

UX / Creative Process Walkthrough

Kenneth Looi

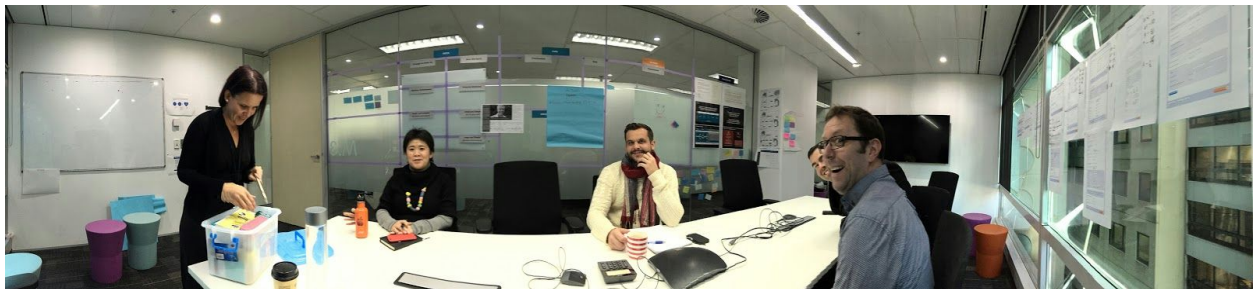
Digital Product / UI / UX / Human Centered Designer

Process Overview

Every project is different, but there are a few key things that I see myself doing within each project. I guess these frequently seen/used techniques form my process.

1. Understanding the Market / Product Landscape / Meeting the Stakeholders / Kick-off Meeting / Information Sharing

The first step towards formulating a picture in my mind about the project is to have a kick-off meeting with the project stakeholders and key people involved in the project (including clients, etc).



This first and foremost allows everyone to get acquainted with each other and since a critical part of UX involves collaboration, this is key. The kickoff meeting usually lasts an hour or so and involves introductions. This is then followed by a description/overview of the product that is to be designed, or a key business problem that has been identified by some other part of the business and that needs addressing or research into.

I usually then go off into one on one discussions with key people in the project to try to understand and get to know them better. I discuss and gain valuable information about the project, business landscape, market, industry, etc and build an overall picture in my mind which I find extremely useful in helping to connect the dots.

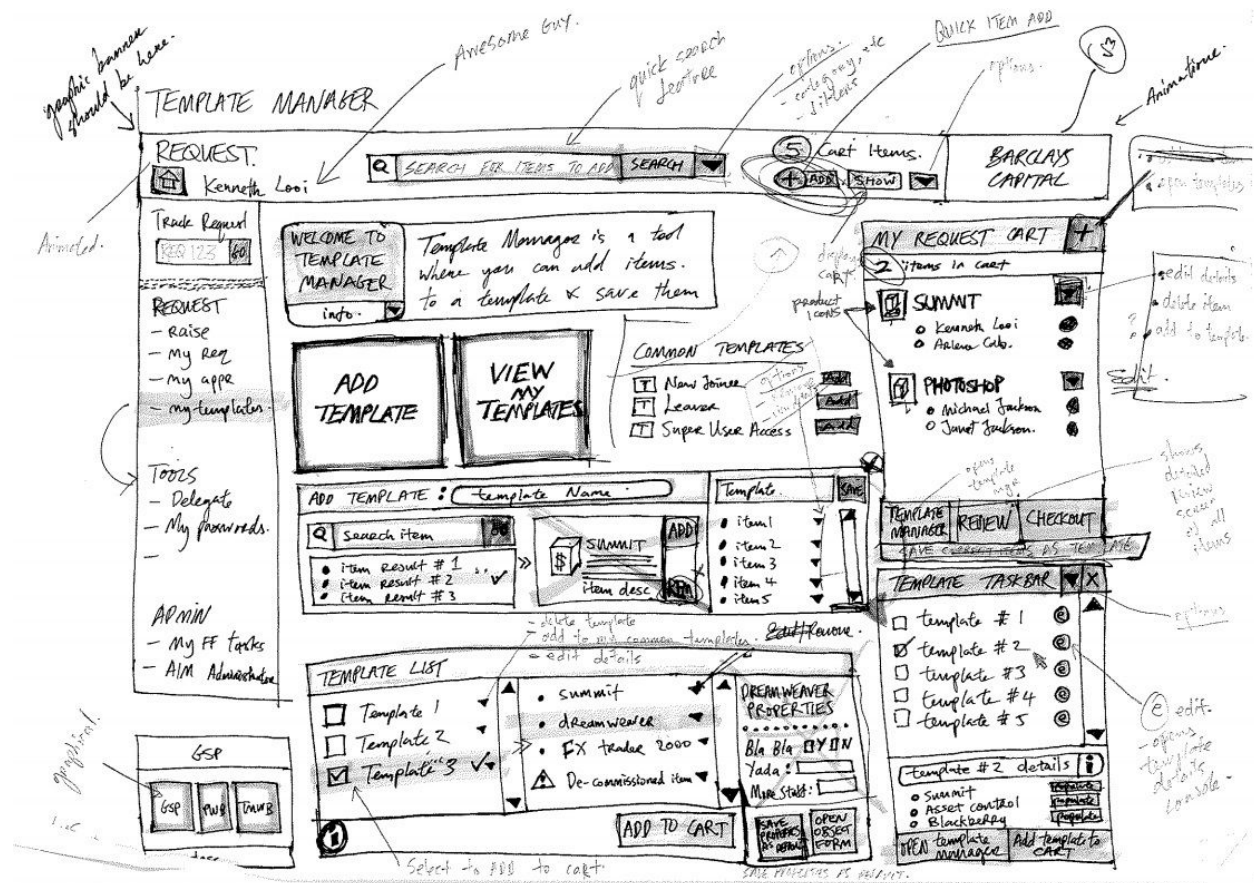
Any useful information pertaining to the project that could be of help to other team members are documented in a shared collaboration space (usually wiki or shared online whiteboard e.g. 'realtimeboard').

