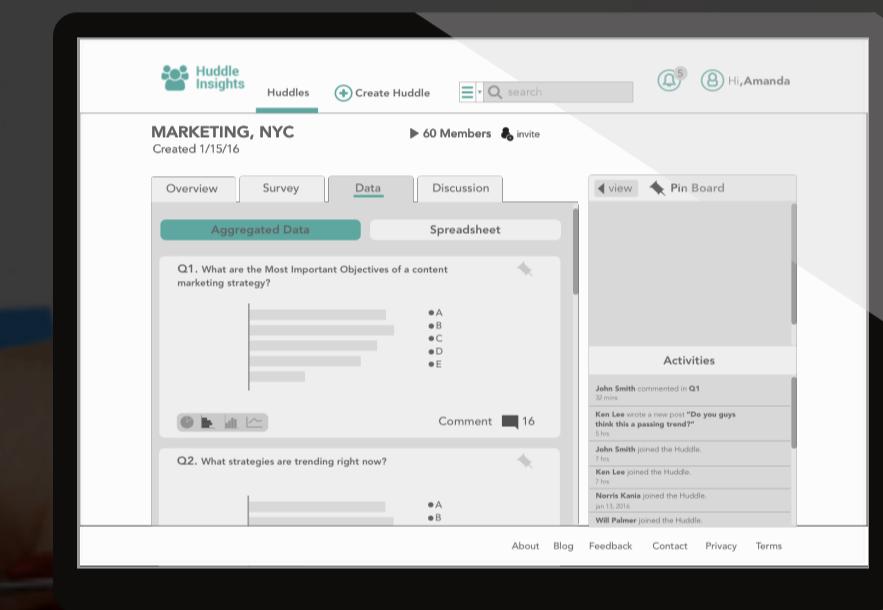


CASE STUDY #2

Huddle Insights - a SaaS platform for professionals that want to gain market insights by sharing data with industry peers



OVERVIEW

This was a **3 week** Client project completed in January of 2016. Our Client, Value Stream Labs, asked our team of 3 to work on the prototype of their newest product, Huddle Insights. Huddle Insights allow its members to collaborate and share datasets with one another in order to create better market insights.

OBJECTIVE

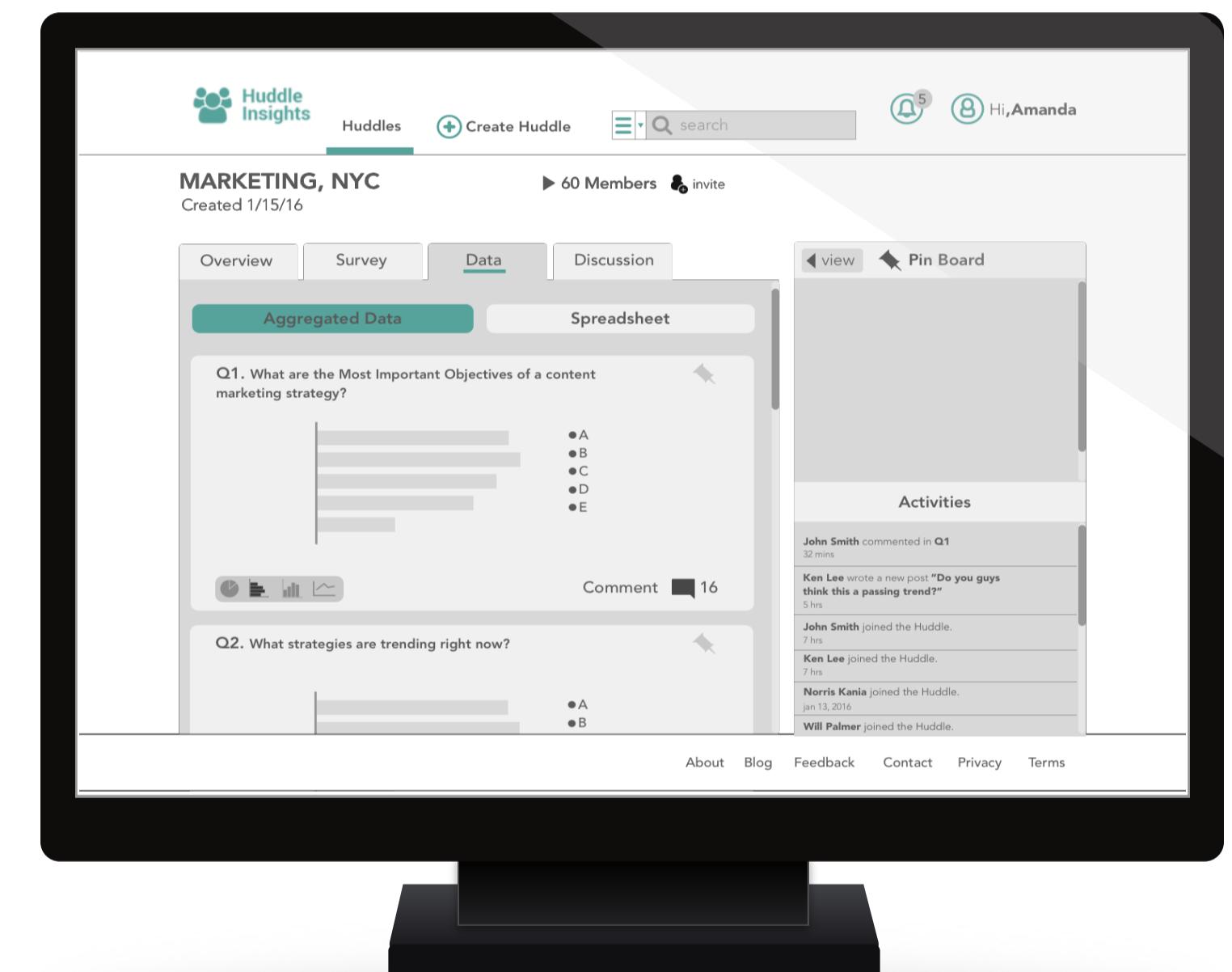
Our task was to create wireframes for the Member experience and the challenge was to design interactions that would engage members to contribute their data and insights.

