

Mendix Agile UX Integration

MENDIX PROJECT UX TEMPLATES - CONCEPTS AND DEFINITIONS

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Concepts and Definitions

Explaining some of the **jargon**

PRODUCT VISION & PRODUCT CANVAS

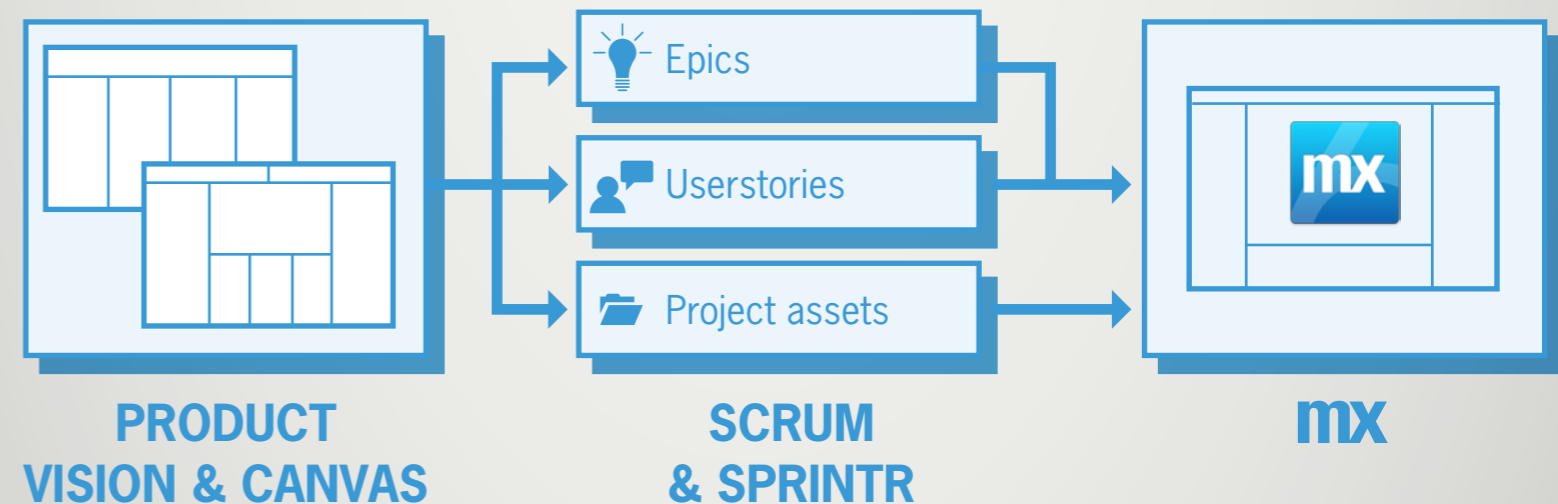
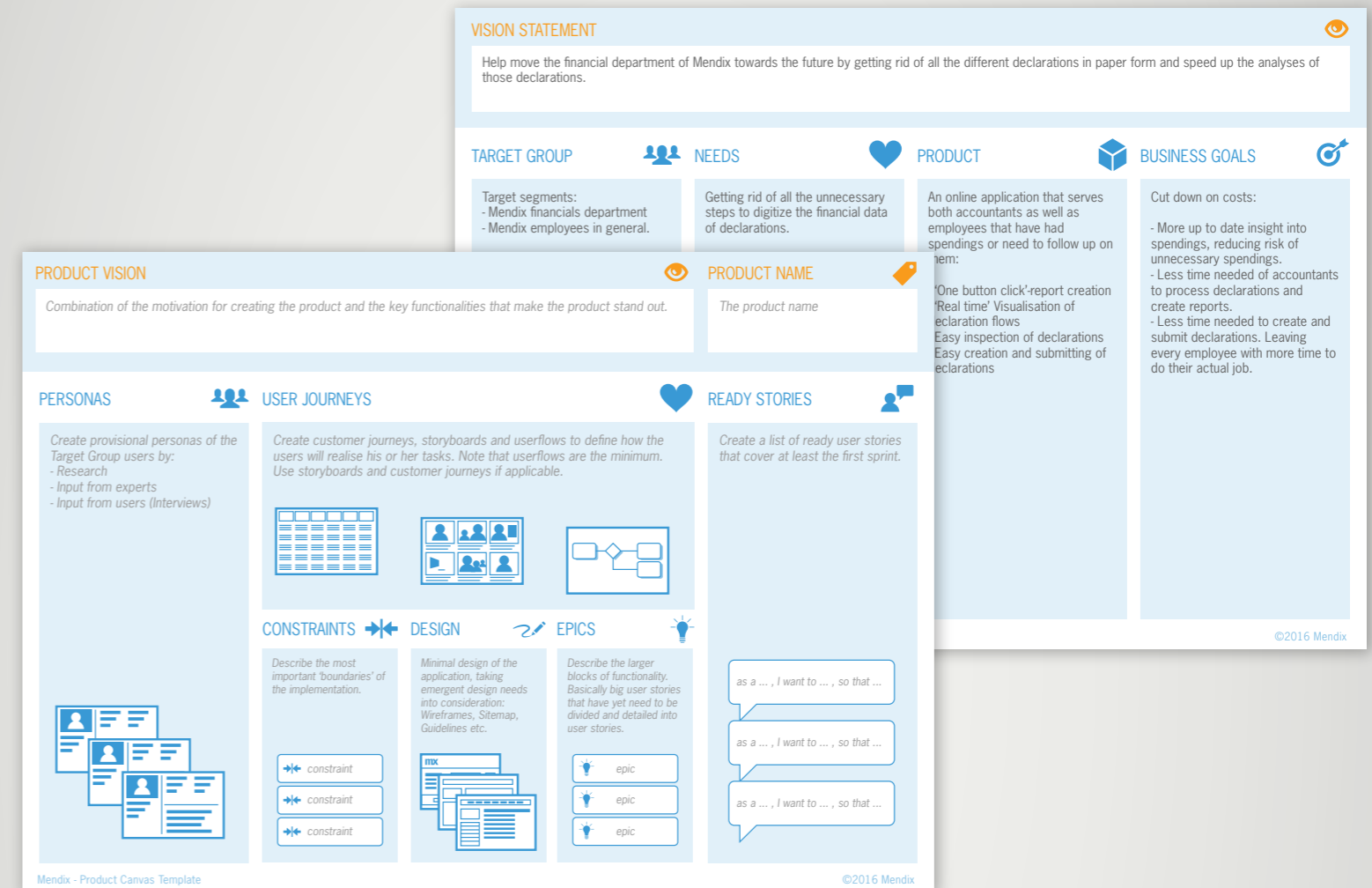
The Product Vision and Product Canvas methodologies offer a great way in both **preparation** for an Agile project as well as **complementing Scrum assets** such as userstories and epics.

