



Successfully Integrating UX in Mendix projects

Embedding UX in an agile way

Willem Gorisse – 27th October 2016

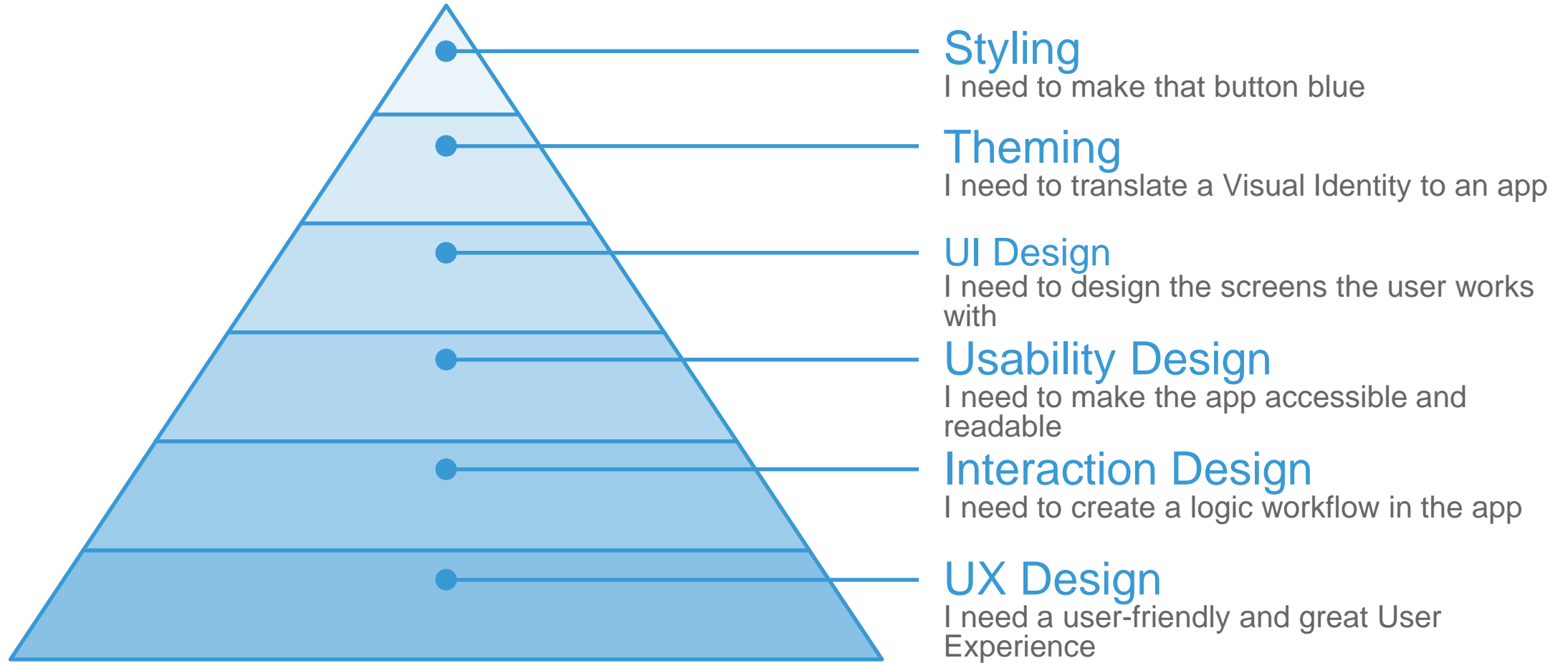
Outline

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

Prerequisite knowledge



Mendix UX Pyramid



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:

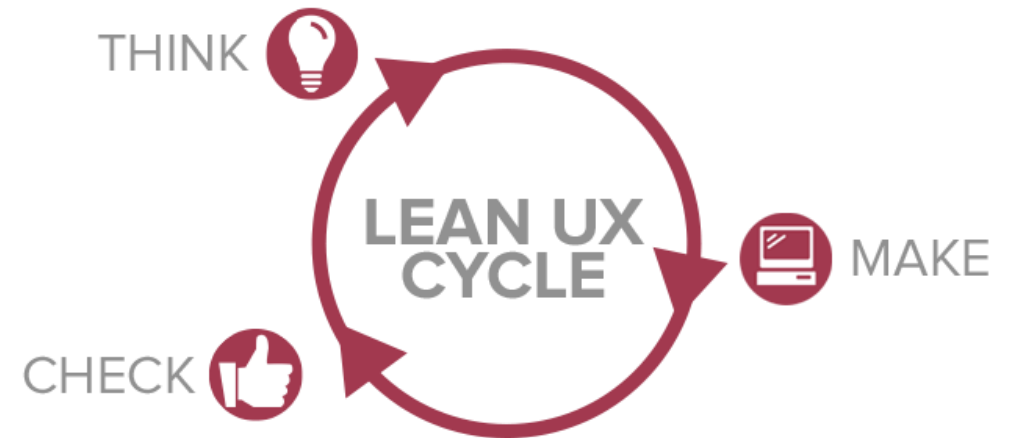
1. Denial
2. Anger
3. Bargaining
4. Depression
5. Acceptance