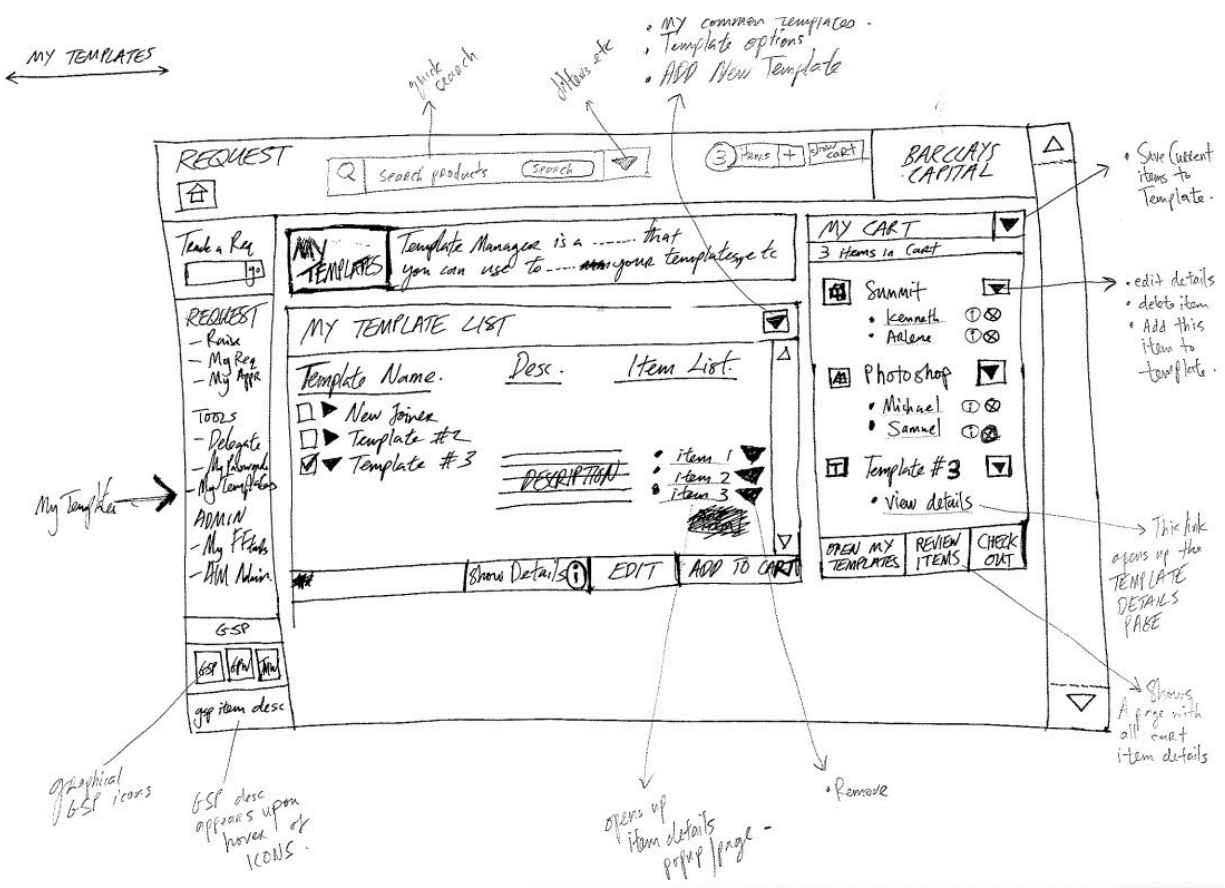
2. Sketching / Initial Wireframing / Design Studio / Lean Product Design

A key element of my UX work involves being 'Lean'. This means stripping away unnecessary documentation, red-tape, expensive waterfall type project scenarios and instead focusing on true collaboration, quick communication to obtain a MVP (minimum viable product) which will then go through successive rounds of optimisation / rapid iteration.

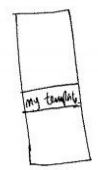
Obviously a key element of UX is sketching. I sketch a lot. Sketching is the quickest way to jot an idea down and to play around with it.

Here are some examples of my sketches:





MY CART TEMPLATE

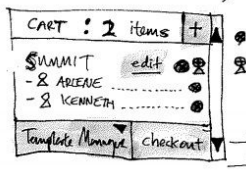


Template detail view.
 Template List view.
 Template (cart) (taskbar).

functional requirements

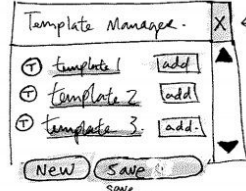
→ Add New items. (opens search catalogue).
 - Template Manager.

