UX INTRO WEBINAR FOR SIEBEL BUSINESS ANALYSTS

MARCH 30, 2021

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TODAY’S PRESENTERS

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IT'S ALL ABOUT THE EXPERIENCE

"Enterprise software is the most terrible, poorly-designed thing in the current universe"

Jacob Nielsen

bit.ly/BadEnterpriseUX

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Three issues with Siebel UX

1

LIMITED SET OF UI COMPONENTS & PATTERNS

Open UI has not more than 20 UI components types and a couple of UI layout patterns.

2

YEARS OF ADDING FIELDS AND TABS TO THE SIEBEL UI

As companies implement more functionality in their Siebel CRM, the UI gets very cluttered.

3

LACK OF USER CENTRICITY IN UI DESIGN

UX activities have never been a part of standard enterprise system analysis and design process.

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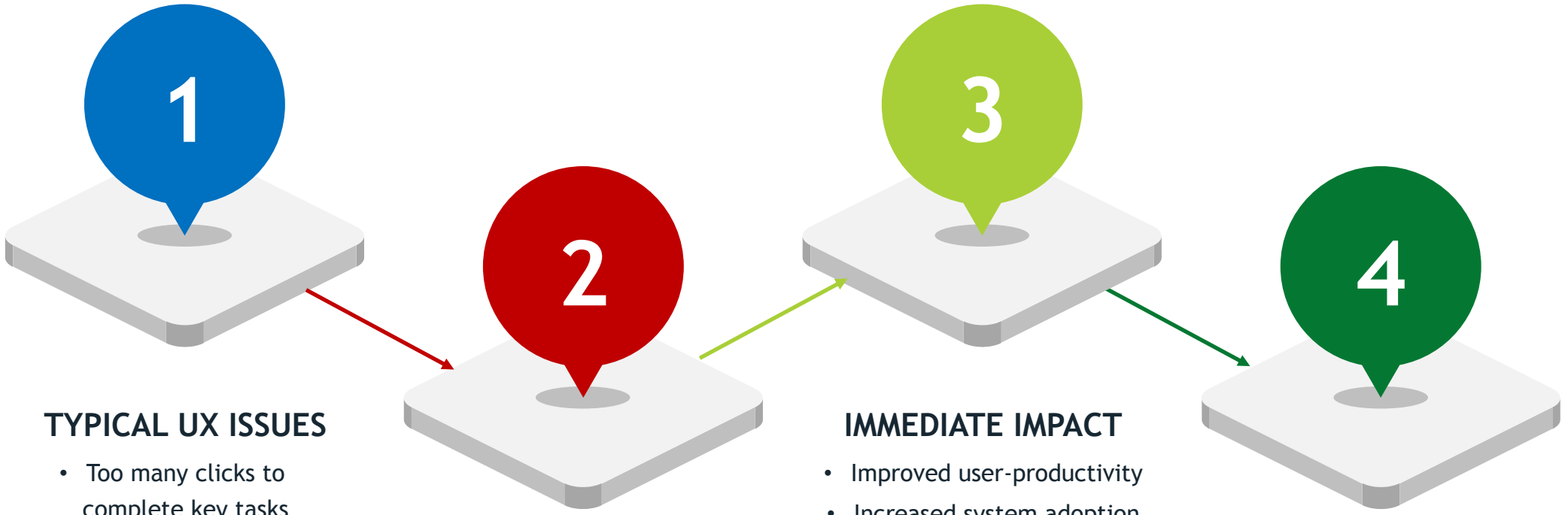
Business benefits of Siebel UX improvement



TYPICAL UX ISSUES

- Too many clicks to complete key tasks
- Overwhelming number of fields
- Long time to learn

SIEBEL UX IMPROVEMENT

IMMEDIATE IMPACT

- Improved user-productivity
- Increased system adoption
- Less effort required for onboarding

LONGER-TERM IMPACT

- More efficient business processes
- Increased employee engagement
- Improved end-customer experience

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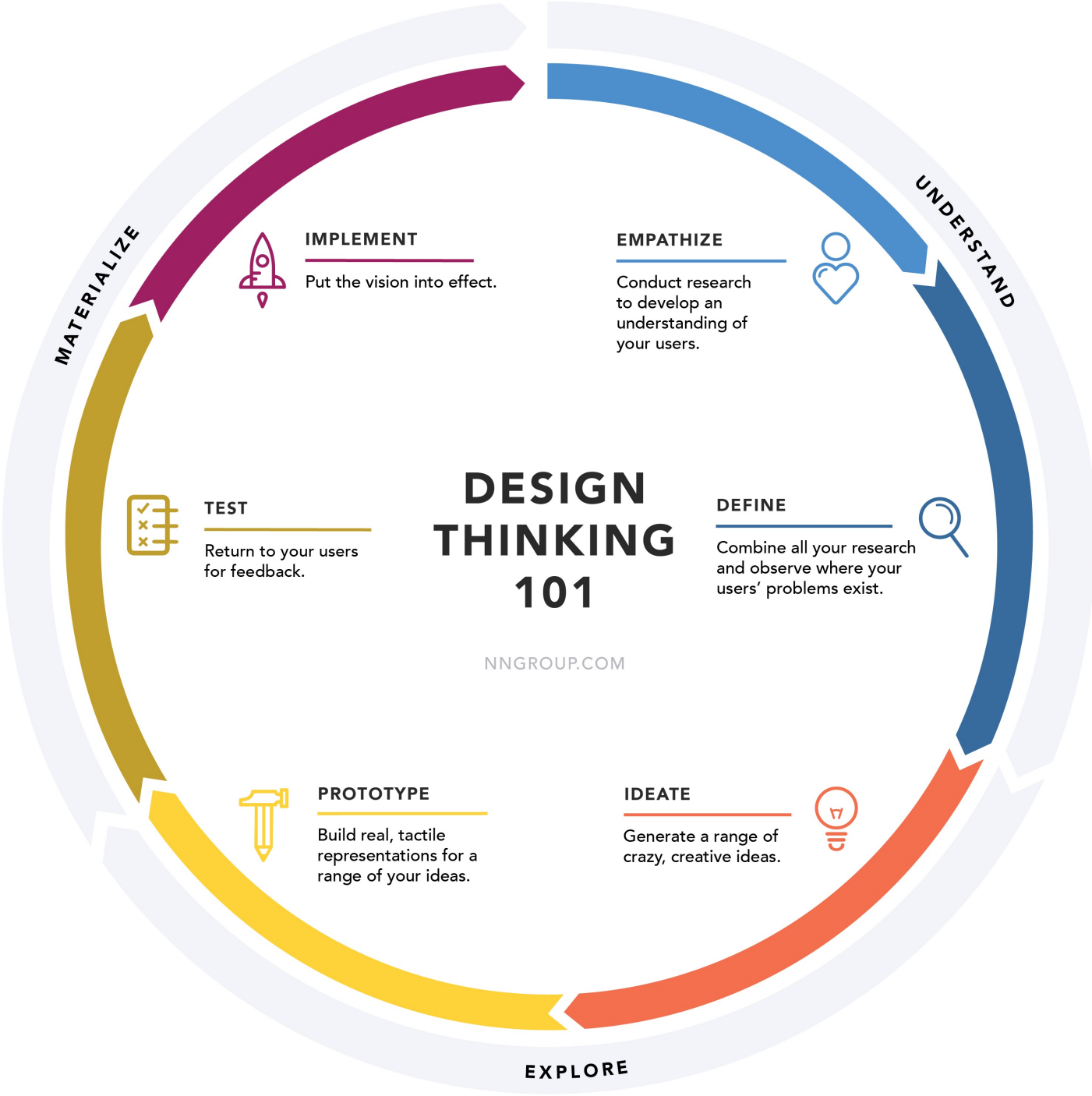
Design Thinking: the core UX process