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

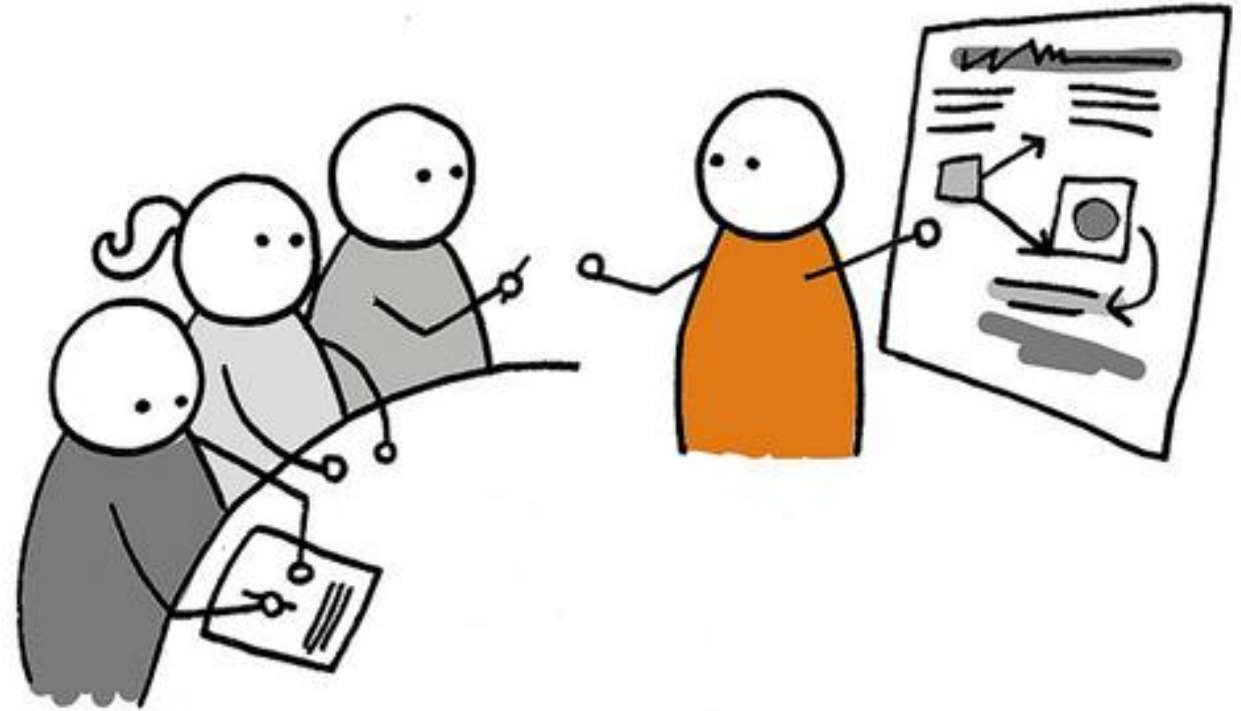
Lean UX

- ▶ 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



(A) Lean UX Manifesto

- ▶ **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.