- * New template.
- ↳ Add items.
 - search catalogue + add item.
- ↳ Input template Name + Description.
- ↳ Save template.



TEMPLATE NAVIGER.

- * View template. [view/edit templates].
- ↳ show list of templates. (edit del)
- display items. (template details page).
- system user = [e.g. de-authorized items, etc.]



* TEMPLATE CART?
 * TEMPLATE TASK BAR?

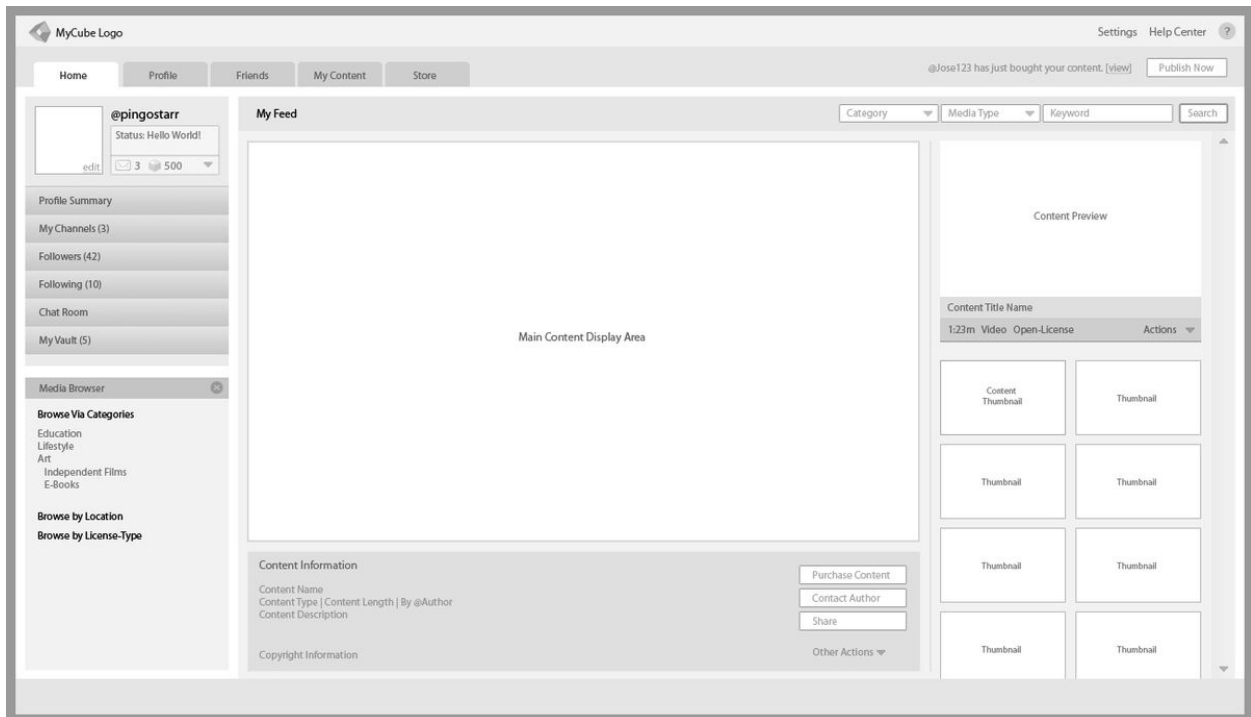
- * Launch template manager.
- button at bottom of cart which opens up the template list. > Add-able.

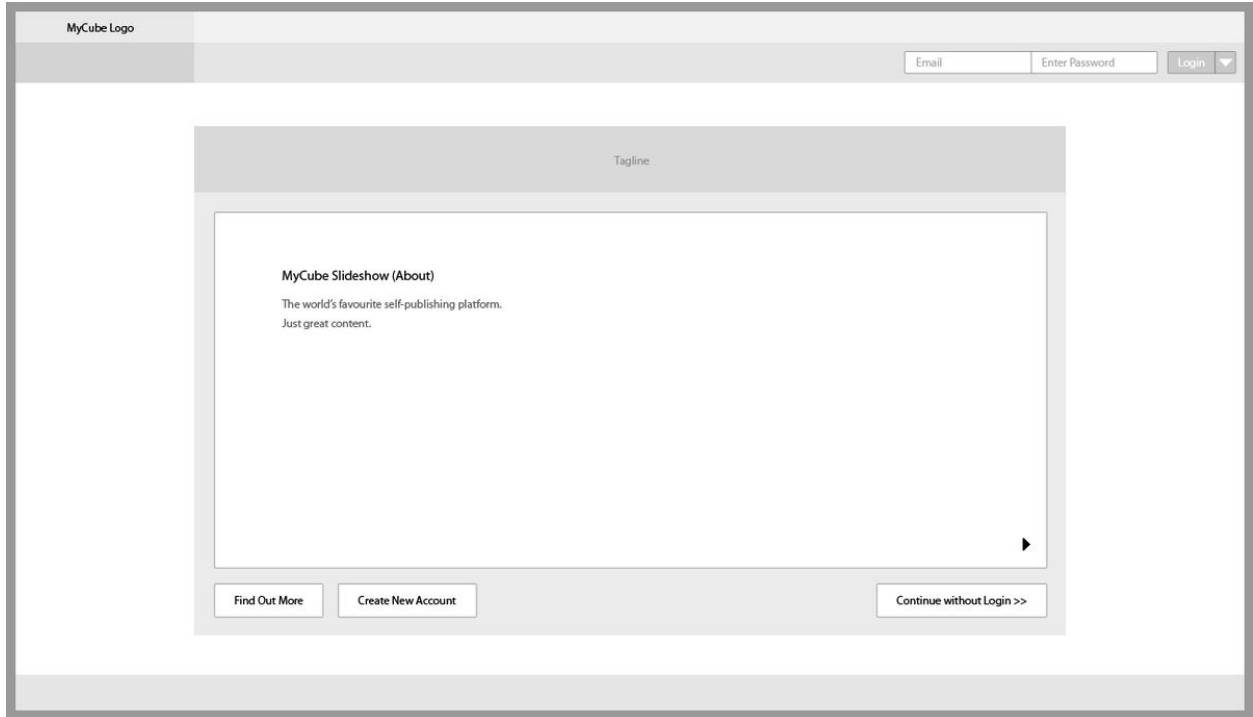
save current cart as template.