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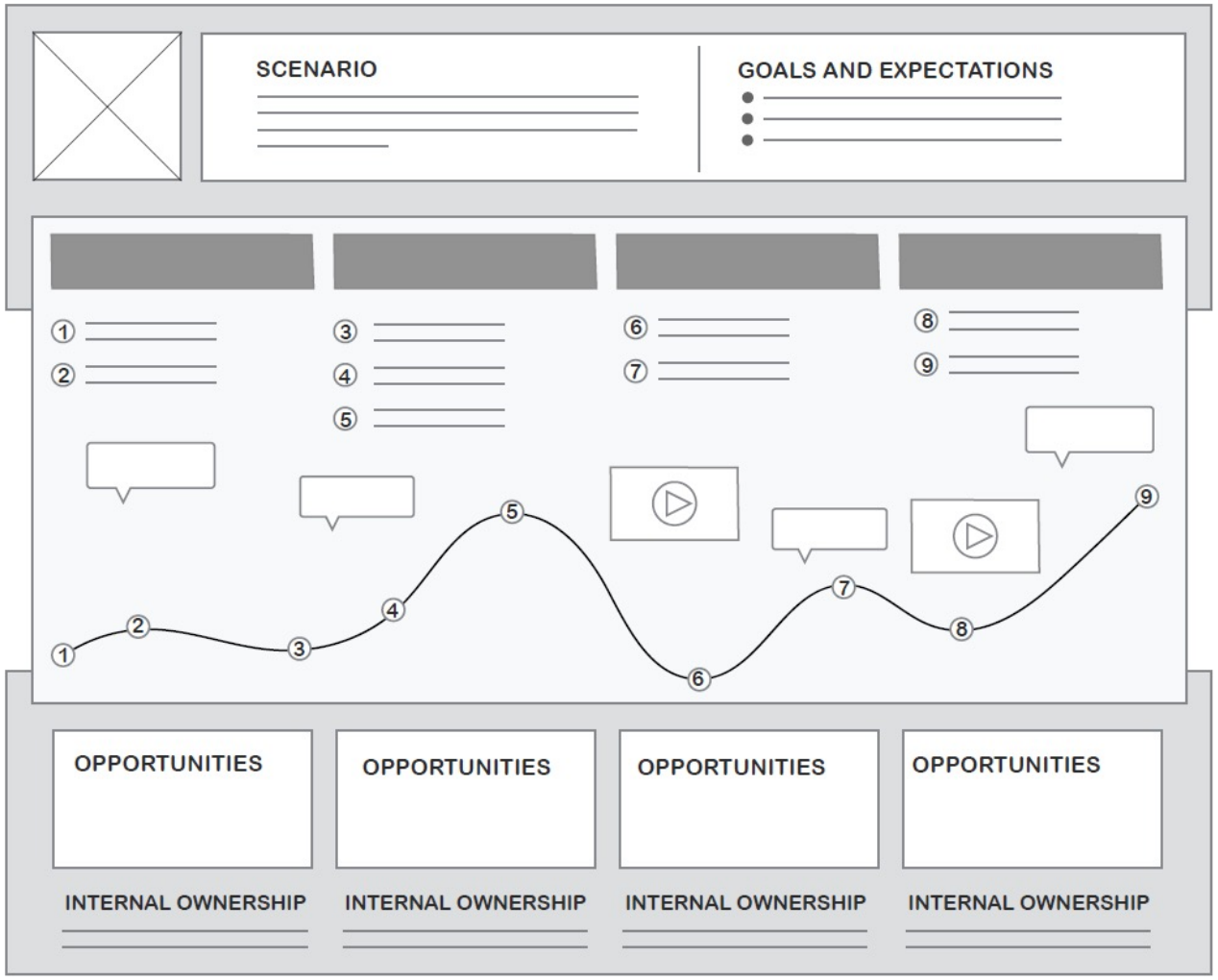
User Research methods and tools



Zone A: **The Lens**

actor

scenario

Zone B: **The Experience**

phases

actions, thoughts, emotions

Zone C: **The Insights**

opportunities

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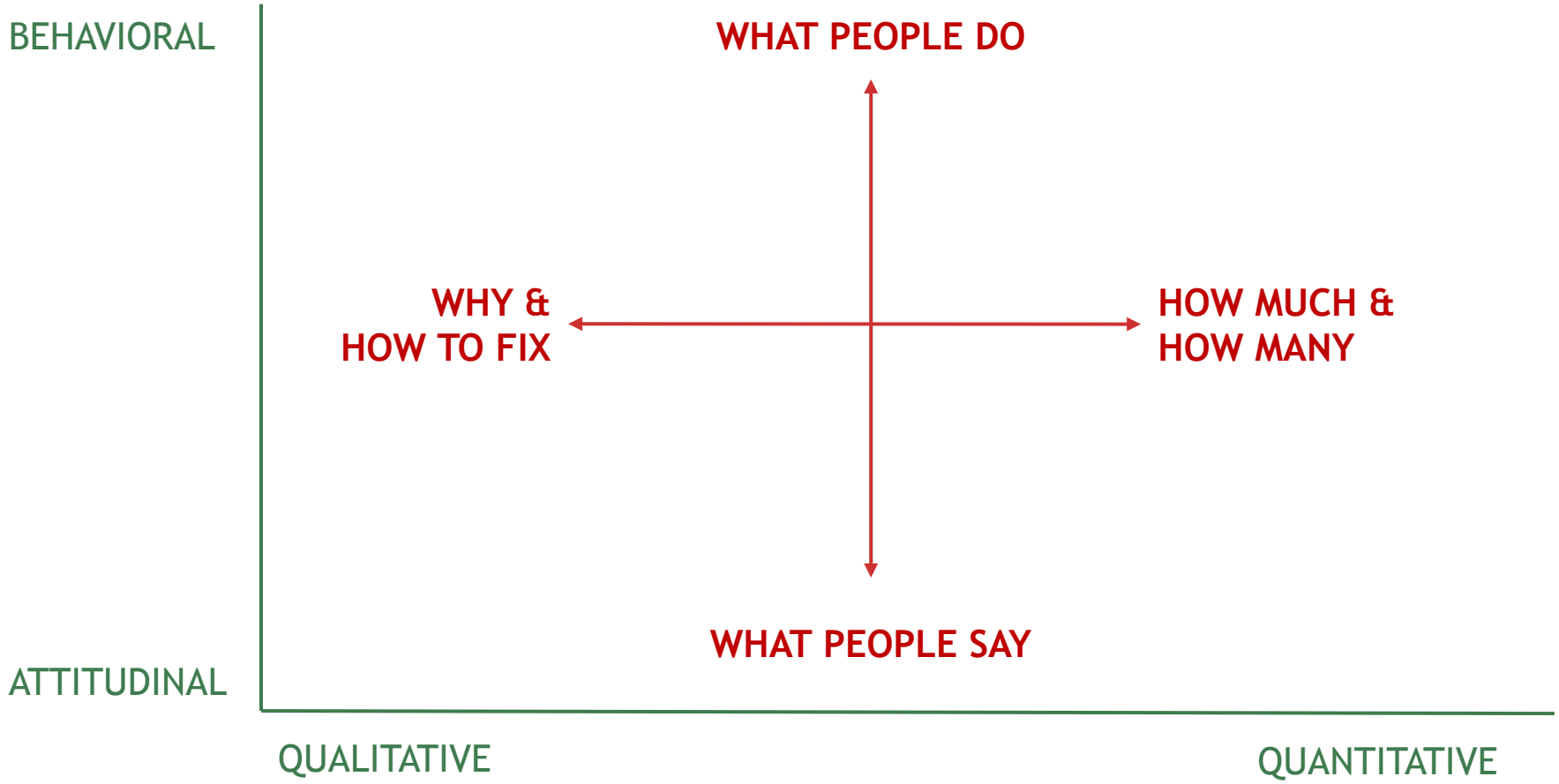
UX Research Methods' Dimensions



