⚡ **Macro**

Macro: Core Product Experience
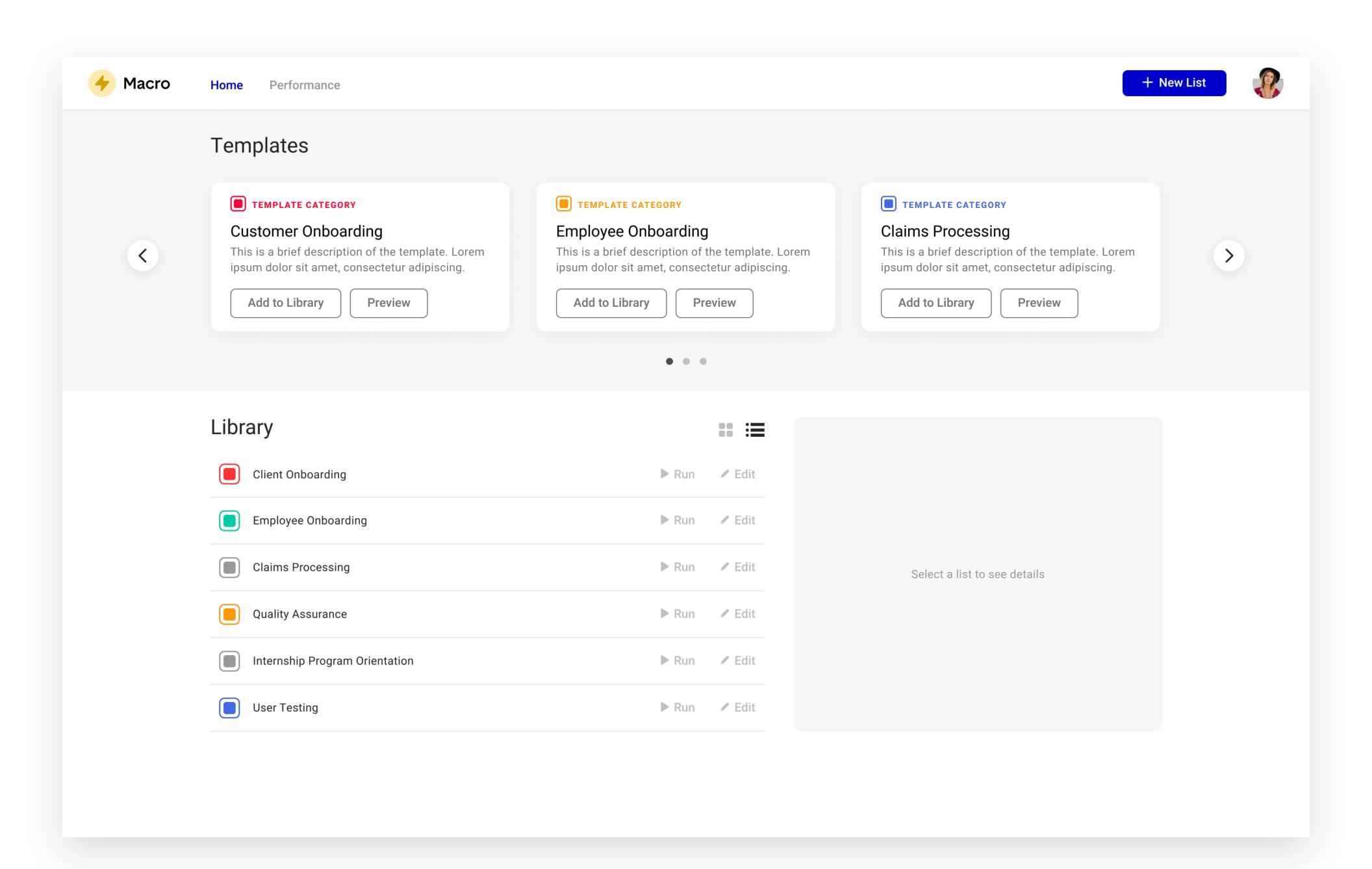March 2020