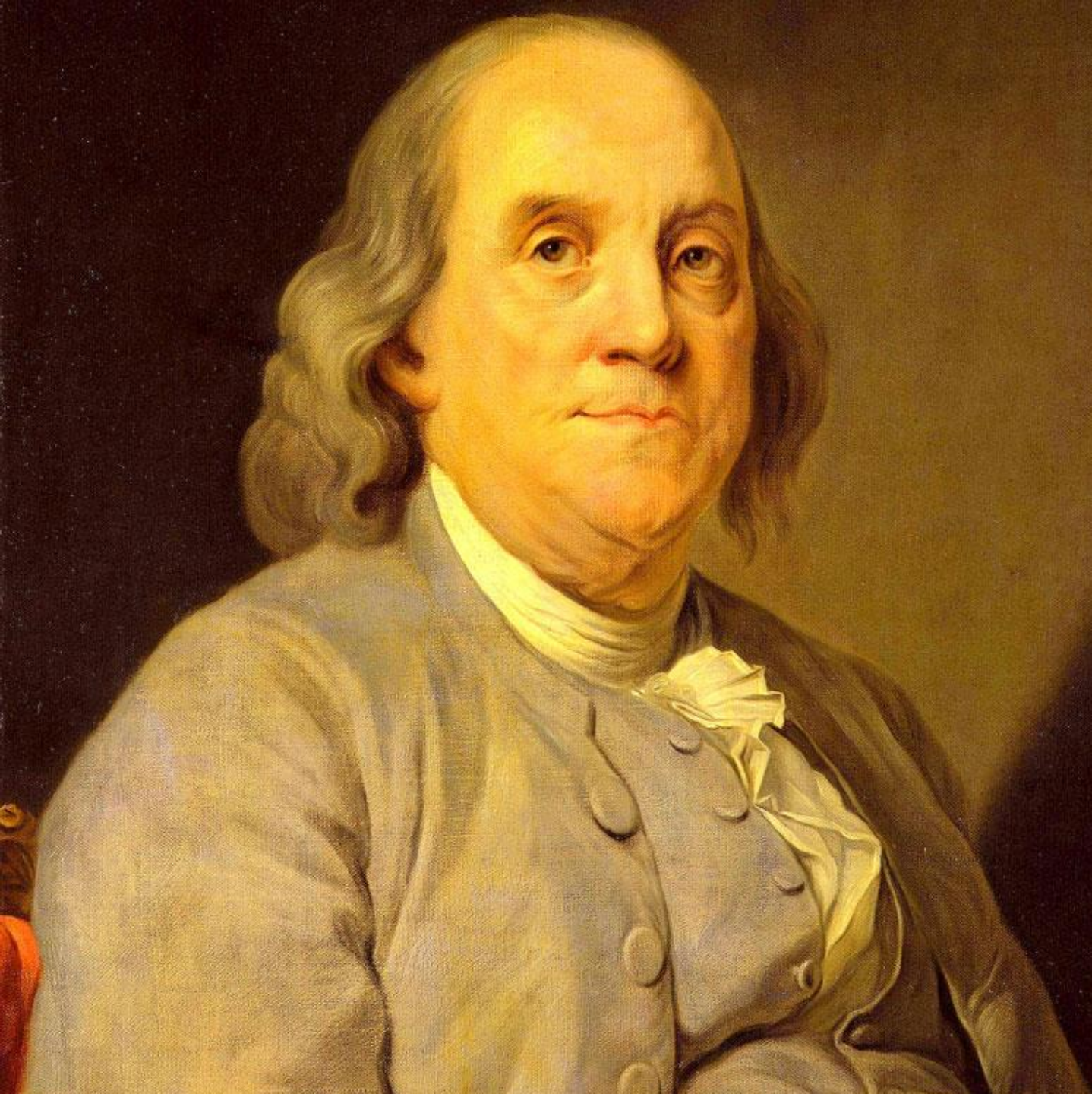
Mendix Project UX Templates

A Mendix project



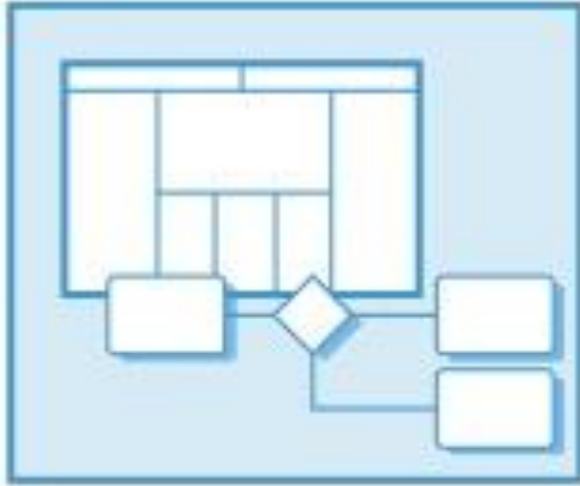
Three distinct phases

- ▶ Preparation phase
- ▶ Sprinting phase
- ▶ Usability testing phase



By failing to prepare,
You are preparing to fail
- *Graham Bell*

Preparation phase



P PREPARATION


- ▶ 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 motivation for creating the product and the positive change it should bring about.

TARGET GROUP  **NEEDS**  **PRODUCT**  **BUSINESS GOALS** **PRODUCT VISION**  **PRODUCT NAME** 

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 still apply in e.g. the form of departments.




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

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 developing the product.

Describe how the company going to profit from the product and what the underlying business goals are.
Note that profit doesn't necessarily mean currency.

Combination of the motivation for creating the product and the key functionalities that make the product stand out.



The product name




PERSONAS  **USER JOURNEYS**  **READY STORIES** 

Create provisional personas of the Target Group users by:
- Research
- Input from experts
- Input from users (Interviews)

Create customer journeys, storyboards and userflows to define how the users will realise his or her tasks. Note that userflows are the minimum. Use storyboards and customer journeys if applicable.

Create a list of ready user stories that cover at least the first sprint.

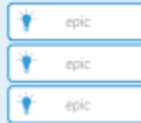




CONSTRAINTS  **DESIGN**  **EPICS** 

Describe the most important "boundaries" of the implementation.

Minimal design of the application, taking emergent design needs into consideration: Wireframes, Sitemap, Guidelines etc.

Describe the larger blocks of functionality. Basically big user stories that have yet need to be divided and detailed into user stories.



as a ... , I want to ... , so that ...

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as a ... , I want to ... , so that ...

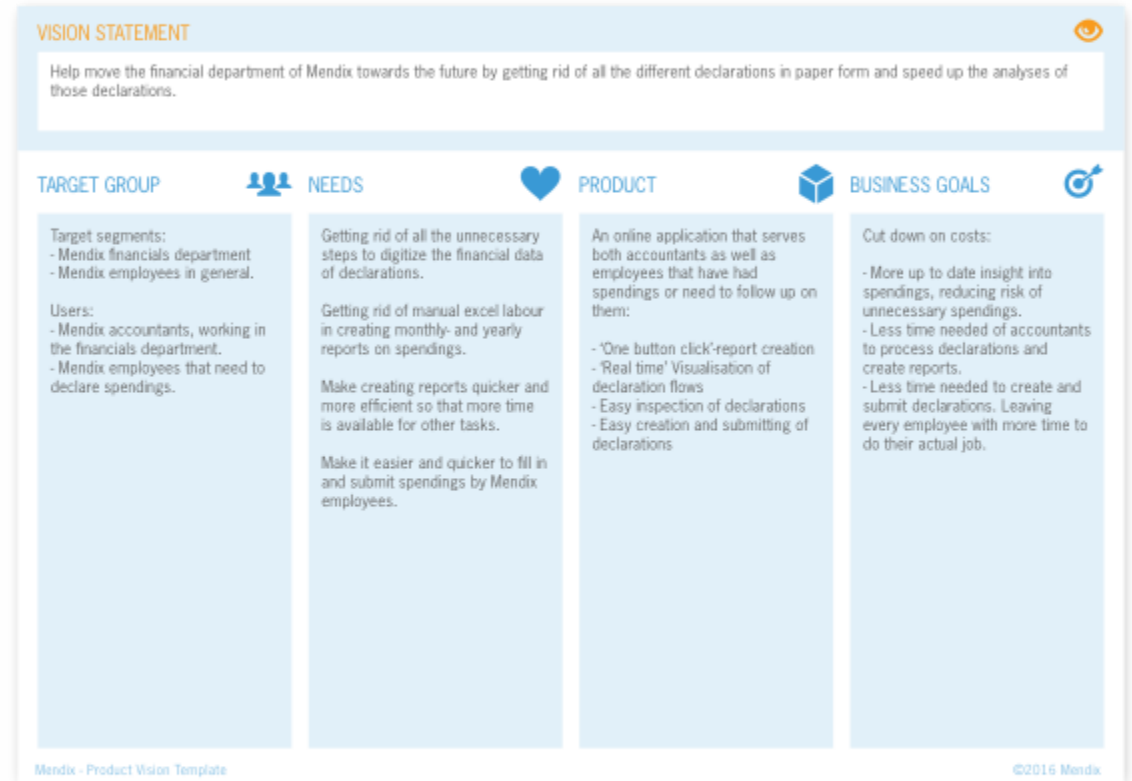
Mendix - Product Vision Template ©2016

Mendix - Product Canvas Template ©2016 Mendix

Product Vision

High level vision:

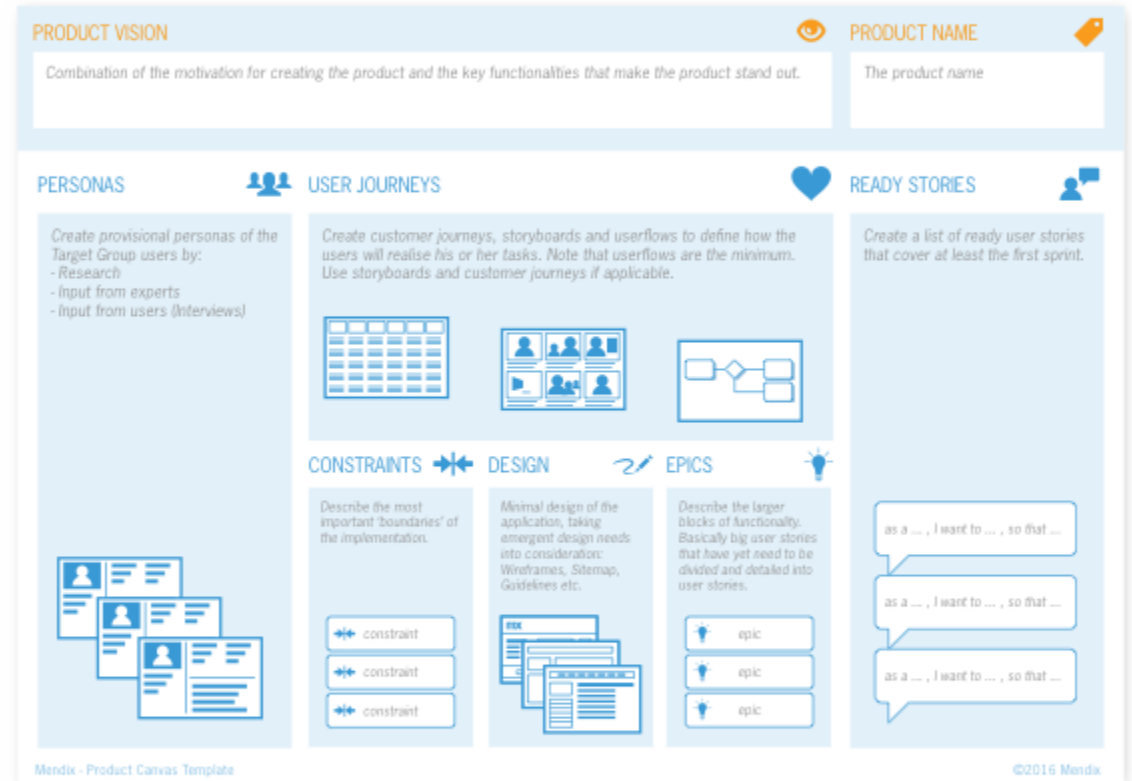
- ▶ Why are we creating the application?
- ▶ Who is our target group?
- ▶ What are their needs?
- ▶ How do we envision our product meeting those?
- ▶ What are our business goals in doing so?



Product Canvas

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



TRYOUT TIMMIE

NAME	AGE
Tim Hughes	28

JOB
Medior Developer at rAppid

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. Bigglesworth.

QUOTE
"Keep looking for the next big thing!"

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 advice 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 & FRUSTRATIONS

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

AFFLUENCES & SKILLS



FEELINGS & ATTITUDES

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

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.