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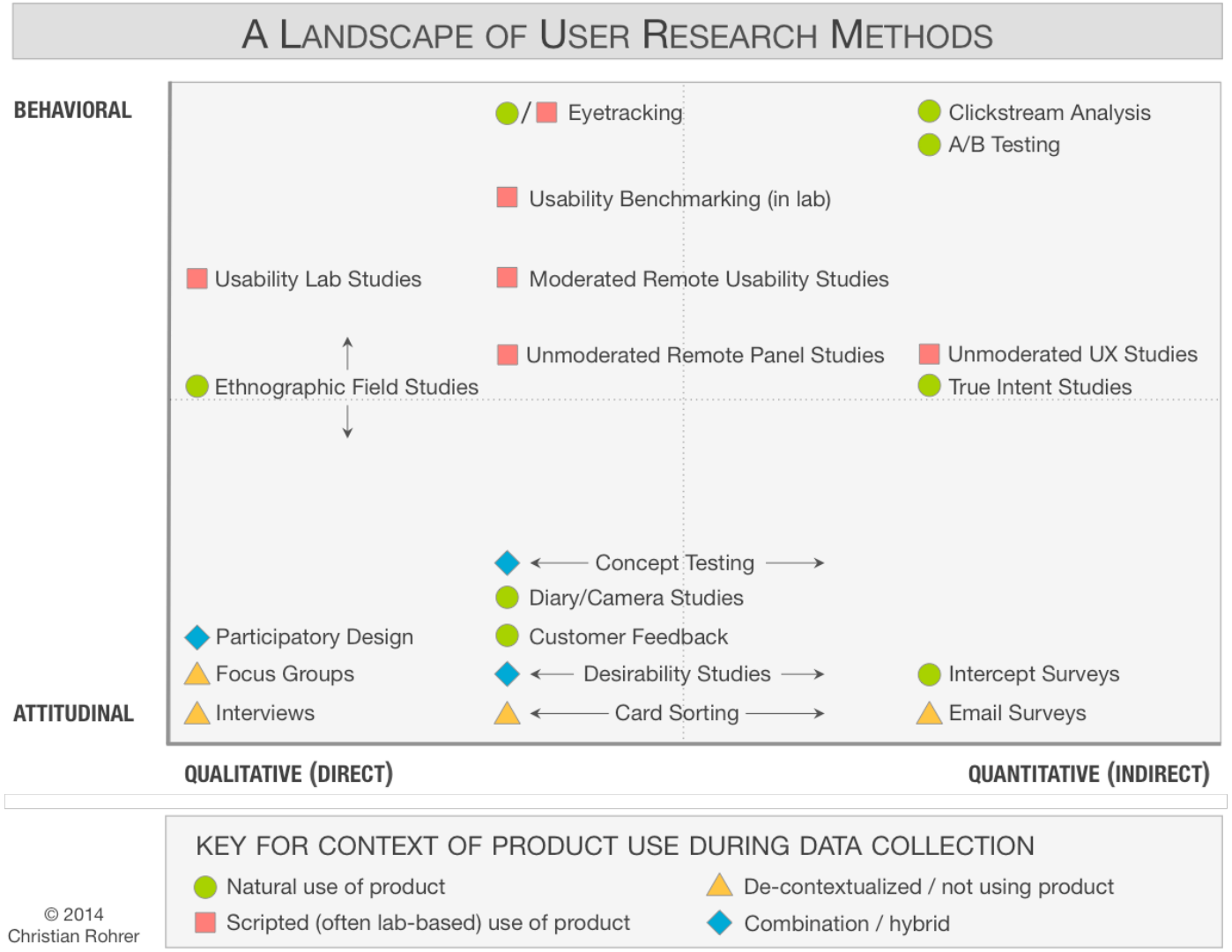
A landscape of UX Research Methods



