Wizeline
UX Challenge

👋🏼 Hi Wizeline,

I had a blast taking your design challenge. I approached it the same way I encourage my teams to work: tight small loops of learning, making, and showing. Whatever the fidelity, don't skip any steps, even if all we're doing is quickly showing it to another colleague, sketching an idea on a post it, or a list of questions to ask users.

I spent an hour on steps 1-3 ,then another on step 4, and one more composing the presentation.

Muchas Gracias!

– Luke Miller

Step 1
Review materials

My notes below are high-level UX considerations I'll use to begin design.
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#Wizeline uses the *forced rankings* method inside its PM product. This allows a uniform scoring criteria solicited through user feedback to prioritize a set of features.
Does design, sales, and marketing work factor into Effort?
What else is known about companies that use this method?

#Persona Robin is familiar w the forced rankings method from previous experience.
How do Wizeline Score metadata compare to other forced ranking methods?

#Robin performs daily and weekly updates to her metadata.
What parts of Effort ROI Impact & Strategy change this frequently?
This suggests a potential need for a quickly accessible UI.

#Doesn't always get through her email, and in meetings a lot.
-A good user centric KPI might be how soon she finishes her emails for the day.

#Other persona tasks:
-solicit user input, quant or qual
-respond to users
-export data w attributes attached or pre-analysis

Goal

At the start my goal is to briefly familiarize myself with the project and see what inspires me from a research or design standpoint.

Step 2
6 minute sketch

After grasping the broad strokes of this problem I spent about 6 minutes thinking up potential solutions and doing some light sketching.

Goal

"First thought, best thought" as the saying goes. Not sure if that's true, but I do know the burden research findings can have on creativity. So a short design studio gives me and my team room to stretch our legs.

An added benefit of working at this fidelity is the initial glimpse of what range technical scope could rise to.
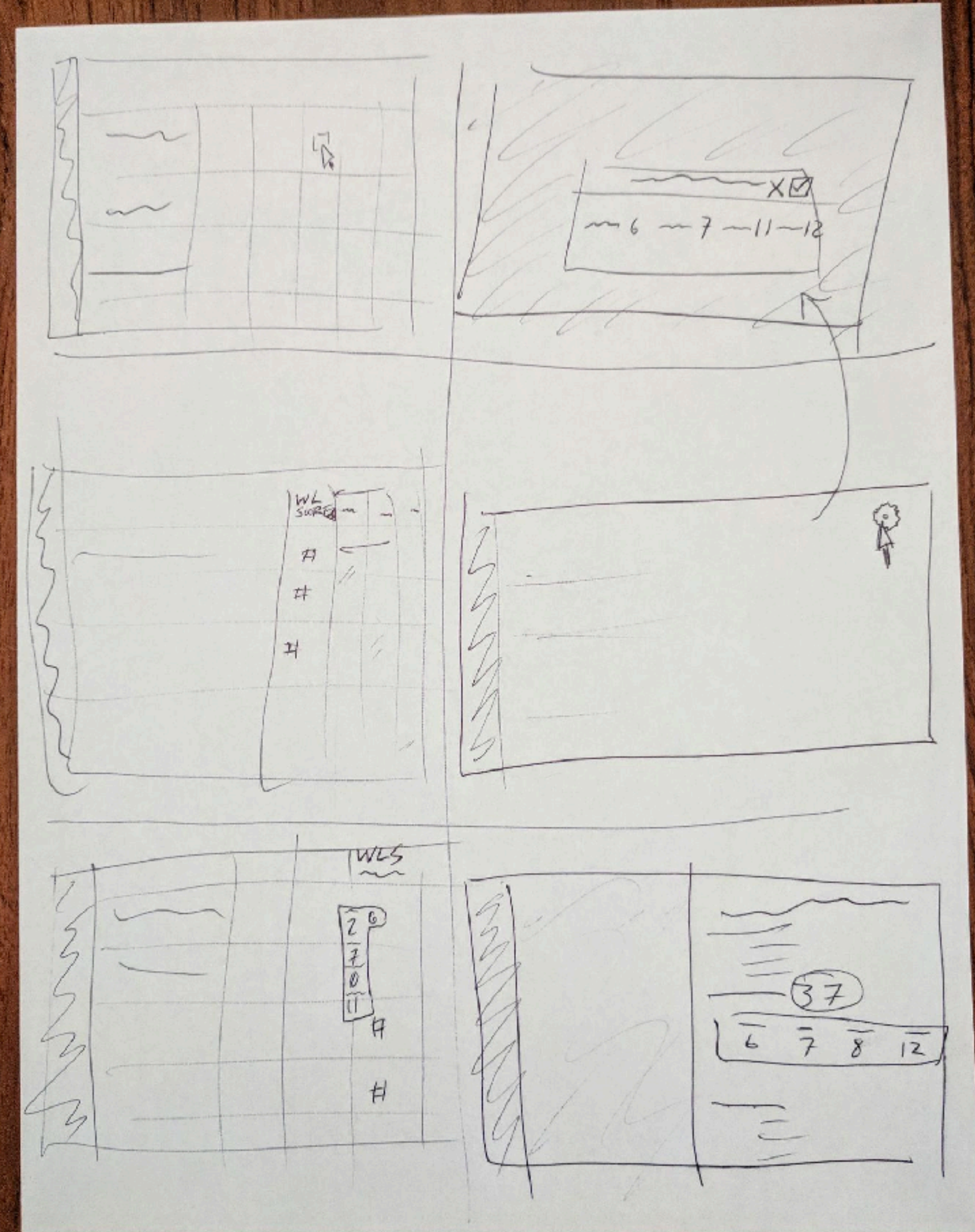
Step 3
Analyze brief in detail