A **Product Vision board** help you describe, visualise and validate your product vision and strategy. It captures the target group, user needs, key product features and the business goals.

A **Product Canvas** offers a way of combining persona's (target group), User journeys, Design and constraints with Epics and User stories. It's based on the Product Vision and is regarded as the next step in preparing for the actual sprints. From the two, the Product Canvas is the **most tangible input for the Scrum team** as it's output can directly be used for implementation.

Note that three of the six ingredients of the Product Canvas are heavily UX focussed and will often require **assistance and input from a UX expert**.

Although the Product Vision & Product Canvas is recommended as a preparation- or starting point for the actual sprints, it's also possible to keep using them throughout the sprints as a dynamic asset. It offers a great and lean way of keeping track of the big picture and goals which the application needs to address. Preventing risk of scope-creep and incoherent userstories resulting in a 'bag of features' instead of a high quality application.



Concepts and Definitions

Explaining some of the **jargon**

(PROVISIONAL) PERSONAS

A persona is a **representation** of a user, typically based off user research and incorporating user goals, needs, interests and frustrations. A persona is not an individual, rather, it is synthesized to be able to **represent a significant portion** of the total group of people.

Personas are common and considered **best practice** in software development projects who've adopted a user-centered approach. Different types of endusers (user-role) have one to several persona's at it's core to help in the design and development of the application. Giving context, behaviour and motivations to user-roles.

Two types of Personas are worth mentioning: **Traditional Personas** (statistically solid, based on extensive research) and **Provisional Personas** (Based on expert's input who've had intense and direct contact with users.) Most Mendix projects have a good fit with Provisional Personas due to time and budget constraints. It is important to realise that they **serve as a first version**, good enough to start discovering the right UX and product features.

If we look at a Mendix project we would use persona's to help define our types of end-users in the form of user-roles (the ones we use in our Scrum assets such as userstories). Finally converting them into user- and module-roles in our Mendix application model.

Not every user is the same, even though they're part of the same end-user group. If we take the example of a webshop with the user-role of 'consumer', it's fairly obvious we need more than one persona to encompass this role. Some people will be impulse buyers whilst some people will want to do a lot of research before committing to a purchase.

Aligning those different kinds of users in one coherent application is a puzzle worth solving if the webshop wants to thrive.