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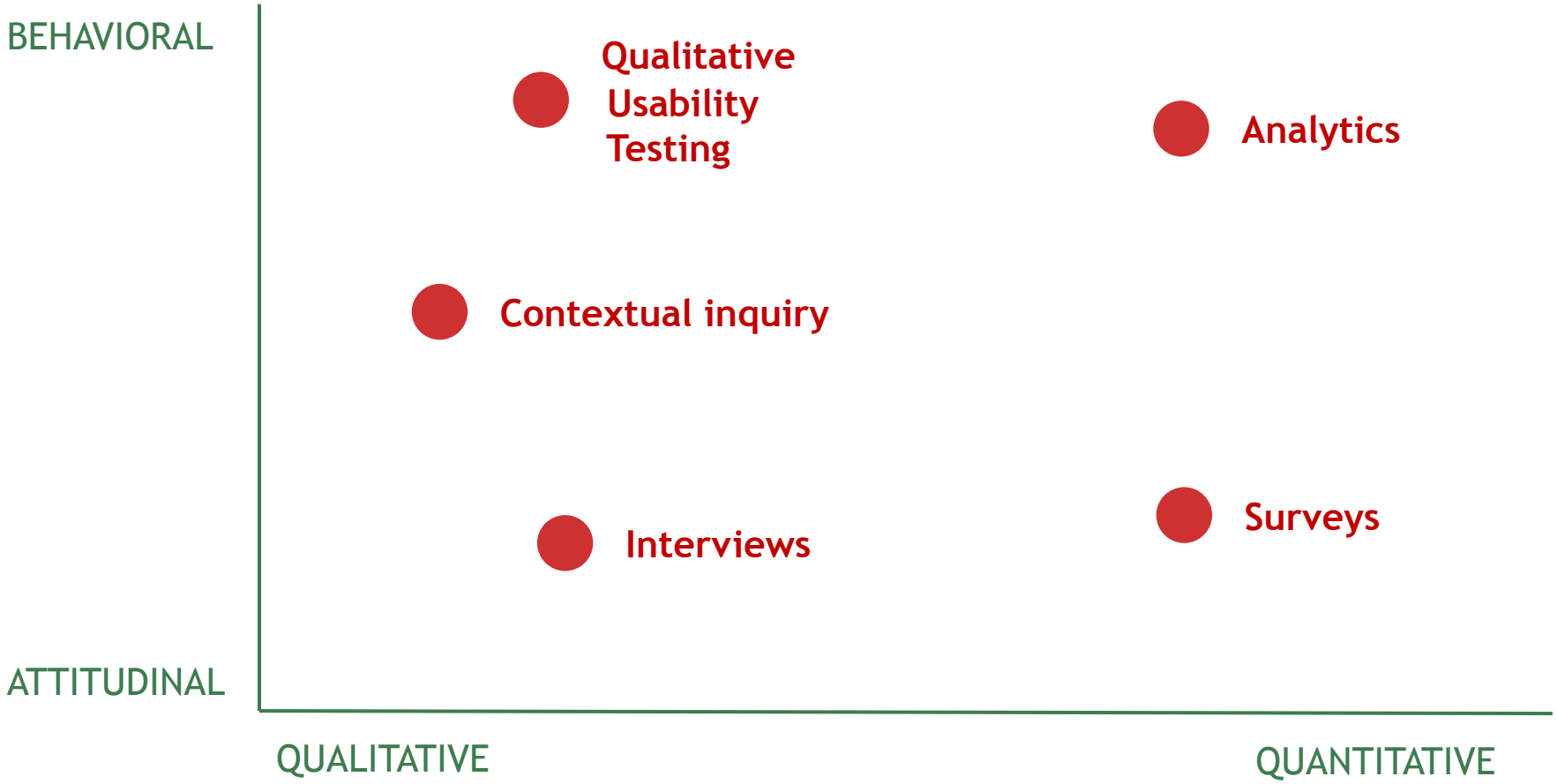
Christian Rohrer

UX Research Methods



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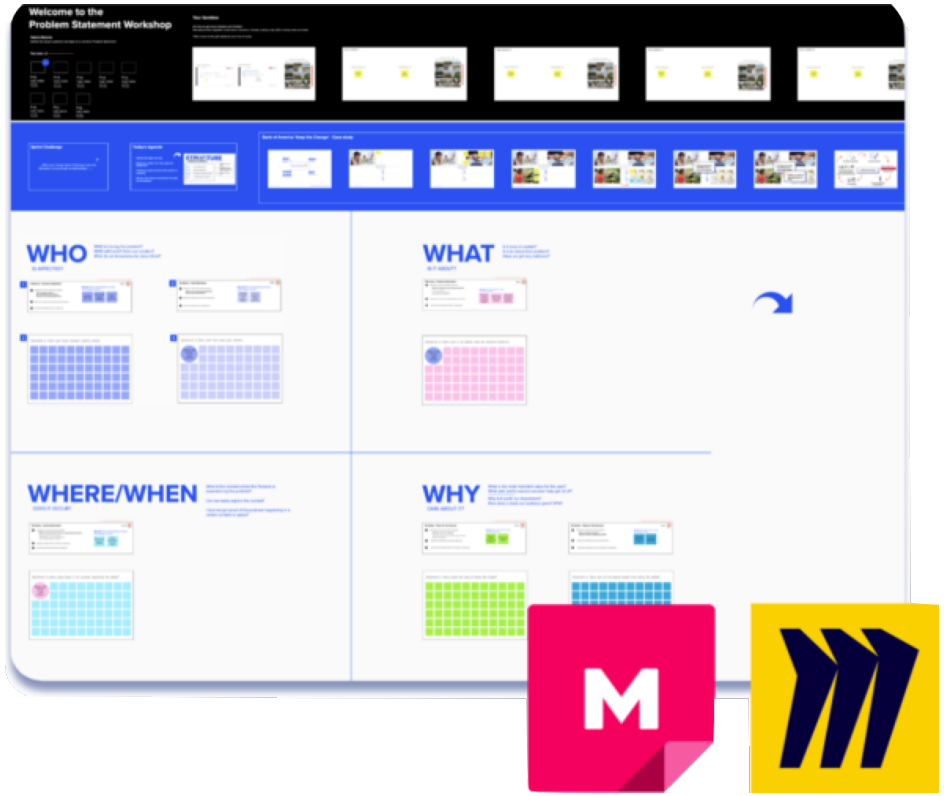
DAY 0: Problem Framing



designsprint.academy/about-problem-framing/

- Define the scope of the UX exercise with the stakeholders
- Outcome: Defined Problem Statement

> Our *(User, Customer, Persona)*
>
> Has the problem that *(issue, task, need)*
>
> When *(situation, context, process step)*
>
> Our solution shoud *(value, customer benefit)*

- Start setting up the User Journey Map
- Identify user role, scenario (top tasks), business goals