The following notes show my thoughts around questions for the client, contexts of the user to consider, questions for users, and a few ideas about how the problem gets addressed.
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#need from client
What does quant show?

#possible stories to probe
When values are set
When values change
How often these actions performed
When values are set/change in bulk
When weights are set
When weights change
When change in value or weight causes large reprioritization

#possible user interview questions
Is reporting the only goal, what other tool are used?
What was the reason for a recent change?

#possible persona nice to haves
Automating entry
Reminders at the end of the day

Goal

Now its time to really list out questions and assumptions. I want to understand what research methods might be necessary, if stakeholder interviews should be scheduled, and what analytics needs to be reviewed.

Step 4a
All up front

This was my first idea from sketching.
1. expandable metadata columns
2. editable fields inline, affordance on hover
3. settings for weights modal

It makes the score the only editable piece of data on this screen which suggests priorities change daily. This is backed up by the persona but it reinforces a habit that may be contributing to Robin being overworked.

Design Note
Because I already had a screenshots of the product I opted to "wireframe" this at the higher fidelity by chopping up the original and adding elements in Sketch.app. It is by no means pixel perfect.
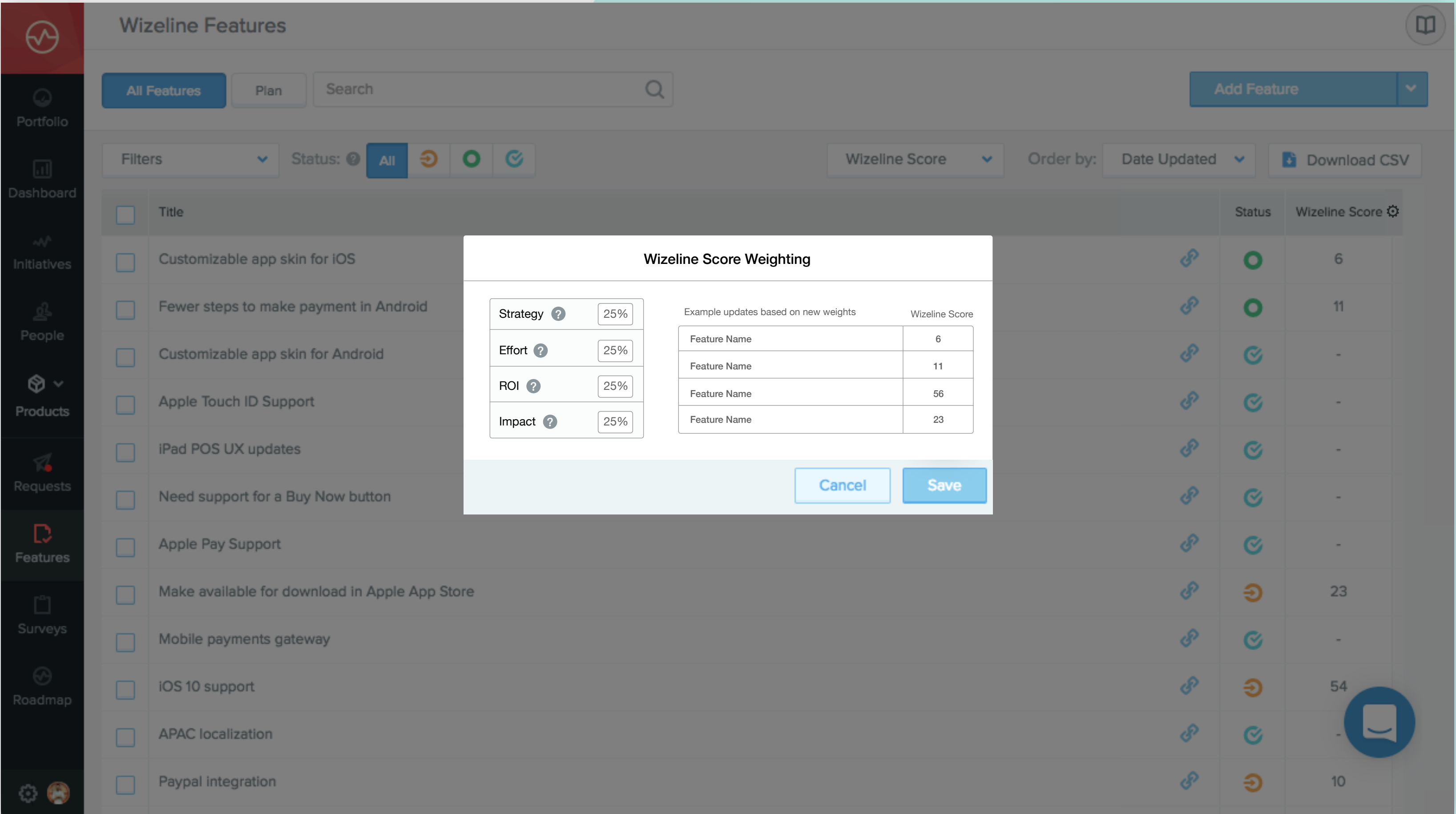
Step 4b
Weight Modal

If no other universal settings exist I'd treat weighting as a modal, accessed through an icon in the column heading. If there were other universal settings, I'd seek to integrate there.

In this design users enter values and watch as the "example" features update in realtime. I could see adding in the individual metadata scores for the examples, or also using a selection of real features.

'?' tool tips give explanations of the different score metadata.

Step 4c
Top of Detail

I started putting score metadata in the detail view, matching similar styles on the page. I moved away from the filled circular style for counts of Requests, Releases, and JIRA Issues because those are to-dos.

After changing the style I began to wonder at how often this information would be interacted with compared to Requests, Releases, and Issues.

In both, users edit values after clicking edit, the same way they do other fields.