SOLUTION

We designed a platform that allow users to **contribute and share raw data** and the ability to **share insights** with other members of the "huddle" through comments, Q&A boards, and blog posts. We also designed the ability for users to **save specific data sets** and to **create their own reports** which they can share with people outside of the huddle.

MY ROLE

My focus was User Research and Interaction Design. I also focused on creating surveys, conducting user interviews, competitor analysis, interaction design, and user testing.



DISCOVERY

Business Goals

Our Team kicked-off the project by **meeting with the stakeholders** of *Huddle Insights*. We discussed with them their business objective for their new product, the target userbase, and the scope of our project.

"In a sense we're trying to upend the classic view of the "research report", which is a static PDF document that is written by a single person."

"I think of each of the Huddle pages as a shared workspace for generating data-driven insight using a community (the members)."

User Research

We created a Survey and reached out to professionals working in Consulting, Finance, IT/Tech. These participants dealt with market research reports on a regular basis. Our **Survey** had **77 responses** and we **interviewed 10 participants** over the phone.

"platforms designed specifically to discuss research reports would be useful as the comments section sometimes holds gold in the form of independent opinions"

"Interactive reports aren't always available. I would've liked to click into the reports."

Competitor Analysis

We conducted our competitor analysis on platforms dealing with data and data sharing. We also wanted to look at platforms that successfully allow their users to freely engage and share ideas with one another (e.g., Quora, LinkedIn, Glassdoor, etc).



Survey Monkey has multiple data visualization options for aggregated data, and these can be exported to PDF's and PPT



Mode Analytics allow users to stitch data together in order to create reports that can be shared with colleagues and clients



Slack, as well as Pinterest, allows users to "pin" content to a repository for later viewing

SYNTHESIS

Persona



Amanda, 32
Consultant

Amanda is a Consultant at a large financial firm. She reads research reports, and needs to analyze the data within. Reports typically come to her as a pdf, which makes it difficult for her to interact with the data. She has to create her own presentations out of these pdf reports, and this involves a lot of time consuming editing.

- Often, not all the data in a report is useful. She has to read back through a whole report to find the relevant information.
- She wants access to raw data, in order make her own analyses.