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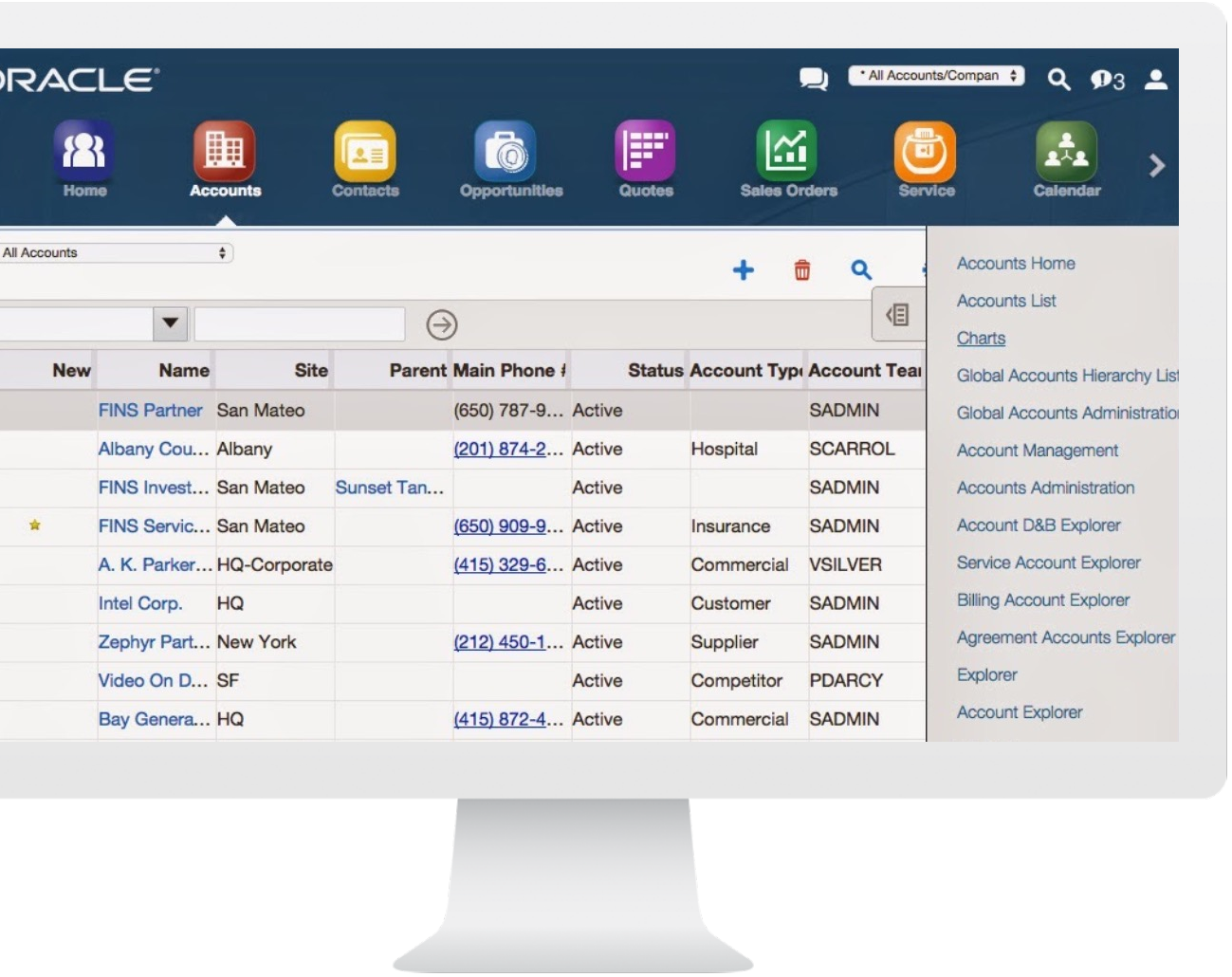
DAY 1: Siebel and process deep-dive



- Interviews with the process experts about general process flow and different variations (2-3 hours)
- Interviews with Siebel experts about process implementation in Siebel and Siebel data model (2-3 hours)

- Define high-level journey phases
- Prepare the users' interviews guide

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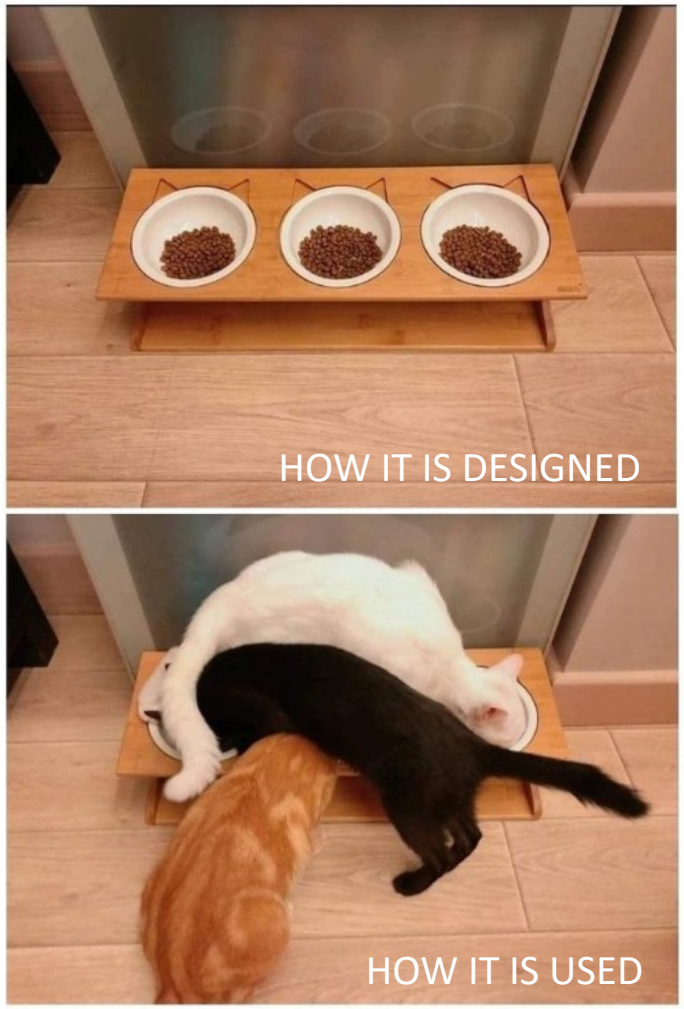
DAY 2: Learning the end-users perspective



- Interviews and observation of at least two users
  - Short interview about the user role, experience, tasks performed
  - Observing how they execute everyday tasks related to the process we study, asking users to explain what, how and why they do things in a certain way
  - In total 3-4 hours is spent with each user
- Define main user activities and user goals
- Prepare the usability test

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DAY 3: Usability tests with 5+ users

- Run the usability tests with at least five users, 45-60 minutes per user
- Each user performs 5-7 basic tasks
- After each task, we ask the user to rate:
  - How easy it was to complete the task
  - How frustrating or satisfying felt performing it
  - How easy it was to make the mistake
- All usability test sessions are recorded

- Summarize users' thoughts, emotions, opportunities

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Filling up the User Journey Map

Day No	Research activities	User Journey Map's parts to fill in		
		Refine	Focus on	Draft
Day 1	3-4 interviews with Siebel and business process experts	Persona, scenario and goals	Phases	Actions Opportunities
Day 2	3-4-hour observation sessions with at least two users	Persona, scenario and goals Phases	Actions	Thoughts and Emotions Opportunities
Day 3	Usability tests with at least 5 users	Actions	Thoughts and Emotions	Opportunities

