

ABI GEDYE BA HONS

UX / UI CASE STUDY

MY ROLE IS ALL OF THIS

OpenCRM is a cloud hosted CRM SaaS software application. The company software add-ons have been developing this product for 11 years.

I was the lead designer for the OpenCRM's version 4 project between 2013-2016. Working alongside the Managing Director and System Architect, Technical Director and other staff members, I have helped illustrate the team's ideas and come up with new UX / UI design solutions.

As the product is currently under development, my role was to represent the user (from my knowledge based on being a project manager for them for 8 months) create style guides/rules, liaise with management and test the actual product 'OpenCRM V4' - all very exciting :-)

THE 'DASHBOARD'

In this case study I am going to use the dashboard as an example to walk you through some of my thought processes; so you can get an idea of who I am, what I do and how I could be an asset to your team.

SO WHAT IS IT?

The dashboard is a module within the CRM package where a user - normally within a management role - can get an overview of their company's comings and goings; such as finances, staff progress, pipeline activity and other administrative tasks.

The dashboard is customisable at user level which is controlled through their account settings. Therefore, users of the system could view a range of widgets, or just one or two, meaning the design needs to be responsive to a dynamic range of content.

Each widget is made up of many UI elements to illustrate the data they contain such as grids, charts, graphs, lists and fields. Each widget also needs a title, to be moveable within the screen, and have a way in which the user can action next steps in their workflow straight from the widget itself.

It was my role to take the old version of a feature and create a better, more intuitive design for it. My process is quite broad, using many processes within UX and UI design principles to achieve results.

IN THE BEGINNING THERE WAS...

Just to give you a little bit of background to the early stages in the project, here are some of things I did:

ART CONCEPT

OpenCRM V4 will be a much cleaner user friendly version of the product. Inspired by other great software out there, we have tried to learn from our competitors and design and develop a fresh, crisp & modern enjoyable new CRM experience for our customers.

RESEARCH

In the early days, I did a huge amount of design research. Drawing inspiration from Swiss style design, Metro, Android and Apple to name a few. But in general as the project has progressed, so has the software UX / UI design so I have always made a keen effort to keep my ears to the ground on new and exciting UX / UI ideas via social media, the internet and magazines.

STYLE

I came up with examples of good style elements for management to choose from. I helped advise management on decisions for which fonts, colours and general style elements we were going to go for. Keeping in mind the whole company brand too.

ICONS

I have designed over 150 icons all within the same style for this project.

LAYOUTS

I have had to mock up and wire frame 1000s of layouts to detail each aspect of the large and varied software interface.

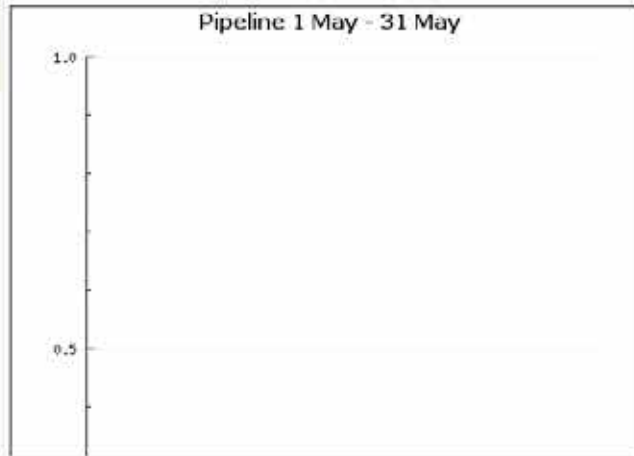
RESPONSIBILITY

Although we have worked as a team throughout this project, my responsibilities have increased. I now oversee all of the design testing and quality control of the look of OpenCRM V4. (As well as being responsible for the look of all of OpenCRM's marketing documents, company website, sales collateral etc which is all in line with the style of V4)

EXAMPLE OF THE DASHBOARD COMPONENTS IN OPENCRM V3

Switch to grid column view

Full view (drag columns)