Problem Statements

- 1) Market Reports are not interactive - what you see is what you get
- 2) Raw datasets behind the visuals are not readily available/accessible
- 3) The opinions in a Market Report are one-sided and reaching out to the author is very difficult

Brainstorming Sessions & Feature Prioritization

Our team met for numerous brainstorming sessions to prioritize the key features needed for our MVP and to ensure we were designing features that would best fulfill the needs and goals of both our client and end-user, Amanda.



DESIGN

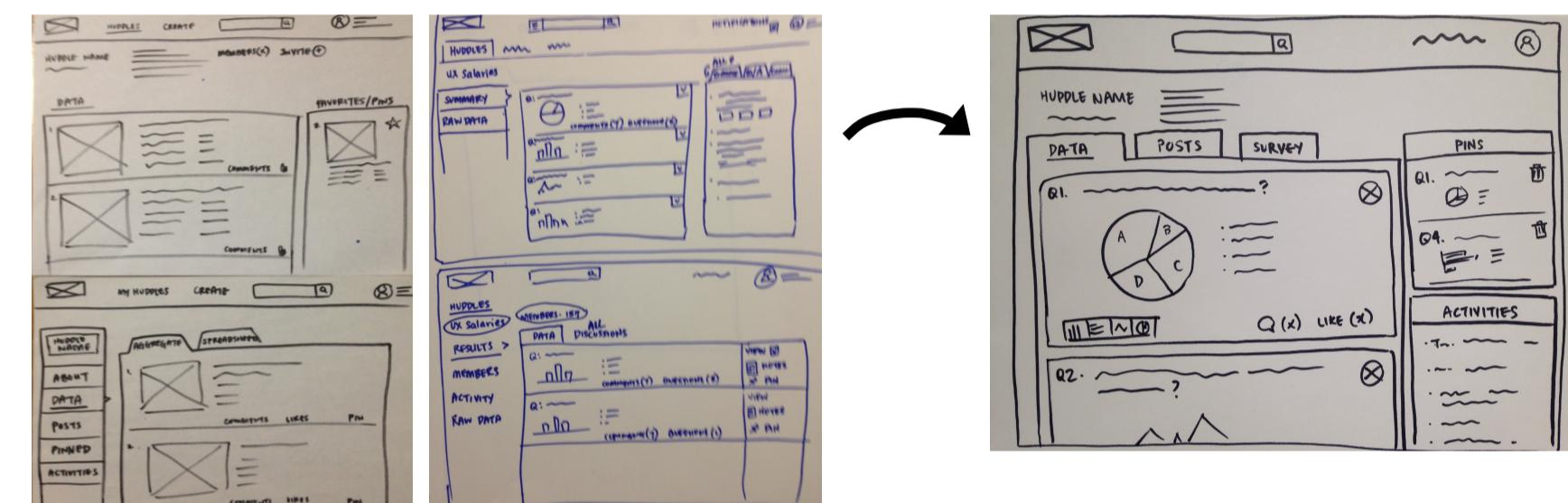
Design Studio

Our Team began the design phase with a collaborative Design Studio. We sketched individually for a few minutes and reconvened to share our work. Incorporating each other's feedback, we refined our sketches until we reached a consensus.