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

Product Canvas – Personas



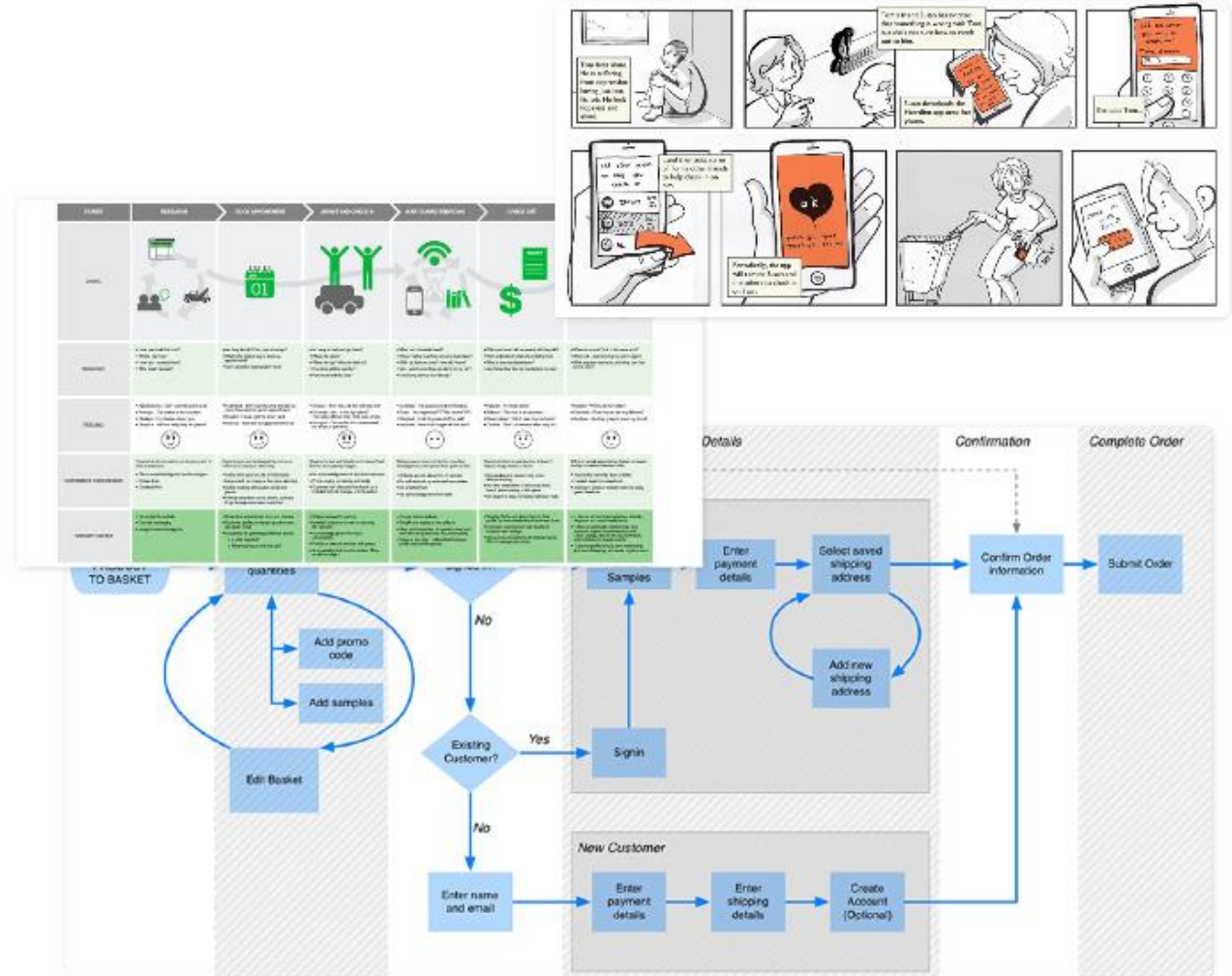
Product Canvas – User Journeys

- ▶ Bridget the gap between:

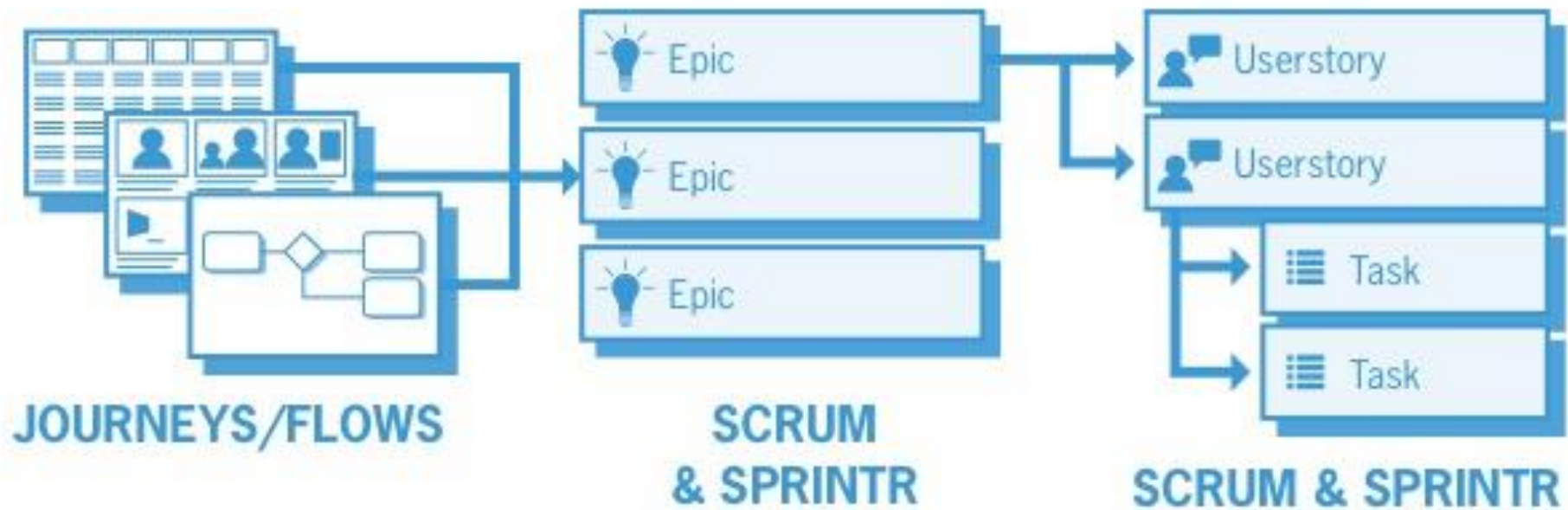
- Personas and their tasks
- How the application works

- ▶ Different levels:

- Customer Journeys
- Storyboards
- Userflows

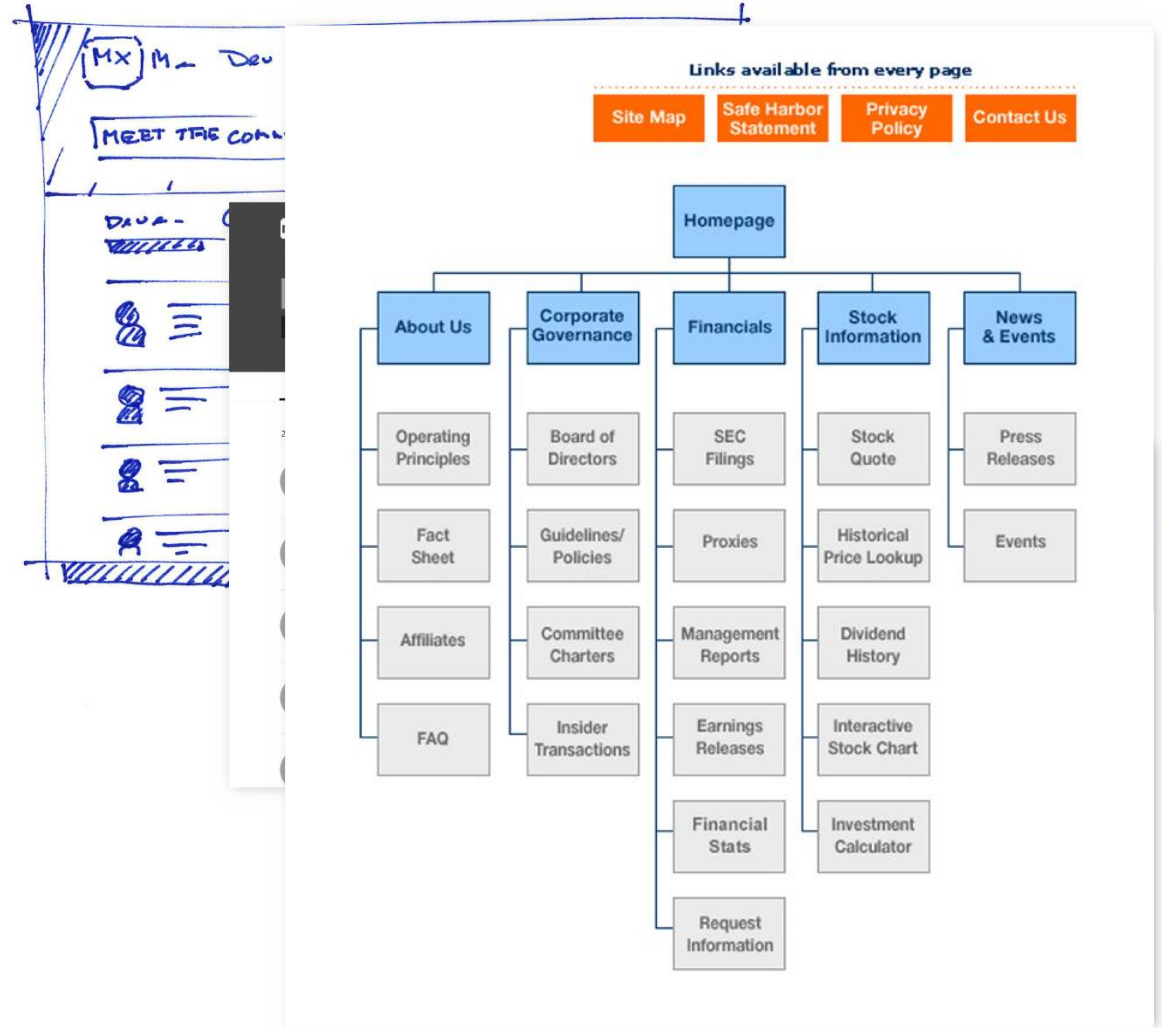


Product Canvas – User Journeys



Product Canvas - Design

- ▶ Wireframes
- ▶ Site- / app-maps
- ▶ Styletiles
- ▶ Design / Corporate identity guidelines



