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UX Research Portfolio

Case Study #1 Notifications in OLX app

Case Study #2 BigPicture LAB

Case Study #3 Gantt chart redesign

2022

Case Study #1

Notifications in OLX app

OLX is a big classifieds platform owned by OLX Group. It is extremely popular in European countries like Poland, Portugal, or Ukraine. Millions of users use it each day to sell and buy used goods.

ROLE

UX Researcher

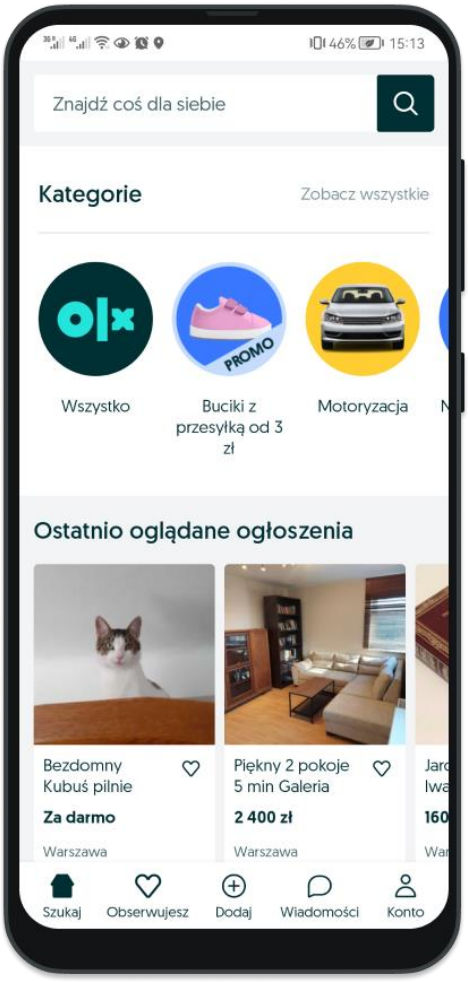
TIME

11.2021 – 02.2022

Background

Users do not use notifications so often

From quantitative data from analyst and my desk research, we discovered that notifications' open rate is not so high. We send pushes to users, but they do not have a place in the app to come back to them (see the screen, no bell icon!). This mean that notifications are easy to lose. Users told us that they do not receive some of our notifications.



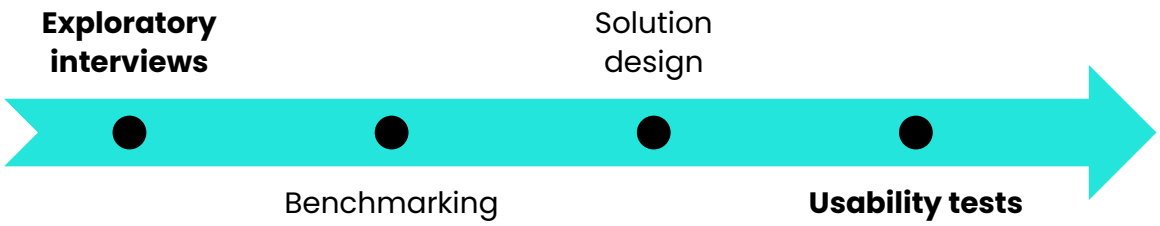
Let's fix notification problem!

I started with our goals for the research:

- Understand user attitudes towards notifications

- Find moments in user journey when notifications are crucial
- Find what information users want to receive, and which notifications are most important for them
- Verify how users perceive and react on most engaging notifications
- Create notification solution which satisfies users, and it is easy to understand

How are we going to achieve these goals?



In the process I was responsible for conducting IDIs and usability tests.

Exploratory interviews

What do we need to discover?

I always start with research questions to understand what we look for and why we need it. This time list was exceptionally long because we did not have any research about that topic before.

Notifications in general

- How do users perceive notifications in general?
- Why do users need notifications?
- In what way should we do it?
- What should be a time of notification?
- How often should people get messages?
- Do users want to control the notifications? How?

OLX notifications

- How do users perceive current notifications?
- How do they react to current notifications? What do they do with diverse types of messages?
- Is communication relevant to them?

- What type of information should we communicate to users?
- What is annoying? What is disturbing?
- What is useful? What is appealing?
- For how long are the messages relevant to the users? How long should we keep them?
- Are there any differences between markets, segments, age?
- Which segment will receive help from this feature the most and how?

Other platforms

- What types of messages from other platforms do they like and why?
- What types of messages from other platforms do they not like and why?

I already had few hypotheses in my mind

- Pushes are easy to lose, so users need a place to see and manage all the notifications
- Users are more interested in in-app notifications than in emails
- Users prefer to receive different messages via different channels
- Most important for users are notifications about their transactions

I decided to conduct exploratory interviews

12 SESSIONS	
6 Sellers	**6 Buyers**

I conducted twelve exploratory interviews via UserZoom. I asked external agency to recruit participants. I sent them recruitment criteria, and then scheduled sessions. Finally, I talked with six buyers and six sellers. In each group half of people used notifications and half of them not. I wanted to understand the problem from each perspective.

