

Kiteworks Improvements

Key design changes to improve the experience and ease the transition for customers migrating from the legacy FTA product to the new Kiteworks product.

The screenshot shows the legacy FTA product's user interface. On the left is a sidebar with links for Inbox (36), Sent, Drafts (1), Trash, All Files (selected), Favorites, and Contacts. The main area displays an inbox with several items: 'hello' (a folder), 'new-folder', 'Document1.docx', 'Document2.docx', 'Document3.docx', 'E7377059-C080-...00-3C599DA7CC7B.MOV', 'heart.svg', and 'Roboto.zip'. A 'Compose' button is at the top right. The right side shows a detailed view of the 'hello' folder, listing its members: mattosurf@gmail.com (Manager), jeremy.fong@accellion.com (Owner), sara.akhavi@accellion.com (Manager), abhishek.arora@accellion.com (Collaborator), and mattosurf@att.net (Viewer). It also includes an 'Invite new member' button, a 'Folder link' with a URL, and a 'Leave folder' button. The bottom right corner says 'Secured by AcSellion'.

The screenshot shows the new Kiteworks product's user interface. The sidebar is identical to the legacy version. The main area shows an inbox with one item: 'hello'. The right side shows a detailed view of the 'hello' folder, listing its members: mattosurf@gmail.com (Manager), jeremy.fong@accellion.com (Owner), sara.akhavi@accellion.com (Manager), abhishek.arora@accellion.com (Collaborator), and mattosurf@att.net (Viewer). It includes an 'Invite new member' button, a 'Folder link' with a URL, and a 'Leave folder' button. The bottom right corner says 'Secured by AcSellion'.

The 'job' Accellion is hired to do is secure & compliant file sending

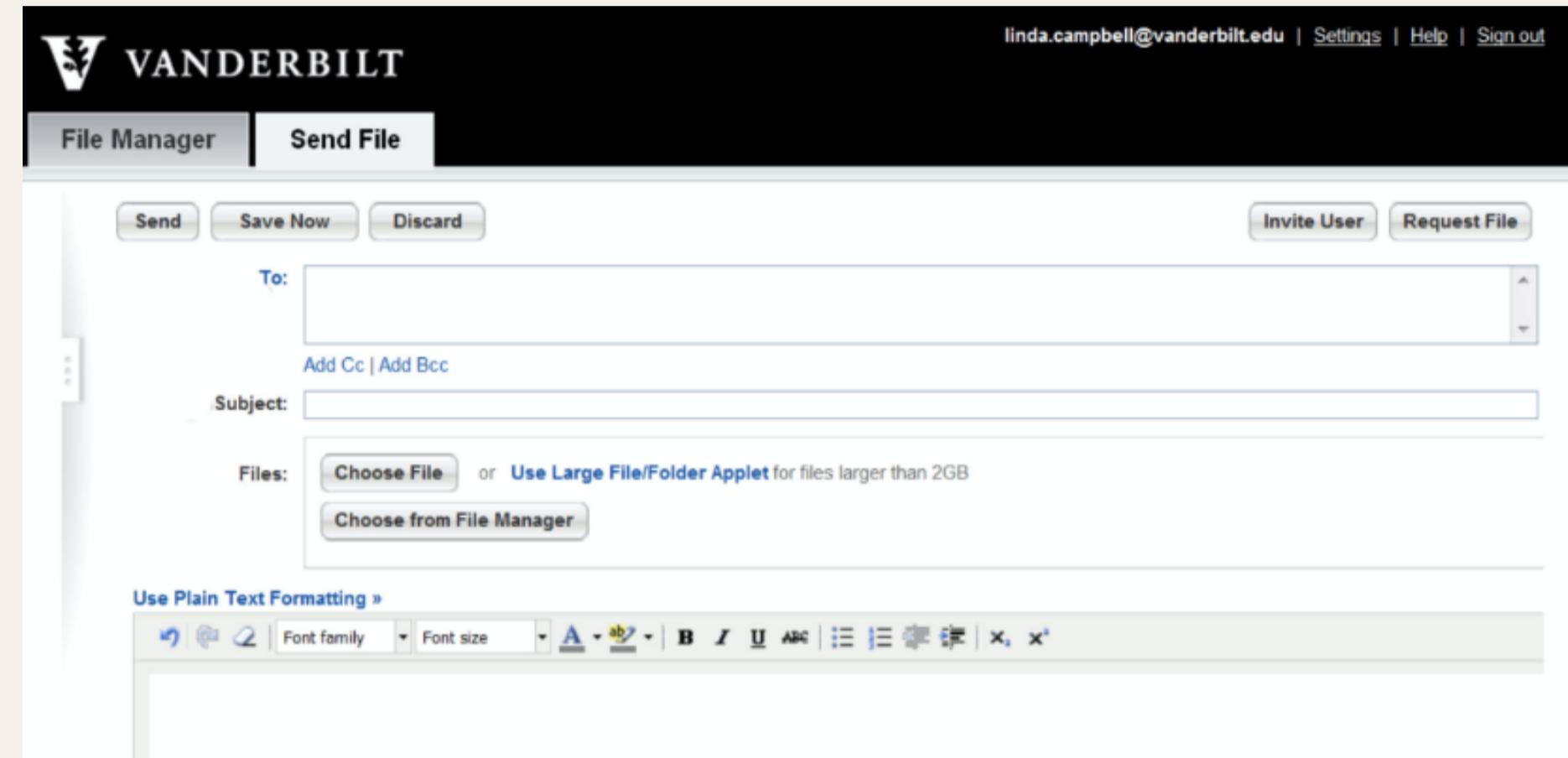
While at Accellion, working on their flagship product, kiteworks, I evolved the experience to better emphasize and improve the usability of the product's core value: Secure file sending.