A typical persona

THE NUMBER CRUNCHER

NAME George Hamilton **AGE** 36

JOB Accountant at Mendix

STATUS Married with 2 children

ABOUT
George is a very positive and busy person. Always looking for ways to improve both his professional as well as his personal life. He enjoys helping out his colleagues and spending quality time with his kids.

QUOTE
"No more cutting down trees just for reporting's sake"

OVERAL GOALS
George needs to keep all the financial flows of the company well documented and almost instantly available for analyses and reporting. He would love to do this in the most efficient and modern way possible.

TASKS & RESPONSIBILITIES
- Collect all internal and external fin.documents
- Transfer all financial data into the central system
- Generate reports for management
- Notify colleagues when incoming docs are over-due

PAIN POINTS & FRUSTRATIONS
- Easy to make mistakes - manual typing
- Lot of documents too late for reports
- Too many locations to get my input from
- Why are we still using paper?
- Have to work late every month for monthly report creation

AFFLUENCES & SKILLS
JUST LEARNED EXCEL — SOFTWARE SAVY
CONSERVATIVE — INNOVATOR
USES CALCULATOR — MATH GENIUS
ACTUAL PEOPLE — FACEBOOK FAN
DESKTOP TYPIST — MOBILE GURU

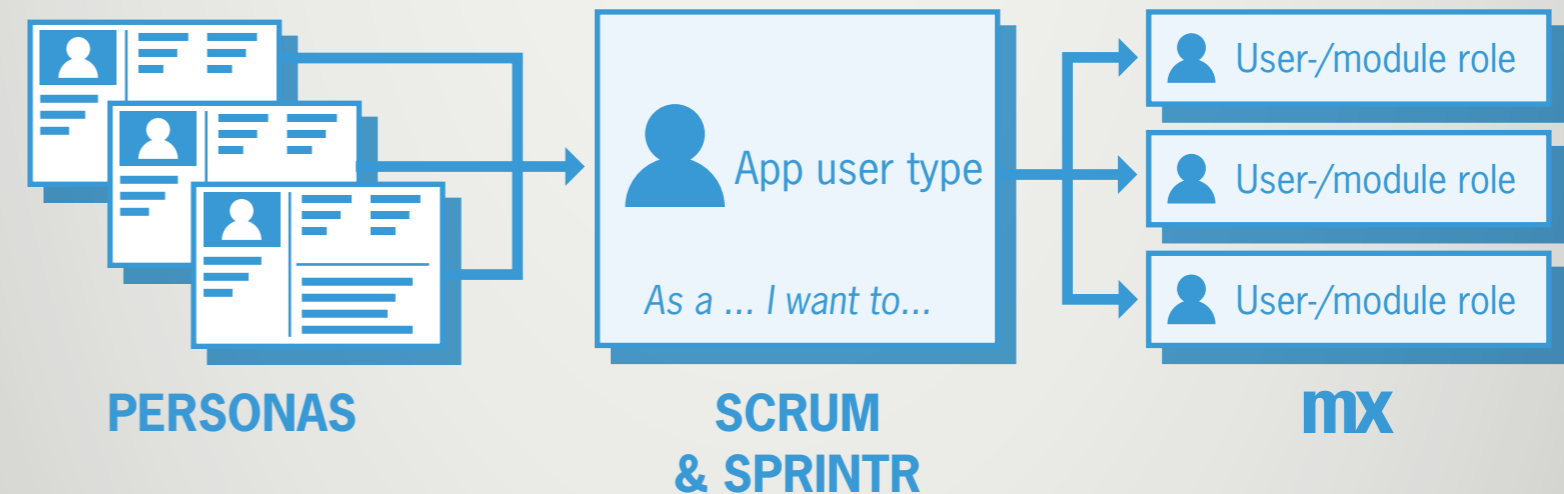
ENVIRONMENT
George works in his office with 3 colleagues most of the time using his laptop. Sometimes he'll work next to other colleagues if they need assistance or are behind on their work.
Due to his children, it's impossible for George to do any work outside of the office.

FEELINGS & ATTITUDES
- Likes to work with people
- Loves number crunching and making reports
- A bit sceptical about current systems
- Wishes to innovate the department
- Wish colleagues would be notified if their documents are due

INFLUENCES
- Talks a lot with fellow accountants at conferences
- Subscribed to a lot of financial magazines
- Always has the latest apps on his phone
- Wants fast and digital tooling

Mendix - Provisional Persona Template ©2016 Mendix

The process from persona to user- and module-roles



Concepts and Definitions

Explaining some of the **jargon**

USER JOURNEYS AND USERFLOWS

A user journey is a **series of steps which represent a scenario** in which a user might interact with the application that is being designed and developed. It helps to **understand user behaviour**, identify possible **high level functionalities** and how the user is going to use them. It's a great and fast way to work out how the application is going to help in achieving tasks and goals.