I divided interviews into three parts:

1. Attitudes toward notifications
2. Current OLX notification evaluation
3. Impressions on first idea of the solution – Notification Center

After sessions, I analyzed answers using Dovetail. I used colorful tags and categorized them into attitudes, needs, behaviors and design elements.

We found out that Notification Center might be relevant to all the users, even if they do not use notifications daily

Transactional messages are most relevant and useful to all users.	Users understood most elements of design solution.
Users who have notifications turned off daily use apps intentionally.	Users expect that important notifications should still come by email.
There are no differences between buyers and sellers and their attitude towards notifications.	Marketing information is attractive to half of users, and they declared that they could use it.

Recommendations

- We should rethink all notification channels and which messages present in the Notification Center
- We must analyze data related to marketing information
- Final solution must include notification settings
- We should think about distinctive style of “unread notifications”

Usability tests

It is time for solution validation

We want to verify if users understand the Notification Center concept and can use it smoothly. We have never had such a functionality before in our app.

What do we want to discover?

- Is the concept of Notification Center understandable?
- Do users know how to filter notifications?
- Do users know how to remove notifications?
- Do users know how to mark notifications as unread?
- Do users know how to mark all notifications as read?
- Do users know how to change notification settings?

I decided to use moderated usability tests

10 SESSIONS	
5 Sellers	**5 Buyers**

I wanted to deepen tasks with other questions, so I chose moderated usability tests. I used UserZoom tool to lead sessions. Because of NDA, cannot present tested solutions.

Again, I used Dovetail to tag along information gathered during the sessions.

We discovered that most users compared the solution to their email inboxes like Gmail or Outlook.

Users almost never mentioned notifications from other apps. They commented “like I have in my email inbox”.	Users do not really see the need of marking notifications as read and making it a bulk action.
Users knew how to perform all actions. Designed flow was amazingly easy.	At once visible context menu or notification swiping seems to be easier to use.

Users easily recognized unread notifications which was not so clear during first interviews.	It was noticeably clear for the users that buttons on notifications stand for shortcut actions.
Filtering concept was easy and understandable. Four users wanted to have the trash filter as well.	Not everyone was convinced to ‘mark as unread’ need. One third of respondents uses it, but usually in their email inbox.

Recommendations

- In MVP add fewer actions and add them incrementally if there is a need. Eventually, add features but hide them a little for more advanced users.
- Change the way to mark all notifications as read or resign from the feature.
- Work on copy. Confirm message and explanations in settings were confusing for users. Display time using full words, like “hour”, “day”, “week”. It will be more understandable for users.
- Add colors to swipers in settings sections. Green for “on” and “red for “off”.

Outcome and impact

During the entire process I was in a close contact with stakeholders. We decided together on the process. After each research, I cooperated with the designer to help with the designs. Designer took part in all usability tests sessions. Based on the conclusions, designer made design adjustments. Soon, we know what quantitative data we should gather, track, and analyze.

Case Study #2

BigPicture LAB

How we created our own research panel

What is BigPicture LAB?

Simply put, BigPicture LAB is a group of BigPicture users, enthusiasts who want to improve the product with their feedback. Joining the lab is voluntary, and it is free of charge. We divided our LABers into segments based on their company role, management method, and parts of the app (modules) they use. Depending on the project, we ask the distinct groups to participate in the study. It all started in 2018 when I joined the company as a UX Designer. One of my first questions was: “How do you conduct research?”. The only answer was an exceptionally long silence. Then, my team leader sighed quietly and explained that he was the only designer until I came, and he did not manage to incorporate research into the design cycle. Quite shocking but understandable. It is impossible to do everything. Our company develops BigPicture. It is a software application, served as a plugin to Jira to help Project and Project Portfolio Managers at their work. I offered my leader that I could incorporate research into the process of designing BigPicture.

Why did we create it?

As you can imagine, it is hard to do guerilla testing of Jira's plugin for Project Portfolio Managers on the street. Not everyone is proficient with JQL, task progress tracking, or risk and resources management. Also, not everyone knows the difference between waterfall and Agile methods, not saying about the SAFe framework. We struggled at the beginning. And the only reasonable solution was to evaluate the product with our users. But how to ask them if they do not log in to our app? And we do not have their emails? At that time, we did not use pushes in the app. We started with hotjar's survey, and the very first tests were done!

One day, my team leader came back from the conference and shouted: "Marta, I have an idea for us!". He told me about Atlas Lab, which then changed into Atlassian Research Group. That was our inspiration for branding our group of testers.

How did we create it?