THE PROBLEM

The 'mail' issue

the old UI

A bit of history: Accellion was originally founded as a replacement for FTP (the very first product was called FTA, as in File Transfer Accellion).



THE PROBLEM

Where's the send button?

The early success of Box and Dropbox inspired the creation of kiteworks with the misguided (in hindsight) concept that all the customers would change the way they worked and flock to the new product.

The issue: Often security policies mandates the use of kiteworks to send files securely, especially outside of the company. They need this app to be extremely easy to use for that purpose (don't like an unfamiliar/unintuitive interface).

early kiteworks (before me)

The screenshot shows the kiteworks web application interface. The top navigation bar includes the kiteworks logo, a search bar, and a user dropdown for 'beth.jonis@aspericom.com'. Below the navigation is a toolbar with 'Upload', 'New', and 'Actions' buttons. The left sidebar contains links for 'All files', 'Shared folders', 'Favorites', 'Recent activities', 'Mail', and 'Move tray'. A 'Dropbox' section is expanded, showing sub-folders like 'Books', 'Photos', 'Private', 'Public', 'Shared with external...', 'test (1)', 'Google Drive', and 'Home Share'. The main content area displays a list of files with columns for 'Name', 'Last Modified', and a search bar for 'Search "Home Connector"'. The list includes items such as 'Books' (10/28/14), 'Photos' (10/21/14), 'Private' (10/21/14), 'Public' (10/21/14), 'Shared with external vendor' (10/21/14), 'test (1)' (10/21/14), 'Caroline.docx' (08/18/14), 'Expense Reports.xlsx' (08/16/14), and 'Yellow stone.xlsx' (10/21/14). Each item has download and share icons.

THE CHALLENGE

Need an easier path and a compelling reason for customers to switch

A significant UI refresh was required

Main focus is to increase simplicity and increase affordance of core product value: Securely send messages and files.

Other challenges for redesign:

- Easily see who else has access to the folders users have access to
- Easily invite new members or change access
- Leverage existing patterns established by other Enterprise File Sync+Share SaaS apps and email apps like Gmail and Outlook, etc.

My role

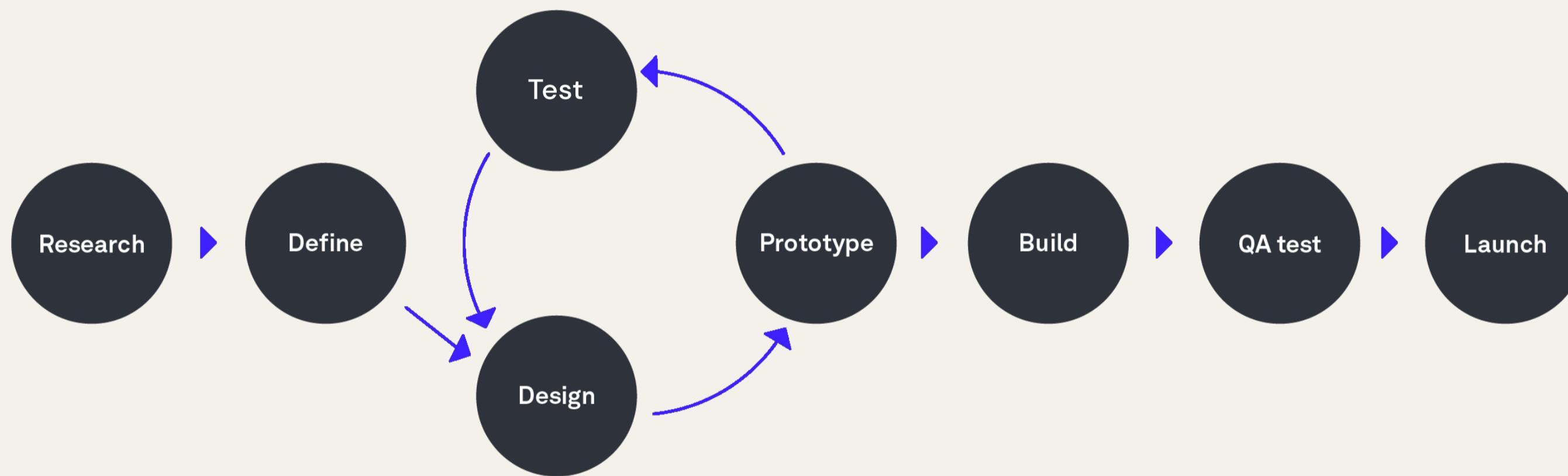
- UX design, Interaction design
- Usability testing