Weights are displayed but cannot be edited.
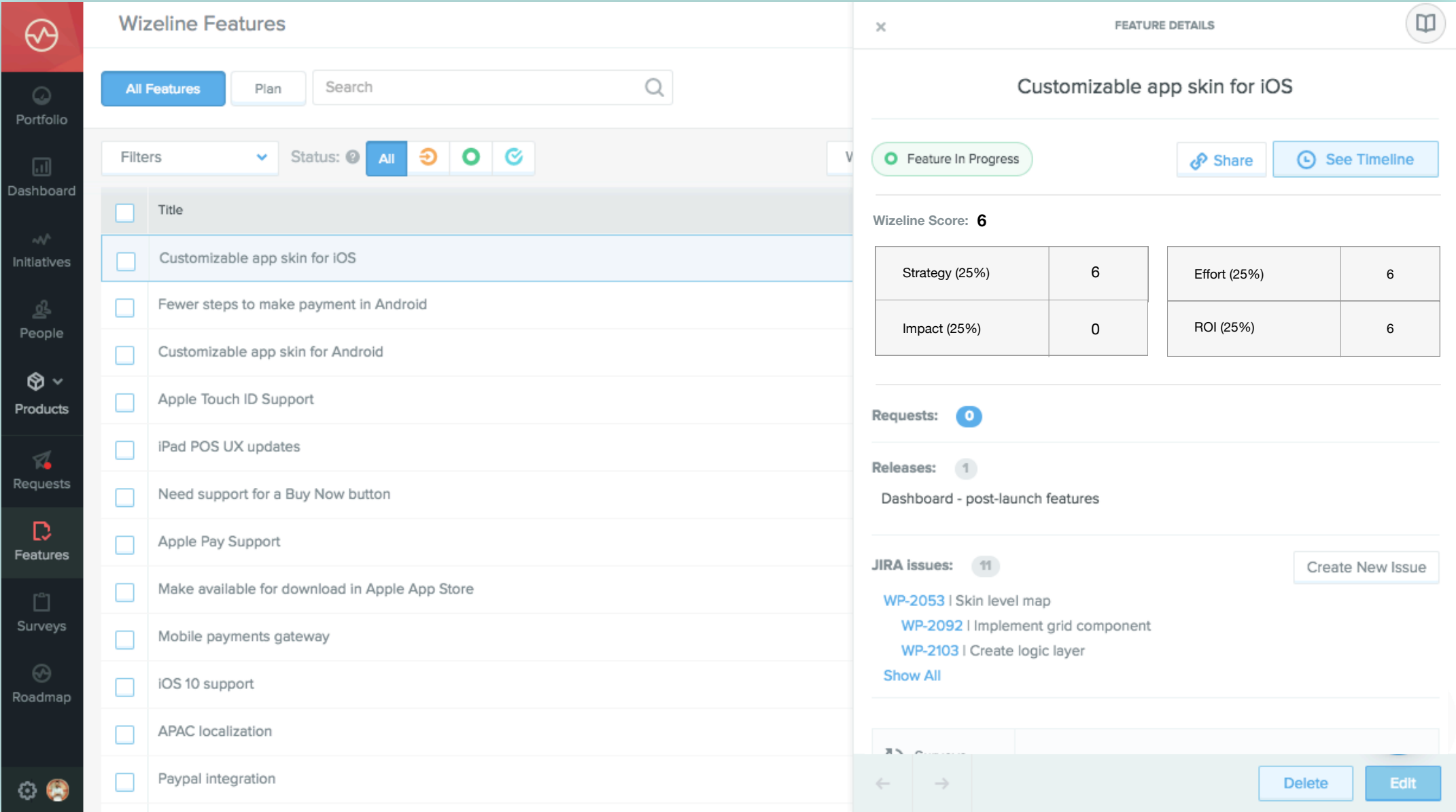