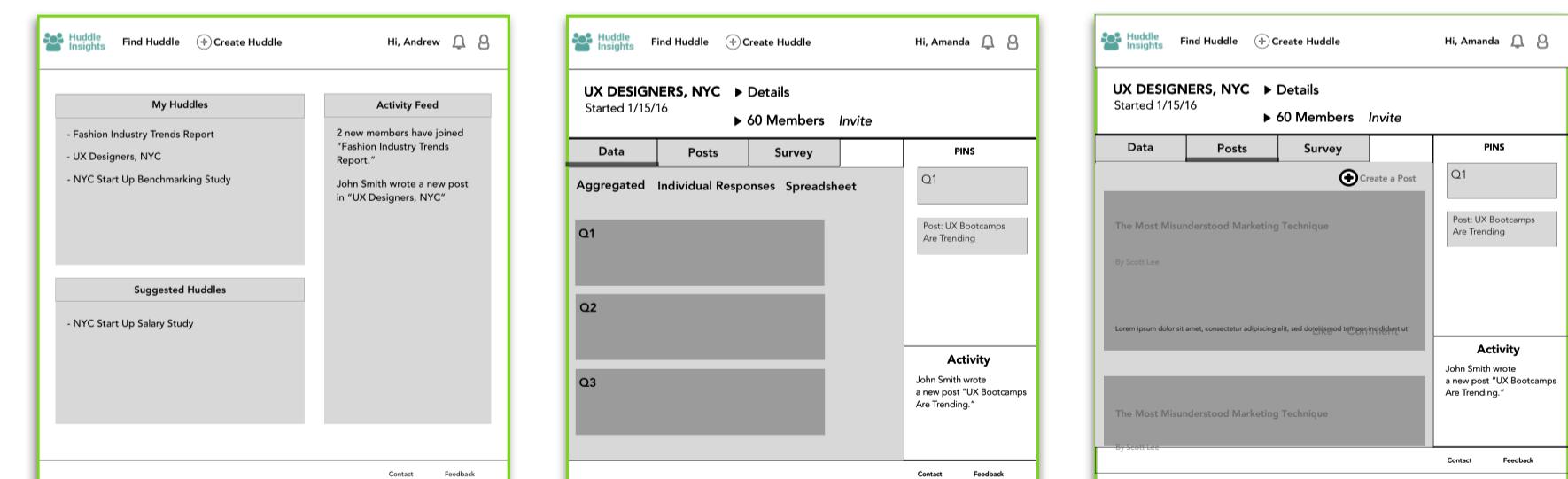
Paper Sketches

Taking into account the design consensus, I drew the paper concept that would serve as the basis of our wireframes