Macro

Macro is a SaaS platform aiming to help companies complete repeatable processes in a single context.
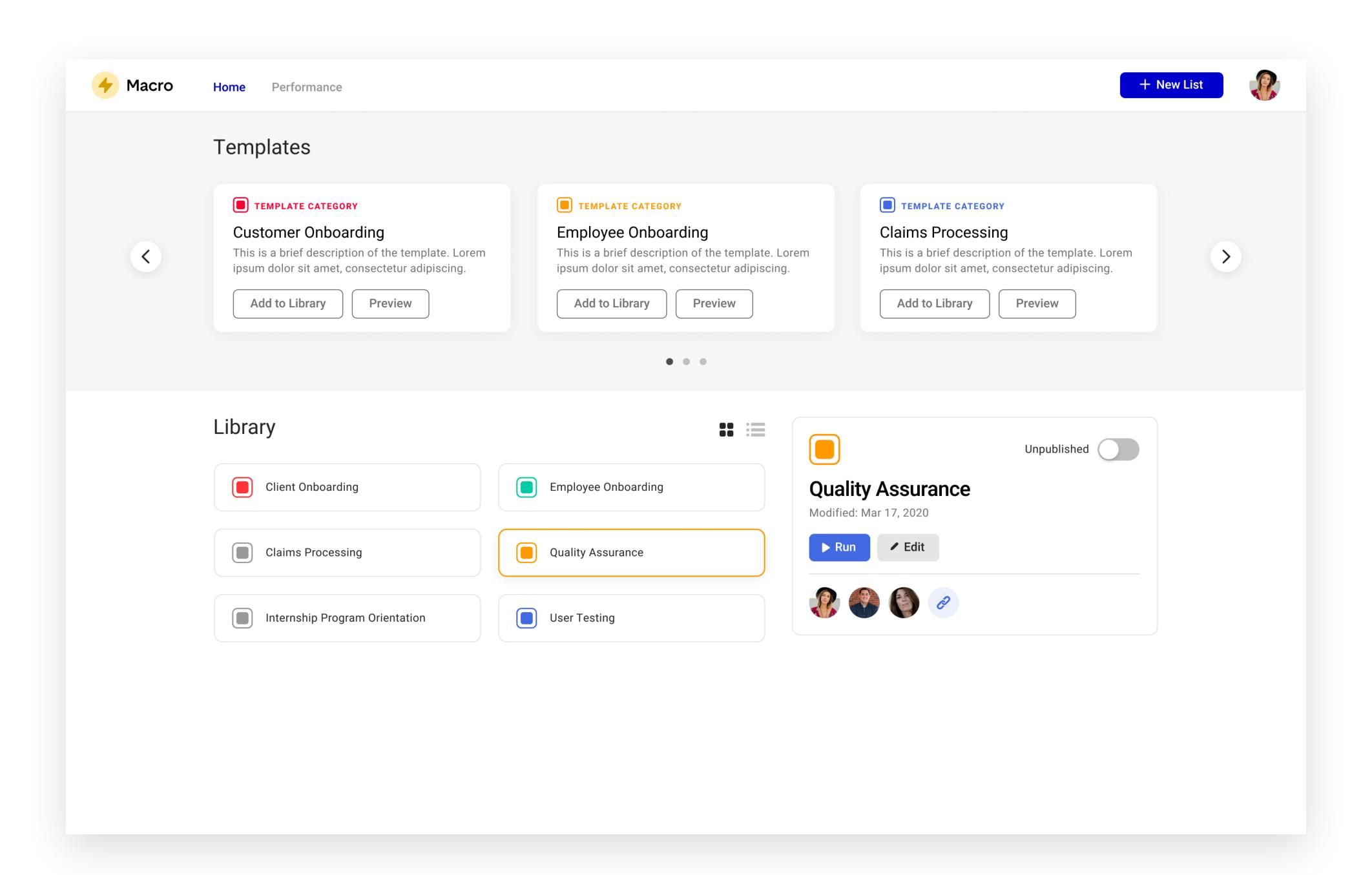
Today, many of these processes take the form of checklists. They reside in text documents, spreadsheets, emails, Slack, and many other SaaS applications.
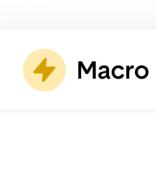
My Role

As the sole designer on the team, I'm currently working with one of the founders/engineer to shape and define the core product experience of Macro.