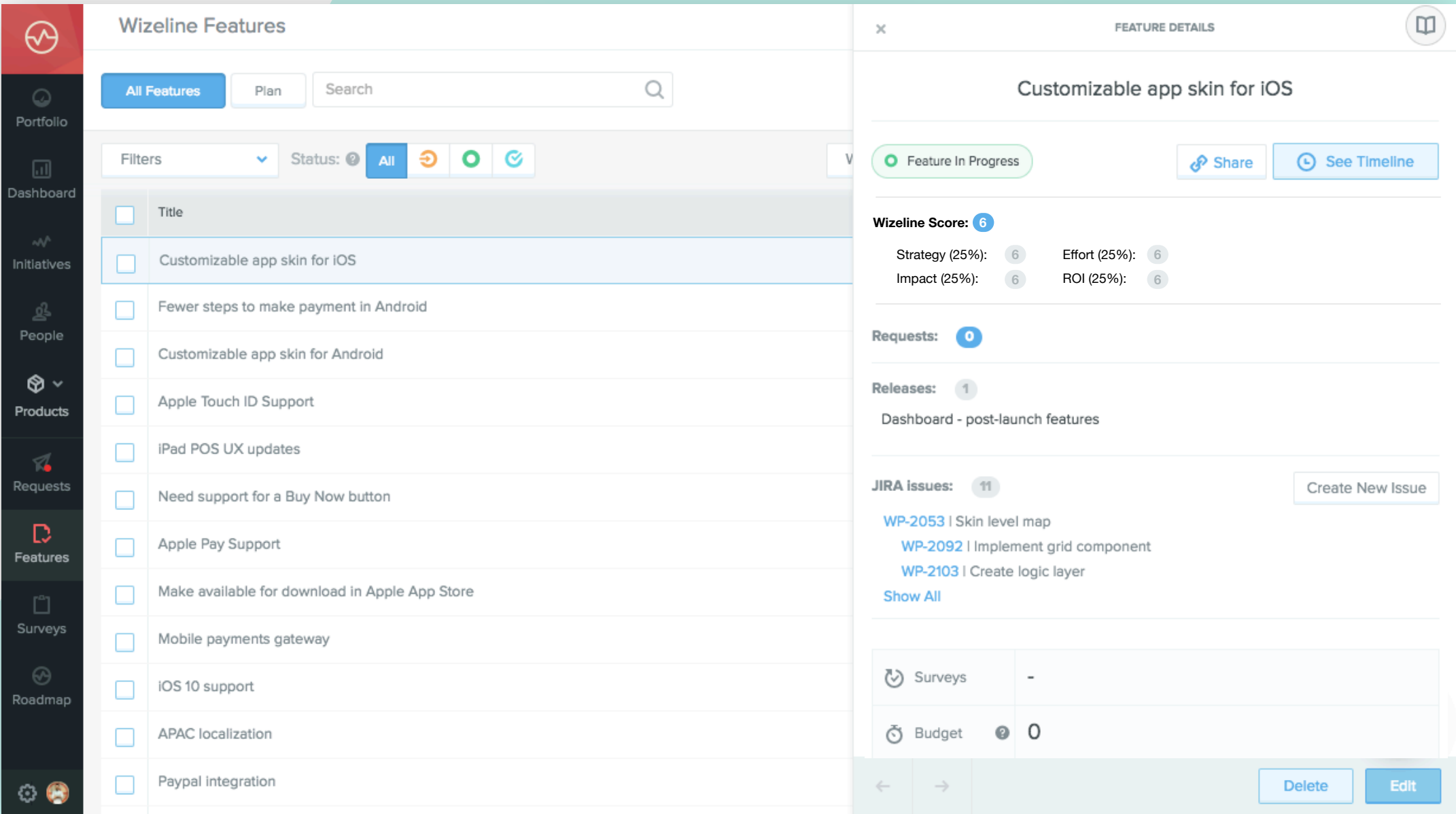
Step 4d
Inline Detail