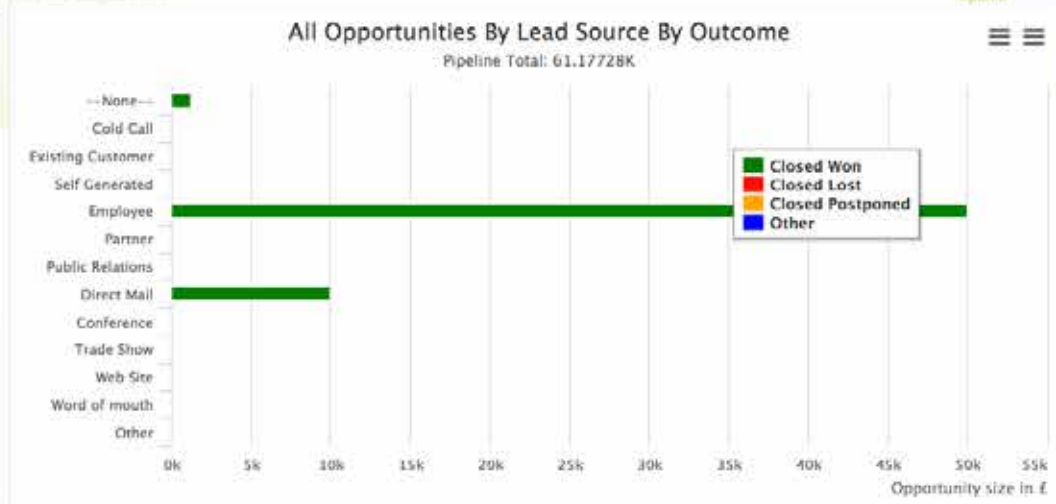


Open [\[Print\]](#)

Target Breakdown: 01 May - 31 May	
Target:	£0.00
New Business:	£0.00
Renewal:	£0.00
Other:	£0.00
Combined Total:	£0.00
Pipeline: 1 May - 31 May	
Target Difference:	£0.00
New Business:	£0.00
Renewal:	£0.00
Other:	£0.00

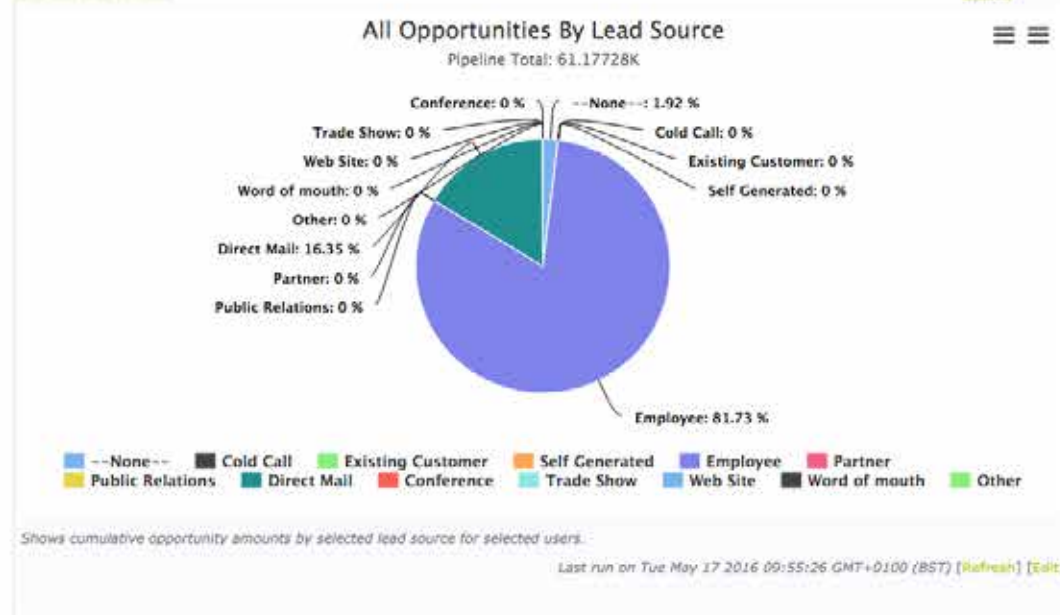
Open [\[Print\]](#)

Full view (drag columns)



Open [\[Print\]](#)

Click and drag to zoom



Open [\[Print\]](#)