My contribution include UX, UI, interaction, color and typography. Here are some screens I've designed over the past three weeks.

Templates

TEMPLATE CATEGORY

Customer Onboarding

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

TEMPLATE CATEGORY

Employee Onboarding

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

TEMPLATE CATEGORY

Claims Processing

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

Library

Client Onboarding	▶ Run	✎ Edit
Employee Onboarding	▶ Run	✎ Edit
Claims Processing	▶ Run	✎ Edit
Quality Assurance	▶ Run	✎ Edit
Internship Program Orientation	▶ Run	✎ Edit
User Testing	▶ Run	✎ Edit

Select a list to see details

Templates

TEMPLATE CATEGORY

Customer Onboarding

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

TEMPLATE CATEGORY

Employee Onboarding

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

TEMPLATE CATEGORY

Claims Processing

This is a brief description of the template. Lorem ipsum dolor sit amet, consectetur adipiscing.

Add to Library   Preview

Library

Client Onboarding

Employee Onboarding

Claims Processing

Quality Assurance

Internship Program Orientation

User Testing

Unpublished

Quality Assurance

Modified: Mar 17, 2020

▶ Run   ✎ Edit

+ New List

Run History

Sort By ⌄

STARTED 12:30PM
Hiring for Andy Bernard
🟠 In Progress (3 of 9 Completed)

RAN BY
Dwight Schrute

NEXT TASK
📄 Sign Contract

STARTED 9:30 AM
Onboarding for Erin Hannon
🟠 In Progress (8 of 9 Completed)

RAN BY
Pam Beesly

NEXT TASK
Ⓜ Send Confirmation Email

STARTED MARCH 18, 2020
Life Insurance Claim Settlement
🟢 Completed on March 19, 2020

RAN BY
Dwight Schrute

STARTED MARCH 5, 2020
Employee Onboarding
🟢 Completed on March 5, 2020

RAN BY
Pam Beesly

STARTED 9:FEBRURARY 5, 2020
Conference Registration
🟠 In Progress (4 of 6 Completed)

RAN BY
Pam Beesly

NEXT TASK
Ⓜ Send Confirmation Email

STARTED JANUARY 27, 2020
Client Onboarding
🟢 Completed on January 30, 2020

RAN BY
Dwight Schrute

NEXT TASK
📄 Follow Up Survey

STARTED JANUARY 9, 2020

RAN BY

FILTERS

Checklist Type ⌃

Employee Onboarding

Customer Onboarding

Claims Processing

Quality Assurance

Operations

Runner ⌄

Status ⌄

Macro   Home   Performance   + New List

Run History

Sort By ∨

Checklist Type ∧

Employee Onboarding ✕

Customer Onboarding

Claims Processing ✕

Quality Assurance

Operations

Runner ∨

Status ∨

STARTED	STATUS	REASON	RAN BY	NEXT TASK
12:30 PM	●	Hiring for Andy Bernard		📄 Sign Contract
9:47 AM	●	Onboarding for Erin Hannon		✉ Send Confirmation Email
Mar 19	●	Onboarding for Erin Hannon		
Mar 5	●	Onboarding for Erin Hannon		
Feb 28	●	Onboarding for Erin Hannon		✉ Send Welcome Email
Feb 12	●	Onboarding for Erin Hannon		
Feb 1	●	Hiring for Andy Bernard		📄 Follow Up Survey
Jan 30	●	Onboarding for Erin Hannon		
Jan 16	●	Onboarding for Erin Hannon		
Dec 27	●	Onboarding for Erin Hannon		
Dec 14	●	Onboarding for Erin Hannon		
Nov 25	●	Onboarding for Erin Hannon		
Nov 11	●	Onboarding for Erin Hannon		

Untitled

CREATE NEW SECTION

\+ Untitled Task

press Enter ↵

Select a step to configure

Macro

Share Published

Client Onboarding

PRE-CONTRACT

○ **Initial Consultation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, scelerisq sit amet pellentesque ac, fermentum rutrum arcu. Nullam at euismod.

Ⓜ **Send Confirmation Email**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sagittis libero a enim gravida, et porta purus interdum. Nullam non porta orci, sit amet lobortis orci.

