NORA PEKKER

Case studies

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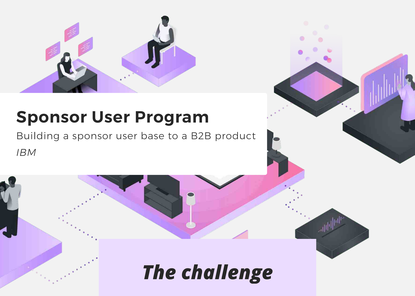


Sponsor User Program

Building a sponsor user base to a B2B product

IBM

The challenge

At IBM, I work on an enterprise video streaming solution. Our platform is a B2B product where the users are skilled professionals with special knowledge. We only have a handful of customers, most of them overseas, and we had little direct contact with them. The only way to get in touch with them was through our customer success team.
When we started a new research study, we were never sure if we will be able to get enough participants in time. The research was slow, unpredictable and our team was not in control. So the first thing I decided to do when I started working at IBM is to solve this situation and somehow get direct access to our users.

The framework

IBM has a framework called 'Sponsor User Program' to help teams like us to have got access to their customers. It is a long-term agreement with users to involve them co-creating process. The selected users would be providing feedback, participating in interviews, workshops, usability tests, or answering surveys. This co-creating way of working was also beneficial to our users as they could have a direct impact on our product and roadmap, while we would get early feedback on our design.

Start small

I decided to build this program for our product, but I kept hitting walls.
The customer success team was very protective and did want us 'to bother the customers'. Without the help of them, it was impossible to move forward. I was stuck, and I knew I needed to approach this from a different angle.
I decided to start small and build the program with only one company at the beginning and see if it works. So I asked our data team to provide some insights about our customers.
It turned out IBM was our number one customer. It meant we had an enormous user base in house. Why not contact them?

Building it up

We had two main persona types the viewers and the broadcasters. My priority was to find people who represent these two user groups. The broadcasters had a registered account in our system, so we knew who they were. I contacted them on slack and invited them to a 1on1 interview where I could explain the sponsor user program. I also conducted introductory interviews where we could get to know them better and understand how do they use our platform.

We also knew that most IBMers use our platform to watch work-related videos. The majority of the company townhalls, and executive videos, were streamed on our platform. We didn't know how to reach them. They didn't have to make an account to be able to watch the videos. So I decided to start to recruit people in a very informal way.

I created a screener and posted them on several slack channels, and waited for people to apply. And they did! I arranged similar introductory interviews with them like broadcasters to have got to know them better and to have a formal agreement that they are willing to participate.

We ended up having a large pool of users at our hands, and we soon started to leverage that in our research. We could immediately see the impact it had on our design process.

Results

-70 signed sponsor user from IBM.
-Participants from 20 different countries.
-Direct access to users.
-Faster research.
-More predictable research time.
-Continuous feedback.
-Faster iteration cycle.

Long term impact

Besides the obvious benefits of having direct access to our customers, building the Sponsor User Program gave us much more.
It also gained the trust of our colleagues overseas, and now with the help of the customer success team, we are building a Sponsor User program with our customers outside of IBM. Our program has shown the value of user research and working with other parts of the organization.

Research repository

Structuring years of research data

IBM

The challenge

When I arrived at IBM, I started working on a product that has been on the market for years. The design team had a good understanding of who the users are and how they are using or platform. During those years, several research studies have been done, which resulted in quite a lot of information on the users. However, no one organized all that accumulated during
the years.

Whenever a new project started, we had to go through one by one all the previous research summaries and try to find any relevant information. That is a slow and painstaking process. Also, the team didn't have personas or user journeys to work with, so during the design process, they were relying on their general impression about the users.

I decided to analyze all the data we had to build a design repository and to create research artifacts to make our research flow faster and more efficient.

Building the repository

CSFR Tickets:
I added metadata to the hundreds of customer feature request ticket in Jira. The tickets became searchable by the tags, so we would not have to go through them one by one every time. To make this sustainable, I included other stakeholders such as sales and offering team members to make sure that in the future new tickets will be entered with tags on them.