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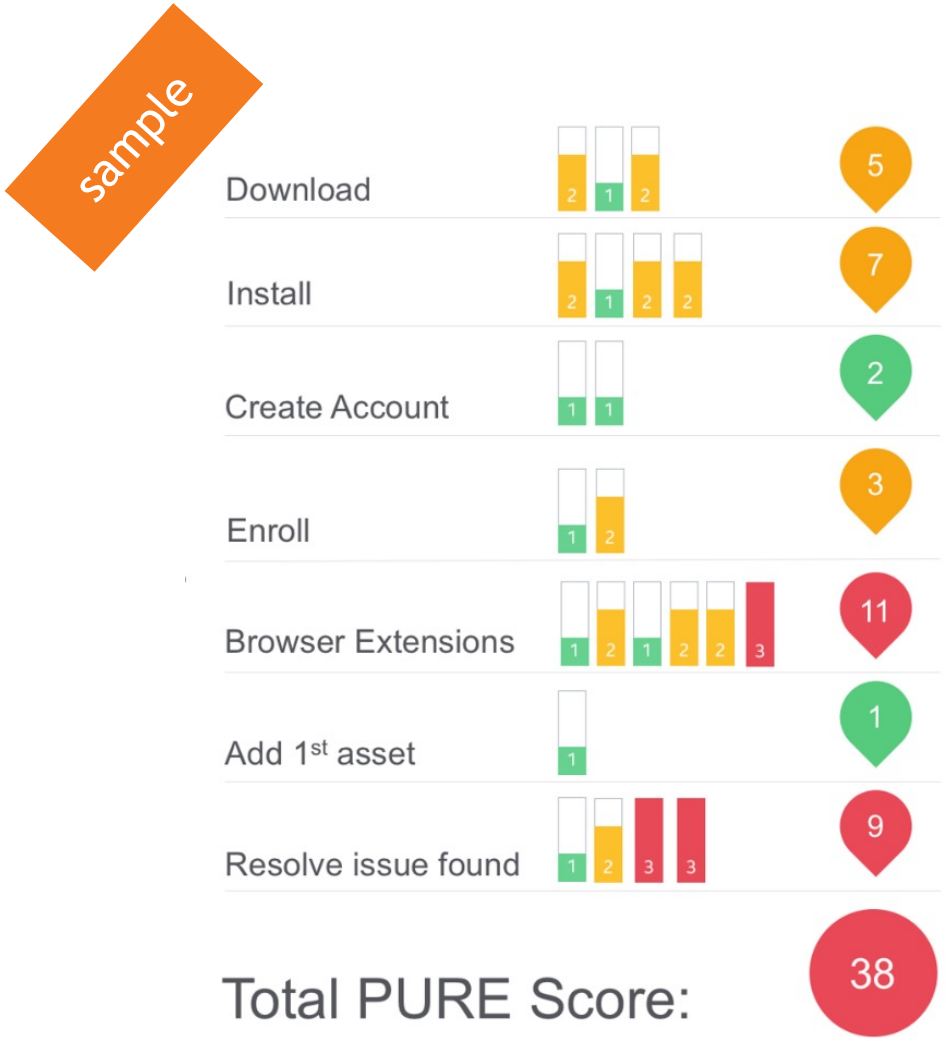
DAY 4: UX analysis



- Review the results of the field work done during the first three days
- Review quantitate data
- Complete the User Journey Map
- Assess usability and determine the PURE Score (Pragmatic Usability Rating by Experts)
- Prepare the list of current UX pain points
  - UI related items
  - Non-UI items to be addressed by Siebel and process teams

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UX Roles can get confusing

Interaction Designer

UX Architect

UX Researcher

UX Manager

Service Designer

Experience Designer

Design Ops

Product Designer

Research Ops

UX Designer

UX Unicorn

Information Architect

UX Copywriter

UX Engineer

UX Strategist

Motion Designer

UI Designer

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Let’s simplify it a bit

UX Researcher

UX Designer

UI Designer

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UX Designer Key Activities

Identifies a challenge, research needs, accumulates findings and drives the process.

Must

- Problem Framing & How Might We
- User Personas
- User Journey Maps
- Jobs To Be Done
- Low-fidelity concepts (Paper, Wireframes)
- Information Architecture

Can

- Qual. & Quant. research & reports
- Expert review reports (Usability, Heuristics)
- High-fidelity prototypes
- Style guides, Design patterns and systems

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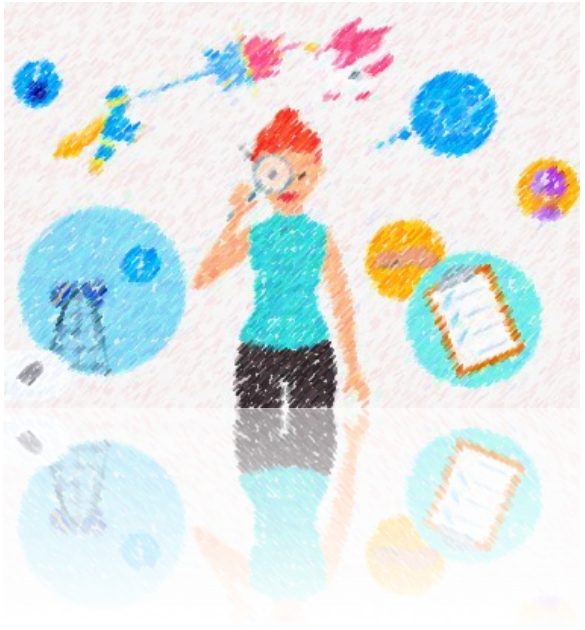
UX Researcher Key Activities



Validates assumptions and mines the facts.

Must

- Qual. & Quant. research & reports

(Interviews, Usability Testing, Observations, Analytics, etc)

Can

- Problem Framing & How Might We
- Expert review reports (Usability, Heuristics)
- User Personas
- User Journey Maps
- Jobs To Be Done

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UI Designer Key Activities

Makes solution prototypes detailed enough for implementation.

Must

- Design specifications
- Pixel perfect prototypes (applying Usability/Gestalt/ Cognitive principles, Heuristics and Hicks laws)
- Interactive prototypes
- Visual kits (Style guides, Icon libraries, Branding materials)
- Expert review reports (Usability, Heuristics)