We started with baby steps. I created an online form for our users to sign up. They had to answer a few basic questions, which helped us later with creating user segments. Our goal was to see if anyone would be eager to cooperate. To our surprise, we gathered more than one hundred people in less than a week! Then we started thinking about our brand, so users could recognize us, fill the part of something bigger. And again, our designer started small, with a logo…

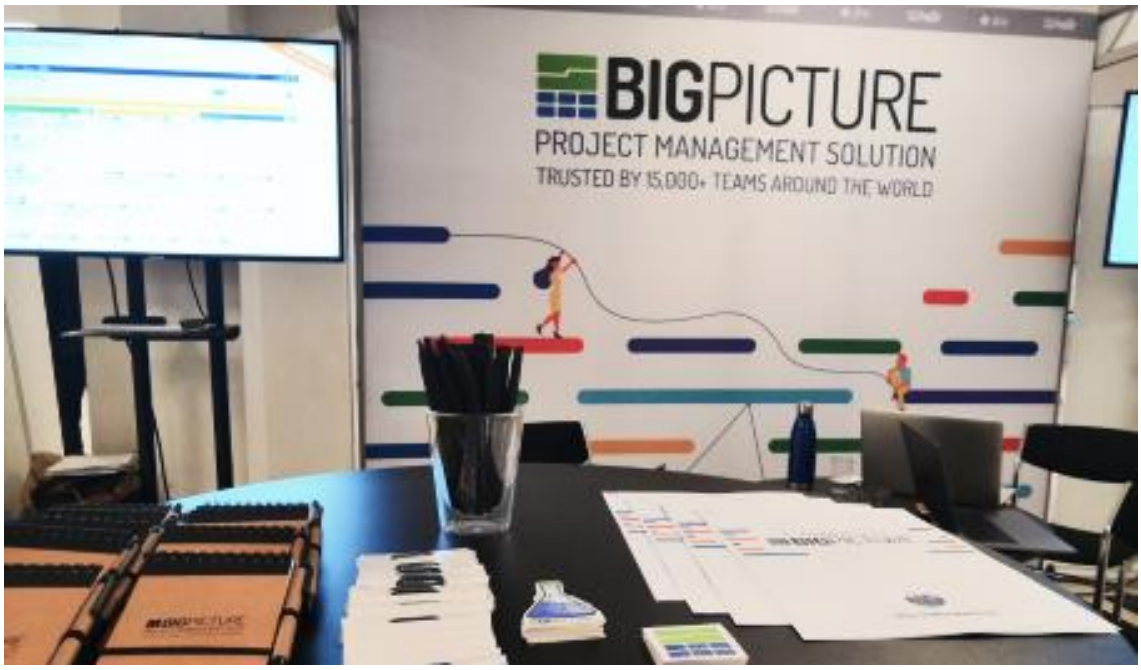
One of the first BigPicture LAB's logo

In the next step, I created the website using WordPress. It made it easier access for our users to sign up to the LAB. Due to GDPR restrictions, I also attached our Privacy Policy there.

BigPicture LAB's landing page

How does it function?

Depending on the topic to explore or project to evaluate, we reach out to a particular group of users. We can easily filter them using a spreadsheet. Then, we send them an email with an invitation to take part in our research. Sometimes it is a simple survey, sometimes interviews, and the other day moderated or unmoderated test. Usually, we use Calendly to schedule the sessions, Google Meet or Zoom for a session, and Maze for an unmoderated test. From time to time, we experiment with different tools and methods. Using the same spreadsheet, we track the users' engagement. In this way, we know how often they participate in our actions. We do not want to bother them too often. Currently, we have around one thousand users in BigPicture LAB. We also started using our brand during industry conferences.