Sponsor user program:
I built up a sponsor user program with more than 70 participants (and counting). This program gave us quick and direct access to our end-users, which made our research faster and easier to plan. We finally had a database of people who we could recruit to our studies. I wrote a short description of every single participant that made it easier for us to decide if that person is relevant to our project or not. I also started to track every session we had with those sponsor users, so we could see what was the last time we have contacted them and in what topics. In this way, we could prevent overwhelming users.
(Read more about how I built up this program in my other case study).

Research repository:
I decided to turn all that knowledge the team has collected during the years into a useful database that is available for everyone. I uploaded all the interview summaries and created a research repository in Optimal Workshop. That enormous data collection became a functioning recruiting tool for us. We could finally search among those interviews and quickly find the relevant information for our project.

Data:
With the help of our data team, I have put together some useful data tables with some generic information about our platform and our users. Every project is different, but there are some metrics that we have to work with over and over again. Now those are collected into those data sets, so we don't have to wait for the data team to provide it for us.

Creating the artifacts

After analyzing all the information, we had I started to have a more detailed understanding of our users than we ever had before.
I created detailed personas and very in-depth user journeys. That wouldn't be possible without analyzing all the data. We ended up with one primary persona and with three secondary personas. I worked out eight user journeys for these personas.
I created Stakeholder's map to visualize the relationship among those personas. These personas and their journeys are covering the majority of our use cases. Whenever we start to work on a project, we can turn to those artifacts for help.

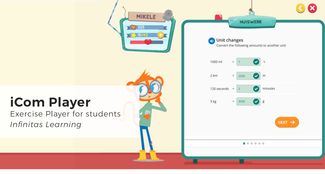
Long-term impact

Building up a research repository made our research process faster. It gave us quick access to all the data that has accumulated during these years.

It also made information available to other stakeholders. Offering managers started to look up data about their projects on their own. The artifacts made our users more visible and present during our product development flow. The printed versions all around the office reminded us of who should be the center of our product decisions.

The presentation I held on our company all-hands and to developer teams helped to build empathy. Quotes and stories from users made them more relatable to everyone in the company.

It is not enough to continuously do research. The results have to be available to everyone and communicated to all stakeholders.



iCom Player

Exercise Player for students

Infinitas Learning

The customer

Infinitas Learning is an international group of educational book publishing companies from Belgium, the Netherlands, and Sweden.
Alongside classical printed materials, Infinitas has entered the digital market as well. They offer online books, exercises, so as several online platforms. Products range from online courses for adults to educational games for kids and learning management systems for teachers.

The project

My task was to design an exercise player for primary education. To enable children to do homework online or practice in the class. The results would be automatically available for the teacher.

That was a crucial step for the group on their way to start offering blended solutions.
Teachers begin to mix digital and classical techniques in the classrooms. We had to address the new needs.

The research

The project started with understanding the business needs. I interviewed management and publishers.

After that, I started and extended user research. I went to do field studies in schools with my colleagues. We were observing everyday life at Primary schools. We were attending classes and following their day.
We also interviewed several teachers. But of course, the final users are the students.
I conducted contextual inquiries. We observed how the kids interact with the different devices and how do they find their way in the digital world.

Ideation + Continous testing

After analyzing the research data and clarifying the high-level user needs, I divided the project into smaller chunks, which can be designed and developed in a relatively short time to make sure we can work smoothly with the agile development team.

For example, each interaction type was a separate chunk. I would pick a task and do some extra research on that specific topic. After the ideation phase, I would turn that into a low or medium-fidelity prototype and go out immediately and test.

Working with small parts at a time gave me a lot of flexibility and a chance to do continuous testing and iteration on the design because of the limited scopes.

We built up long-term relationships with schools where we could go and do quick usability tests regularly.