After layout, I matched the Wizeline Score type to match the level of hierarchy used for the budget, but displayed it as the icon in the table.
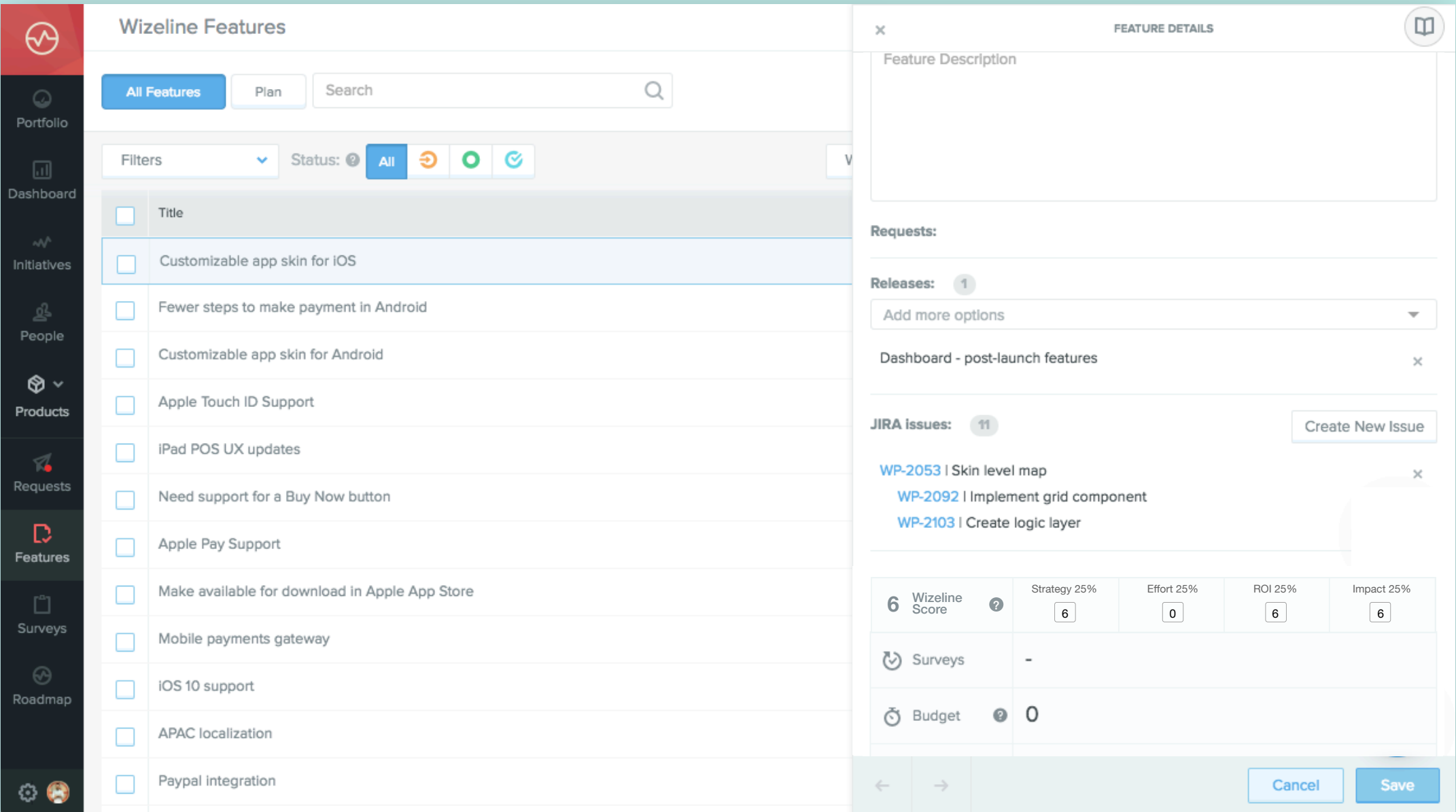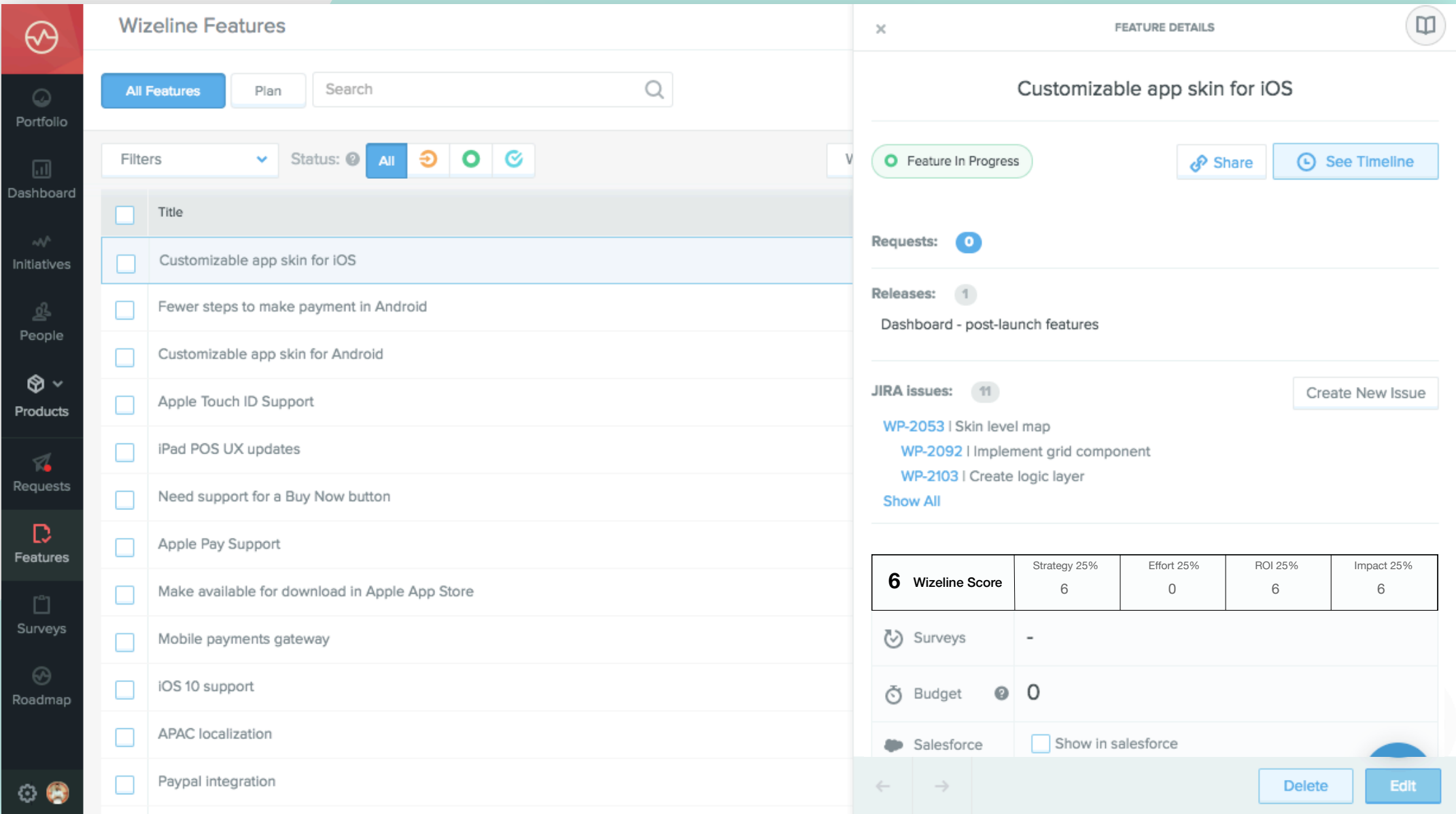
Values are still edited only after users selects edit mode.

The Wizeline Score updates in real time as values are entered. I still don't think UI for adjusting weights should be on the detail level since it's universal. However I didn't want to leave users hanging:

'?' Tooltip:
Wizeline Score is based on a weighted calculation of Strategy, Effort, ROI, and Impact. **Weighting is universal for a project***, you can make updates in the [universal project settings].*

Asks users to save or cancel their edits before navigating away.

Design Note
Moving through iterations I increased fidelity to understand how the hierarchy of information would play out.

Thank You