Worked with

- PM Team to align on requirements, help with getting feedback/ usability studies with customers
- Front-end engineers (including on-sight meetings in Singapore)

My process

My process is to understand the problem and goals at a deep level, then define the scope of work to stay focused. Then the design, prototype, and test cycle begins – iterating towards an acceptable solution. Next is to follow along the dev process to make sure the final product aligns with design.



This image, originally from uxinstitute.com illustrates the process well but I made one intentional change: where it says 'Test' now, I changed that from 'Validate' since that very word suggests a potential bias to look for results that agree with your solution. The motto I prefer is to "Design like you're right, but test like you are wrong."

FIRST SOLUTION

Evolution...

This simpler, more familiar layout was a success, but there were still problems:

- Send Files as a label in navigation didn't show affordance for viewing received, sent, drafts, or messaging only for example
- Blue header is too strong of a brand expression and did not work as well for branded customers (65% of customers brand their instance)

The screenshot shows the kiteworks application interface. At the top is a blue header bar with the kiteworks logo, a search bar labeled "Search Files and Folders", and a user profile icon. Below the header is a sidebar on the left containing links for "All Files", "Favorites", "Activities", "Send Files", and "Contacts". The main content area displays a list of "All Files" with the following items:

Name
kiteworks Files
CIFS
CIFS big files
Home Share
SP10

At the bottom right of the main content area, there is a promotional message: "With kiteworks you can create a secure single point of access to your enterprise's content." Below this are two links: "Get kiteworks app" and "Get help".

What do customers struggle with / what do they care about?

As part of the discovery process and to achieve a deep understanding of customer needs and flows I helped organize and ran a week-long usability study project with the city of Pleasanton.

Each day I met with employees from various departments within the city: planning, police, fire, business development, IT and more. The individuals I met with had varying levels of experience using the product, from zero experience to power users. The goal of the project was to understand the behaviors and needs of a representative customer to improve the product for all customers and inform product design decisions going forward. The sessions took place in the users own environment and context to learn how they are using the product and where they are having issues. Sessions started with a casual interview followed by observation of the users going through a series of common tasks. The project revealed a wealth of issues that would not have been discovered without this deep level of testing.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	kiteworks - Onsite Moderated testing												
2	Rated on a ease-of-use (1 - 5)												
3													
4													
5													
6	Name	Navigate to Folder	Create Folder	Invite User	Change Permissions	Upload file	Open file	Comments	Send file	Versioning	Received Files	Overall Impression	
7		5	5	5	4	5	5	4	2	3	3	5	
8		5	5	5	5	5	5	5	5	4	4	5	
9		5	4	4	3	4	5	4	3	2	3	3	
10		5	4	4	3	4	5	4	3	2	3	3	
11		5	5	3	5	5	4	4	4	4	2	4	
12		5	4	4	4	4	5	4	3	3	1	4	
13		5	3	4	5	5	4	4	3	1		4	
14		5	4	5	5	5	5	5	4	3	3	4	
15		5	4	4	4	5	5	5	4	3	4	4	
16		5	5	5	5	5	5	5	5	5	5	5	
17		4	5	5	5	5	5	5	5	5	2	5	
18		5	5	4	5	5	5	4	3	4	4	5	
19		5	5	5	5	5	5	5	4	4	4	4	
20		4	4	4	4	4	5	5	3	2	2	4	
21		4	4	4	4	4	5	5	3	2	2	4	
22		4	4	4	4	5	5	4	3	0	0	3	
23		5	4	5	5	5	4	4	3	3	0	4	
24	AVERAGE	4.764705882	4.647058824	4.294117647	4.294117647	4.705882353	4.823529412	4.470588235	3.529411765	2.941176471	2.625	4.117647059	
25													
26													

Additional research activities

- Multiple calls/Screenshare meetings with customers.
- Attending webinars and presentations – especially focused on the very end when customers share their questions – to see what they care about (What features are they actually using, or interested in)
- Mini-tests using Validately (online recorded usability studies)

Key Takeaways

Send File icon (airplane logo) by itself in inline actions on files was not clear to users.
Received files hidden under the Send Files drop down. Users didn't expect to find it there.