The above sketches were for Barclays Capital where I worked to revamp 2 internal major bank systems from scratch together with the help of several BAs (business analysts) and various stakeholders.

Individual system components were sketched out and re-sketched repeatedly until we had something that could actually work well given business, technical, project and cost constraints.

Such sketches are then usually transposed to something of slightly higher fidelity for presentation purposes:

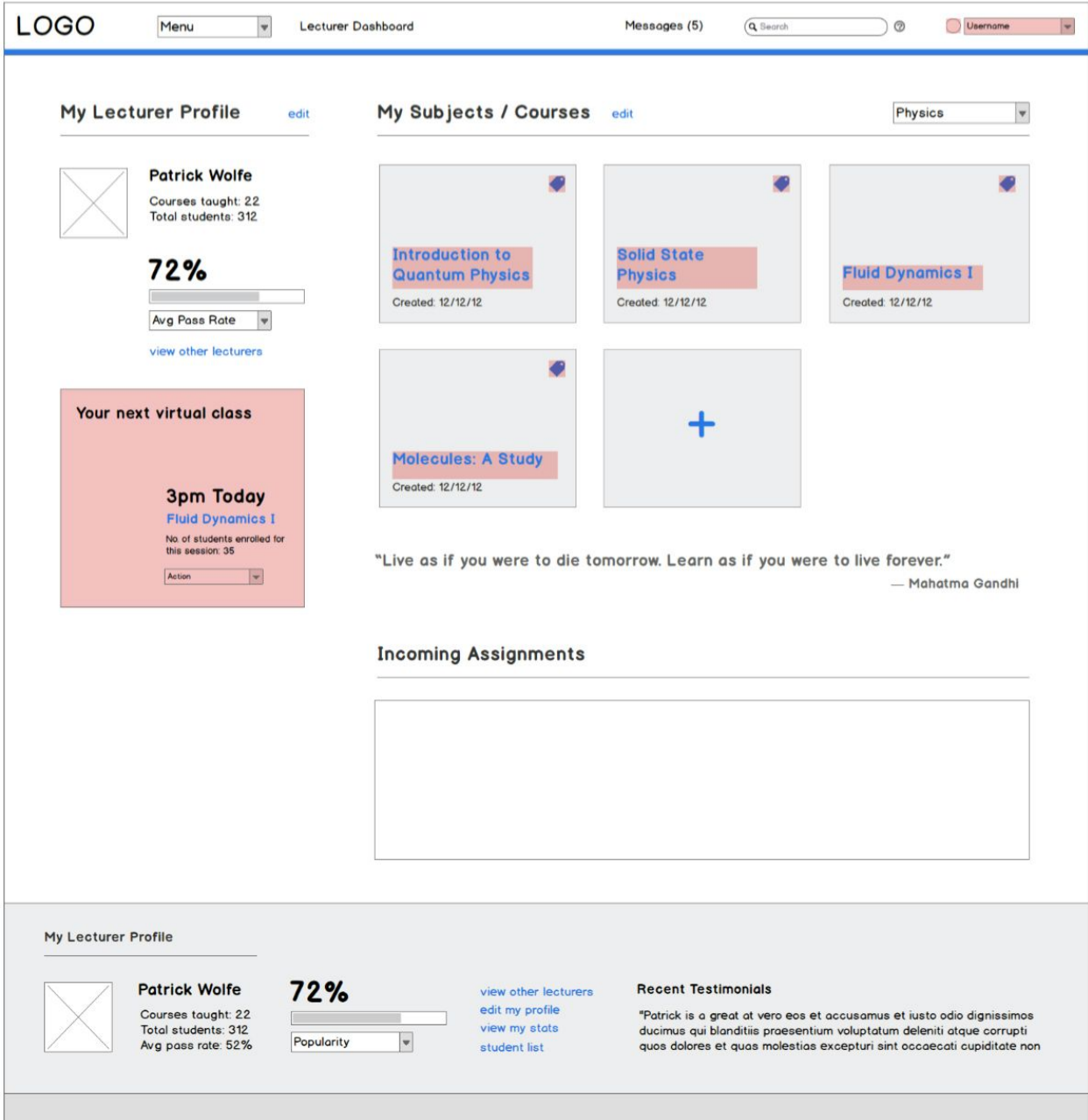




The above mid-fidelity wireframes were done using photoshop (back in the day when there weren't much UX wireframing tools available). They are wireframes for a social content sharing platform I was asked to create.