Evaluation

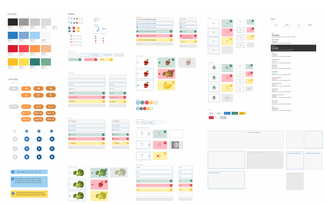
As we were designing the smaller elements of the product, we included fast semi-formal usability tests after every chunk. At that stage, the goal was to find the areas to improve and iterate.

But that can never replace rigorous UX evaluation. So after the rollout of our MVP, I set up a plan to run an extensive evaluation study. The main goal was to measure the walk up ease of use for new users. I choose Initial user performance as the UX measure to evaluate. I have chosen error rates as a metric. We were testing several smaller aspects of the player like the interaction types, the evaluation, etc. Therefore we set the target levels tight to be <1 error per task.

We run the evaluation study in four countries. In every country, we test with 1-1 class (usually around 15 students) for each age group. The usability tests run individually and on a mixture of devices (laptop, phone tablet).
After the usability test, every task which did not reach the target level was revisited and further iterated.

UI design

At this project, the most important aspect if the UI was to be neutral and flexible. It has to accommodate all kinds of content. The player has to be integrated into other platforms. All the platforms have different design Systems and different ways of integrating the player. Therefore the main goal was to create a minimalistic interface with customizable UI elements.



Content

Usability doesn't stop with the interface. At this project, it was equally important to make sure the content that we will display in the player is contributing to good user experience.
The authors creating content were coming from the mostly printed background and had little or zero knowledge about web usability. Therefore a part of my task was to share knowledge and educate them. I created guidelines and training to explain the possibilities and limitations of online content display.

Evaluation plan

Defining the main KPIs
Infinitas Learning

The customer

Infinitas Learning is an international group of educational book publishing companies from Belgium, the Netherlands, and Sweden. Alongside classical printed materials, Infinitas has entered the digital market as well. They offer online books, exercises, so as several online platforms. Products range from online courses for adults to educational games for kids and learning management systems for teachers.

3 countries
6 platforms
1 000 000 users

The task

My task was to define common KPIs for the group for their digital solutions. I had to set up benchmarks to evaluate the success of the online products across the countries and over time.
The platforms have very different functionalities, target groups, and strategies. Therefore the challenge was to find KPIs that we can apply for a wide variety of products.

The goal was to set up metrics for standard UX evaluations over platforms that we can conduct repetitively.

The metrics

With the management team, I have selected the representative future-proof products that we wanted to measure in the long run.
I analyzed the products' main target groups, their goals, and features, trying to establish a common ground. I was focusing on two aspects: user behavior and user satisfaction.

User behaviour

User satisfaction

Part 1: User behaviour

User behavior Retention, usage, and user engagement, has been chosen as metrics to evaluate our platforms.

1. Retention

We were measuring the percentage of returning visitors. Teachers use our platforms as part of their everyday work. Therefore, we defined a regular visit as at least one visit per week. We started to measure the percentage of users who are interacting with our platform weekly.

2. Usage

There can be several indications of usage for different types of platforms and websites. For this set of products, we determined the opening of content as the indicator of usage. What we were interested in here is the usage per visit. Therefore we set up a benchmark to measure the percentage of visitors who interact with our content.

3. Engagement

The third part of user behavior we set to measure was engagement. We decided to track the percentage of users who spend at least a pre-defined amount of time on our platforms. The time-lapse was high, as our products are not classical commercial websites but web applications.

Part 2: User satisfaction

NPS + **SUS**

The other aspect of our measurement was user satisfaction. I believe that qualitative user research techniques are the best ways to understand the user's goals, motivations, pain points.
However, because of the different nature of the platforms, these methods were not feasible on a group level for a continuous, centralized assessment. We needed to quantify user experience and use generic measurement tools that we can use for our wide variety of products.
From a large number of tools, we have chosen to measure NPS and SUS. Both metrics helps to measure the self-indicated satisfaction of the users. While NPS is focusing on the overall satisfaction, SUS is more detailed and focused on the perceived usability of the platforms.