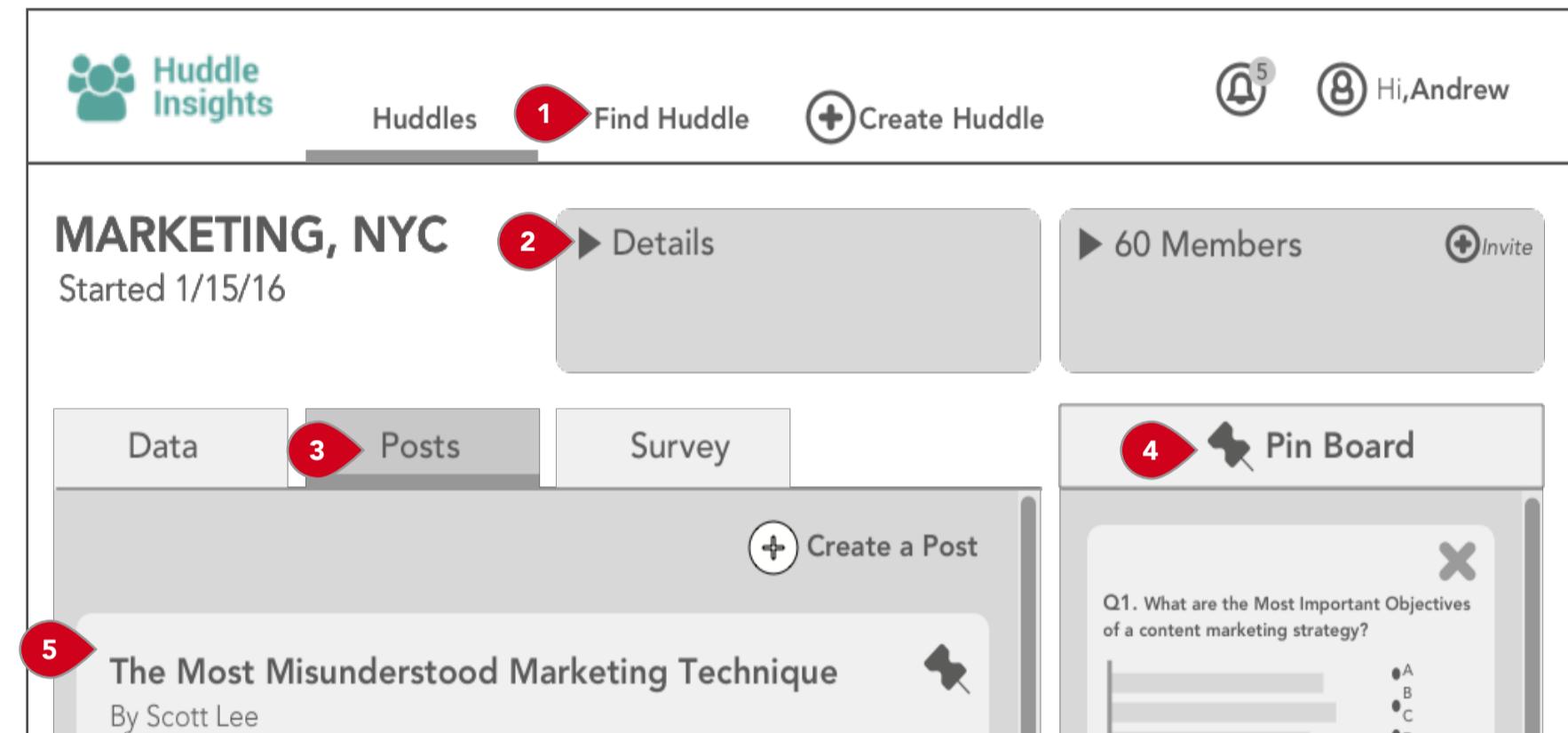
Wireframes

Our initial low-fidelity wireframe laid out the structure of the interface.



User Testing & User Feedback

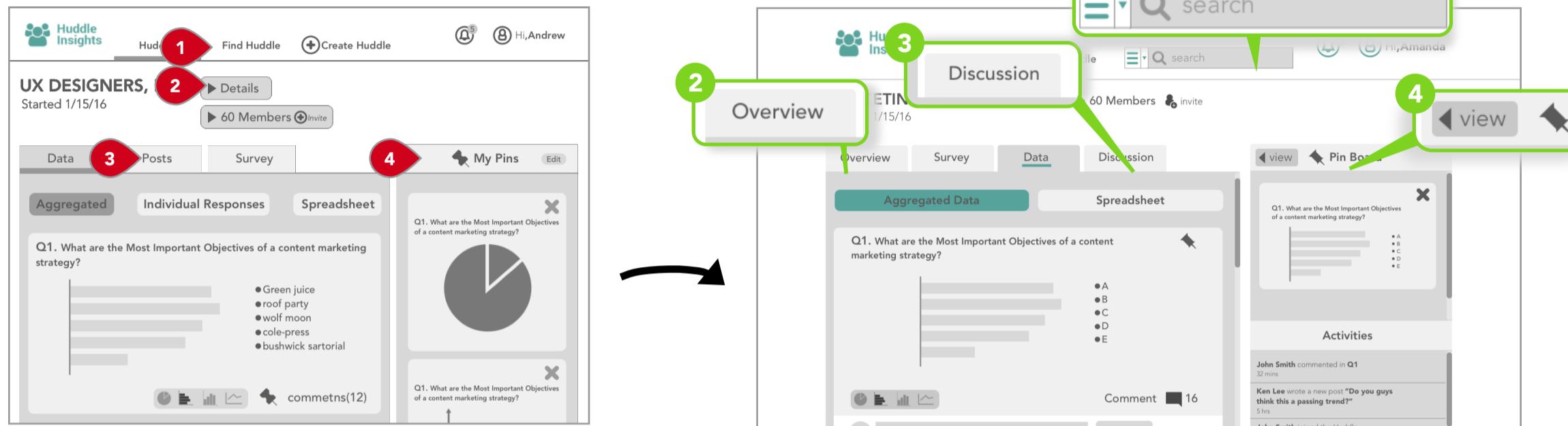
We ran usability tests for every iteration. Participants were asked to complete tasks and we took note of the areas in which participants seemed confused. After completing the User Tests, we asked participants for their feedback.



1. Instead of 'Find Huddle' (part of client's prototype), we could make a search bar with filters that can customize the search (e.g., people, huddles, etc)
2. Details of the Huddle could be a tab to create more space as the interface lacks negative space and seems cluttered
3. Users were confused with "Posts" as this section was also for Q&A and other community based discussions
4. Users did not know that they could expand the Pin Board to see all of the pinned items in a larger view
5. There should be a separation of longform posts/articles and Q&A section

ITERATE

Iteration of the Huddle's Data Page



1. We replaced the 'Find Huddle' button with an advanced search bar
2. We changed 'Details' to 'Overview' and made it its own tab for more visibility
3. We changed 'Posts' to 'Discussions' to convey a sense of community engagement
4. We created a 'view' button for a clearer interaction

