Successfully Integrating UX in Mendix projects
Embedding UX in an agile way

Willem Gorisse – 27th October 2016
Outline

- Prerequisite knowledge
- How to do agile UX
- Mendix’s Project UX Templates
- Balancing UX effort
- Partners input
Prerequisite knowledge
Mendix UX Pyramid

- **Styling**
  - I need to make that button blue

- **Theming**
  - I need to translate a Visual Identity to an app

- **UI Design**
  - I need to design the screens the user works with

- **Usability Design**
  - I need to make the app accessible and readable

- **Interaction Design**
  - I need to create a logic workflow in the app

- **UX Design**
  - I need a user-friendly and great User Experience
How to do… Agile UX
Typical challenges designers face

- Deliverables-heavy processes are hard to combine with agility.
- We’re used to trying to deliver perfect end-game solutions.
- Where does user research fit into the story?
- The users don’t have a stakeholder.
- Limited team size often offers only one spot for UX.

The five phases of agile adoption for UX people:

1. Denial
2. Anger
3. Bargaining
4. Depression
5. Acceptance
Typical challenges developers face

- How is the design up front agile?
- Limited timeframe
- Speaking a different language
- Why all the rework?
- Waiting for designs
- They’re not in our team
Lean UX

- Inspired by Lean and Agile development theories
- Less emphasis on deliverables
- Greater focus on the actual experience being designed
Lean UX in practice

- Keep deliverables light and editable
- Frequent feedback
- Prototyping
- Maintaining a holistic vision
Early customer validation over releasing products with unknown end-user value.

Collaborative design over designing on an island.

Solving user problems over designing the next “cool” feature.

Applying appropriate tools over following a rigid plan.

Nimble design over heavy wireframes, comps or specs.
Why the good fit with Mendix

- Quick iterative projects
- Minimal Viable Product approach fits a lot of Mendix projects
- Collaborate with business is core of Mendix
- Early validation is core
- Prototyping in Mendix is easy and fast.

Note: doesn’t have to be a 100% perfect implementation of Lean UX. Most important: it needs to fit the project.
Mendix Project UX Templates
What are these Project UX Templates?

- Outlining all the UX related topics that occur in projects
- A way to share our own experiences with integrating UX
- Offer a helping hand
- Use it as a starting point and guidance for projects
A Mendix project

Three distinct phases

- Preparation phase
- Sprinting phase
- Usability testing phase
By failing to prepare,
You are preparing to fail
- Graham Bell
Preparation phase

- Scrum says nothing on how to prepare.
- Doesn’t mean you don’t need any.
- Agile projects need a horizon to work towards.
- Don’t overdo it, keep it lean.
Goals of preparation

- Getting ready to deliver business value
- A clear vision for the project
- Enough preparation to enable forecasting
- Just enough detailed preparation to get started with sprint 1

"A job well conceived is a job half done"
Product Vision & Canvas

VISION STATEMENT
Describe the motivations for creating the product and the positive change it should bring about.

TARGET GROUP
Describe which market or market segment does the product address. Also describe the target customers and users. Note that when dealing with company internal applications, segments can apply in e.g. the form of departments.

NEEDS
Describe the problems that the product solves and which benefits it provides for the target group.

PRODUCT
Describe the product and the aspects that make it stand out. Think about the key features that define the product. Also think about the feasibility of delivering the product.

BUSINESS GOALS
Describe how the company is going to profit from the product, and what underlying goals are. Note that profit doesn’t necessarily mean currency.

PRODUCT VISION
Combination of the motivations for creating the product and the key functionalities that make the product stand out.

PERSONAS
Create provisional personas of the Target Group users by:
- Research
- Input from agents
- Input from users (interviews)

USER JOURNEYS
Create customer journeys, storyboards and user flows to define how the users will evolve with or without the product. Note that storyboards and customer journeys can apply.

CONSTRAINTS
Identify the most important constraints of the implementation.

DESIGN
Identify design of the application, taking external design norms into consideration: frameworks, standards, guidelines etc.

EPICS
Describe the larger chunks of functionality. Basically big user stories that need to be broken down and translated into user stories.
High level vision:

- Why are we creating the application?
- Who is our target group?
- What are their needs?
- How do we envision our product meeting those?
- What are our business goals in doing so?
Prepping the project:

- Who are our users?
- What are their tasks and how do we envision them completing them?
- What are high-level constraints?
- What will the design be like in broad lines?
- What are our epics and ready userstories to accomplish this?
Product Canvas – Personas

OVERALL GOALS

Tim works at a software company that is falling behind due to the speed of change in software development. Tim’s main task is to research and evaluate new technologies and platforms for innovation. He also needs to report his findings and advise his management on what to do with them.

TASKS & RESPONSIBILITIES

- Trying out new platforms / tech.
- Discovering the limits of new platforms / tech.
- Generate pro’s and cons for new platforms / tech.
- Create findings reports for management.
- Helping out implementing new tech within teams.