The execution and planning

We committed ourselves to measure twice a year.
We excluded all school holidays like summer holiday and Christmas holidays from our planning, as they would influence our results and would make us draw faulty conclusions.
All three companies were running the same metrics and at the same time. We would then compare the results among products, companies, and what is more important to the previous results. The plan is to repeat those studies every year.

Online metrics are the best way to measure our product performance, but qualitative user research is crucial to understand our users.

Training

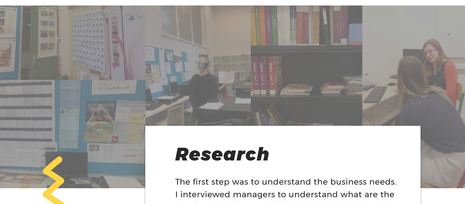
It was all ready to measure success and user satisfaction. But how will we build successful platforms? The only way to create delighting products for our customers is if we understand them. The online questionnaires, metrics will never give us an in-depth insight into their behavior, feelings, opinion.
Therefore I created guidelines and held training on user research. I give practical tips for the product teams in different countries to help them understand their users. That will ensure that the companies not only know how to measure the success of their platforms they also learn how to build successful products.

Scoodle

Learning management system for teachers

Infinitas Learning

Scoodle is the online platform of Plantyn, a leading educational publisher in Belgium. They provide online materials and planning tools for teachers. I get the task of redesigning the way they present their online content in their platform.



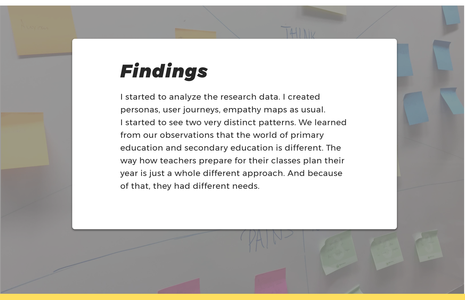
Research

The first step was to understand the business needs. I interviewed managers to understand what are the requirements from their side and conducted Expert interviews to learn more about the topic.

Then it was time to put some measurements in place. I set up Google Analytics and Hotjar for them. I created funnels and waiting for the heat maps to get ready.

In the meantime, with my team mates, we have started our field study. We were observing teachers both in primary and secondary education and conducting user interviews.

- *Field studies*
- *User Interviews*
- *Observations*
- *Online polls*
- *Management interviews*
- *Expert interviews*
- *Competitor's analysis*
- *Analytics & heatmaps*

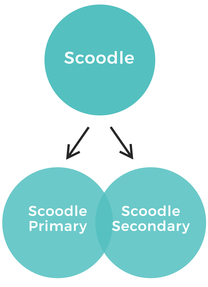


Findings

I started to analyze the research data. I created personas, user journeys, empathy maps as usual.
I started to see two very distinct patterns. We learned from our observations that the world of primary education and secondary education is different. The way how teachers prepare for their classes plan their year is just a whole different approach. And because of that, they had different needs.

New directions

That made us realize that it is time to rethink our product strategy. Our current offering did not fully meet the needs of nor primary teachers nor secondary teachers. There was some overlap, but to create a relevant product, we had to split our platform into two. Primary education was all about meeting government goals, using pre-made content with a lot of games. While in secondary education, it was more about freestyling, using their own exercises, and way less planning.
Also, the market positions of our products were different. We decided to split Scoodle and create Scoodle Primary and Secondary and build different strategies for them.



Redefining the products

We set up the new strategies with the management for Scoodle Primary and Secondary. After having the high-level goals defined, I returned to my research data again to refine the functionalities in more detail. We finalized the new feature lists for our products, separated the codebases, and set up the new teams. From that point on, Scoodle became two separate projects for two different target groups.

Scoodle - Authoring tool

A new CMS system for the authors and editors

Infinitas Learning

The task

Plantyn is one of the lead educational book publishers in Belgium. They are currently going through a digital transformation and started to offer a blended learning solutions. Therefor online content creation became the core of their business.