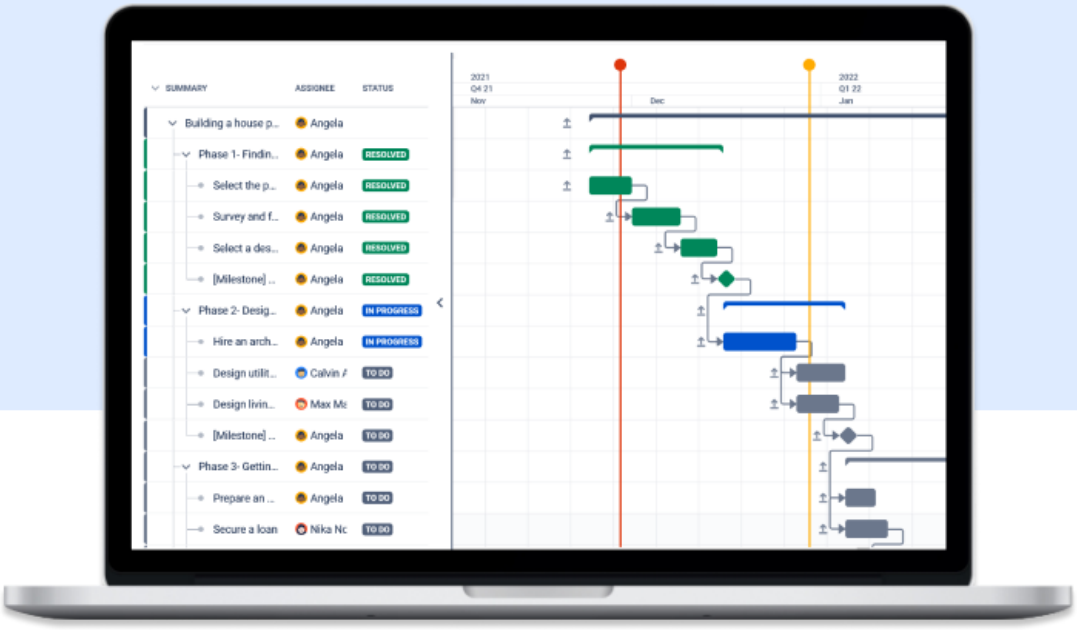


BigPicture LAB's stickers on the SAFe conference in Hague, 2019

Lessons learnt

This story seems to be very pleasant and smooth with happy conclusions only. Nothing could be further from the truth! First, I needed to be patient when discussing the BigPicture LAB project with my managers. I had to gain their trust and present them data so they can let me launch the project. It took us a while to be honest. Secondly, research is fun, and I love to meet with our users. But I had to learn how to deal with our users sometimes. They are managers, who prefer to take matters into their own hands and take over the interview when they need a troubleshooting session. It struck me at the beginning, and I had to learn how to be more assertive. We also had to create the UX research understanding among our users from the very beginning. Finally, we learned that if we believe in our initiative, we have enough power to make it real. We needed to talk with different stakeholders, learn modern technology and tools. However, in the end, we created the BigPicture LAB. And we can support our design cycle with corresponding research. Having our own panel is very convenient!

Case Study #3



Gantt chart redesign

The Gantt chart is a timeline which illustrates the project schedule and help managers track work progress. I did its redesign in my previous company. I worked on BigPicture application - a tool for project portfolio managers - and the Gantt was one part of it.

ROLE

UX Designer & Researcher

TIME

01.19 – 08.20

Problem

Users reported difficulties in planning their projects in the Gantt chart. They lacked functions to improve their management process. We could not develop further improvements as the Gantt chart was based on old technology. Finally, we decided to change it.

Goals

At the beginning I set goals of the project with the Product Owner:

1. Improve management processes for waterfall and hybrid methodologies in the Gantt chart.
2. Refresh the look and feel of the module to match the rest of the app.

Exploratory research

To understand the foundation of user dissatisfaction, I wanted to look at the problem from various angles and all available sources. I used below methods.

Support tickets analysis

Consultant interviews

User interviews

Surveys

I analyzed problems sent by our users to Customer Support team. Together with Product Owner we categorized them on technical issues, pain point and feature ideas. From the Consultant Team I received information about the biggest clients. That helped me understand the scale problem. Small companies work and plan their projects differently than big ones, even if methodology is the same. Usually, bigger companies meant bigger needs. At the end, I scheduled seven interviews with our user to find out use cases of using our product. Having done that, using the simple survey method we ask customers to choose their main pain points and needs.

Key research insights

It is difficult to read the information from the chart, like dependencies.	It is hard to plan projects without clearly visible assignees and project dates.
The grouping function makes the chart hard to read. It is too gray and not all information is visible in the columns when turned on.	The timeline does not move smoothly, users cannot move tasks, drag dependencies, and scroll the timeline at the same time.
To zoom in or out on the timeline, the user must select a period and its aggregation time (week, month, etc.). This is too much thinking and clicking.	Users want to easily distinguish between tasks, from which projects or epics they are.
The high-level view (presenting years' time stamps) is useless because all parent tasks look the same. They are gray without status indicator and visible start and end dates.	

Users

To keep in mind problems and needs of users, I used our internal personas created by my teammates. I joint them with what we discovered during the research phase. Based on that with the Product Owner, we decided to focus on the main user needs.

For **Project Portfolio Managers**, it is crucial to receive information about upcoming milestones and deadlines. However, they do not want to feel overwhelmed by all information.

On the other hand, **Project Managers** need to monitor the status of the projects and the schedules, as well as supervise dependencies between teams and projects.

Competitive analysis

We are not the only app on the market that offers a Gantt chart. There are increasingly comparable products, such as Teamgantt, Proggio, Proofhub or GanttPRO, so we had someone to compare and inspire ourselves.

During analysis, I reviewed the features, wrote down their pros and cons, checked the layout, system feedback, or information architecture. I gathered all the information in Figma, so they were easy to access during design phase.

Jobs To Be Done

During the process, I referred to the 5-layer framework as there is no single user flow in complex applications. Gantt is a tool – it allows multiple actions, but users do not have to perform them in a linear order. We defined the most important Jobs to Be Done based on the first research phase and competitive analysis.

