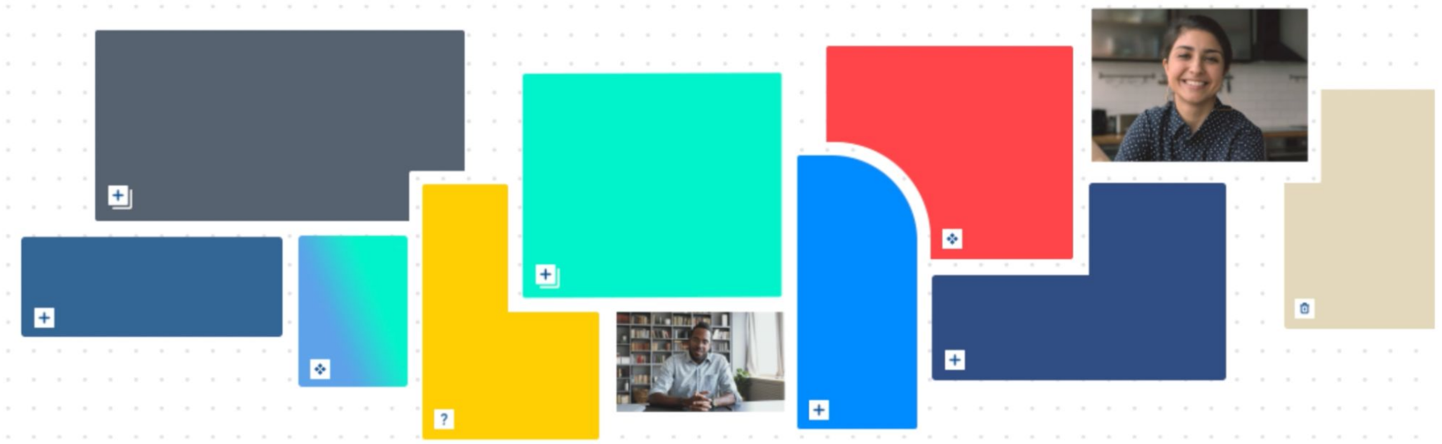
UX Case Study

Research Platform Redesign

Dynamic Prototype

Introduction

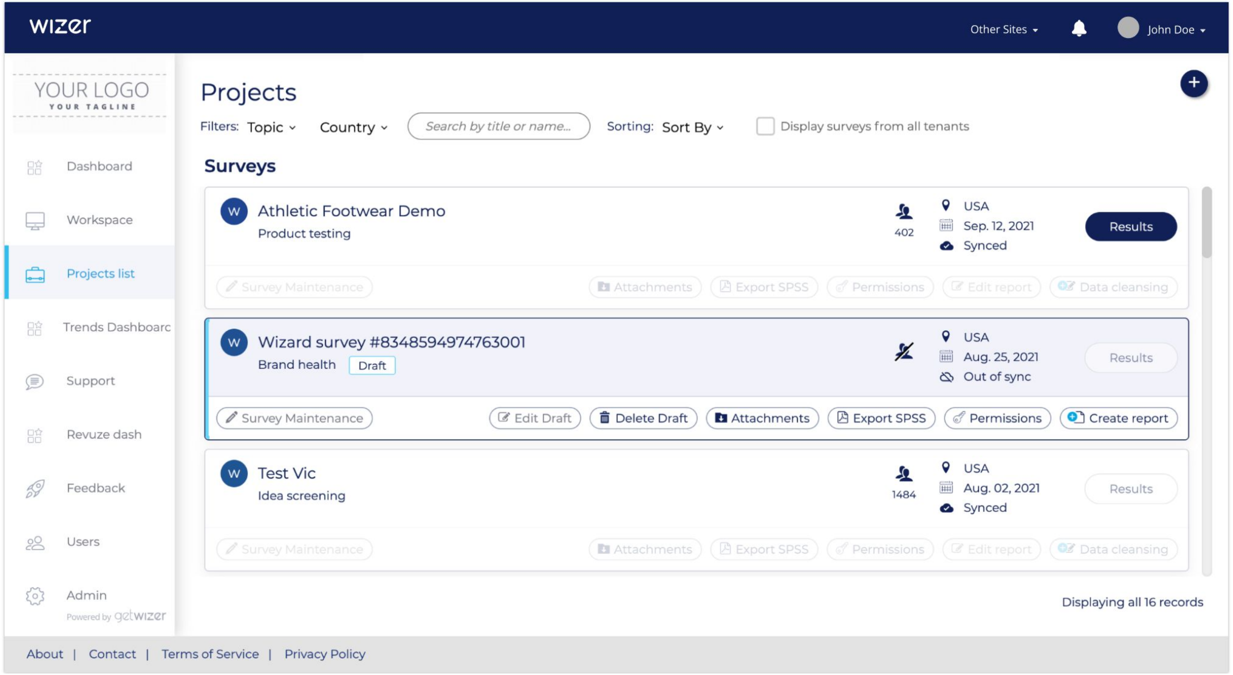


Getwizer is a hybrid consumer insights platform, allowing its customers to create highly professional surveys and get fast business insights through data visualization (Report).