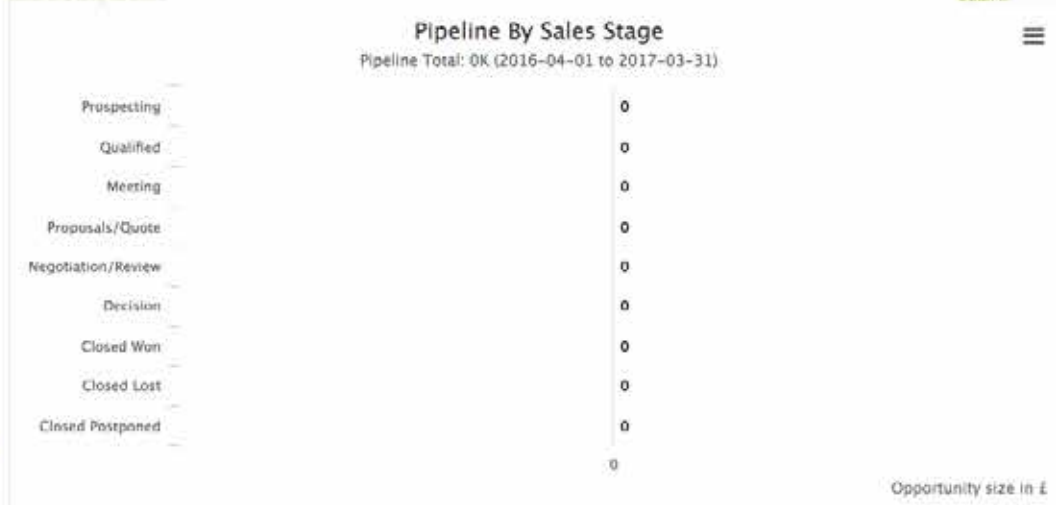
Shows cumulative opportunity amounts by selected lead source by outcome for selected users where the expected closed date is within the specified date range. Outcome is based on whether the sales stage is Closed Won, Closed Lost or any other value.
Last run on Tue May 17 2016 09:55:26 GMT+0100 (BST) [[Refresh](#)] [[Edit](#)]

Click and drag to zoom



Open [\[Print\]](#)

Click and drag to zoom



Open [\[Print\]](#)

Click and drag to zoom

Search

Last Viewed

- Administrator
- Traditional Fudge - Training Session
- Soilent Solutions - 10 Dell computers
- The Perfect Figure Ltd - Data Integration

Links

- Twitter - OpenCRM
- LinkedIn - OpenCRM
- Sales Forecast
- Support Dashboard

Messages

Administrator:
 Welcome to OpenCRM
 t: 01748 473000
 e: support@opencrm.co.uk
 Add/Edit Message

Target

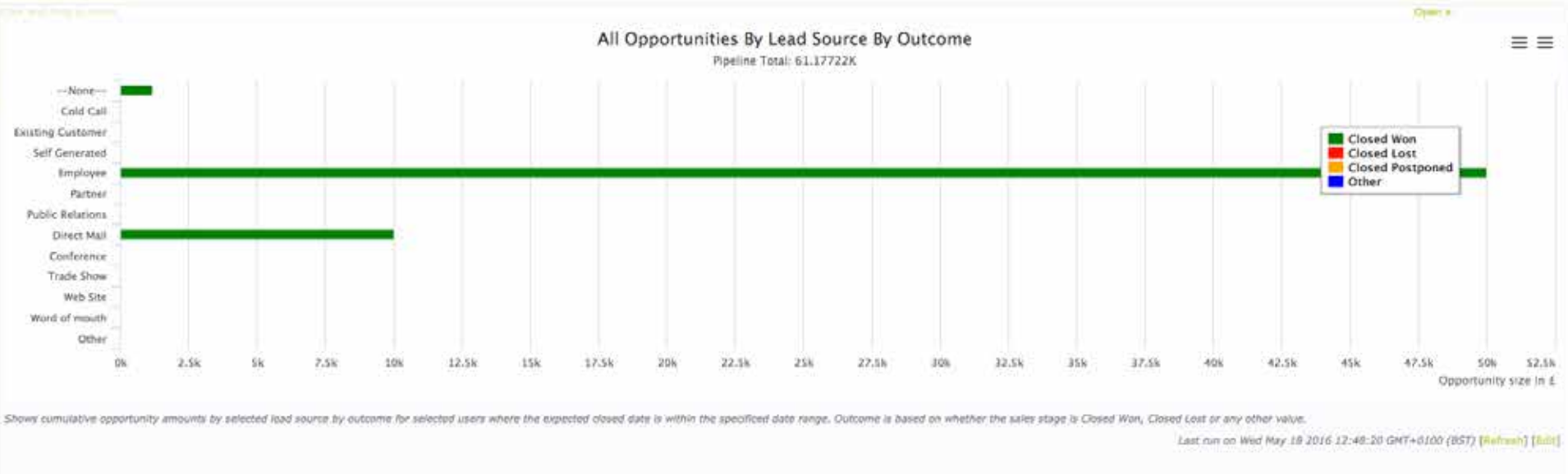


New Activity

Subject: []
 Start Date & Time: 18-05-2016 12:48
 Activity Type: Cell
 Duration: 0 : 05
 Save