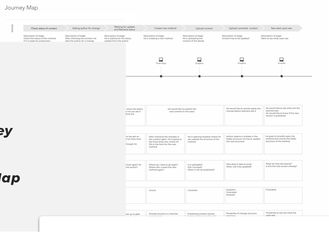
My task was to reinvent the way authors create their online methods. I had to design a new CMS for them to make the authoring and publishing process more efficient.

Research

The first step was to understand the business needs. I interviewed managers to understand what were the requirements. Then I started the user research. I was in the lucky position that the users were sitting in the same office as me.
I shadowed and interviewed authors and publishers to learn as much as I can about their way of work, their problems, etc.

Research analysis

- Personas
- User Journey
- Empathy Map



After the research, I analyzed the results. I created personas, user journeys, and empathy maps to get a better understanding of user needs.
I drafted the first feature lists and created the information architecture.

Ideation + early stage testing

Because of the ideal situation that the users were continuously available, we could involve them early on in the ideation phase. We could test our ideas fast without having to do high fidelity prototypes. After having the first wireframes done, we invited the authors and publishers and started co-creating. It ensured that we could polish the product based on user input on the wireframe level. It also gave us access to do quick usability tests and further iterations.

Evaluation

One of the initial business goals with this project was to help authors to create online methods more efficiently and to reduce the time to publish. Therefore after release, we started to measure the time and compare it with the old results. The new designs resulted in shorter publishing circles, which meant our authors could work more efficiently.

I'm fine

Mobile application concept

School project

The idea

I'm fine is a healthcare mobile application concept made during a university course.
The main goal was to help patients participating in psychological therapies.

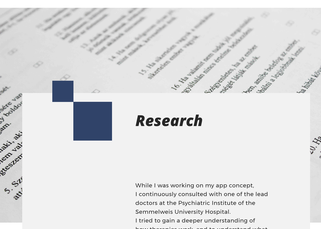
One part of the solution was to help maintain the contact between doctor and patient in between two face to face sessions. It enables doctors to monitor the patient's well being before the next appointment. It also provides transparency.
The other aspect of the app was prevention. The app would analyze the data collected from the person's phone with AI. It could help to prevent patients get into a critical state and encourage them to reach out to the therapist if needed.

The Inspiration

"According to the World Health Organization, depression is one of the primary sources of disability around the world. It contributes to many physical and mental health complications. But, it is treatable. Various types of talk therapy, medications, and lifestyle adjustments have all been shown to help individuals dealing with depression."

(World Federation for Mental Health, October 10, 2010, www.wmfh.com)

Mental health problems are still very controversial in our society. Many people never get diagnosed as they are either worried about the social stigma or because they are unaware they have a condition. From personal experience, I know how untreated depression can lead to family tragedies.



Research

While I was working on my app concept, I continuously consulted with one of the lead doctors at the Psychiatric Institute of the Semmelweis University Hospital.
I tried to gain a deeper understanding of how therapies work, and to understand what can be improved, what are the pain points of the doctors. I also conducted interviews with patients to understand their side of the story and see how I could help them.

Findings

Speech therapy and medication is the most common therapy form.

Tests, questionnaires are used to evaluate the patients' current wellbeing.

There are no digital records. It is difficult for the doctors to keep track of the patients' records.

Completing questionnaires takes too much time away from speech therapy and other therapy forms.

Lack of monitoring between two sessions.

Risk of a meltdown between two sessions.

Lack of knowledge on the patients' side about other supportive activities such as support groups, hotlines, meditation, etc.

Lack of transparency in the records.

The solution

The solution consists of a mobile app for the patients and a web solution for doctors.
Doctors could access all the information about the patients in their accounts.

Patients could complete all the tests and write the journals in the app before the therapy session.
Doctors would have time to evaluate those before the appointment, be more prepared, and have more time for speech therapy.
Besides, regular tests the app could help doctors to evaluate the patients well being between meetings. It would give them the chance to spot any worrying signs in their condition and arrange a face to face meeting earlier or do any steps they feel necessary. Doctors could monitor the patient's health better in between the sessions.
The digital entries would save a lot of time for doctors as they don't have to spend time digitizing the test results etc. This database also would enable doctors to more efficiently go through the patient's history and find any relevant information. Digitalized documents also create transparency for the patient.