Behind the product stand very sophisticated AI technology, automation, and human experts which allow conducting a highly professional research experience.

The Problem

The original Platform and other components of the product were planned and designed by the tech team, without considering the user experience aspects. As a result, the functional flow and the visual experience of the platform were very tangled, confusing, and not intuitive to the users.



The Research

The platform users are Marketing and Business Analysts, usually not tech people.

I’ve conducted user interviews and here is the feedback:

- Existing users are complaining that they “get lost” in all the functionality options. There is no clear hierarchy of elements and actions on the screen, and no definition between primary and secondary actions. All this conglomeration of actions and buttons causes frustration.
- The Platform isn’t modern and looks too complicated.
- The poor experience affects the existing users’ engagement and performance.
- For the new users, it takes significant time to learn the platform.
- The users got frustrated easily and were asking for support from the company representatives very frequently.

Project Goals and Needs

We’ve decided to redesign the existing platform and also add new useful functionality to a new one. The name of the new platform is “My Workspace”.

1. The new layout should allow the user to find, access, and view the Survey Items easily. It should present the additional info and notifications without losing the context of the relevant Item. The new Workspace layout should be fully responsible.
2. Product users need an overview of the platform that captures the status of their “Surveys in field” as well as access to completed Studies and Dashboards. The interface needs to allow them to easily access the relevant report or survey and organize their work so that the platform supports high productivity.
3. “My Workspace” will be displayed as a Homepage when launching the platform and includes access to several functions such as:
    - Creation of new studies;
    - Access to existing reports;
    - Search options;
    - Organization of content;
    - Status and progress indicators.

Project Details

Team

Direct team: Product Manager, UX/UI Product Designer, Frontend Developers.
Consulting team: Head of Research, Company CEO, Company CTO, System Architect.

Timeline

The Project had a very tight timeline - up to 4 months. It was very important for our CEO to present the new Platform layout at the upcoming research conference (TMRE). Research and design: 2 months, developing: 2 months, Q&A: 2 weeks.

Tools

For designing the prototypes I was using a **Figma** tool. It allowed me to create low-fidelity and then high-fidelity prototypes. Then define the main use cases and create a dynamic prototype for each one of them, and test it with stakeholders and some of the existing clients. Figma also allows create of a very functional design system with direct collaboration between multiple teams. The frontend dev team can access design resources and get the UI information.
Monday tool was used for product management and evaluation. **Jira** tool was used by the Dev team for tasks and progress.

Personas

There are two main Personas for this project - Internal and External. Some advanced features and indications are available only to the Internal user.

Jane

Internal Researcher (Company)

- Professional researcher, a part of the company's research team;
- Has a social studies academic background;
- Has a deep understanding of the research methodology;
- Not a tech person;
- Provides fast and quality assistance to a client: from suggesting a suitable methodology and creating a survey to getting the final report;
- Familiar with all advanced features of the Platform;
- Communicates with customers on a daily basis, and understands the customer needs.

David

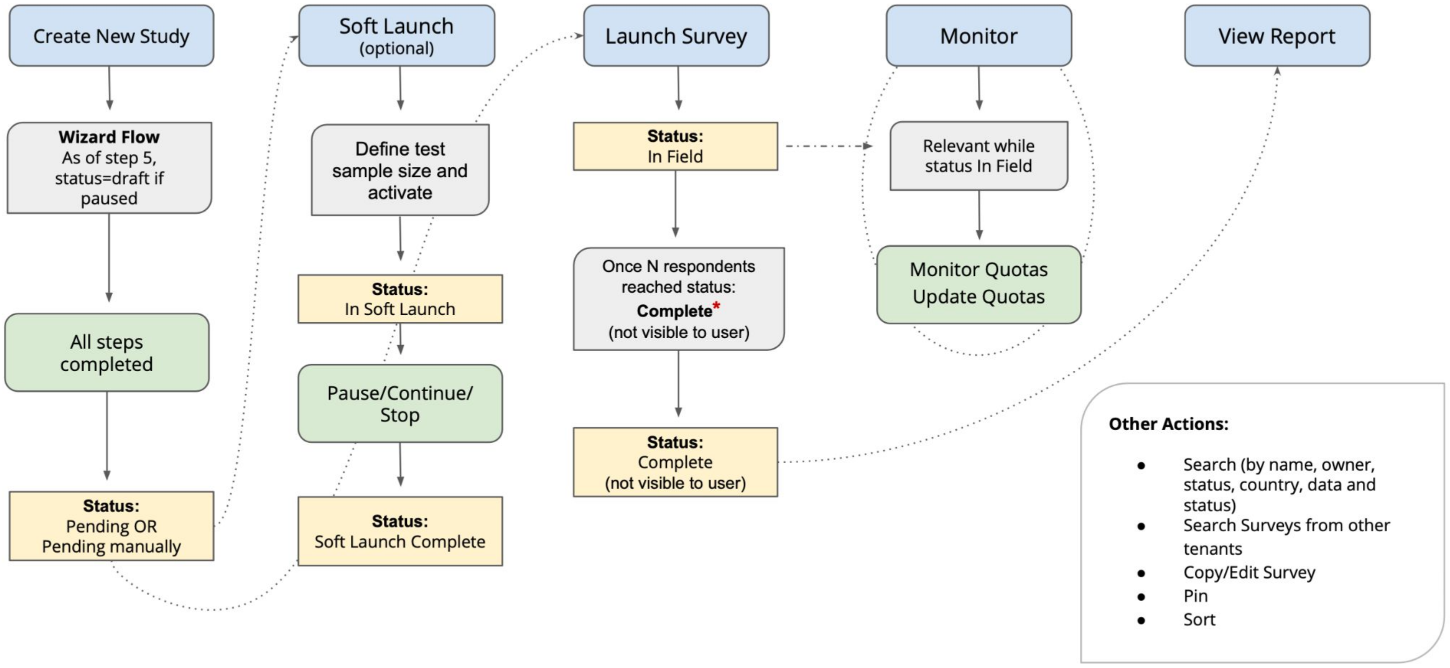
External Analyst (Customer)