Support Desk

Switch to two column view



Lead Status Report

Lead Status	First Name	Last Name	Company	Email	Lead Source
	Mario	Pompuldink	Pompuldink Sink's Ltd	Hp@psl.co.uk	
		Kuan Yew	Kuan Yew Group	chiefexec@KWG.com	
--None--	Tanya	Fudge	Traditional Fudge	TanyaFudge@hotmail.com	--None--
--None--	Tim	O'Toole	Linkpedia	sales@linkpedia.com	--None--
--None--	Janet	Dawson	FiveShare	jdawson@fiveshare.co.uk	--None--
--None--	Elizabeth	Brown	X-ceed Inc 99	elizabeth_brown@company.com	--None--
--None--	Peter	McCann	Devspot Ltd	sales@devspot.co.uk	--None--
Attempted to Contact	Jason	Warwick	Radio Frequency Testing	jason.warwick@radiofreq.com	--None--
Attempted to Contact	Howard	Jones	Jones and Sons	Jones@Jonesandson.com	Web Site
Attempted to Contact	Frank	Rizzo	Rizzus Of Portsmouth	frank@rizzus.co.uk	Public Relations
Attempted to Contact	Craig	Holden	Financial Consulting Group	craig@fcglimited.com	Word of mouth



EXAMPLE OF THE DASHBOARD WITHIN THE INTERFACE IN OPENCRM V3 - ANNOTATED

Search

Last Viewed

- Administrator
- Traditional Fudge - Training Session
- Soilent Solutions - 10 Dell computers
- The Perfect Figure Ltd - Data Integration

Links

- Twitter - OpenCRM
- LinkedIn - OpenCRM
- Sales Forecast
- Support Dashboard

LOGO

Messages

Administrator:

Welcome to OpenCRM

t: 01748 473000

e: support@opencrm.co.uk

Add/Edit Message

Target

Target not set%

Company This Month

New Activity

*Subject

*Start Date & Time

18-05-2016

12:48

(01-mmm-yyyy 24:00)

Activity Type

Cell

Duration

0 : 05

(hours/minutes)

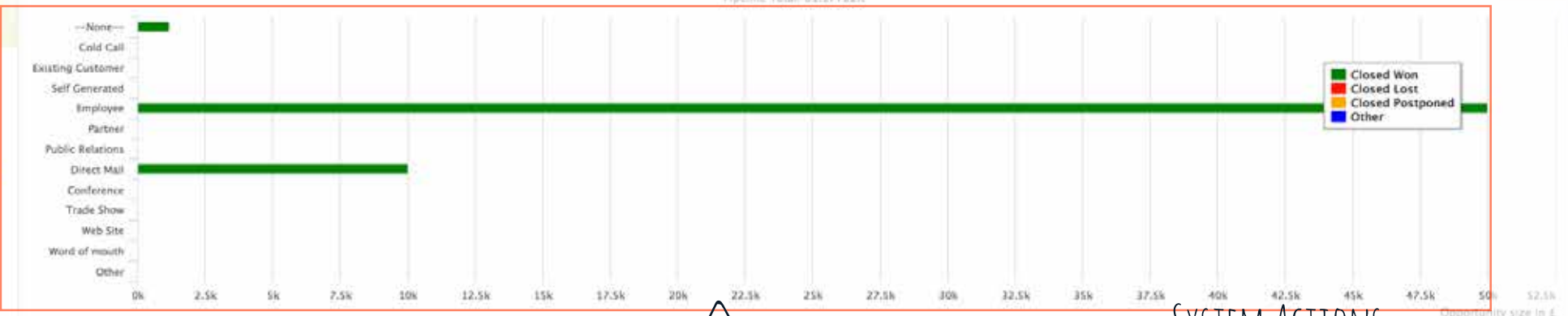
Save

Support Desk

Switch to two column view

LAYOUT CONTROL

COMPONENT MENU



Shows cumulative opportunity amounts by selected lead sources by outcome for selected users where the expected closed date is within the specified date range. Outcome is based on whether the sales stage is Closed Won, Closed Lost or any other value.