Building task structure

Linking tasks to each other

Scheduling projects

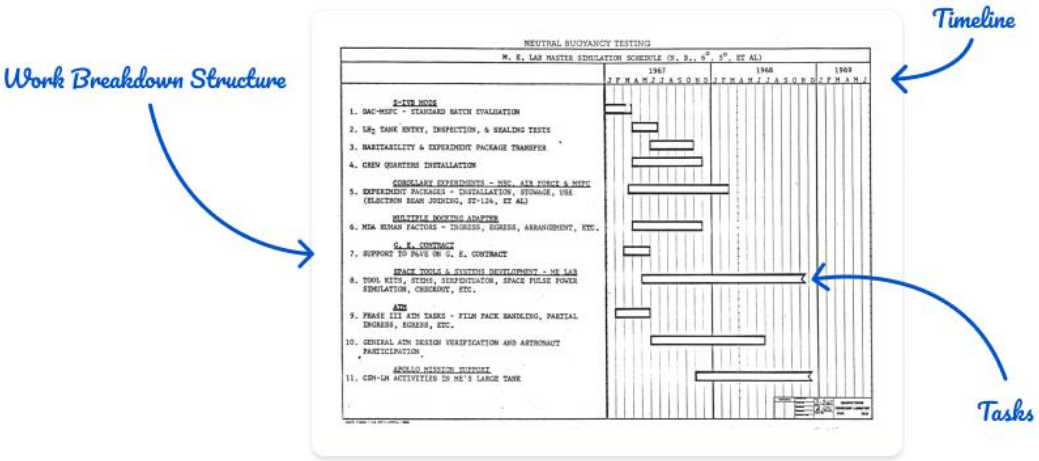
Marking valuable time in calendar

Zooming in and out on a timeline

Grouping tasks by status, epic, assignee

Information architecture

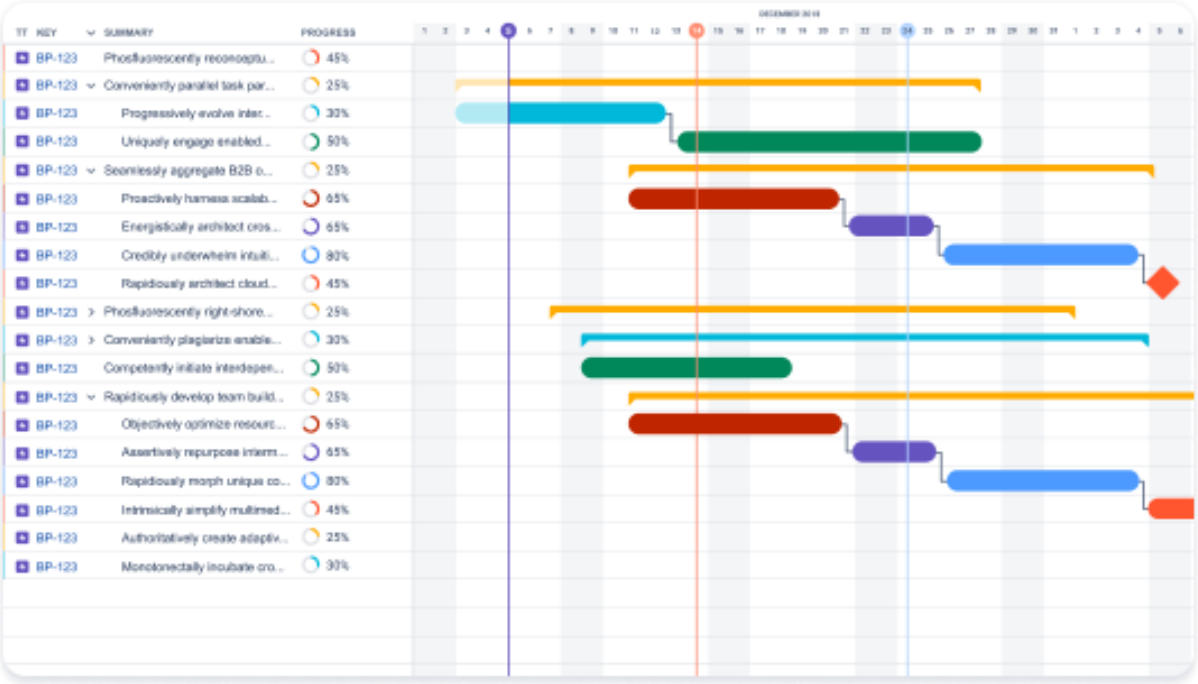
Users already have their mental models because Gantt charts have existed for around one hundred years. I arranged main elements as in traditional Gantt charts. Their order is logical and does not force users to change their habits.



Traditional Gantt chart

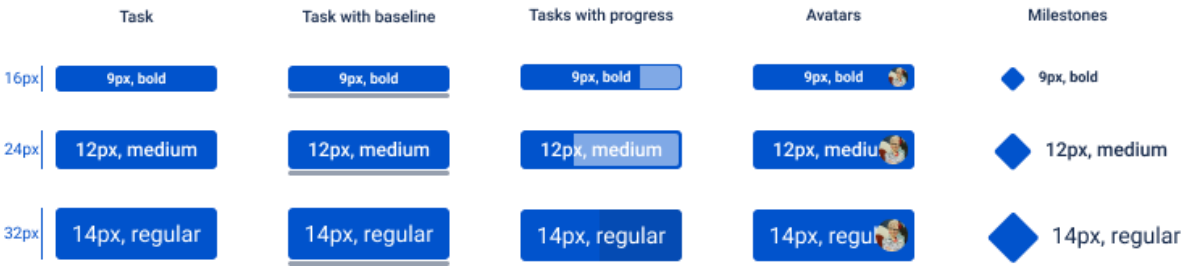
(Source: https://www.apm.org.uk/blog/a-brief-history-of-gantt-charts/)

Keeping that in mind, I created very first layout with an uncomplicated design.