- Marketing & Innovating professional in a big fashion company;
- Has some research background;
- Not a tech person;
- Has a hectic schedule, and runs multiple surveys of brand & concept testing;
- Needs to get the survey results ready and accurate in a tight timeframe;
- Prefers independently create his Surveys with the minimum help of the company researcher;
- Familiar with basic functionality of the Platform;
- Constantly complaining about the poor user experience of company products.

Understanding the Flow

In order to create a high functional and successful design, we need to deeply understand the product flow and functionality.

Mapping the current functionality of the system helped me to see the big picture and retrieve the UX problems.



*Until "Complete" status reached, status depends on sync (see full details in sync table)

Statuses Investigating

This product has many different statuses and states that affect the behavior of different elements and the whole platform. It was very important to map and understand their functionality. I’ve created a list of possible statuses with their description. It helped me to study the product and fix and eliminate the redundant or unused statuses. Also, it helped me to redesign the Survey Item.

Survey Status States

Status	Visible	Description
Pending	Yes	Survey is set by the client. Waiting for researcher to QA the study, and once it is confirmed Launch or move to Soft Launch.
Pending Manually	Yes	When there is no automatic Panel integration for the Survey (The chosen country is not supported by Lucid/feasibility limitation), the Survey gets status Pending Manually. In this case - the researcher will manually connect the survey to a relevant Panel Provider. Currently, only Lucid has an automatic API connection to Wizard.
In Soft Launch	Yes	Survey currently is during a Soft Launch mode (until predefined # of respondents complete it)
In Field	Yes	Survey is Active now
Draft	Yes	Survey creation via Wizard. Started but not finished. Could be saved from step 5 as a draft.
Wizard Survey Statuses • New • Selected Insights • Selected Distribution Method • Customised • Created	No	These are internal statuses - not visible to User.
Created	Yes (internal)	**Used for two main situations:** 1. For ad hoc projects where there is no Wizard 2. When we need to create another report for a study that was set via the Wizard (PRS multiple reports per client - users/non users) The Survey created Manually (without Wizard) and not connected to a Panel via the API. During the definition process - the researcher inserts a Survey ID from SG. In that case, the researcher will manually Sync the survey. This will get a data from SG (when Sync)