SYSTEM ACTIONS

[Refresh] [Edit]

TITLE

Lead Status Report

Lead Status	First Name	Last Name	Company	Email	Lead Source
	Mario	Pompuldink	Pompuldink Sink's Ltd	Hp@psl.co.uk	
		Kuan Yew	Kuan Yew Group	chiefexec@KWG.com	
--None--	Tanya	Fudge	Traditional Fudge	TanyaFudge@hotmail.com	--None--
--None--	Tim	O'Toole	Linkpedia	sales@linkpedia.com	--None--
--None--	Janet	Dawson	Fiveshare	jdawson@fiveshare.co.uk	--None--
--None--	Elizabeth	Brown	X-ceed Inc 99	elizabeth_brown@company.com	--None--
--None--	Peter	McCann	Devspot Ltd	sales@devspot.co.uk	--None--
Attempted to Contact	Jason	Warwick	Radio Frequency Testing	jason.warwick@radiofreq.com	--None--
Attempted to Contact	Howard	Jones	Jones and Sons	Jones@jonesandson.com	Web Site
Attempted to Contact	Frank	Rizzu	Rizzus Of Portsmouth	frank@rizzus.co.uk	Public Relations
Attempted to Contact	Craig	Holden	Financial Consulting Group	craig@fcglimited.com	Word of mouth

VIEW CONTROLS

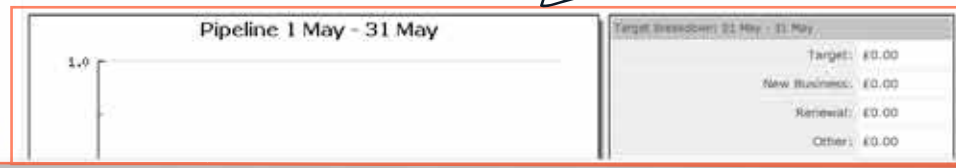
Open's

INTERNAL SCROLLBAR

CONTENT

MORE SYSTEM ACTIONS

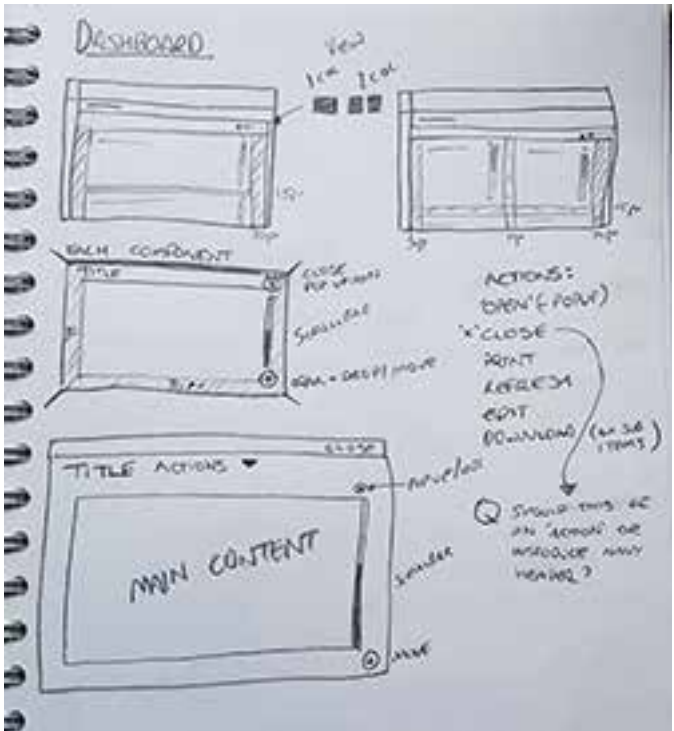
[Print]



SKETCHING - DEVELOPING AN UNDERSTANDING OF THE FEATURE & THINKING UP UX AND UI SOLUTIONS

1. I GET A BRIEF FROM THE PROJECT MANAGER/MD TO RE DESIGN THE V3 DASHBOARD.
2. PLANNING - I CLOSELY STUDY THE FEATURE, THINK ABOUT WAYS TO MAKE IT MORE USABLE, STYLISH AND PERHAPS RESPONSIVE. SKETCH IDEAS, NOTE DIMENSIONS, ASK QUESTIONS TO MANAGEMENT TO SEE WHAT IS FEASIBLE.