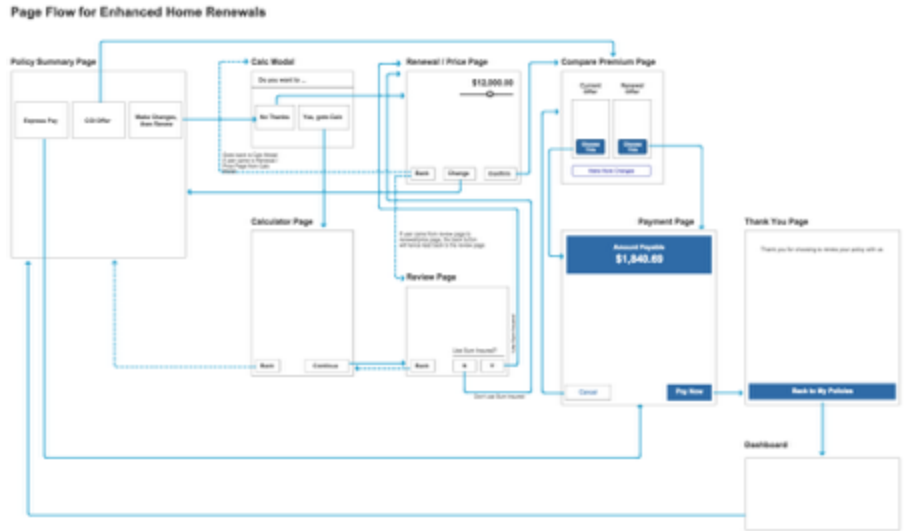
In general the rule of thumb to quicker implementation and product happiness is to iterate quickly using simple wireframes and/or prototypes to convey UX and test for results.

Here (below) we have another example of a mid-fidelity wireframe done with Balsamiq. This is a wireframe for a responsive online learning education platform I was tasked to create for a Sydney based education startup.



With the help of tools like Balsamiq and Axure (and as of late Adobe XD), we are much better equipped these days to modify screens to our liking with ease. I offer client training on such wireframing tools as well and conduct rapid sketching and conceptualisation workshops as well as part of my UX and product design strategy. These help to mediate too much focus on a particular individual's design of a system and provides valuable creative input from stakeholders. It is also useful for gauging different user competence levels for systems that are designed. Optimising system design based on projected user competence levels (beginner user, intermediate-level user, advanced user) is another UX consideration which falls under persona definition.

Other UX deliverables such as site maps and various sorts of page flow diagrams often are created as well during this phase (here's one I did for a rather complicated flow):



3. Iteration / User Testing within Sprints / Getting Product Feedback

What's UX without actual user feedback and/or user testing? Not much. In this step of the process, I strive to understand the user's mental model (internal mindset) when he/she uses the interface.



I use a variety of techniques to interview users (which are determined based on the creation of a persona usually at the start of a project). One of the key interview methods I use is to conduct a formal contextual inquiry.

A set of approximately 3-5 users are interviewed, with the help of an interviewer with a pre-prepared test script as the user is led through a series of tasks. Observers in the observation room observe the session which increases understanding throughout the team. Team/project members who are not able to attend physically can use a tool like 'GoToMeeting' to attend it online. The session is also recorded and distributed digitally to team members for later perusal. Team/project members are encouraged to watch the session even if they are not involved in UX design as it helps to facilitate user understanding and cut down team documentation. A post user testing session with interview findings is usually presented within a few days of the user testing session occurring while findings/observations noted are still 'fresh'. I typically have Thursdays in the week allocated for user testing, with the days leading up to Thursday being prep days where ideas can be thrown around the team and prototypes built. For more complex projects involving distributed teams, the UX sprint length (in agile environments) might be 2 weeks instead of 1 with contextual inquiries scheduled every 2 weeks.

Contextual inquiries aren't the only way to get feedback. I do 'go out on the street' sometimes to interview passers-by when I have an idea that requires immediate testing. It is unnerving and strange at times but I do find it an interesting and effective method. It is also cheaper. Feedback forms and 'web-intercepts' via online channels are also amongst some of the methods I use to obtain data. Data obtained can be analysed with or without the help of an analytics team using software or analytics services like Google Analytics.

4. High Fidelity Visual Design & UI Component Implementation

Implementation can occur with dev sprints occurring a few sprints behind the UX sprints. With the help of style guides that have been predefined for the organisation or project, UI development becomes somewhat more of a breeze. Components are built according to what UI has been deemed as needed and the act of development in an iterative manner helps to weed out unwanted surprises if one were to use the traditional waterfall SDLC approach. It is also good to engage the designer (in this case me) with the developer. Frameworks and limitations can be discussed and solutions optimised.