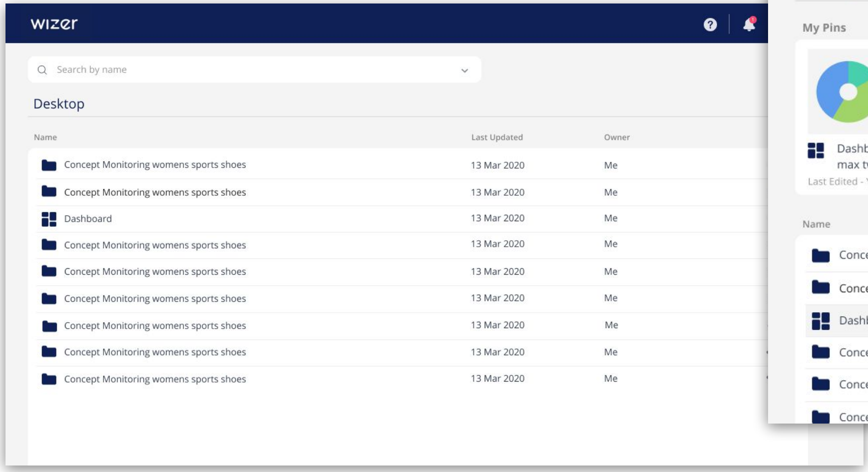
Menu Action Definitions

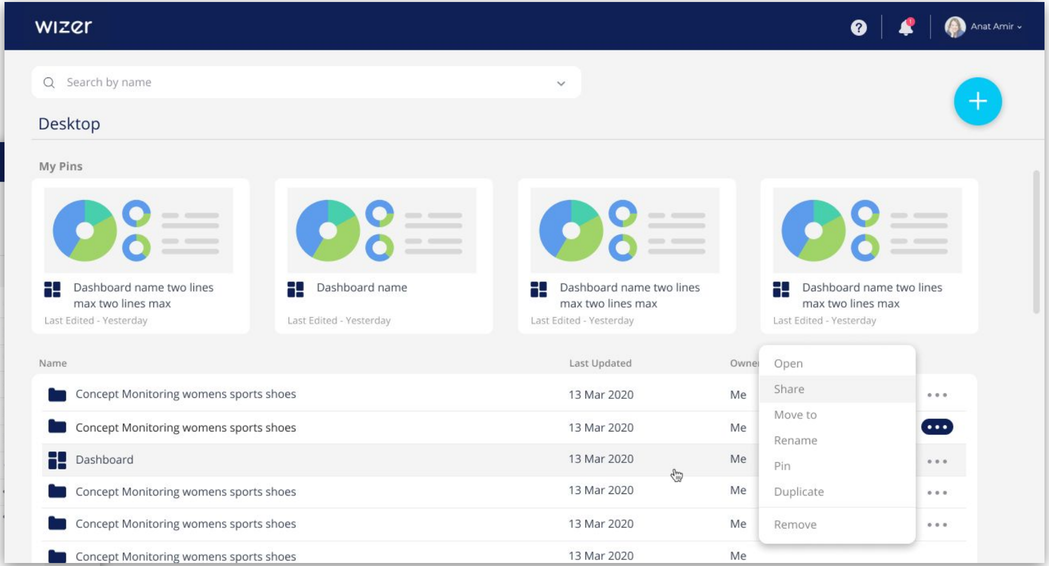
Action	Relevant Statuses	Visible to	Comments
Permissions	All Statuses (Except Draft)	Wizer users + Client Admin.	During all survey statuses, even before Report is ready
Edit Report	In Field, Complete, Pending (Once report created)	Wizer Users	Setup of configurations/report template
Create Report	Pending		
Test (Link)	Pending	All users	To test the **link** to view the Survey pre-launch
Launch	Pending	Wizer Users	To soft launch the survey/To launch the survey
Survey Maintenance	All Statuses	Wizer Users	
Edit Survey	Pending	Wizer users + Client Admin.	Surveys can be edited only in this status.
Edit Draft	Draft	Wizer users + Client Admin.	Draft can be edited only in this status.
Duplicate Survey	All Statuses	Wizer users + Client Admin.	User is taken to the ‘survey name’ (Form) asked to rename the study initially, all other fields are pre-populated and the user can either edit or click ‘Next’ to complete the wizard
Attachments	All Statuses (Except Draft, Pending)	All users: View & Download; Admins: Upload	Determine if this should be excluded from the menu as its part of the info panel
Monitor	In Field (during Launch + Soft Launch)	**Monitor Tab** - for all users **Update Tab** - for internal only	Checking the survey progress; Determine if this should be excluded from the menu as its part of the info panel
Export to SPSS	In Field, Complete		We may need to export SPSS during fieldwork, after soft launch (export to SPSS of ‘RAW data’ or ‘Cleansed data’ need to be supported. Both files have the same DB structure. Raw

Design Phases

Our CEO requested to create a List layout, by insisting that most of our customers will prefer the table-look view of the Survey items. But after I conducted user interviews, the feedback was that most of our customers prefer the grid-view layout and are convinced that it is much more modern. Finally, it was decided to create two options: A Grid view and a List view, so the user would be able to choose the most convenient option.