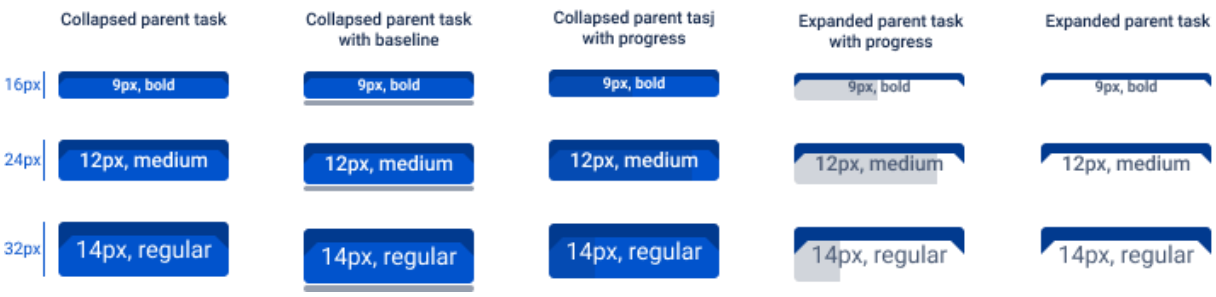


Task design

Tasks are at the heart of Project Managers' work. Depending on the user actions and the size of the chart rows, I adjusted the task states to their functions. I had to consider the height, font size, colors, task progress. Below I present the final design that matches the style of the application.



One of the needs of the users was to distinguish between 'parents' of tasks. Before that, they were always gray in the shape of a horizontal clip. I have added color to them and when users collapse them, they look like normal tasks, but their clip is still visible.

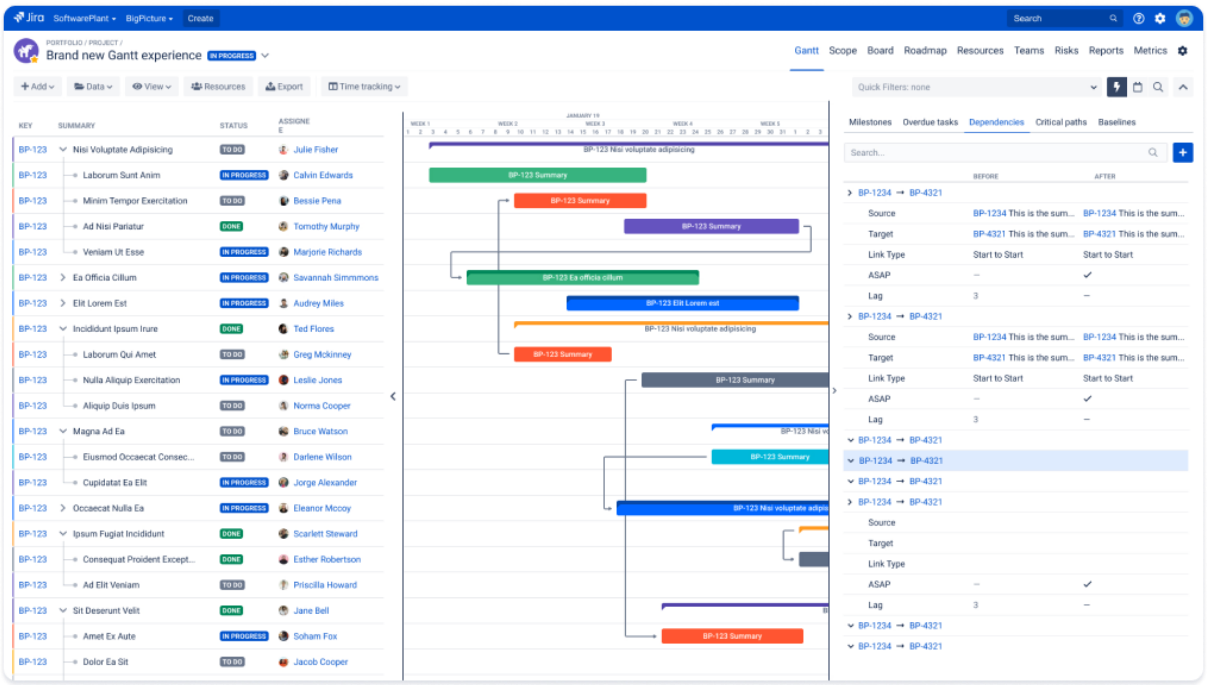


Dependency management

To have full control over all dependencies between tasks, projects, programs, or portfolios, we have created a sidebar with a quick overview of dependencies in this space. it is important to understand how they affect the timeline of your entire portfolio.