Can

- Low-fidelity prototypes (Paper, Wireframes)
- Information Architecture

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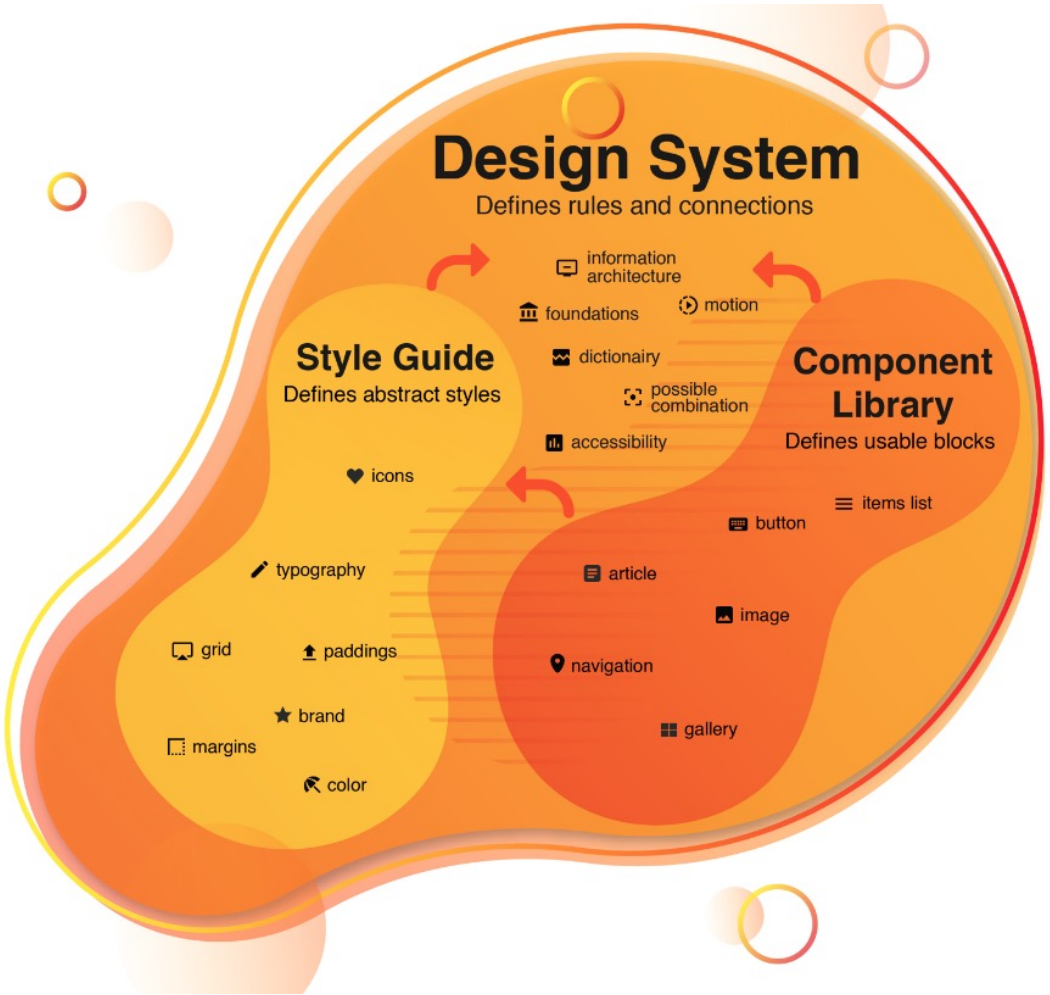
Design System

The source of truth which groups rules and principles that allow the team to design and develop a product



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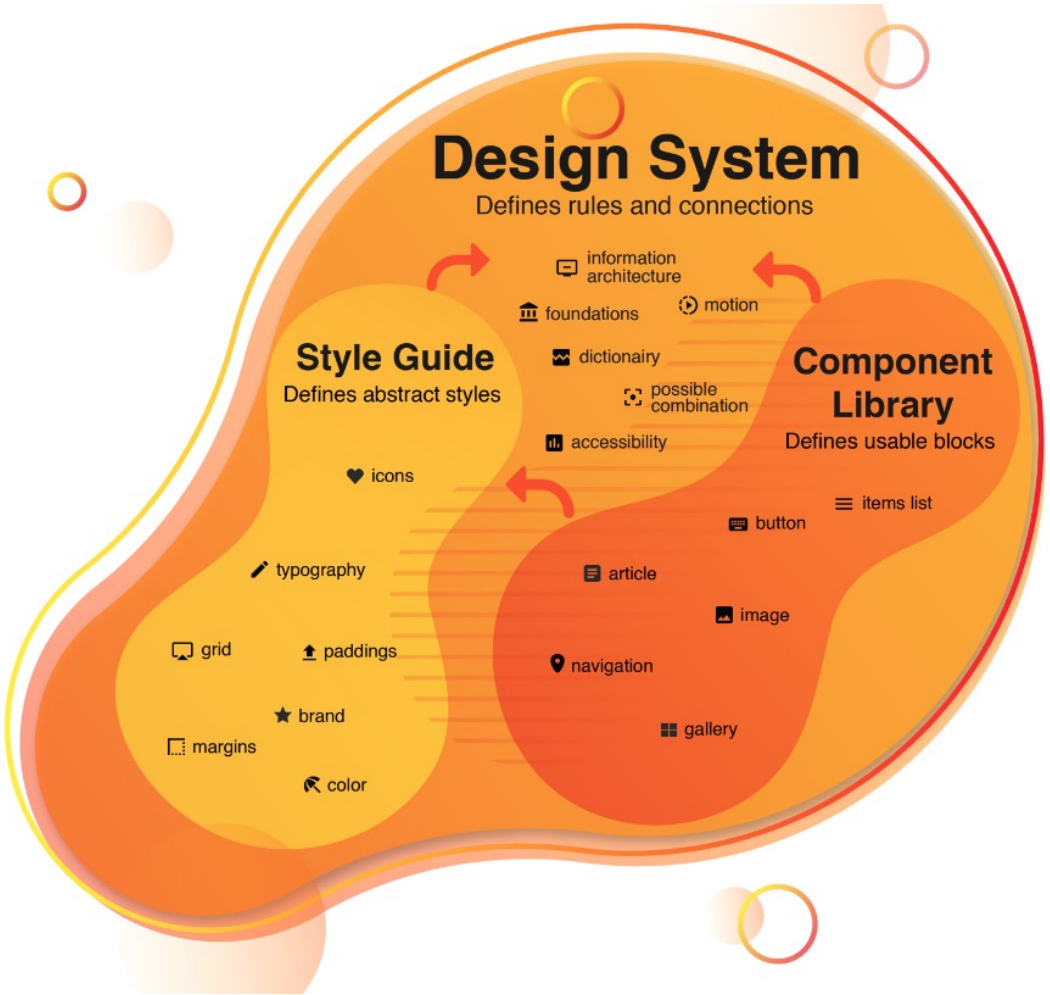
Design System examples

- Google Material Design
- IBM Design Language
- Polaris
- Airbnb
- Atlassian Design System
- Salesforce Lightning Design System
- Oracle Redwood Design System (not public)



Collection of a Design Systems

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Design Systems’ Benefits

Increase consistency

- Consistent design across different platforms and products

Time to market

- Design takes less time
- Common language with developers
- No need to build from scratch