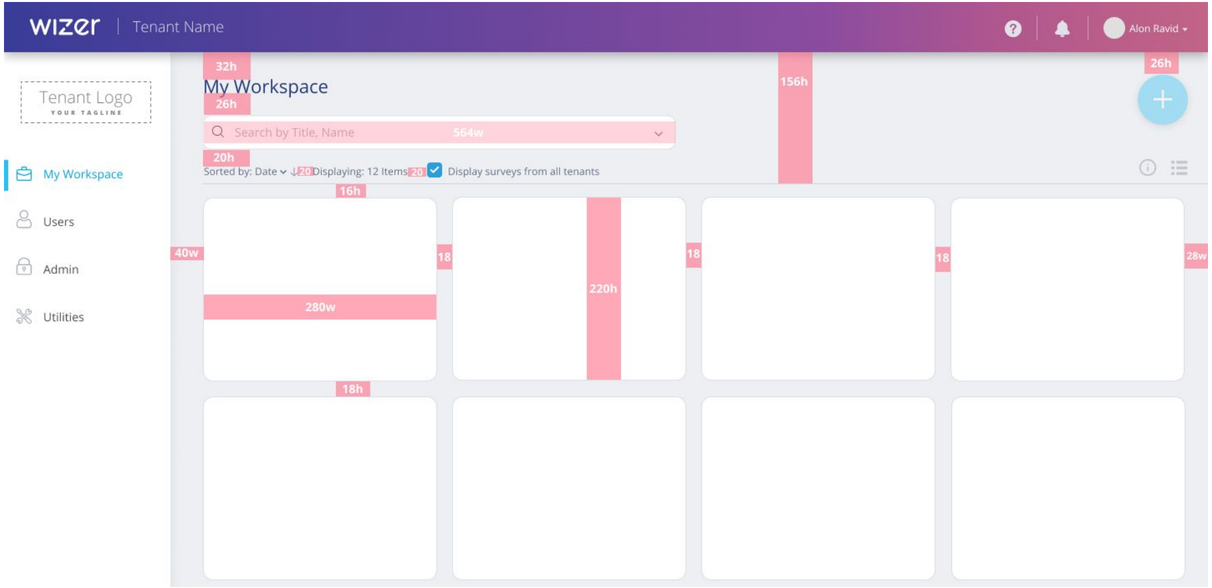
Example of first-phase designs

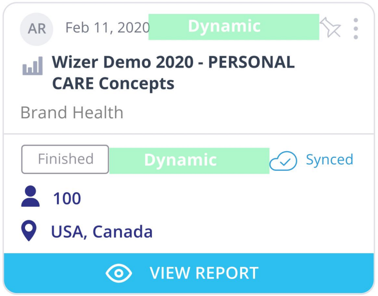




Responsive Layout

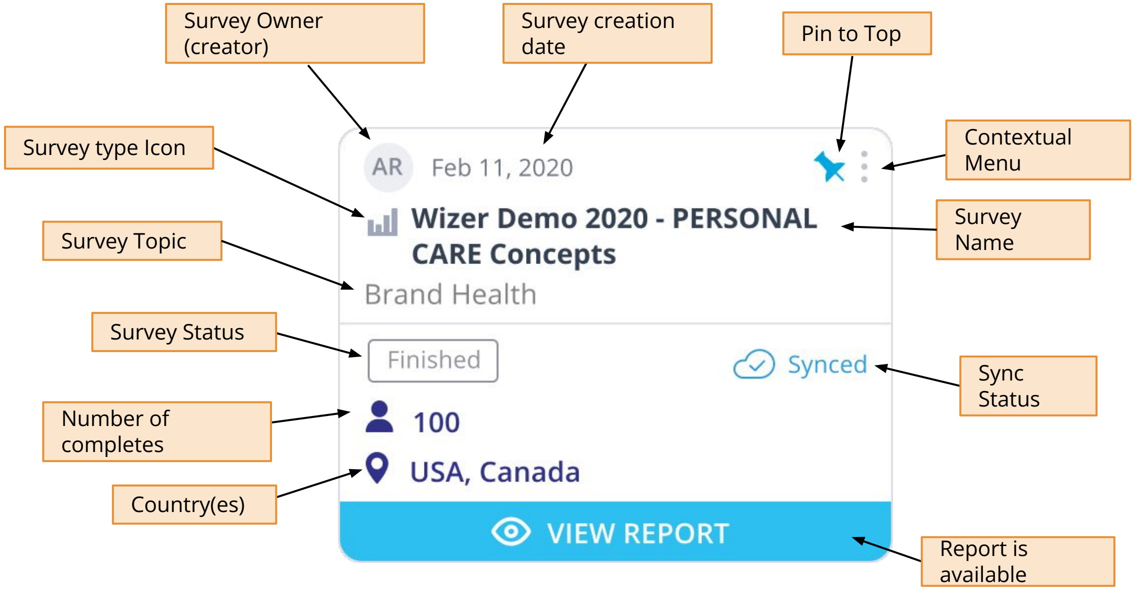
I had to create a new page structure and layout. As a result of my research and analysis, I've decided to design Survey Items as a grid of rectangular elements, while supporting the layout responsivity (similar to a Google Drive layout), including the ratio inside each element and a dynamic Info panel that displays additional information for each item.





Main Element Design

The main element of the platform is a **Survey Item**. It has a clear structure and hierarchy. Primary actions always visible and have a direct dependence on the Survey status. Secondary actions could be easily accessed via the contextual menu.



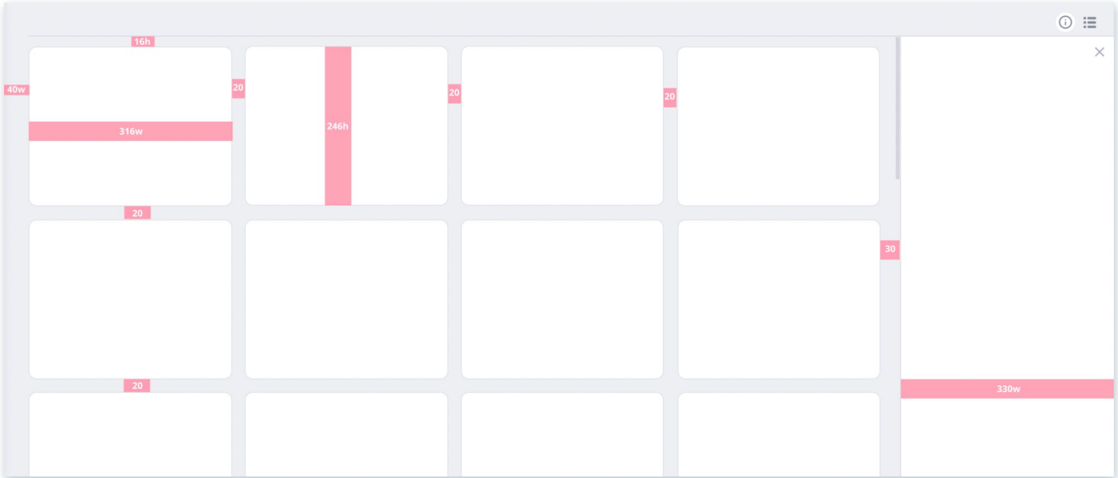
Features List:

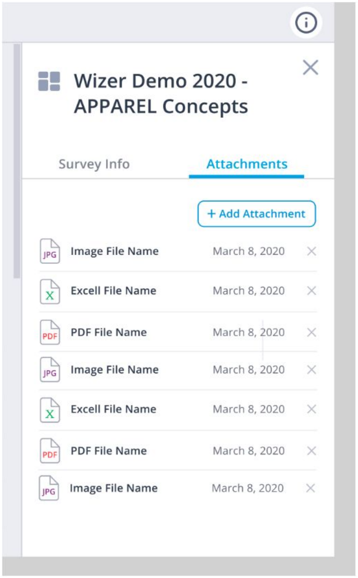
- Surver Owner
- Survey creation date
- Pin to top button
- Contextual menu
- Survey type indication
- Survey Name
- Survey Topic
- Survey Status
- Sync Status/Label
- Number of completes
- Countries
- View Report/Launch CTA

New Platform Elements & Features

The Info Pane

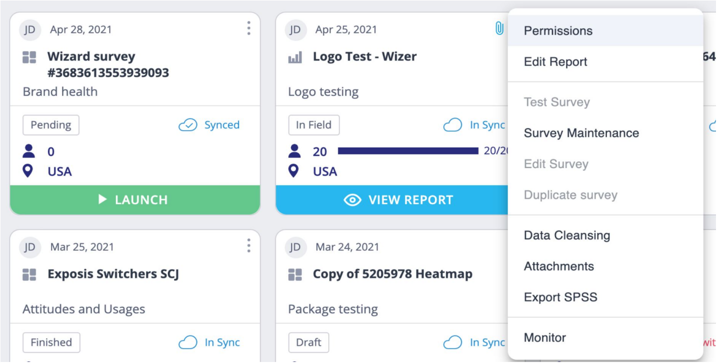
- The Info pane can be opened and closed by clicking the “i” button.
- It shows the additional info about the selected study.
- Multiple tabs allow showing additional info without losing the context (for example, attachments).
- In the future, we are planning to add new tabs presenting additional info about the selected study.





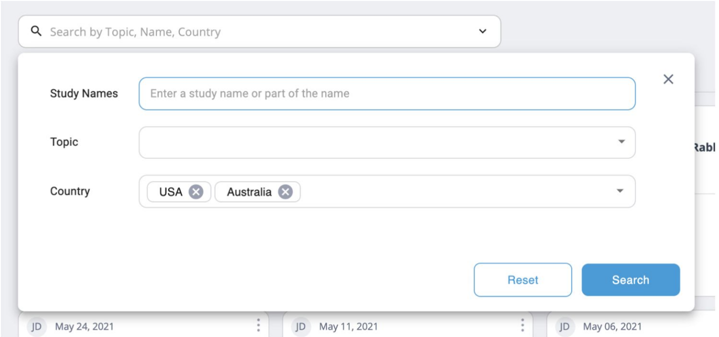
Contextual Actions Menu

Main action buttons (Launch survey & View report) are shown on the study item when available. The Secondary actions are located in the contextual menu for each survey item



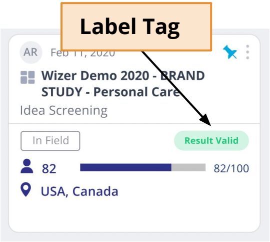
Advanced Search

Items can be searched/filtered by multiple parameters.



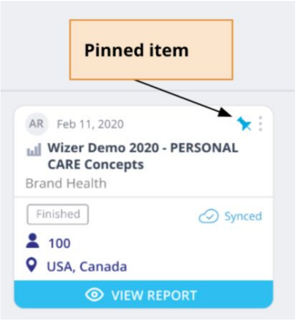
Label Tags

Label Tag is a useful feature which can assist the user to organize his workflow.



Pin to Top

Users can pin the important surveys to the top of your workspace. Pinned items could be easily “unpinned” by selecting the pinning button.