NEW SOLUTION

The screenshot shows the kiteworks web interface. On the left, a sidebar lists navigation options: Compose, Inbox (36), Sent, Drafts (1), Trash, All Files (selected), Favorites, and Contacts. The main area displays a file list under 'All Files > kiteworks > hello'. The list includes:

File/Folder	Updated	Size	Actions
hello	Jul 8, 2016	0 items	...
new-folder	Jun 28, 2018	0 items	...
Document1.docx	Jun 23, 2015 by Matt O'Leary	19.9 KB	...
Document2.docx	Sep 8, 2015 by Matt O'Leary	140.7 KB	...
Document3.docx	May 25, 2016 by Matt O'Leary	21.6 KB	...
E7377059-C080-...00-3C599DA7CC7B.MOV	May 29, 2018 by mattosurf@gmail.com	33.6 MB	...
heart.svg	Today at 11:29 PM by mattosurf@gmail.com	371 Bytes	...
Roboto.zip	May 21, 2018 by mattosurf@gmail.com	1.1 MB	...

To the right of the file list is a detailed view for the 'hello' folder, showing its members:

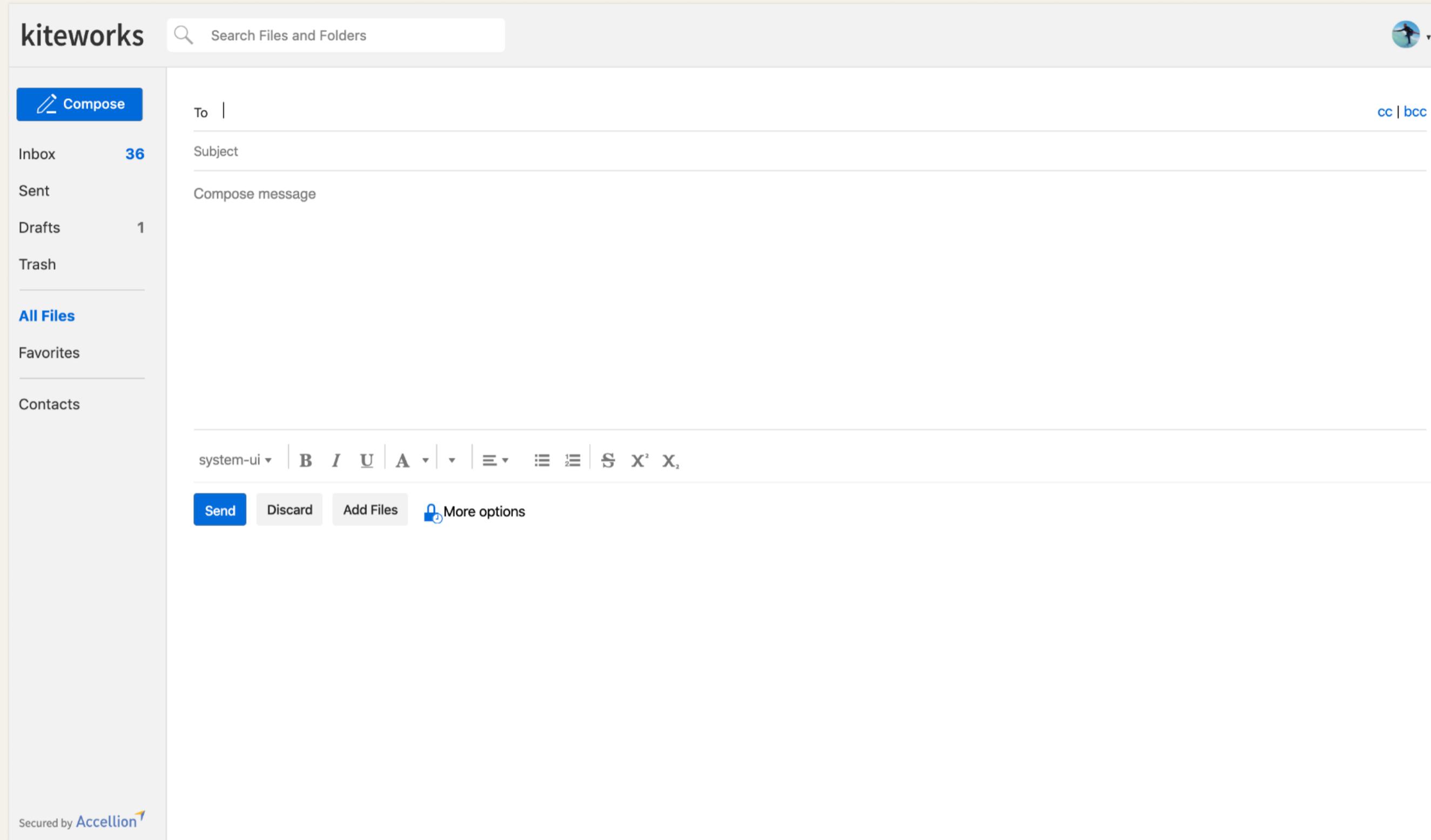
Members	Details
mattosurf@gmail.com	Manager
jeremy.fong@accellion.com	Owner
sara.akhavi@accellion.com	Manager
abhishek.arora@accellion.com	Collaborator
mattosurf@att.net	Viewer