Product Canvas – Design



GOALS OF SPRINTING

- Minimize braking forces
- Increase propulsive forces



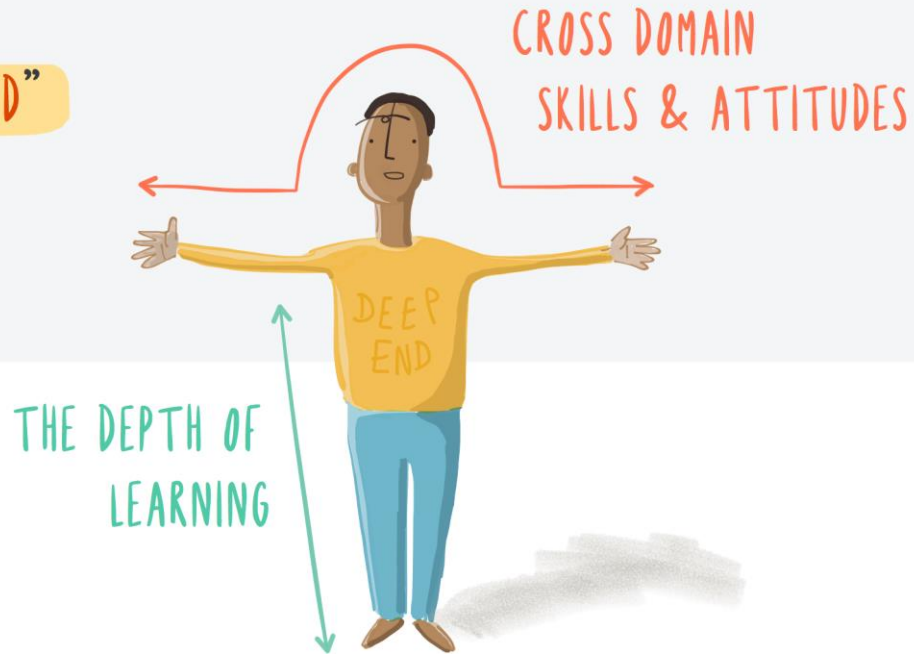
Sprinting phase



S SPRINT

- ▶ 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



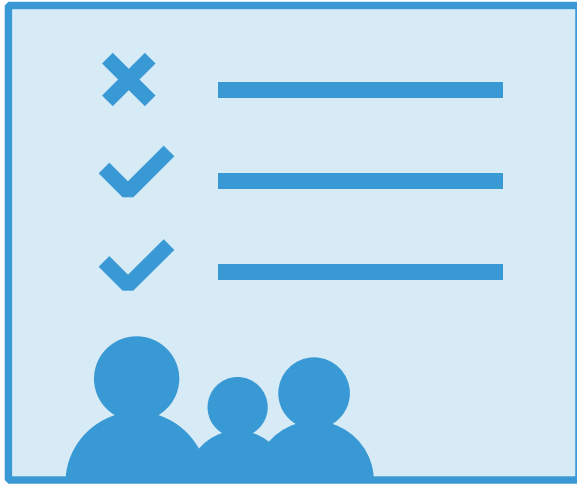
KEEP
CALM

AND

CONTINUE
TESTING



Usability Testing phase



T USABILITY TEST

- ▶ Supplements the 'regular' testing
- ▶ Focus on finding usability issues
- ▶ Done throughout the project
- ▶ Doesn't have to be big and scary

Usability Testing

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



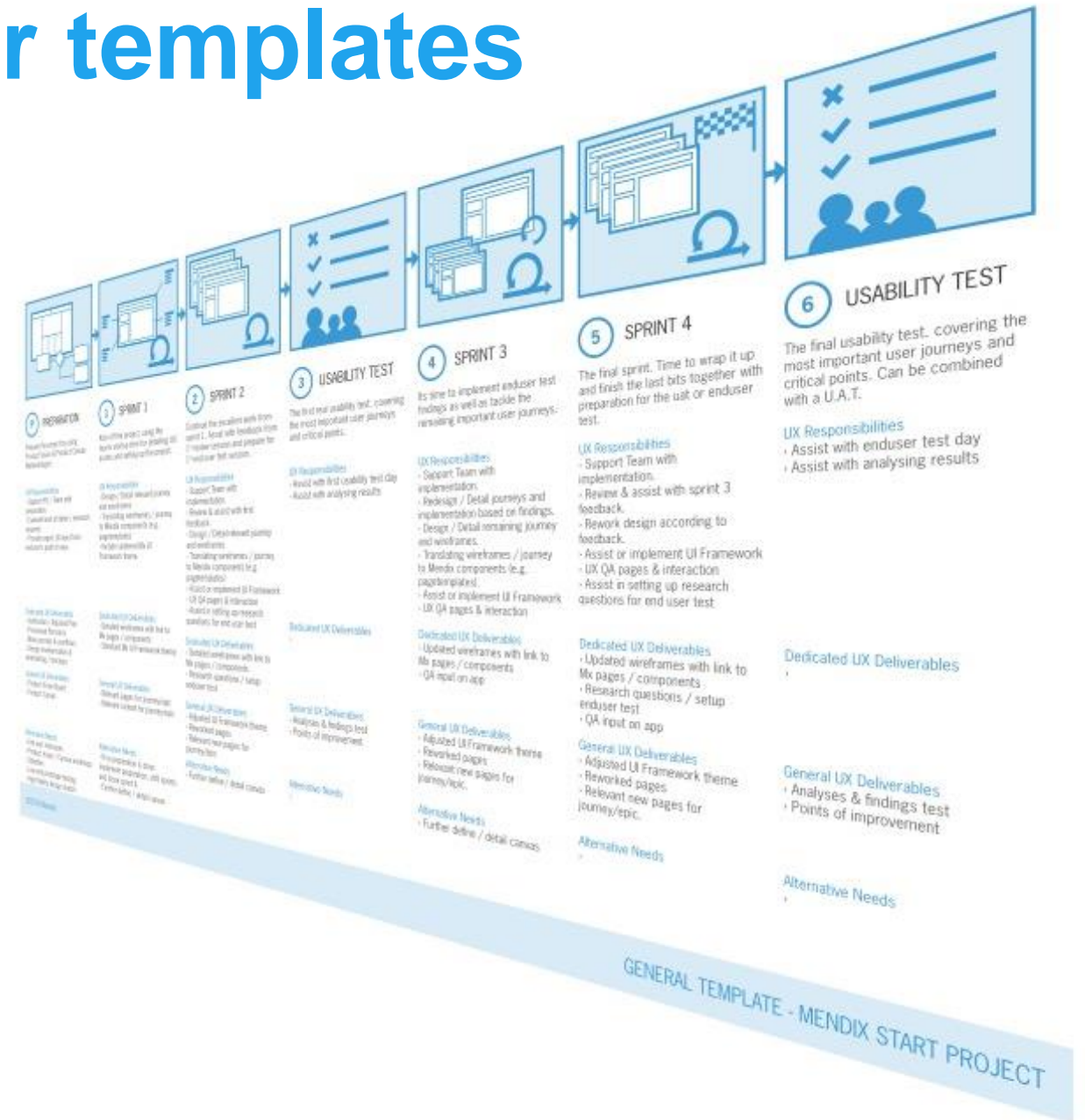




GET ON WITH IT !!!