The other part of the solution is AI-driven indirect monitoring of the patients' well being. All kinds of data, such as location, activity, contacts, could be collected from their phone. Based on analyzing those results and comparing them to the average, the app would be able to find and highlight possible risks. For example, a sudden lack of communication with others, staying home too much could be signs of getting worse. In these scenarios, the app could check on the patients and make suggestions to contact their doctor if needed.

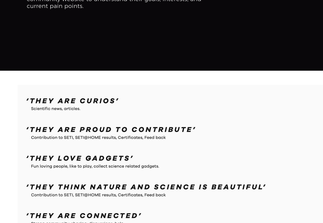
SETI Observe

Telescope tracker concept

School project

PROJECT

At our Interaction design course at the University, we get the assignment to redesign SETI institute's observer website. That is the community website where people can contribute to the search for extraterrestrial life by connecting their computer to the network, helping the tons of data to be analyzed.
It was a group project my role was UX research and UX Design. The main goal was to identify personas, understand their needs, and ideate with the rest of the team on the design principles and the main feature set.



RESEARCH

Best practice: I have analyzed the market, searching for industry-standard best practices.

Online Field Study: I have joined every SETI and space-related online group to learn more about them. I wanted to see what are the topics of discussions.

Interviews: I interviewed people who were using the SETI community website to understand their goals, interests, and current pain points.

'THEY ARE CURIOS'

Scientific news, articles.

'THEY ARE PROUD TO CONTRIBUTE'

Contribution to SETI, SETI@HOME results, Certificates, Feed back

'THEY LOVE GADGETS'

Fun loving people, like to play, collect science related gadgets.

'THEY THINK NATURE AND SCIENCE IS BEAUTIFUL'

Contribution to SETI, SETI@HOME results, Certificates, Feed back

'THEY ARE CONNECTED'

Strong community, sharing, discussions, help

FINDINGS

From the research data, I have created personas, collected the most important quotes, and clarified the user needs.

SHOW UP TO DATE INFO

'I want to see up to date info'
'They need to have regular up dates'
'They should reflect on the current scientific finding'
'It would be nice to know where they are looking'
'If I come here I want to know what's happening'

EXPLAIN WHAT THEY DO IN DETAILS

'How they choose the next area where they are going to search?'
'You need to have something which says what the site is about'
'What is the system behind the search? Why are they looking in particular ones?
'Why don't they look for life on the planets what NASA is also focusing on?'
'What are the other (planned)new techniques, methods to look for extra terrestrial life?

SHOW THE PROGRESS

'It's the journey what should matter'
'Information what they do but in WORDS, like journal entries, like this week they were looking for in this area'
'They have to find another way to measure success, then find extra terrestrial life'
'Show the progress'
'I want to see which stars have been eliminated'
'What signals they received and they turned out to be nothing'

FEATURE SET AND DESIGN PRINCIPLES

Based on the results of the research, we started storyboarding, formulated the design principles and the final feature set with the team.