MAIN ELEMENTS OF CONTENT:



COMMON UI COMPONENTS:



BY SKETCHING OUT WIREFRAMES OF THE COMPONENT, I CAN TRULY GET A FEEL FOR THE PURPOSE OF THE ELEMENTS WITHIN IT. I CAN THEN IMAGINE NEW WAYS TO FIX OLD SLOW PROCESS AND TIDY UP THE GENERAL UX AND UI.

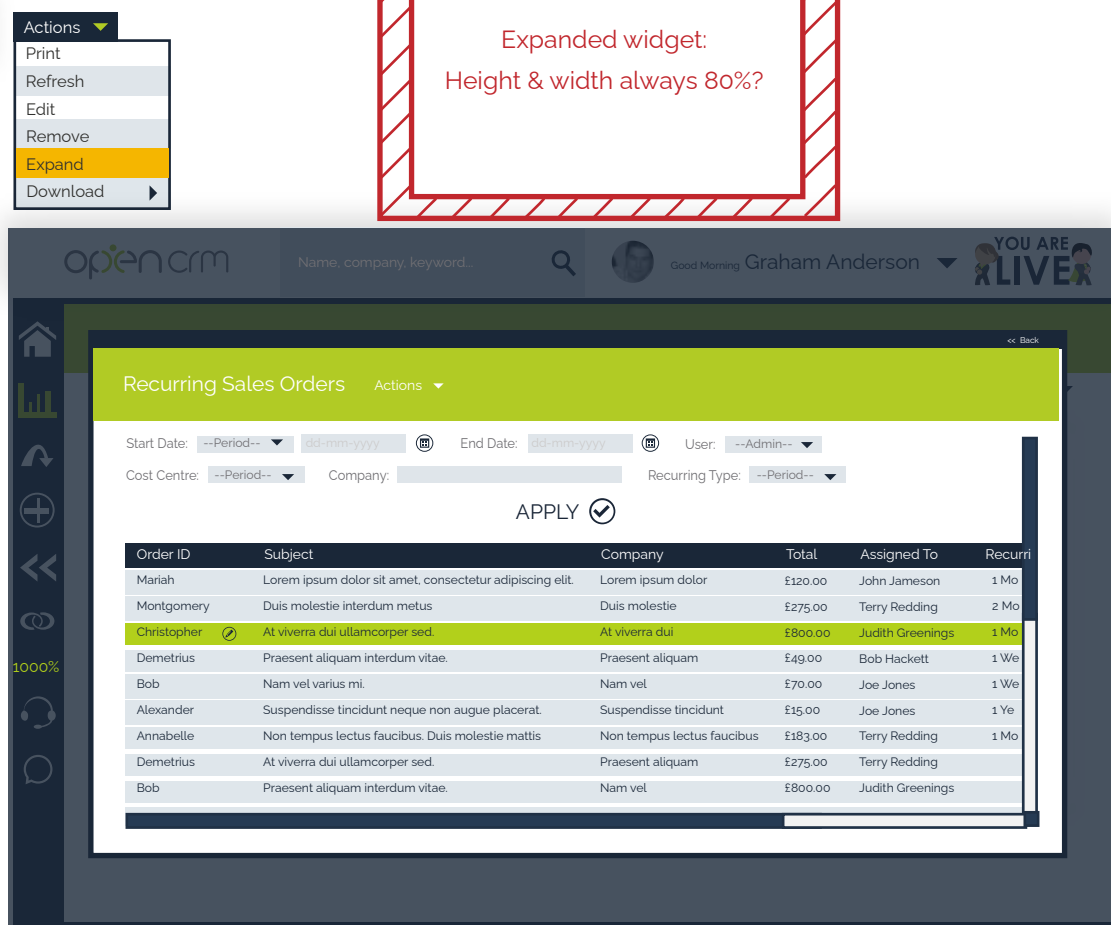
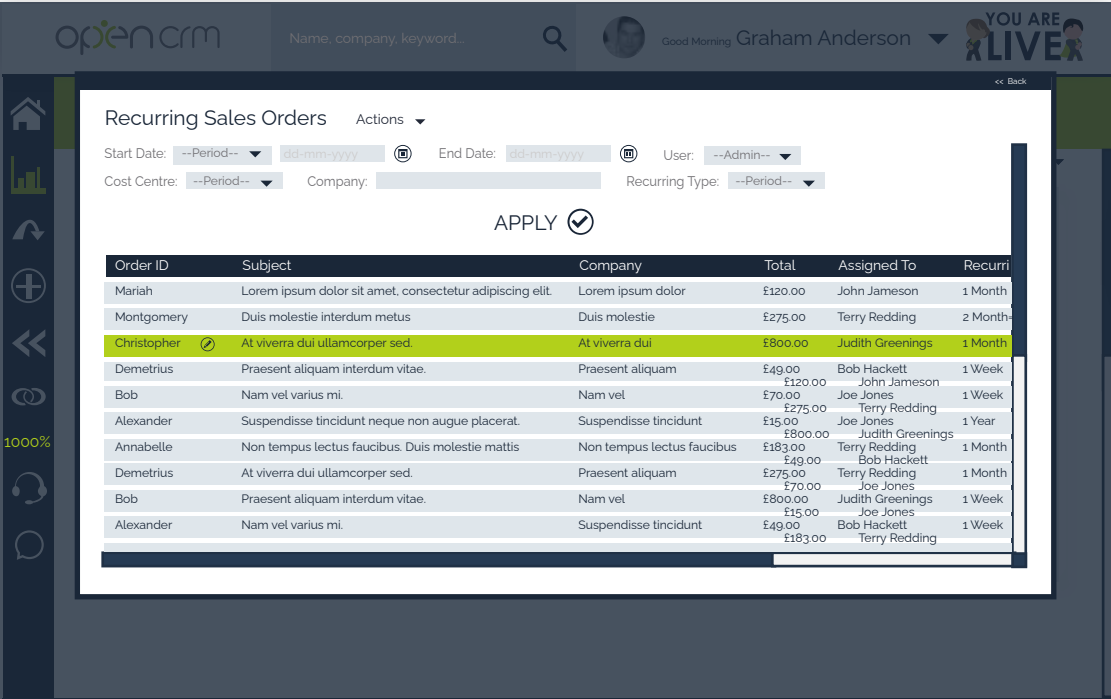