Buttons for 'Invite new member' and 'Folder link' (with a URL) are also present. A 'Leave folder' button is located at the bottom right of the folder view.

At the bottom left, a 'Secured by Accellion' logo is visible.

I moved to a different company shortly after this version went into production so I was unable to get quantitative measurements on success. However according to my contacts there, the changes were a great success. The new look-and-feel has been extended to in-app forms, and requesting files features, as well as mobile apps.

NEW SOLUTION



Accellion is still using this design today (since early 2018) which in today's world is a sign of success and a resilient design.

To date:

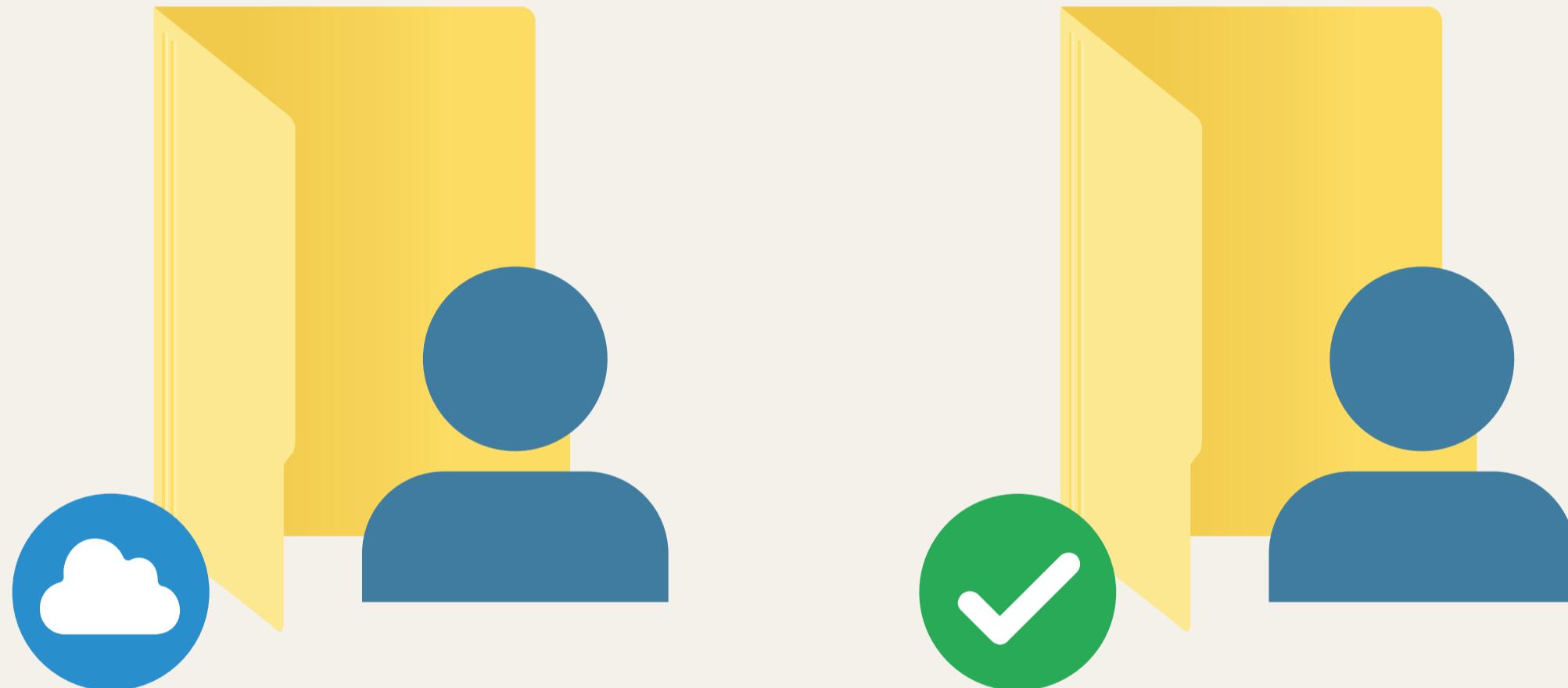
98% of customers have migrated from FTA to Kiteworks