EPIC

ALIVE

CLARITY ABOVE DATA

OPEN RESEARCH

LIMITLESS OPPORTUNITIES

SOLUTION

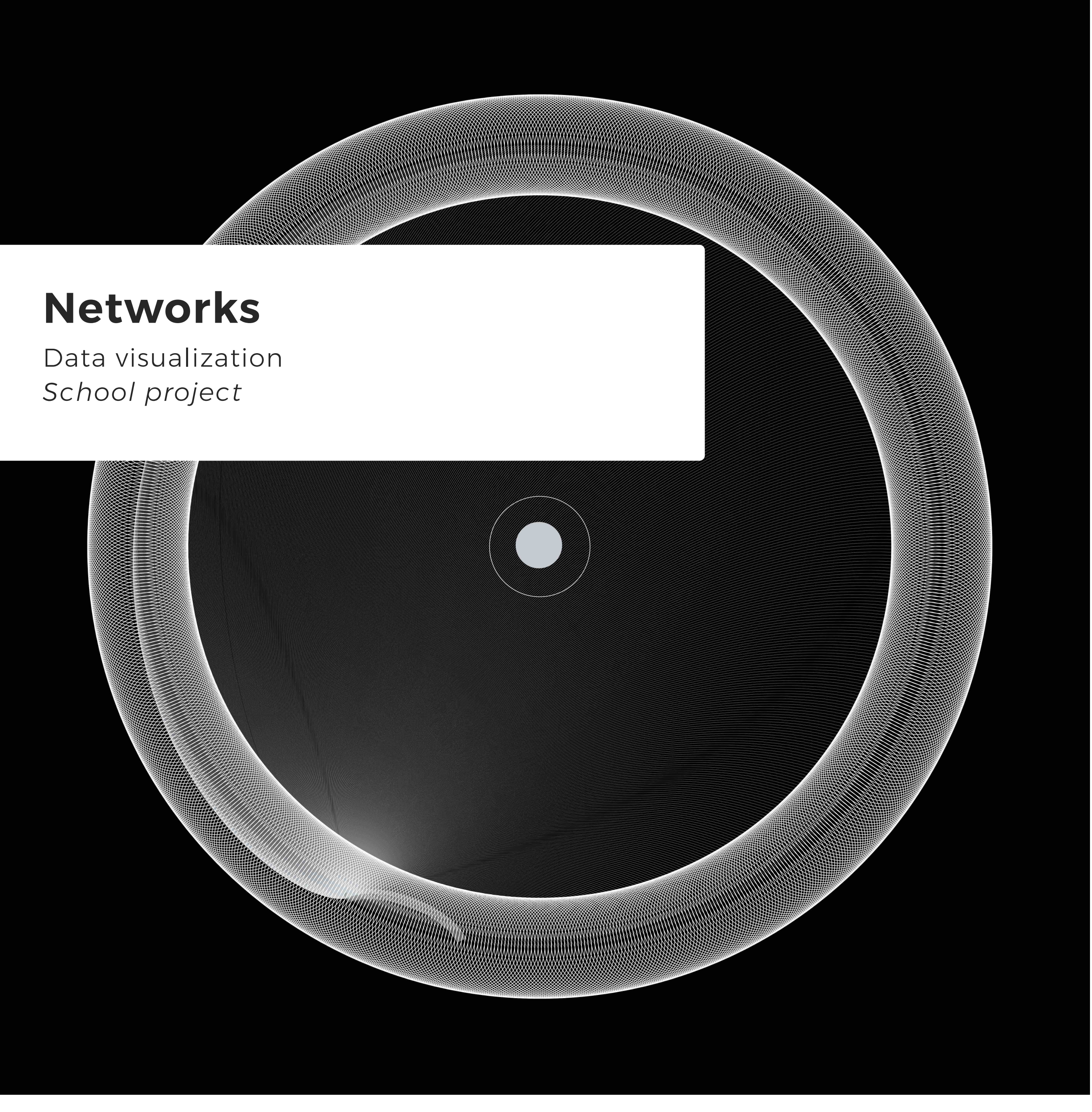
The main focus in our solution was to display the current observations, so that people could see up to date info about the ongoing research. Visitors could choose what satellite type they are interested in. They could switch between map and list view, based on their interest. In the list view the audience could see the progress and see what is the roadmap, which stars have been eliminated and which ones are still to come.
They could directly contact the observer with questions, and see the observation notes to be part of the journey and have a better understanding of their method.

SUMMARY

Although the project only remained a concept due to the limited resources on development, it is one of my all time favorite projects. It gave us absolute freedom, and as we are space fans, it was fun to work on this project.

Networks

Data visualization
School project



'Networks' is a project I have created for a Data Visualization course at the university. It examines the relationships among the individuals in my social network.