Because I come from a web/visual design background I am well suited to sit with developers to pixel push products to visual perfection as well. My understanding of IT and front-end frameworks and technology allow me to create satisfying front end solutions that work for my clients and their users.

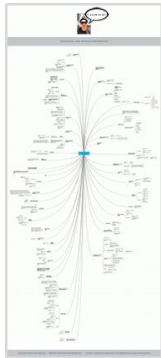
5. Innovation & Future Proofing the product/system

Along the course of the project, improvements and innovations are bound to come up. These ideas are all documented and presented post-project as a future proofing supplement. Improving product functionality is a big part of what I do and I have helped in determining future product trends as well as documenting possible future product features/functionality.

UX Process Mindmap

I have an on-going UX Process Mindmap that documents my thoughts on the Lean UX and Agile Process and which I refer to as well throughout the course of my work. You can view it by clicking the hyperlink or the thumbnail image below or by visiting:

http://www.kennethlooi.com/new/process/Kenneth_Looi_UX_Process_Mindmap_20160410_Cropped_50.PNG24.png



Business Opportunity Identification

It has become part of my job to identify market gaps and introduce digital solutions accordingly to address business issues/problems pertaining to those gaps. Each analysis is different and varied in terms of approach. The following pages list a few solutions that I have conceptualised based on an identified business problem or market gap.

CX / Innovation Case Study A

NFC E-Receipts - Getting rid of paper receipts

This is a chiefly FinTech (Financial Technology) industry related solution I conceptualised in 2012 while working on problems within the FinTech world. The solution design in question revolves around paper receipts and how they end up being useless scraps of paper needing manual input into an excel file for any useful information to be obtained. The proposed solution makes use of an NFC (near field communication) sticker which is placed on a paywave bank card to allow receipt or purchase/transaction information to be uploaded into a cloud within the same tap by the user/customer. It requires no additional effort on the part of the user during the paywave transaction experience. In short, the receipt information gets

uploaded to the cloud and is subsequently available on mobile devices or as a web application in a visual, easily-understandable way.

PFM (personal finance management) type analytics and data categorization methods are applied to the receipt data that was acquired and expenditures are displayed graphically in a useful manner to the user/customer.

The solution is bank independent which means it can exist as a standalone solution independent of banks. The model can be purchased by banks or financial institutions for implementation. No re-issue of bank cards are necessary. Just the addition of a NFC sticker to the tap-to-pay card. It can even be used for NFC phone transactions.

The benefit for both merchant and customer is great. Tracking and graphical analysis of expenditures allows for better spending or business decisions to be made. Physical paper and ink waste in the form of receipts are also eliminated. If implemented worldwide, and with billions of transactions happening every day, this solution will result in massive ecological benefit / lessening of ecological footprint.

CX / Innovation Case Study B

HelloWorld Digital iPad App



While I was contracting at Helloworld Limited, a travel company, I conceptualised and pitched a digital solution based on acquired stakeholder feedback which was “not enough customers were physically going to the Helloworld branches”.

Combining the use of digital technology and aware of the proliferation of devices like the iPad, I came up with an iPad app that addressed this particular business problem.

The app is simple. It is a picture browsing app that lets users browse pretty/scenic/alluring pictures of travel locations/destinations that Helloworld offers. Potential customers browse from the comfort of their own home and if they fancy a particular location, they simply scribble down the unique Helloworld location/experience code (a hexadecimal identifier) tagged to the picture and bring it to any Helloworld branch for serious enquiry or for further information about the experience and/or location to be revealed to them.

Users can also share potential locations or travel destinations with travel companions using the iPad app. The introduction of the hexadecimal code (e.g. A123) allows the user to skip writing down or remembering a complicated location name in a foreign language (e.g. Neuschwanstein Castle, Hohenschwangau Village, Neuschwansteinstraße 20, 87645 Schwangau), which is a pretty destination, but with a complicated name that most customers can't pronounce or spell.

That experience can be turned into reality by the user by scribbling a 4 digit hexadecimal code down onto a piece of paper, putting it into their back pocket and bringing that code to a Helloworld branch). There you go, more interested customers at your physical Helloworld branches.

It's a beautiful combination of high tech (hexadecimal truncation and identification of travel locations and/or experiences) and low tech (scribbling the hexadecimal code to a scrap of paper lying around and bringing that to a nearby branch) and solves the business problem by bringing actual interested users to the branch. Did I mention the app/solution is greatly entertaining as well and can be used as a desktop-screensaver/digital-slideshow? It was another way of exploiting (or rather making use of) Helloworld's vast library of beautiful travel images from packages they offer.

It is worth to note that majority of Helloworld customers are seniors and are not too tech-savvy. The simple app + combination of 'old school' scribbling down a code on paper was a good way to get senior users engaged without technical complexity.