Once migrated, there is very limited churn: Less than 3%

There were multiple triggers for customers to move, mostly security-related. However, the new design has proven successful at making this move as easy and smooth as possible, and at keeping migrated customers satisfied and productive.

Syncplicity Improvements

General improvements to the Syncplicity platform on native desktop apps and mobile.



OVERVIEW

The 'job' Syncplicity is hired to do is to backup employee's important work files along with secure file sharing and collaboration

PROBLEM 1

Sync Status and Sharing Overlays

PREVIOUS



Fully synced or cached



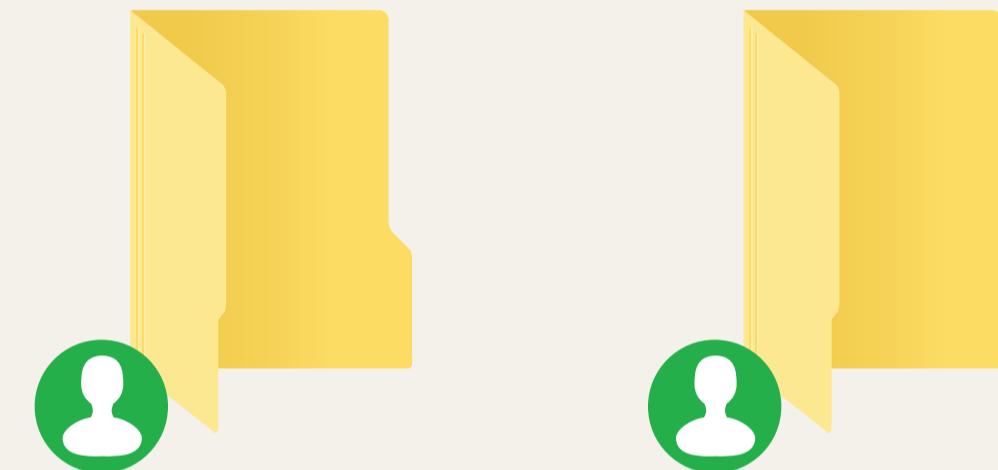
Shared (Folders only)



Available when online / Streaming



Fully synced / On the device('Favorited')