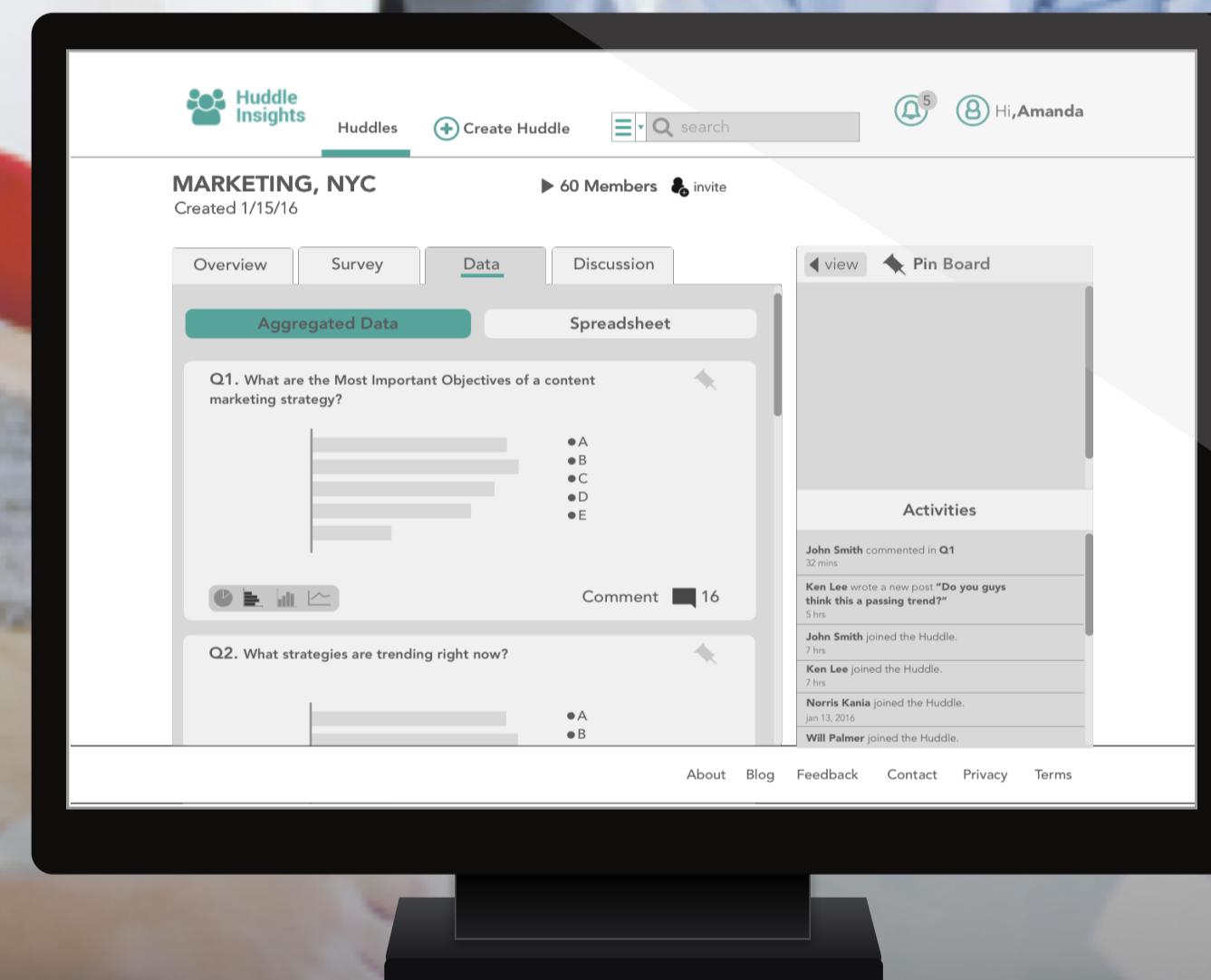
Iteration of the Huddle's Create Report Page



1. We changed the location of the Pinboard to put more emphasis on the Report.
2. The standalone textbox caused confusion, so we removed it and added the text button on the toolbar (similar to Keynote's textbox).
3. The word "Canvas" caused confusion so we changed it to "Report".

CASE STUDY #2

PROTOTYPE



Clickable Prototype
<https://invis.io/JF7FU8DA4>