⊕ NEW SECTION

○ **Follow Up Meeting**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, arcu. scelerisque sit amet pellentesque ac, fermentum rutrum.

⊕ **Create New Task**

press Enter ↵

Select a step to configure

Macro

Share Published

Client Onboarding

PRE-CONTRACT

⊙ **Initial Consultation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, scelerisq sit amet pellentesque ac, fermentum rutrum arcu. Nullam at euismod.

Ⓜ **Send Confirmation Email**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sagittis libero a enim gravida, et porta purus interdum. Nullam non porta orci, sit amet lobortis orci.
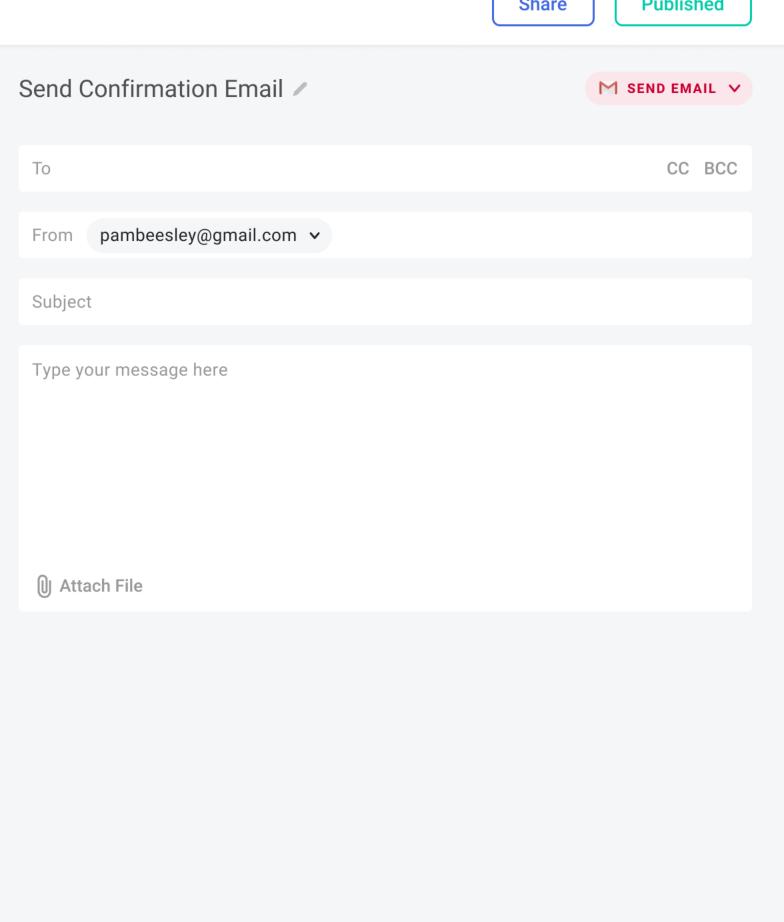
CONTRACT OUT

⊙ **Follow Up Meeting**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, arcu. scelerisque sit amet pellentesque ac, fermentum rutrum.

⊕ Create New Task

press Enter ↵

Select a step to configure

Macro

Client Onboarding

PRE-CONTRACT

○ **Initial Consultation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, scelerisq sit amet pellentesque ac, fermentum rutrum arcu. Nullam at euismod.

M **Send Confirmation Email**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sagittis libero a enim gravida, et porta purus interdum. Nullam non porta orci, sit amet lobortis orci.

CONTRACT OUT

○ **Follow Up Meeting**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, arcu. scelerisque sit amet pellentesque ac, fermentum rutrum.

+ **Create New Task**
press Enter ↵

Send Confirmation Email ✎   M SEND EMAIL ⌄

To	CC BCC

From   pambeesley@gmail.com ⌄

Subject

Type your message here

📎 Attach File

Macro

Share   Published

Client Onboarding

PRE-CONTRACT

⊙ **Initial Consultation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, scelerisq sit amet pellentesque ac, fermentum rutrum arcu. Nullam at euismod.