A user journey bridges the gap between persona's (their tasks, frustrations and motivations) and how the application should present and implement the needed functionality.

User journeys can come in different shapes and **different levels of abstraction**. Some interesting examples (from high to low in abstraction):

1. Customer Journeys:

Used to explore and map out the actual experience a customer has with a service or application. Often has a high level of abstraction and used in Marketing focussed projects.

2. Storyboards:

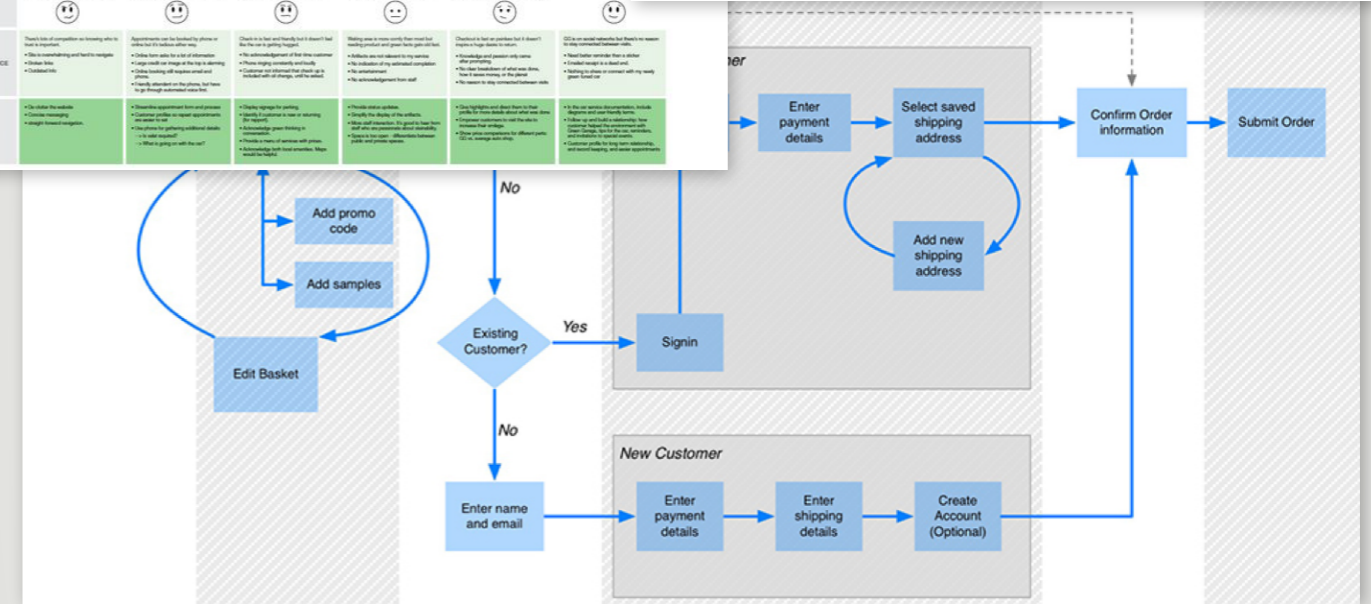
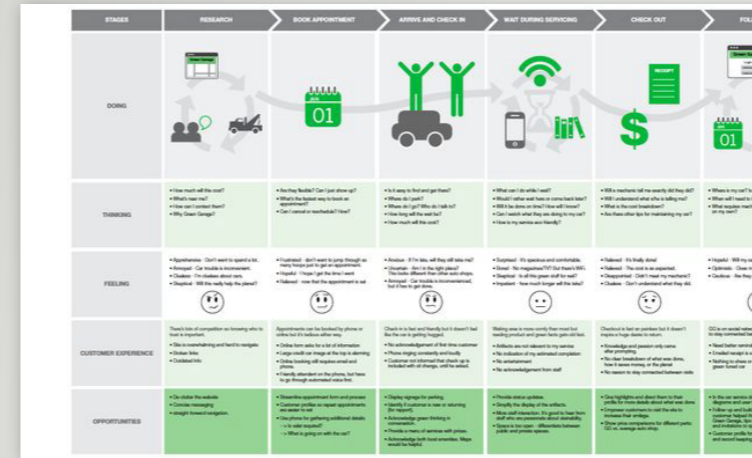
Using simplistic illustrations together with minimal amount of text. Very usefull in combining persona's, their surroundings and the tasks they're trying to accomplish.