PAIN POINTS & FRUSTATIONS

- Very limited time to get a good impression of the new platform / tech.
- Depends a lot on (lack of) documentation.
- Losing a lot of time trying out addons or advanced functionality.

AFFLIENCES & SKILLS

WHAT’S AGILE?

- SCRUM MASTER

MENDIX INITIATE

MENDIX EXPERT

SOLOIST

TEAM PLAYER

NO FRONTEND

JS ADDICT

NOT INTERESTED

TECH CURIOUS

ENVIRONMENT

Tim works at the office on his laptop. Sometimes he’ll pick up some research in the evening at home on his couch with his cat.

FEELINGS & ATTITUDES

- He feels clueless sometimes with new tech.
- Likes to push innovation further for his company.
- Strongly believes in useful documentation.

INFLUENCES

- Goes to tech conventions and MxWorld
- Is member of a lot of IT minded fora
- Always has the latest apps on his phone
- Reads a lot of online magazines
- Talks a lot with like minded techy people

NAME: Tim Hughes
AGE: 28

JOB: Medior Developer at MxApp

STATUS: In a relationship without kids.

ABOUT

Tim is always looking for the next gadget or tech development. He loves to try out new things at work or at home on his couch together with his cat Mr. Bagglesworth.

QUOTE

“Keep looking for the next big thing!”
Product Canvas – Personas
Bridget the gap between:
- Personas and their tasks
- How the application works

Different levels:
- Customer Journeys
- Storyboards
- Userflows
Product Canvas – User Journeys
Product Canvas - Design

- Wireframes
- Site- / app-maps
- Styletiles
- Design / Corporate identity guidelines
Product Canvas – Design

1. Wireframes
2. Design
3. Blueprints
   - Pages & Widgets & Theme
GOALS OF SPRINTING

- Minimize braking forces
- Increase propulsive forces
Sprinting phase

- Scrum team is responsible for the end result
- Knowledge and expertise need to be in the team
- External experts are definitely permitted
- T-shaped people
T-shaped People

- Broad base with an expertise:
  - Cross functional knowledge
  - In depth expertise

- Meaning:
  - UX designers to become full-fledged team members
  - Business Developers to become more adept at UX
UX responsibilities

- Designing the experience:
  - Information architecture
  - Content strategy
  - Interaction design
  - Usability design
  - Visual design

- Leads to:
  - Wireframes
  - User flows
  - Site maps
  - Guidelines
UX responsibilities

- Designing the experience
- Implementing the design:
  - Building pages & interaction
  - Implementing the visual design
  - Quality Assurance
- Leads to:
  - Consistent application
  - Efficient development workflow
  - Higher quality output (UX related)
  - Theming package and Page templates
UX responsibilities

- Designing the experience
- Implementing the experience

Strengthen the team:
- Supporting PO
- Supporting team members
- Help reaching that Sprint goal
- Learn
- Teach

Leads to:
- Increased velocity
- Becoming a better designer
- Better developers
- Increased quality
KEEP CALM AND CONTINUE TESTING
Usability Testing phase

- Supplements the ‘regular’ testing
- Focus on finding usability issues
- Done throughout the project
- Doesn’t have to be big and scary
So what is Usability Testing?

Basically: it’s **watching people** trying to use what you’re creating.
Usability Testing Fit

- Qualitative approach
  - Agility is about iterating and improving. Not proving points

- Accessible approach
  - Limited space for experts

- Fast approach
  - Fast results
  - Limited time to test
  - The next sprint will start any second
Rocket Surgery Made Easy

- Everyone can do it
- Spend one morning a month
- Three testing sessions
- Results on the same day

Note:
‘Heavier’ methods or hiring professionals is always better.
Usability Testing
GET ON WITH IT !!!
Every phase has 4 blocks:
- UX Responsibilities
- Dedicated UX Deliverables
- General UX Deliverables
- Alternative Needs

You don’t always need a UX expert

Nothing is new, most of is already in your projects
Getting started

1. Download
2. Adjust
3. Start
4. Tinker
   SUCCESS
Balancing UX Effort
UX Effort is not a straight line

Generally speaking:

- Most of the effort is in the first few sprints
- A professional will always be more efficient
Holistic Portfolio-wide UX approach:

- Reusable assets:
  - Company UX guidelines
  - Page templates / theming packages
- Increased UX level team members
- In house expertise
An example from our partner
"Entering an insurance claim has become an intuitive process. The user friendliness has improved tremendously."

JAN RUBINGH - IT Director at CED
Flowfabric

- Has dedicated UX designers.
- Involved from very early on
- A business analyst and a UX designer team up for project intake.
- Uses Sprint 0 as a preparation phase resulting in Analysis - Prototype
- UX remains involved throughout sprints
- QA in the form of UX review
Almost there...
Some thoughts

All projects have UX, whether we realise it or not
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UX is all about team play.

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Have fun

UX is all about team play
Thank you for watching

Question time