Ⓜ **Send Confirmation Email**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sagittis libero a enim gravida, et porta purus interdum. Nullam non porta orci, sit amet lobortis orci.
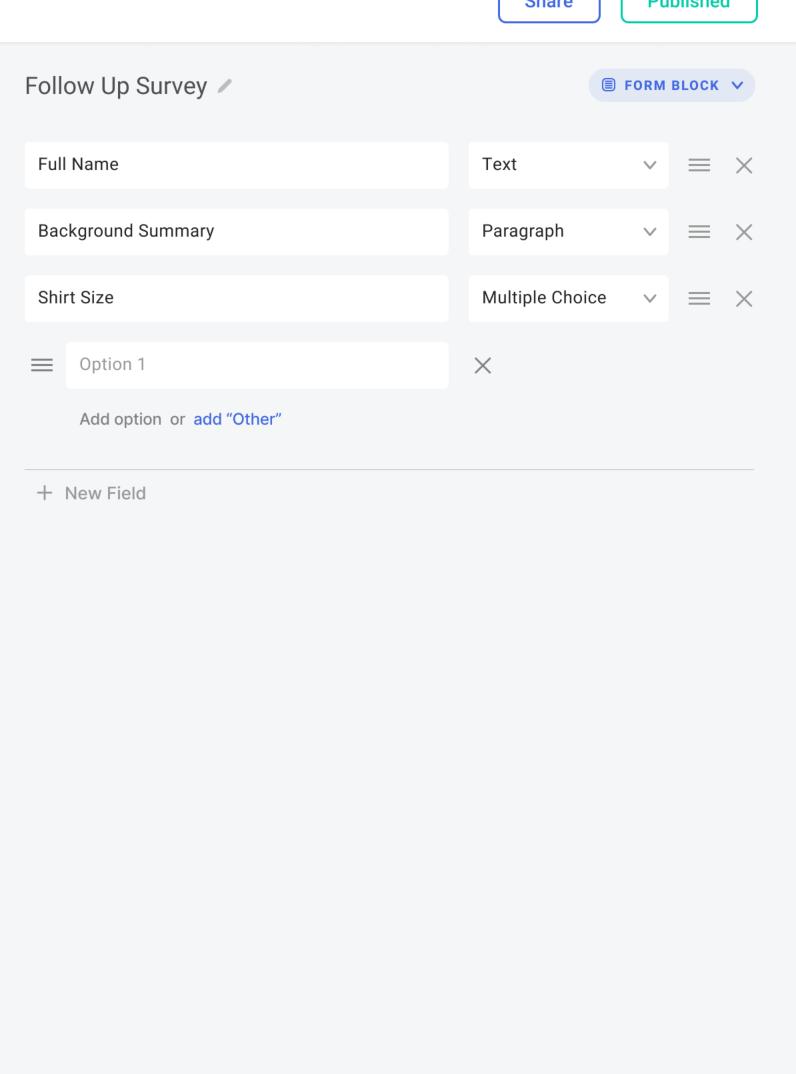
CONTRACT OUT

⊙ **Follow Up Meeting**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer mi ligula, arcu. scelerisque sit amet pellentesque ac, fermentum rutrum.

⊕ **Create New Task**
press Enter ↵

Follow Up Survey ✎

▤ FORM BLOCK ⌄

Full Name	Text	☰ ✕
Background Summary	Paragraph	☰ ✕
Shirt Size	Multiple Choice	☰ ✕

☰ Option 1 ✕

Add option or add "Other"

＋ New Field

Client Onboarding
Onboarding for Nike ✎

👤 Pam Beesly

INFORMATION

☐ Client Information

PRE-CONTRACT

☐ Initial Consultation
☐ Upload Resume

CONTRACT OUT

☐ Send confirmation email
☐ Update manager
☐ Schedule Follow Up Call

CONTRACT SIGNED

☐ Send copy to customer
☐ Send welcome kit

LAUNCH

☐ Send Welcome Email

0 of 9 tasks completed

Client Information

A brief description of the process lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sagittis libero a enim gravida, et porta purus interdum.

Moderator Name

Full Name

Client Name

Full Name

Additional Notes

Type anything

Complete

Initial Consultation

When a client first expresses interest, we should schedule time to meet with them as soon as possible.

Upload Resume

Macro

Login

Email Address

johhnyappleseed@email.com

Password

At least 8 characters

Login

or

Continue with Google

Don't have an account? **Sign Up**