From the sidebar (which we called ‘infobar’), as well as from context menu, the user can jump from the beginning to the end of the dependency. These activities help to plan and reschedule tasks.

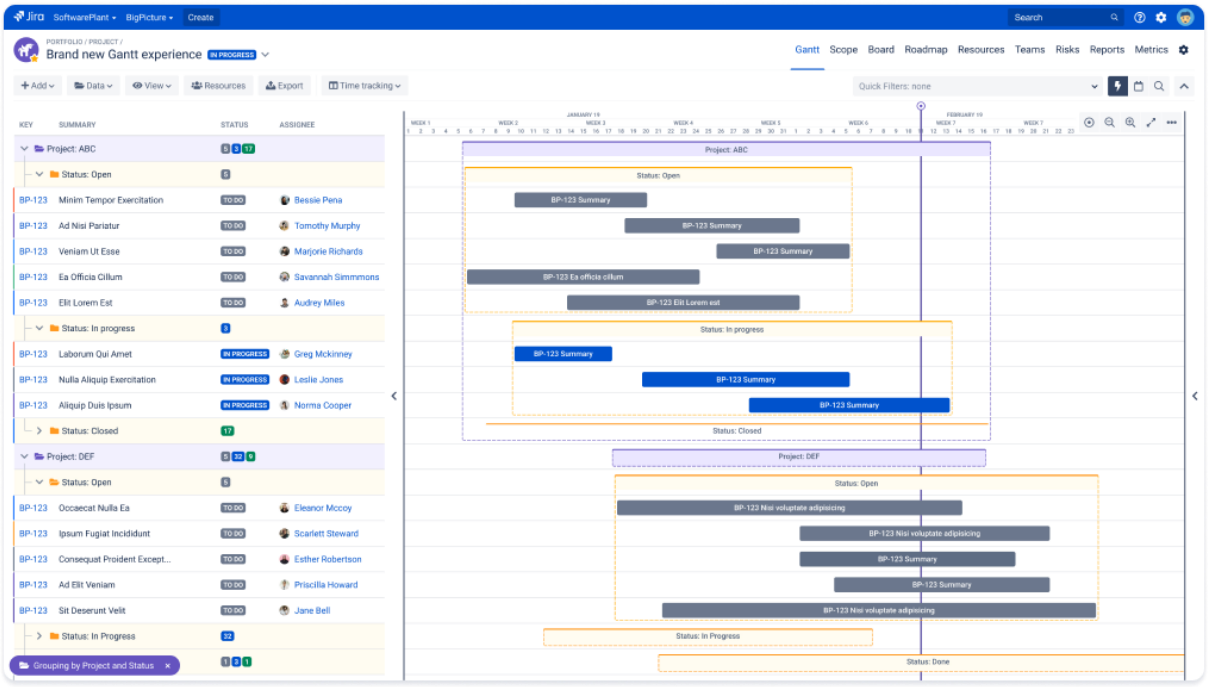
Finally, we improved the dependency dragging feature, and the timeline keeps moving when user drags the dependency. Previously, this manual action was useless and very frustrating for users.



Grouping

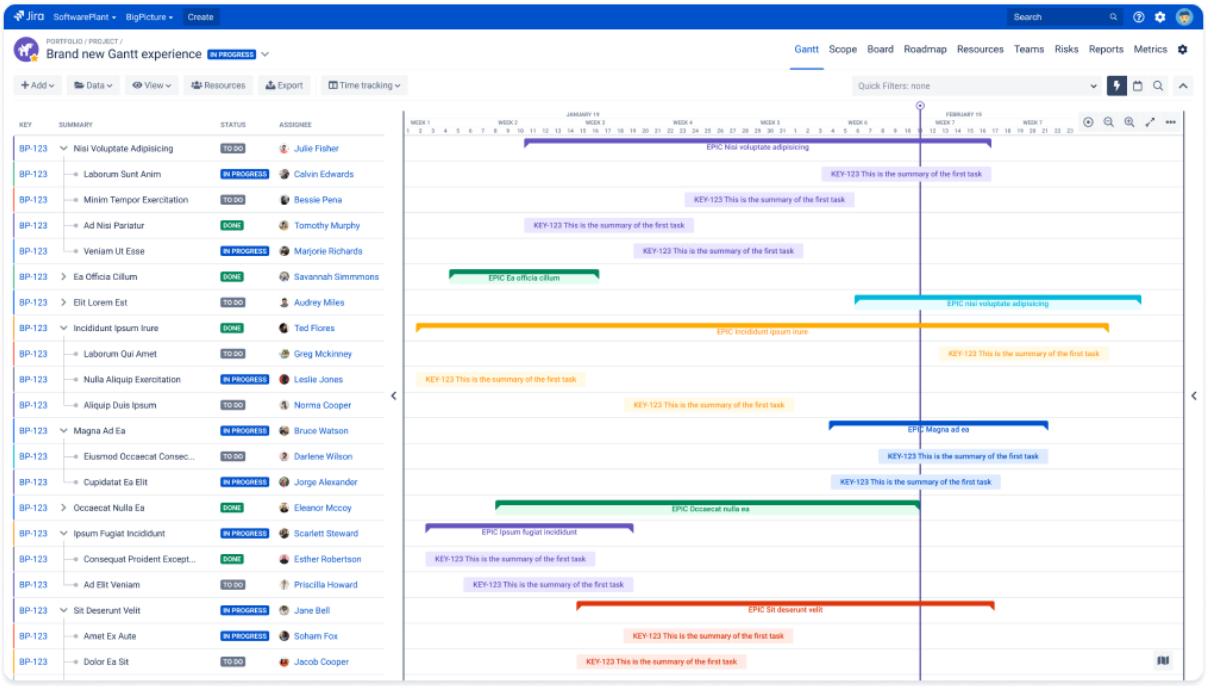
For better organization of tasks and structure planning, I focused on the grouping. Until now, the grouping was vague and gray. Users can choose a color to represent the group, and, in