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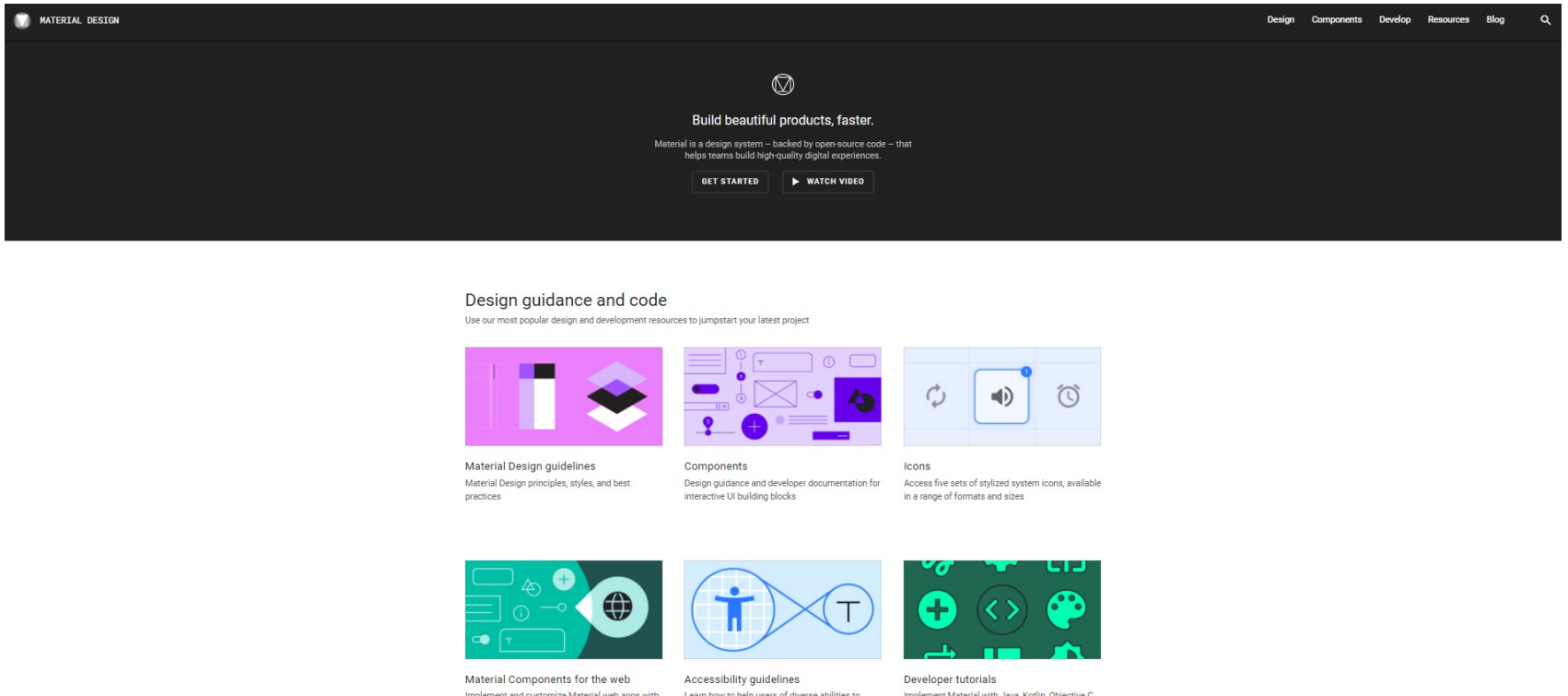
How to start?

If you do not have a design system, only branding rules, and you are ready to use React or Vue.js to build an UI –

start by adapting existing design system (e.g., Google Material Design) to your needs



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Tools to design and prototype the UI

Figma

Adobe XD

Sketch

InVision

Marvel

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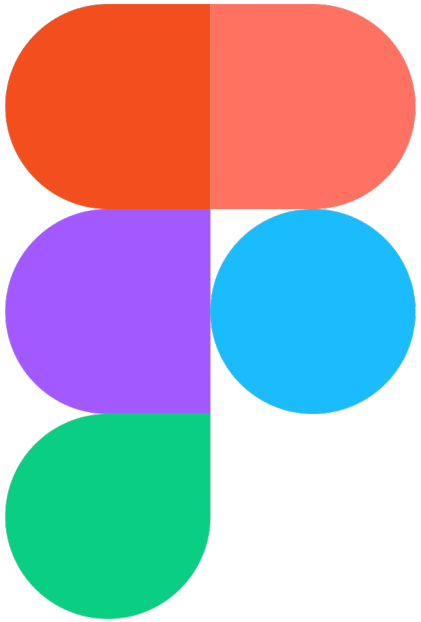
Reasons we love Figma

- Real-Time collaboration
- Version control
- Shared UI Kit

  (essential part of the Design System)
- Cross-platform
- Everything in one place
- Prototyping



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Start Learning!

Certificates & Courses

- Nielsen Norman Group UX Certification
- Google UX Design Certificate
- Interaction Design Foundation

Additional Reading

- UX Collective
- UX Planet
- Figma youtube channel
- Figma Material Baseline Design Kit

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How can you start practicing UX?

UNDERCOVER UX

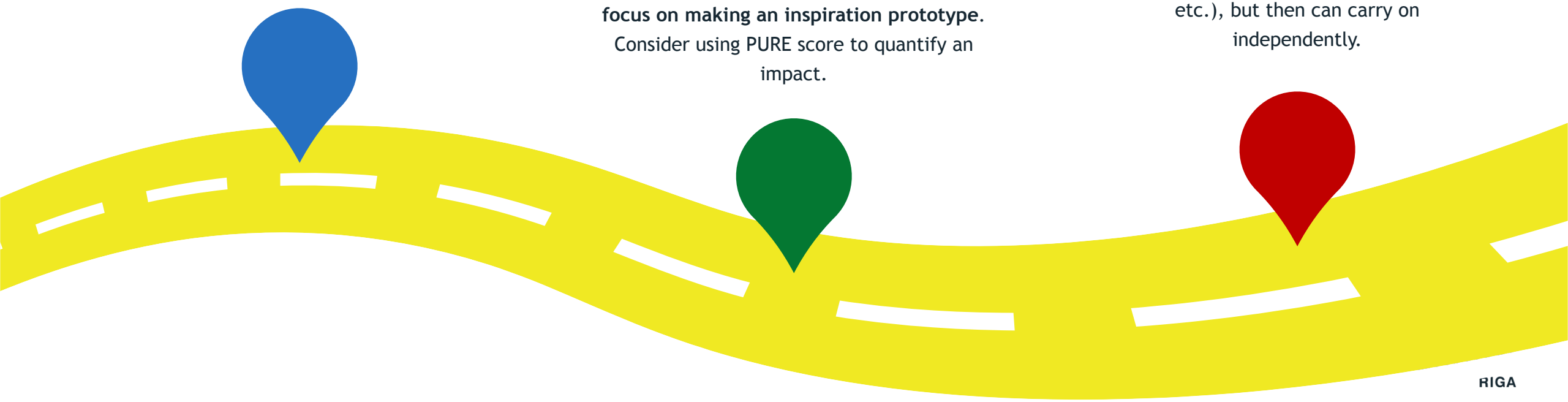
Forget UX lingo. Just "spend a day visiting users in the call center" and "conduct user-flow business analysis." Hide your UJM and PURE artifacts. Spend your time on **solving just one "too many clicks" problem.** Prepare an awesome prototype that fixes this problem and sell it to the stakeholders, asking for more time.

BUSINESS GETS UX

Pick a use-case to improve and run a two-week-long user research and UI design mini-project. Check if there is a Design System in your company; if not - use Google Material Design and brand it. Show your findings in UJM and **focus on making an inspiration prototype**. Consider using PURE score to quantify an impact.

CX TRANSFORMATION UNDERWAY

Reach out to the team in charge of the CX initiative, explain that Siebel is used in one of the customer interaction channels, and you want to contribute to CX improvement. **Ask for their initial support** (methodology, Design System, etc.), but then can carry on independently.



How Ideaport can help

PRIVATE UX WORKSHOP

2 hours // FREE
All End Customers

PREPARING YOUR FIGMA

2-3 days // FREE
For First Five End Customers

RUNNING UX PROJECT

2 weeks // FREE
For First Three End Customers

Interested? Reach out to juris.terauds@ideaport.pro

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Q&A

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