EXAMPLE ILLUSTRATIONS QUESTION TO THE TEAM RE: DASHBOARD - WIDGET EXPAND & HEADER CONSISTENCY

3. DRAFTING – IN ILLUSTRATOR START COMPILING UI ELEMENTS TO PUT DESIGNS TOGETHER OF THE FEATURE. LOOK AT DIFFERENT PERMUTATIONS OF THE TOOL AND HOW GRAPHICALLY AND PRACTICALLY THESE WILL WORK. MAKING NOTES ALL THE TIME. REFER TO OTHER V4 DESIGNS FOR CONSISTENCY. REFER TO THE V4 STYLE GUIDE. REFER TO V3 FOR CONTEXT. CRITIQUE MY OWN WORK, GO AWAY, COME BACK, SEE IF IT WORKS. DEVELOP DESIGN IDEAS.

4. QUESTIONS – LIAISE WITH PROJECT MANAGER, TECHNICAL DIRECTOR, MANAGING DIRECTOR AND DEVELOPERS ABOUT THE DESIGNS. SOMETIMES QUESTIONS COME UP WHICH NEED CONSIDERATION FROM DIFFERENT PEOPLE IN THE TEAM. GREAT MINDS ARE BETTER THAN ONE!

Should this be the same as usual pop up rules? (Green Band for a title? Max 1120 x 600px (could this rule only be for laptop screensize and go larger for desktop like 80% of screen size for eg?)



THESE ARE THE KIND OF LAYOUT DESIGNS I WOULD PUT TOGETHER TO ILLUSTRATE QUESTIONS WHICH MIGHT HAVE ARISEN AT PART OF THE DESIGN PROCESS; THIS HELPS THE TEAM ENVISION HOW THE SYSTEM COULD WORK WITHIN V4, CONTEXTUALISING A PROBLEM WHICH NEEDS SOLVING OFTEN BOTH TECHNICALLY AND VISUALLY.

EXAMPLE OF LAYOUT CONSIDERATIONS FOR THIS FEATURE

RESPONSIVE DESIGN DETAILS

One column: Block at Min Width

This screenshot shows a dashboard layout where all components are stacked vertically. The 'Key Metrics (View)' section at the top left contains a table with columns 'Metrics' and 'Count'. Below it is a 'Links' section with a list of links. The 'Recurring Sales Orders' section features a table with columns for 'Order ID', 'Subject', 'Company', 'Total', and 'Assigned To'. The 'Target Pipeline' section includes a 'Graph Component...' placeholder and a table with 'Target', 'New Business', 'Renewal', and 'Other' rows. The 'Comission Tracker' section has a table with columns for 'Type of Product', 'Current Month', 'Current Quarter', and 'Year to Date'. The bottom section, 'Key Metrics (View)', includes a calendar for 'September 2015'.