Style Guide

Color Palette

Main

Primary

Primary actions, buttons and links

Other action buttons

Negative

Recommended usage

- **Purple** - Graphic elements, indications
- **MainText** - Title texts, captions, input fields
- **SecondaryText** - Small texts, subtitles
- **Icons** - Icons, Info texts, graphic elements
- **DefaultText** - Default texts in text field
- **Graphics** - Icons, graphic elements
- **Disable** - Inactive states
- **Borders** - Dividers & borders
- **BG** - Background and disabled background for buttons
- **Hover** - Selected row

- Primary actions, buttons and links
- Error
- Warning
- Success

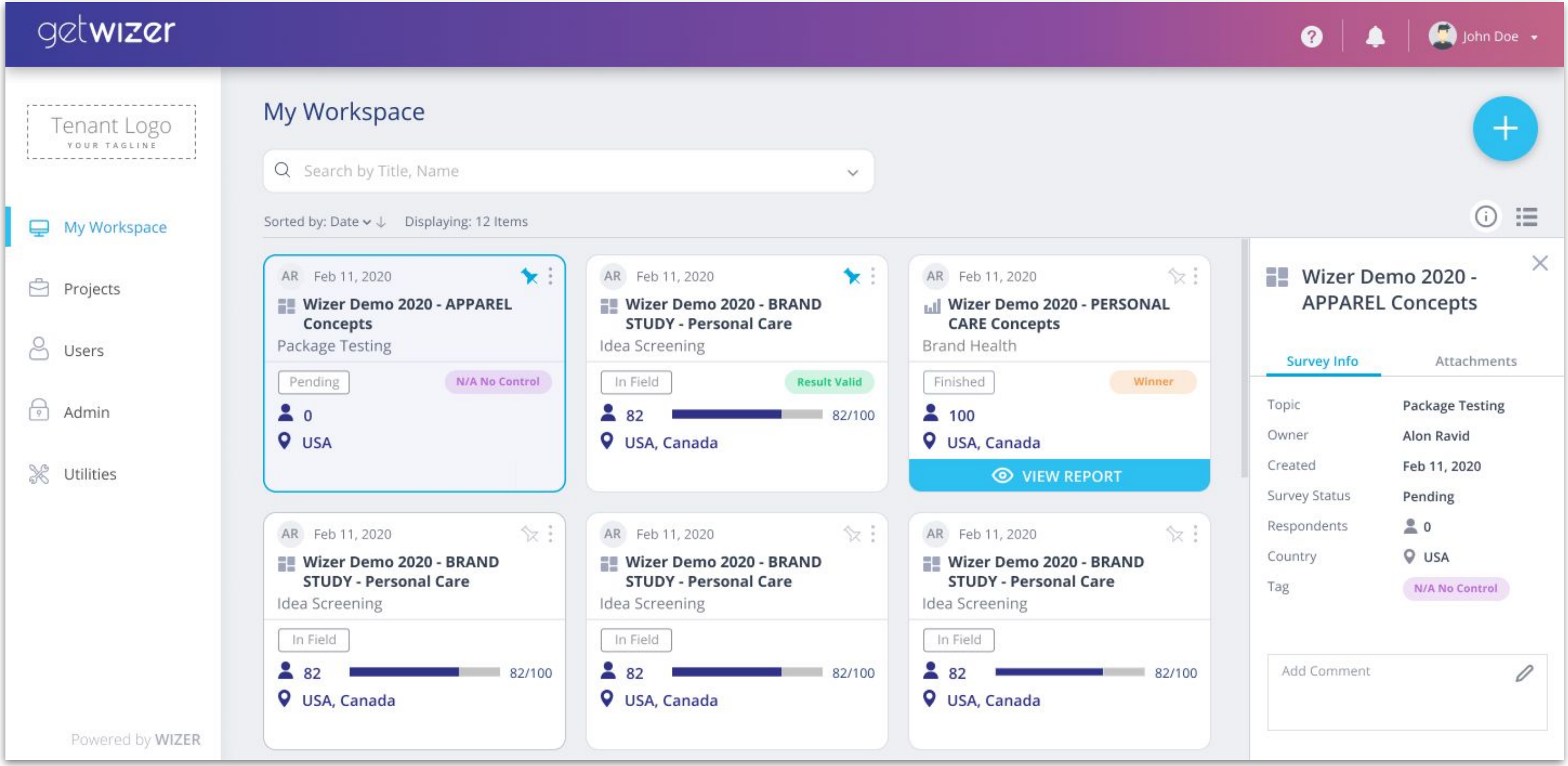
Typography

Open Sans

Type	Weight	Font size	Line height	Letter spacing
H1	Medium	22	Auto	Auto
H2	Bold	14	18	Auto
H3	Semibold	18	24	Auto
H4	Bold	12	Auto	Auto
Subtitle 1	Medium	14	24	Auto
Subtitle 2	Semibold	12	24	Auto
Body 1	Medium	12	24	Auto
Body 2	Semibold	14	18	Auto
Small Body 1	Regular	12	18	Auto
Small Body 2	Semibold	12	18	Auto