3. Userflows:

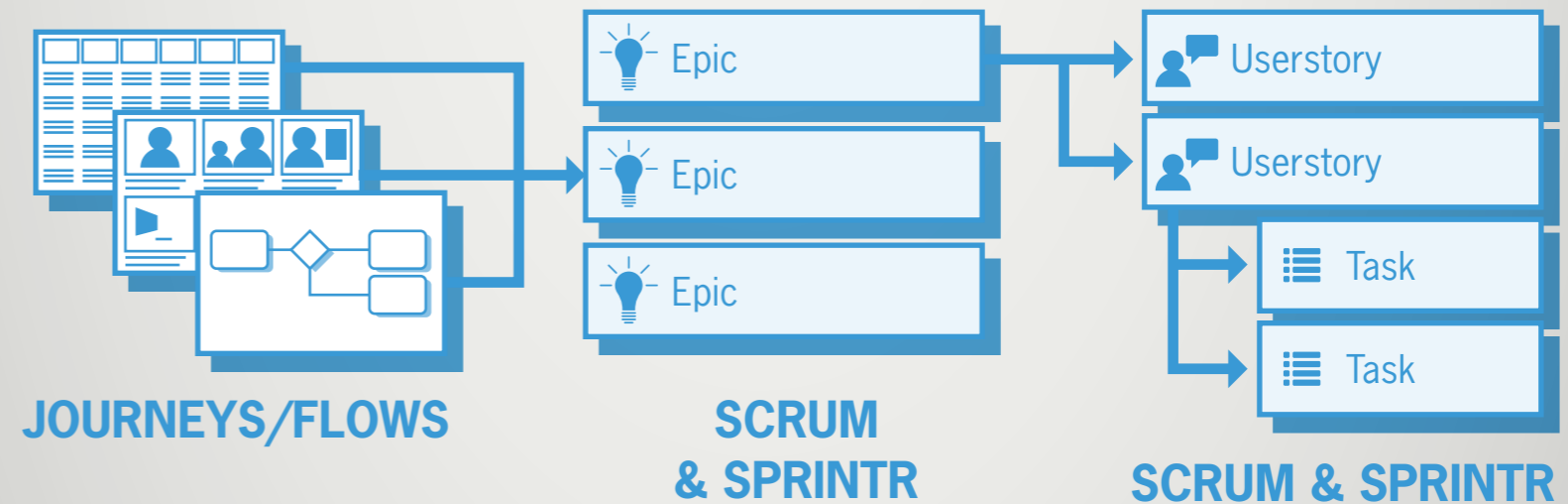
A schematic and concrete representation of the steps and choices a user encounters when trying to accomplish a task. Often used for mapping out functionality before coding the application.

Most Mendix projects have a need for userflows as they're concrete, easy to create and very usefull for team discussions and preparation. They are limited however in their reach, if for example usage surroundings or device choices play a part, or some stakeholders need convincing: you should invest time in storyboards as they can communicate a bigger picture