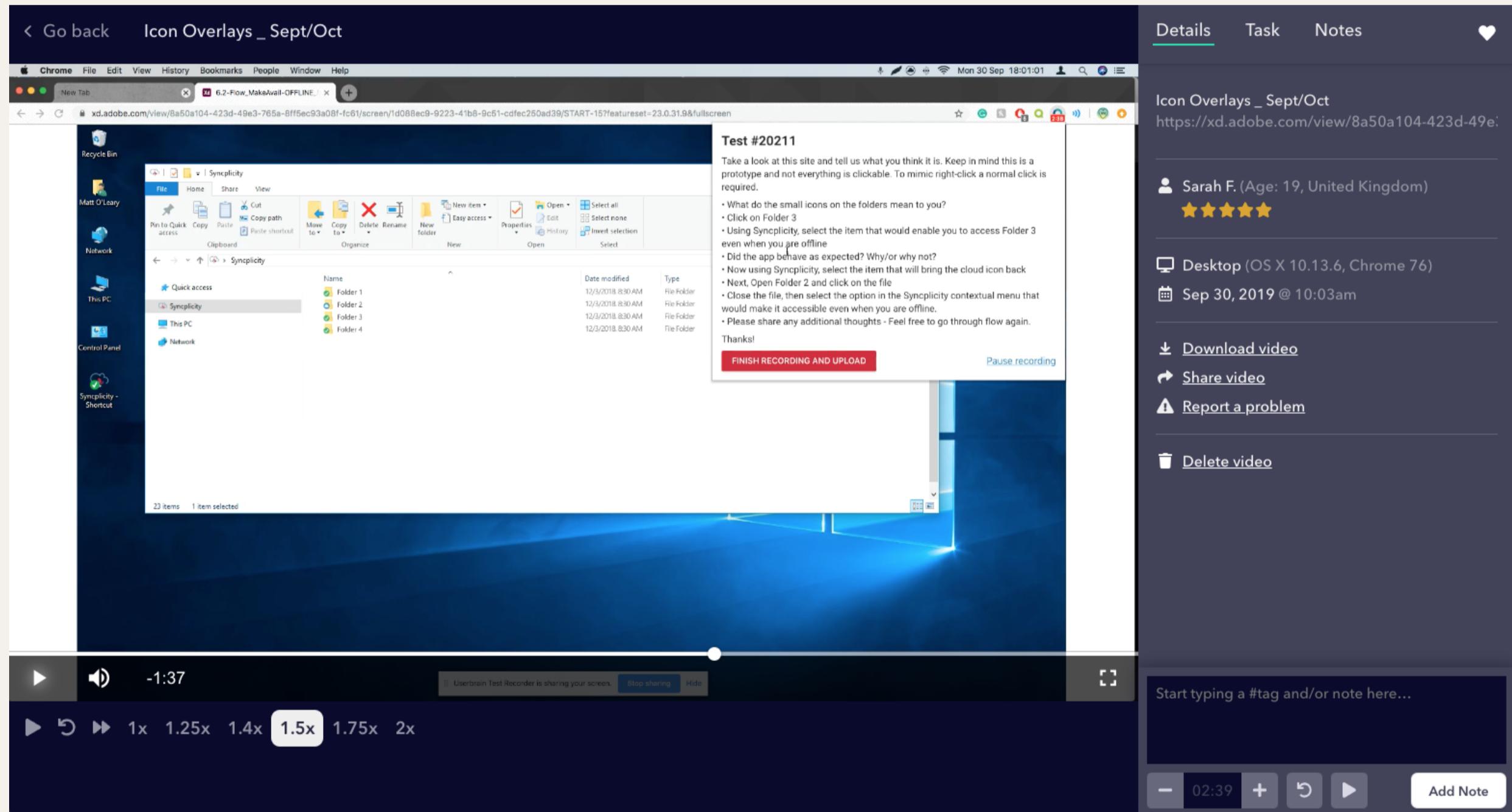


- Folder_1
- Folder_2
- Folder_3
- Folder_4

- All the green icons look the same (especially in list view)
- Also when shared, the overlay obscures the other (valuable) states

PROCESS

Unmoderated User Testing



In the design phase I ran unmoderated tests on prototypes on userbrain.net (Also tested the language on the action labels.)

SOLUTION

New Sync Status and Sharing Overlays

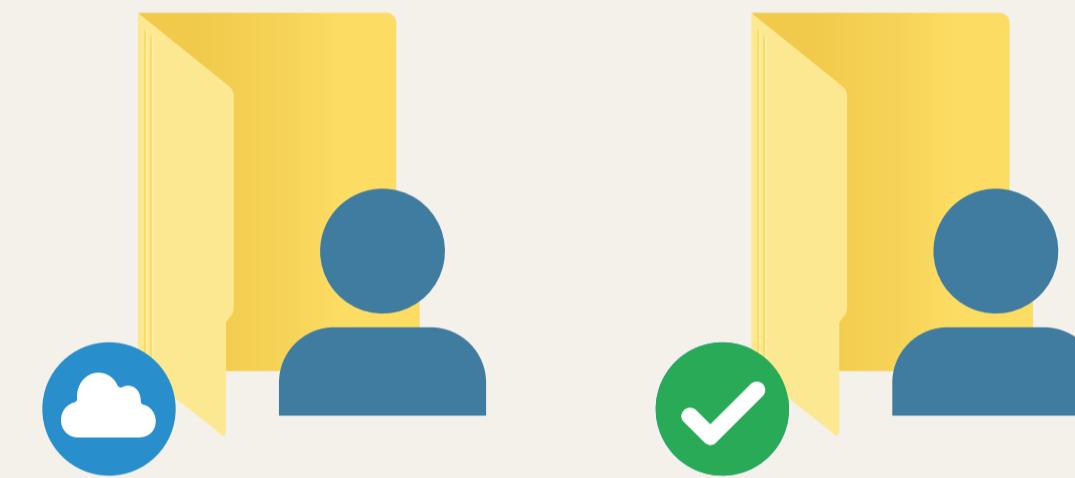
NEW



On the device / available offline



Available when online / Streaming



Name

- | | |
|--|----------|
| | Folder_1 |
| | Folder_2 |
| | Folder_3 |
| | Folder_4 |

Simple and more common/recognizable icons for cloud and on-device. Shows sync status AND whether items are shared or not.