CX / Innovation Case Study C

NRMA Apple Watch Smart Login & Renewal Experience for NRMA Kiosks

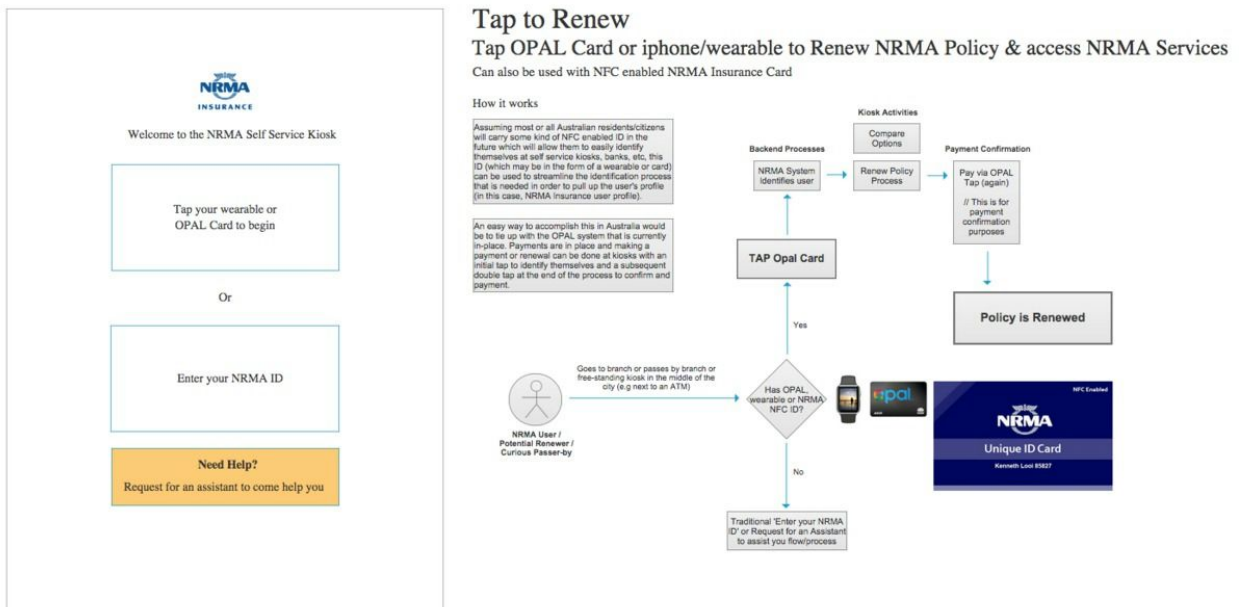
This is a wearable based innovation involving a QR code driven app which aims to streamline the login process for NRMA customers. In order to renew a current insurance policy, a

customer currently has to login traditionally using the username/password combination and then navigate a number of screens to identify and access the insurance renewal form.

This new process is greatly streamlined with the use of a unique QR code which is sent to the customer whenever a renewal or specific action is required from the customer.

The customer simply presents the QR code (conveniently displayed on-screen via an app on a wearable device or a smartphone) at a physical NRMA kiosk for 1 step authentication. Subsequent presentation of the action required from the user (in this case, policy renewal) is presented on screen at the kiosk. Example: “Tap here to renew Policy B123 now”.

Traditional kiosk screen steps are skipped and the key-ing in of usernames, long email address and complex passwords (which a large percentage of NRMA customers cannot recall) at public physical terminals is not necessary with this option. Below is a schematic showcasing the customer flow:



CX / Innovation Case Study D

Call me back functionality

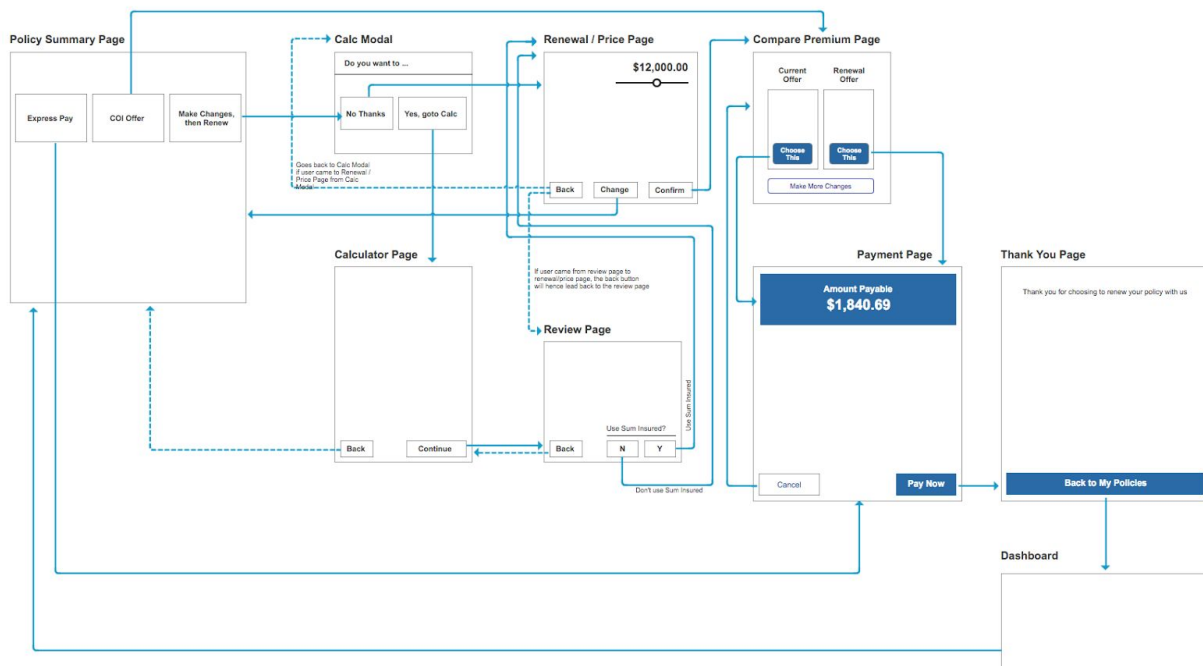
This is an in-app feature / button which allows users to skip long hold times while calling to speak with an operator. Instead of spending excesses of 30 minutes on hold on the phone, the user now simply taps a ‘Request for Operator to Call Me Back’ button which is a function within a pre-logged in app (where the customer’s phone number is registered in the system).