Customer journey



Userflows



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STYLETILE

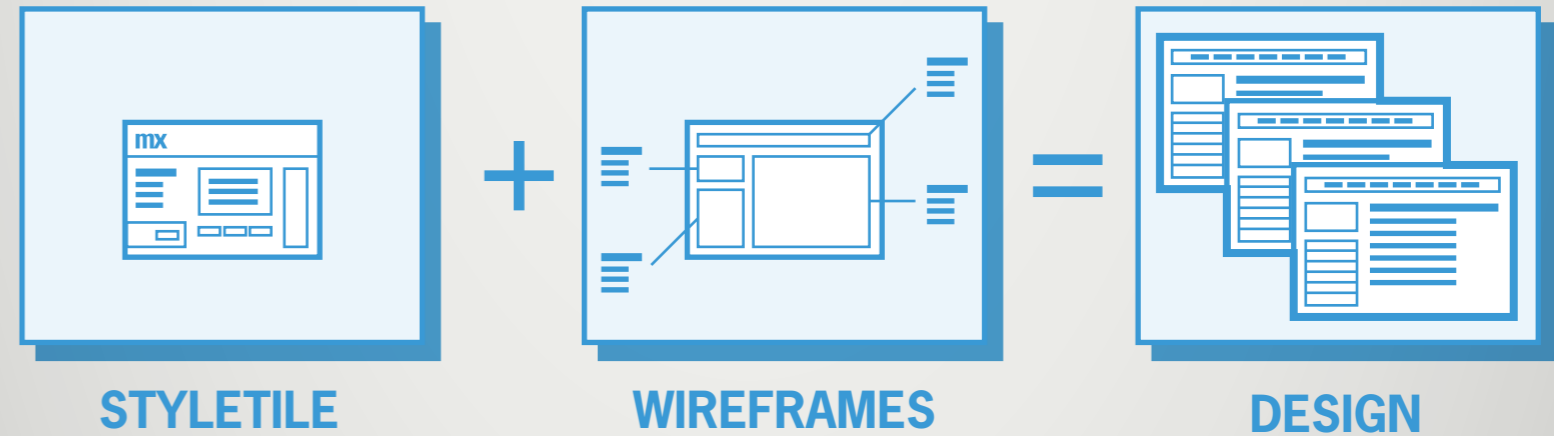
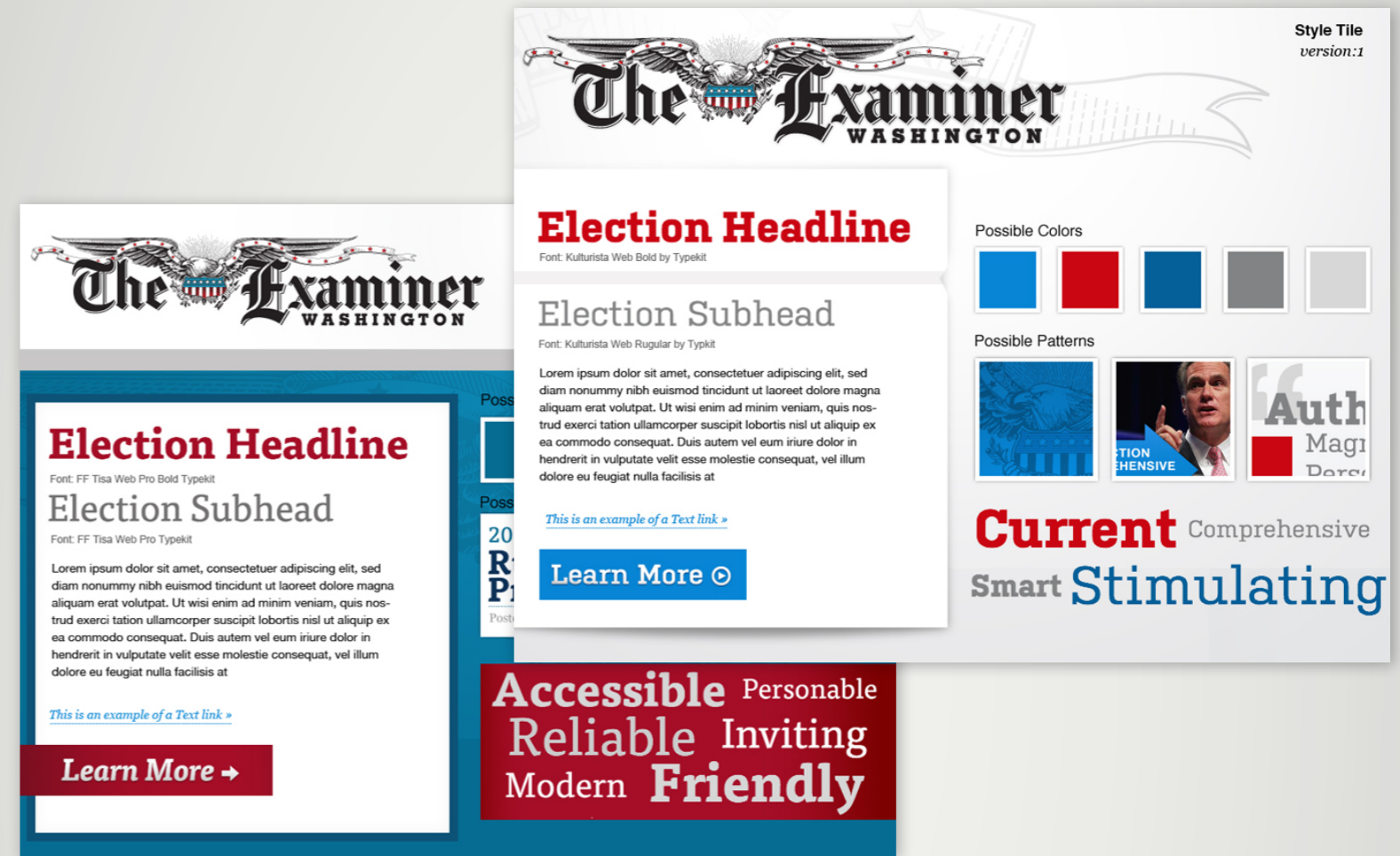
Optional project asset

Styletiles are a **design deliverable** consisting of fonts, colors and interface elements that communicate **the essence of a visual brand** for the web. They help form a **common visual language** and provides a catalyst for discussions around preferences and goals. They bridge the gap between moodboards and high fidelity wireframe comps.