PROBLEM 2

Folder sharing from the Desktop

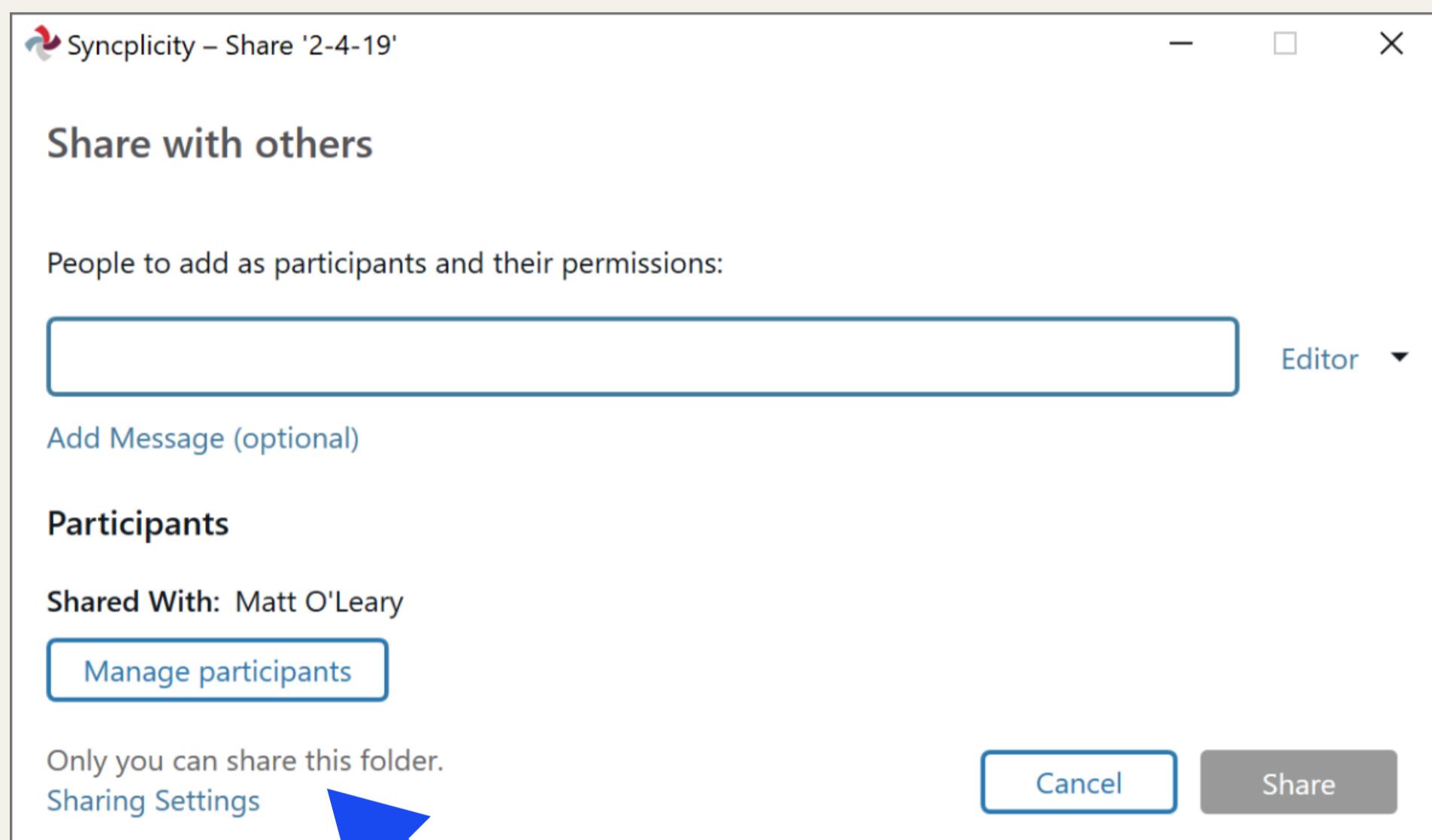
PREVIOUS:

From talking to many customers and watching them share folders using the app, one thing I started to notice was that people would always turn off the ability for folder recipients to re-share folders (via a small toggle). I asked a few folks about it and they would say “Yeah, I always turn that off - I don’t want people turning around and sharing my content - I want to be in control.”

SOLUTION

Folder sharing from the Desktop

NEW:



This setting used to be set to allow re-sharing as the default. Now the default has been changed for better user control and privacy.

Around this same time, the folder sharing feature was being developed for the desktop. So I shared with engineering my opinion that the default re-sharing setting should be changed to opt-IN instead of always on. After some pushback I decided to get some quant data and went to the small data team and we put a query together to test what all customers are actually doing here. I wasn't really sure how many folks were going out of their way to change the default so was surprised to see 82% changed it! These compelling numbers helped convince the team to change the default to put the users more in control, and better support their privacy.