the future, they will choose to color by epics, status, risk of others. In the previous version of Gantt, it was not visible where the groups start and end. Therefore, I added a clear structure to the left of the WBS and boundaries in the chart.



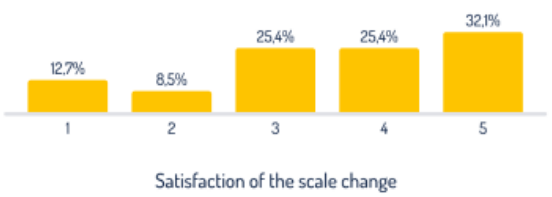
Epic management

At Jira Software, managers create Epics that represent a wide range of work. Sometimes tasks from one Epic split into multiple projects. For easier management, we defined grouping and coloring by Epics functions. This feature we will implement in the future due to technical issues.

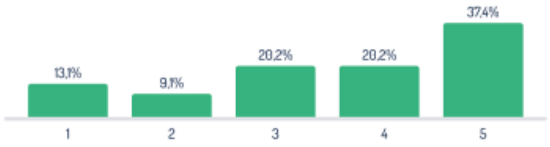


User feedback

During the development process, we created an alpha version of the Gantt chart to check the basic functions in the production environment. In the survey included in the application, we collected about five hundred responses. At least 50% of users were satisfied with the changes.

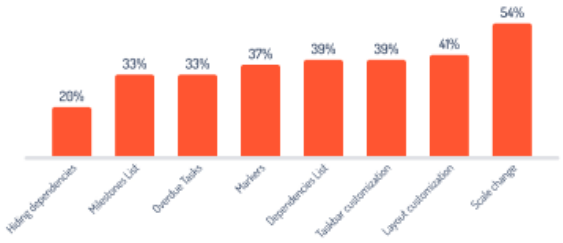


Satisfaction of the scale change



Effectivenes of creating and editing dependencies

Satisfaction of the taskbar personalization



Most useful Gantt's features

In addition to that, I organized moderated usability tests with our BigPicture LAB clients. During six sessions, I checked performance of the basic actions like creating dependencies, scale change, or grouping. I also watched the Hotjar recordings to see real user interactions with the latest version of the module.

Research findings

Most users like the new Gantt chart design because of its clarity and enhanced management capabilities.	Users prefer to customize their views (layout, tasks) and we will focus on this more in the future. Users supported the idea of preconfigured views.
At least half of our users are satisfied with the changes we have made in the new release, such as dependency management, rescaling, and taskbar customization.	The infobar is especially useful for users. They said it is extremely helpful in their management processes and they can navigate faster through individual items on the timeline.
Adjusting timeline scale occurred to be the most useful function of Gantt. It is important that users can easily navigate through the timeline.	Users prefer the new grouping, but still expect better coloring and more variables to group by. They would like to personalize the view more.

Majority of users have turned dates on next to tasks to see immediately when they start and end. This option is also available on mouse over.

Conclusions

I have never worked on such a large and complex project before. It required many meetings with stakeholders and users. But the MVP we prepared was better than we expected, which confirmed enthusiasm of the users.

We still need to improve some features, but the core of the Gantt chart itself is ready. With such a complex module, it was difficult to perform user testing until the project was ready. We tried this with static pages, but it did not give us useful feedback. Next time, we should quickly iterate solutions with imperfectly coded small fragments of the project and gather conclusions on the fly. Especially that the project was exceptionally long. During that time, we made a lot of compromises between business, tech, and user needs.

For me, it was new experience. As I earlier mentioned, Gantt chart actions are not linear, so I could not prepare one user flow. That was incredibly challenging. With many actions possible the most difficult part was checking if one action does not interfere with another. Close cooperation with developers really helped here. I learned that developers had a lot of experience in their field and have great ideas. They always explained me all tech solutions so we could choose the best one. I really appreciate that cooperation.