Using this approach **prevents a lot of misalignment** in the team or with stakeholders and prevents rework in the project with minimal effort. Switching to another visual branding and visual language in the middle of a project can be a (time-) costly affair and can easily be prevented.

Note that if extensive Corporate Identity guidelines exist that also cover online- and application branding, a styletile won't be necessary as an asset. Using those guidelines in conjunction with wireframes will do the trick as well.

“Styletiles establish a direct connection with actual interface elements without defining layout or designing the actual page.”



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WIREFRAMES

A wireframe is an illustration of a page's interface that specifically focuses on space allocation and prioritization of content, functionalities available, and intended behaviors. They serve as **a blueprint for pages** that need to be build.

We can distinguish 3 levels of fidelity when dealing with wireframes:

1. low fidelity wireframing:

Outlining the bigger picture, elements and structure. Can be made with as little as pen and paper or a whiteboard with markers.

2. medium fidelity wireframing:

Adding more detail to the wireframe. Often created with software tools such as Axure or Balsamique.

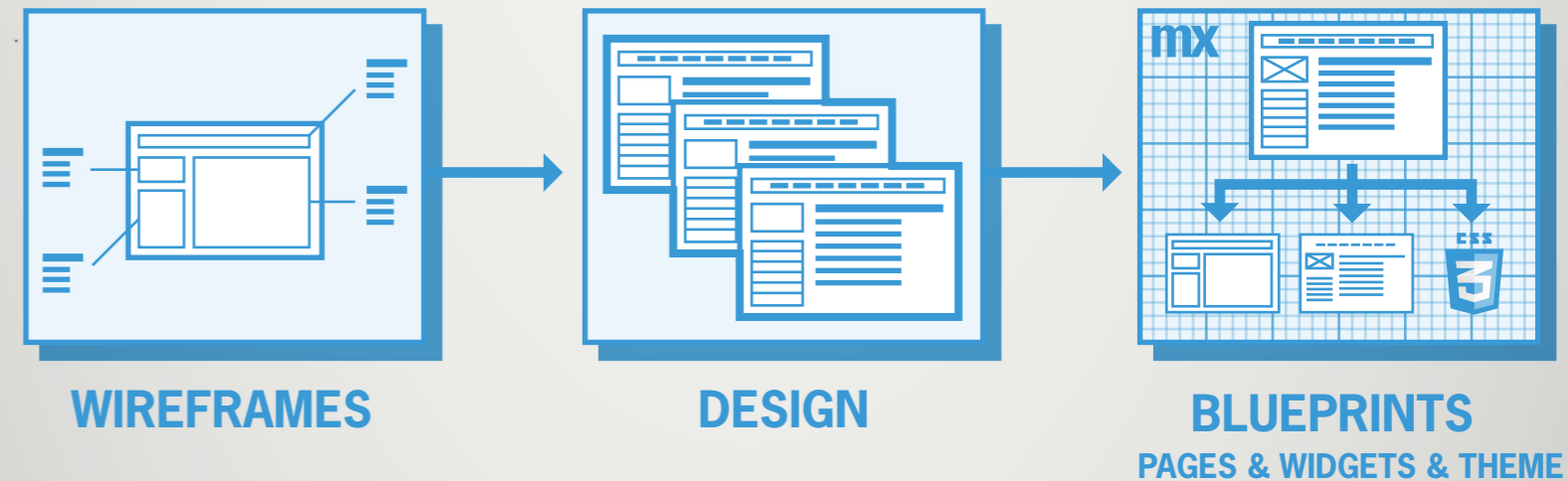
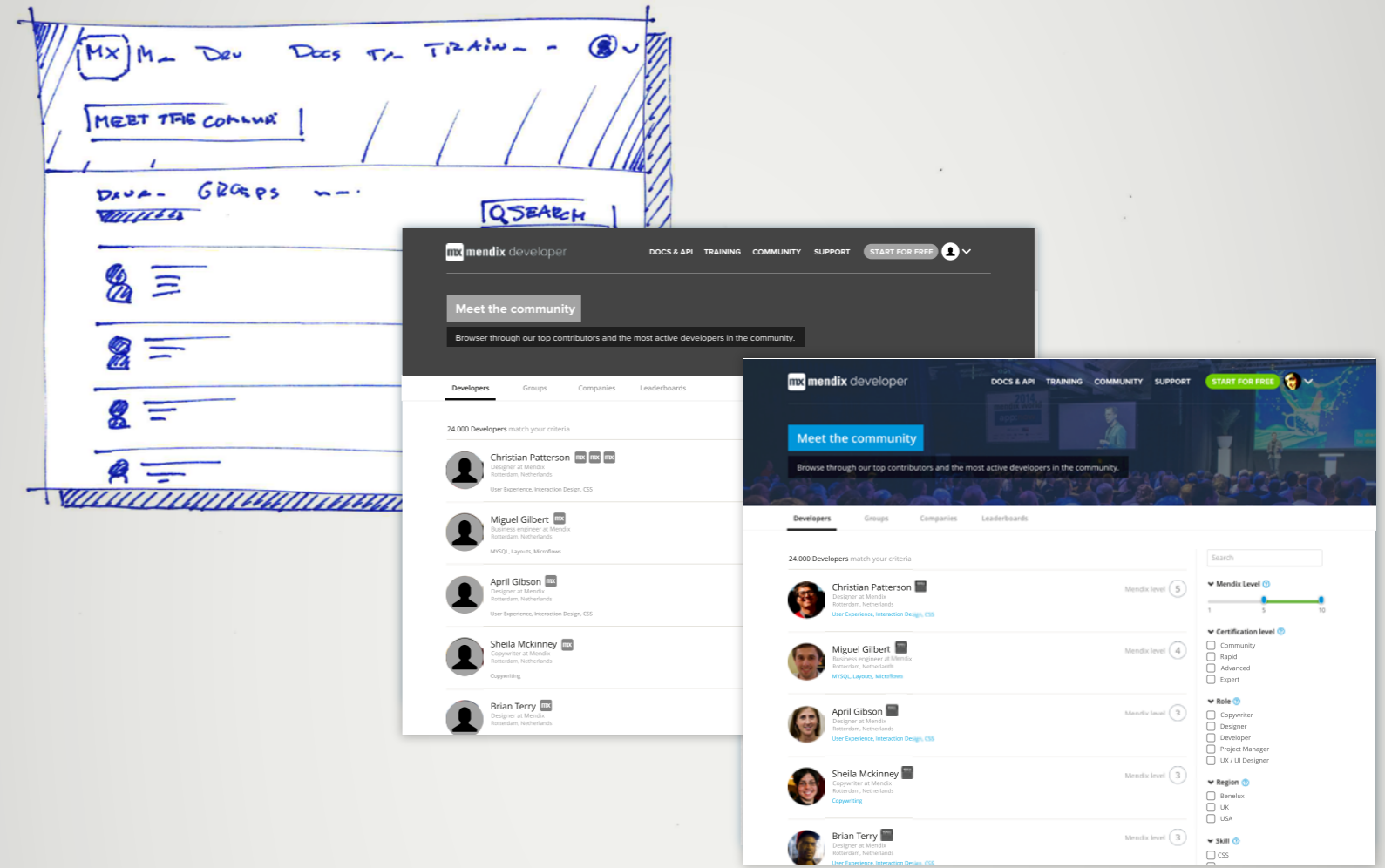
3. high fidelity wireframe or mockup:

A more realistic representation of a page, including details as well as graphic design and branding.

Creating wireframes is **a first step towards opening the Mendix modeler**. They serve as a thinking and brainstorming platform as well as a reviewing tool for the application. Aligning the team to the pages and functionality that needs to be build.

Rule of thumb is to start at low fidelity and move up a level if the situation requires it. For example: when working on an application that has little need for UX, the standard pagetemplates and Mendix UI Framework will already provide most of what's needed. A sensible approach would be to create low fidelity wireframing in preparation and create medium fidelity wireframes during sprints, linking the items to pagetemplates and Mendix components.

Different types of wireframes



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USABILITY TESTING

Usability testing is a type of testing that revolves around **watching people try to use** what is being created with the intention of:

- a. **Making it easier** for people to use or
- b. **Proving that it's easy** to use

The focus of usability testing is not on finding bugs but on **finding usability issues** that can be improved in a next iteration. Hence usability tests are usually done throughout a project.

There are two main categories of usability test methods:

1. Quantitative methods:

Methods that use extensive research sessions and statistics **to prove things** by measuring.

2. Qualitative methods:

The main focus is **improving the product** by collecting insight and not provide proof. As such, qualitative methods are more accessible to less experienced researchers and are easier to implement in agile processes.

It comes as no surprise that Mendix projects need **a fast, accessible and qualitative approach**.

Since most Mendix projects have very limited time and resources available, finding the best fit with a usability testing method can be challenging.

Steve Krug's 'Rocket Surgery Made Easy' is one of the gems with an excellent fit due to the 'do-it-yourself' nature, a meagre investment of one morning a month and the fact it's easy to learn for everybody.