Back to our templates

- ▶ 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

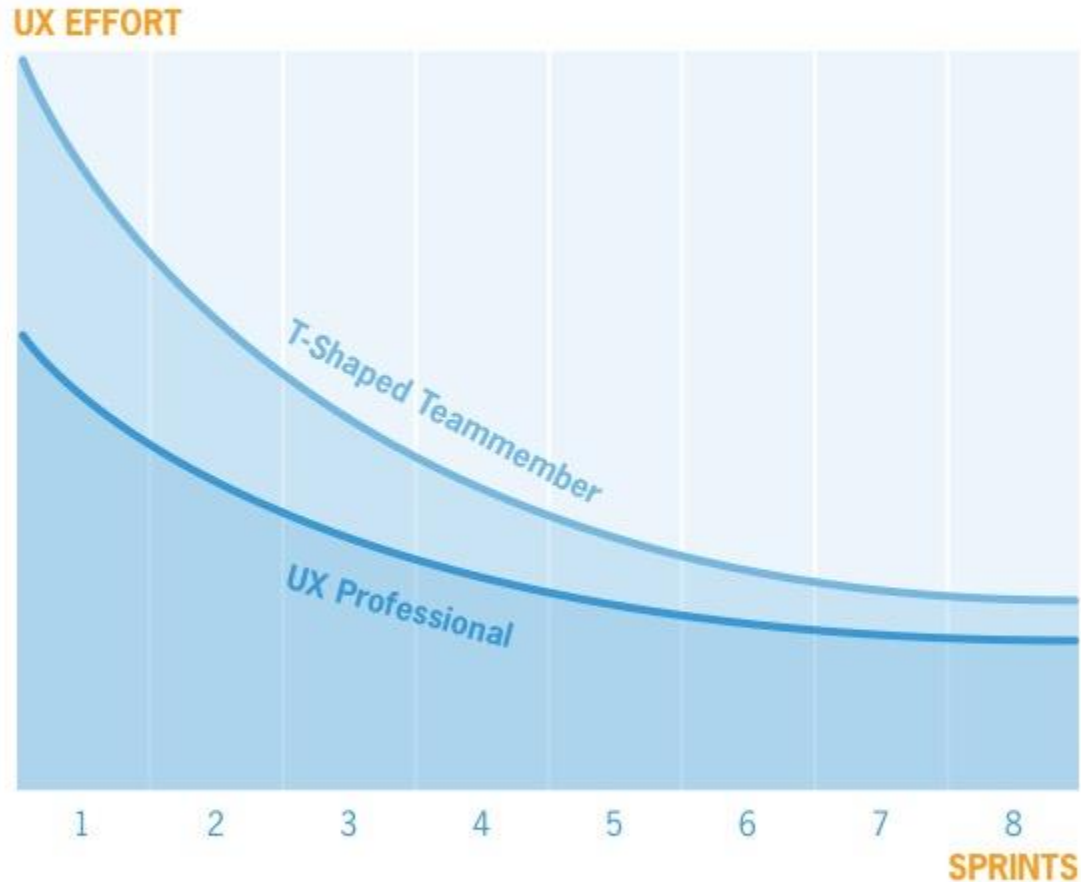


Getting started



Balancing UX Effort

UX Effort is not a straight line

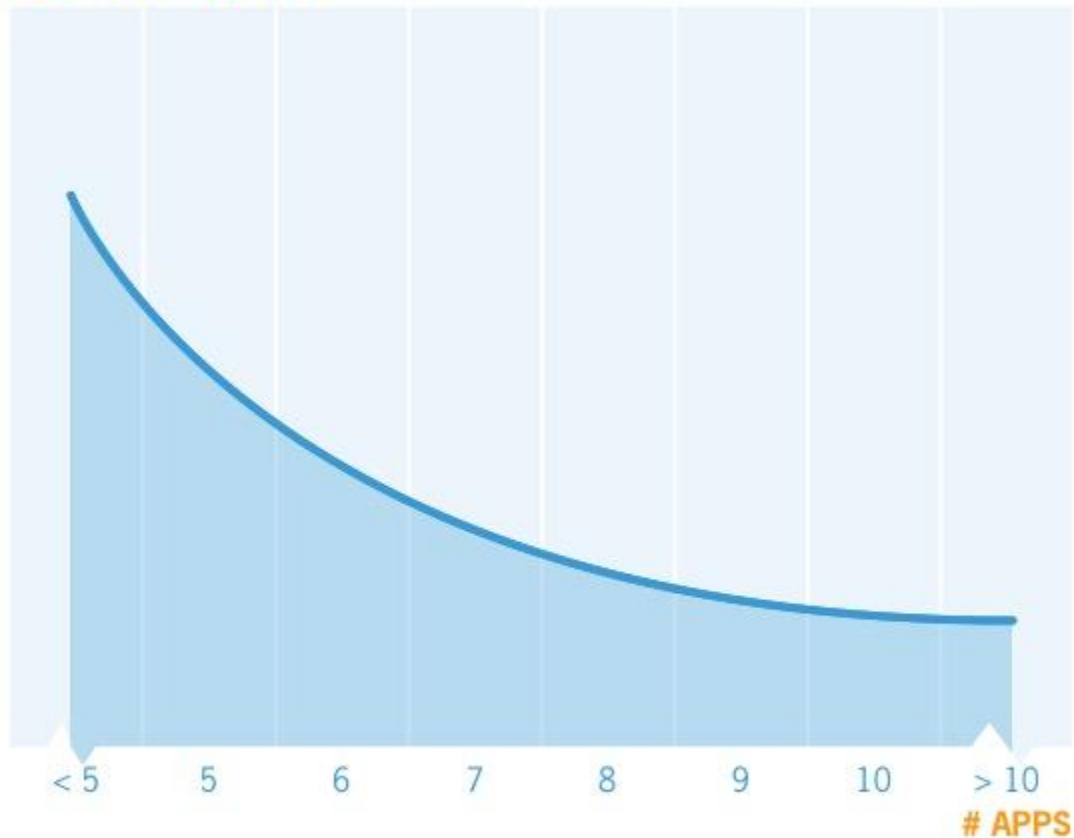


Generally speaking:

- Most of the effort is in the first few sprints
- A professional will always be more efficient

Structuring and Scaling

UX EFFORT PER APP



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

OPTIMISATION ENGINEERS

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



Some thoughts



Some thoughts



Some thoughts



Some thoughts



Thank you for watching

Question time