Unnecessary phone costs are eliminated and communications infrastructure strain is greatly reduced. More importantly, customer experience is greatly improved and unnecessary time wasted 'on hold' was cut or eliminated altogether.

I conceptualised this innovation/feature in 2012 and put it up on the public domain on a financial technology idea bank. I noticed the first implementations of similar models about 1-2 years later by banks such as Commonwealth Bank in Australia.

Additional Case Study: Enhanced Page Flow

Page Flow for Enhanced Home Renewals



Whilst contracting at IAG recently, I was tasked to understand the current flow for a major function the organisation had (insurance policy renewals) and to help to improve the customer journey / user flow.

I sat down with stakeholders and senior people who had been in this business for a long time to understand the process end-to-end and had various rounds of discussions and heavy diagramming / brainstorming.

Together with collaboration involving other UX designers and test subjects, we reached an agreeable flow we'd think would work (based on test results) and hence proceeded to make adjustments to the Axure prototype and got the screens developed (collaborated with devs to ensure accuracy / similarity).

Testimonials / References

References available on request. Serious enquiries only.

Meanwhile here is a screenshot of a year-end appraisal which highlights my strong points during my time at AdNovum Singapore, a Swiss software house with offices in Singapore, Bern and Zurich, where I spent a lot of time doing UI & UX related design work, as well as technical writing and client-pitching / marketing related work and helping to grow the once 8 person team to a now 40 strong team.

My competencies 1 until 15 from 15

Title <small>↕</small> Description <small>↕</small>	Ach'level EM <small>↕</small> Comment EM <small>↕</small>	Ach'level PM <small>↕</small> Comment PM <small>↕</small>
Overall impression of performance in own special field <i>Dev, test, doc ...</i>	According to expectations <i>Doc: Good, BAU (business as usual), did graphics where required, stuck to timelines, etc</i> <i>UI/UX: Did some good screen designs (e.g ADB News, Direct Asia) ... Quite happy with result</i>	Exceeds expectations <ul style="list-style-type: none"> • Very versatile allrounder • Design, proof reading, presentations, pre sales • Hard working and gets things done
Overall impression of performance in other special fields relevant to the company <i>Please indicate which special field under comments.</i>	According to expectations <i>Special field: Prototyping / Assisting with presentation material creation</i> <i>Was able to conjure presentable work from basic requirements given to me (e.g DirectAsia, ADB News).</i> <i>Comment: Good</i>	Exceeds expectations <ul style="list-style-type: none"> • Real work in projects • Good impression in pre-sales meetings and client communications in general • Excellent graphics in slides • Good at prototyping apps • Can conjure up excellent screens on basic/vague requirements
Quality of work result	Exceeds expectations <i>Not bad, quite happy with what I was able to help AdNovum team out this year with. ADB News turned out okay, Direct Asia screens were good imo.</i> <i>Doc / proof reading work was done on-time etc.</i>	Excellent <ul style="list-style-type: none"> • ADB news: Best app we've designed so far! • Screens for DirectAsia are excellent as well
Creativity, innovation <i>Ability to identify new strategies, trends, contexts</i>	According to expectations	According to expectations
Initiative, commitment	According to expectations	Exceeds expectations <i>- Hard working and able to deal with pressure.</i>
Productivity <i>Work pace, workload, ability to work under pressure</i>	Exceeds expectations <i>Workload was quite heavy at times but managed to manage.</i>	According to expectations <i>- Managed to manage despite hectic tasks and at times very heavy workload</i>
Planning, methods	According to expectations	According to expectations
Setting priorities; attention and adherence to deadlines	According to expectations <i>Managed priority of tasks handled to me well.</i> <i>Managed time well. Delivered tasks on time / on schedule.</i>	According to expectations
Customer- and market-oriented thinking	According to expectations	Exceeds expectations <i>- Can communicate effectively with clients (ADB)</i>
Social skills, communication (internal and with customer)	According to expectations <i>Good.</i>	According to expectations
Ability to work in a team, contribution to work atmosphere	According to expectations <i>Good.</i>	According to expectations
Willingness to help and to share knowledge	According to expectations <i>Good. Always willing to share (and also learn).</i>	According to expectations
Loyalty	According to expectations	According to expectations
Ability to give / receive feedback	According to expectations	Exceeds expectations <i>- Corrects mistakes of others and gives input where our ideas don't make sense.</i>
Ability to work autonomously	According to expectations <i>Good.</i>	According to expectations

1 until 15 from 15

Your private comment on agreement

...

Status information

Agreed on: 19.12.2012
 Agreement confirmed by the employee on: 19.12.2012
 Evaluation closed on: 19.12.2012