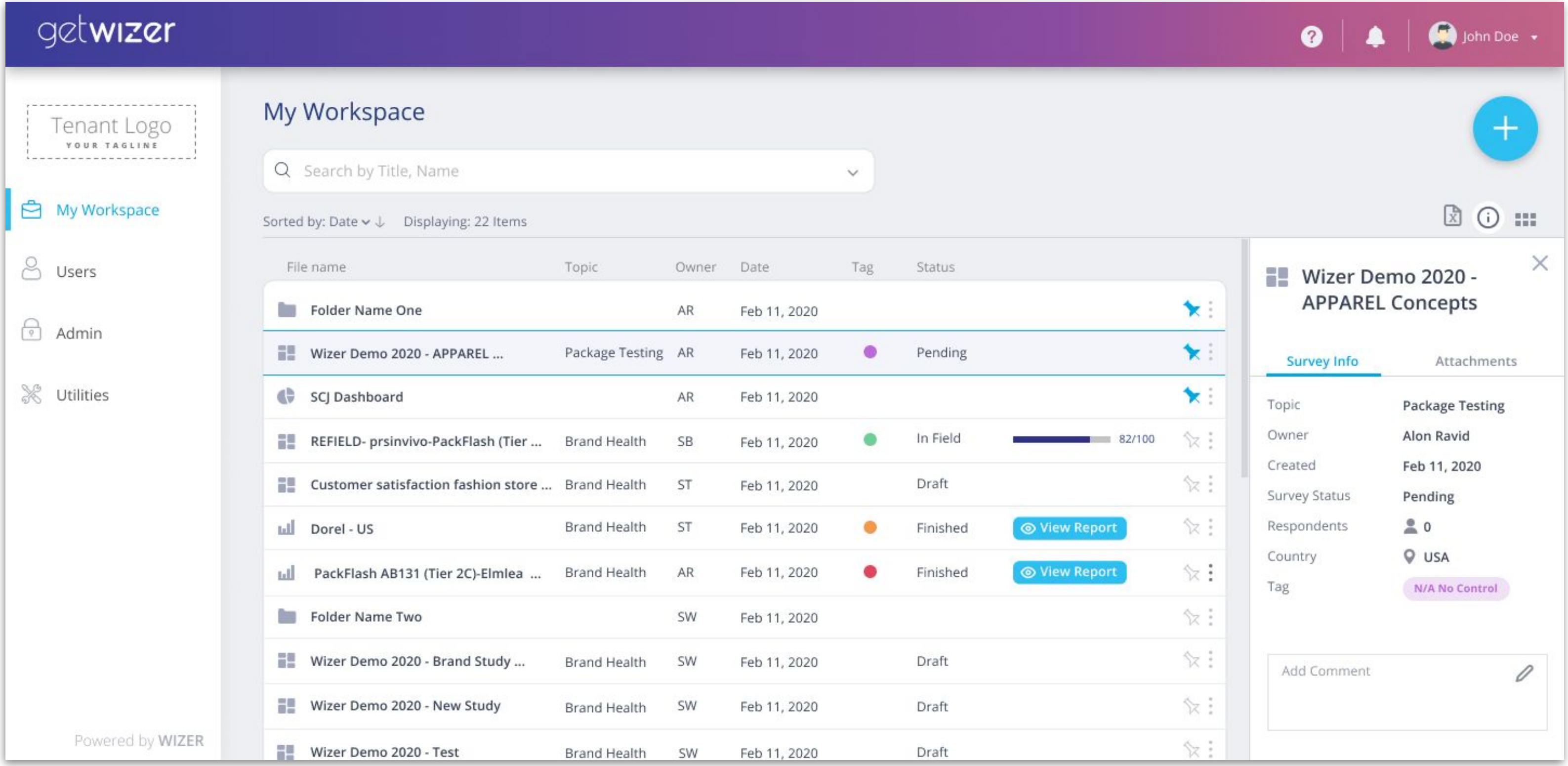
The Final Result

The final Platform design supports both Grid & List view. **Grid View:**



The Final Result

The final Platform design supports both Grid & List view. **List View:**



Conclusion and Success Analysis

Advantages of the New Design

Fully responsive layout, modern UI design, and ability to show more surveys on a page. Each survey item has an intuitive structure and a clear menu. Easy access to the relevant report or study and a user-friendly and productive platform experience; Improved search and sort capabilities; New useful features assisting the user to organize the work items.

Business Impact

After the new Platform design was launched, we started to get very positive feedback from the existing customers. Finally, they have a clear understanding of all the elements and actions in a platform. They need less assistance from the support team and feel more confident working with the product. Also, they feel more engaged with the product. Customer retention was significantly improved. And the sales results improved as well. The company sales representatives reported that it became much easier for them to find new customers. The product finally spoke for itself.

Reflections, obstacles, and lessons I've learned

While studying the product and all its components, I've encountered unclear statuses and indications, or even different statuses which indicate the same situation. Having no clear understanding of the platform prevented me from creating a new and useful layout. I organized multiple meetings with the Tech and Product people to get clarification. Eventually, I discovered that they have a totally different understanding of the processes, due to a lack of communication inside the company. There was a need for collaboration and education for company teams. As a result, I've created a clear mapping of all actions, indications, and processes of the Platform. This document was very helpful for me to understand the system and create a highly functional product. And also it was very useful for other company employees - to see and understand better the whole picture.

For my future projects, I'll try to get as much information as possible from my colleague, tech, and product teams. It could save my time and bring a clear understanding of the processes. Multiple team collaboration is the key to creating the most successful products.

Thank You!