One column: Block at 100% Width

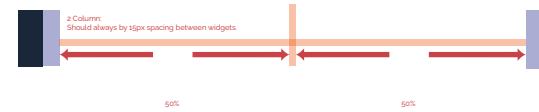
This screenshot shows the same dashboard layout as the previous one, but all components are expanded to fill the available width of the column. The tables and text are larger, and the overall spacing is consistent with the 'Min Width' version.

Masonry: Block at Min Width

This screenshot shows a masonry layout where components are arranged in a grid. The 'Key Metrics (View)' and 'Links' sections are at the top. Below them is the 'Recurring Sales Orders' table. The 'Target Pipeline' section is split into two columns, each containing a 'Graph Component...' placeholder and a table. The 'Comission Tracker' and 'Key Metrics (View)' with the calendar are at the bottom.

Two columns: BGs at 100% Width

This screenshot shows a two-column layout. The 'Key Metrics (View)' and 'Links' sections are in the top left. The 'Recurring Sales Orders' table is in the middle left. The 'Target Pipeline' section is in the top right, split into two columns. The 'Comission Tracker' and 'Key Metrics (View)' with the calendar are in the bottom right.



THESE ARE THE LAYOUT OPTIONS WHICH WOULD BE IDEAL FOR THE FEATURE, USED AS REFERENCE FOR A QUESTION TO THE TEAM AS TO WHAT WILL BE FEASIBLE CONSIDERING TIMESCALES AND TECHNICAL RESTRAINTS.

5. SIGN OFF – SEND VIA EMAIL TO MANAGEMENT FOR SIGN OFF. SOMETIMES DISCUSS WITH MD OR TECHNICAL DIRECTOR TO CHECK WHAT IS POSSIBLE IN THE TIME SCALE BUT ALSO TECHNICALLY. IF HAPPY MOVE ON, IF NOT GO BACK AND TWEAK DESIGNS.



6. WRITE UP – WRITE UP IN DETAIL THE DESIGNS. NOTE INSTRUCTIONS FOR THE DEVELOPERS ON FUNCTIONALITY, DIMENSIONS AND GRAPHICAL ELEMENTS. IF THERE ARE ANY NEW ICONS, I CREATE THE SVGS AND MAKE SURE THESE GET SENT TO DEVELOPERS ALONG WITH THE INSTRUCTIONS



7. GUIDANCE – WORK WITH THE DEVELOPERS ON QUESTIONS. HELP GUIDE THEM THROUGH THE DESIGNS. MAKE SURE THEY UNDERSTAND THE DETAILS AND RULES BEHIND THE UI.



8. TESTING – ONCE THE DEVELOPERS ARE ‘FINISHED’, WORK THROUGH THE LIVE SYSTEM TO MAKE SURE THE WORK IS UP TO STANDARD. LIAISE WITH THE TEAM TO MAKE SURE WE GET THE FEATURE BUILT TO THE HIGHEST STANDARD POSSIBLE.



9. DOCUMENTATION – IF THERE IS NEW ELEMENTS I MAKE SURE THESE ARE DETAILED WELL IN OUR INTERNAL WIKI OPENCRM V.4 STYLE GUIDE.

Dashboard - All Metrics common UI

Common Widget Elements:

- Title
- Actions (misc per metric)
- Move

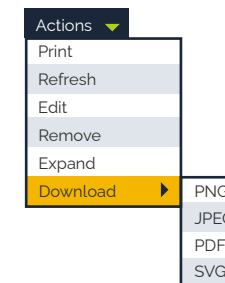
Spacing Dimensions:

- 40px
- 30px
- 20px
- 15px
- 10px

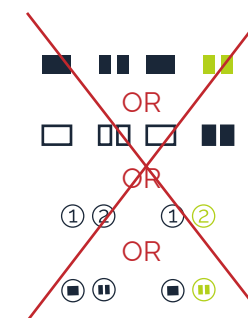
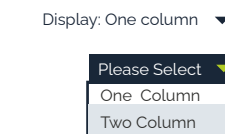
Scrollbar Position:



Maximum Actions:

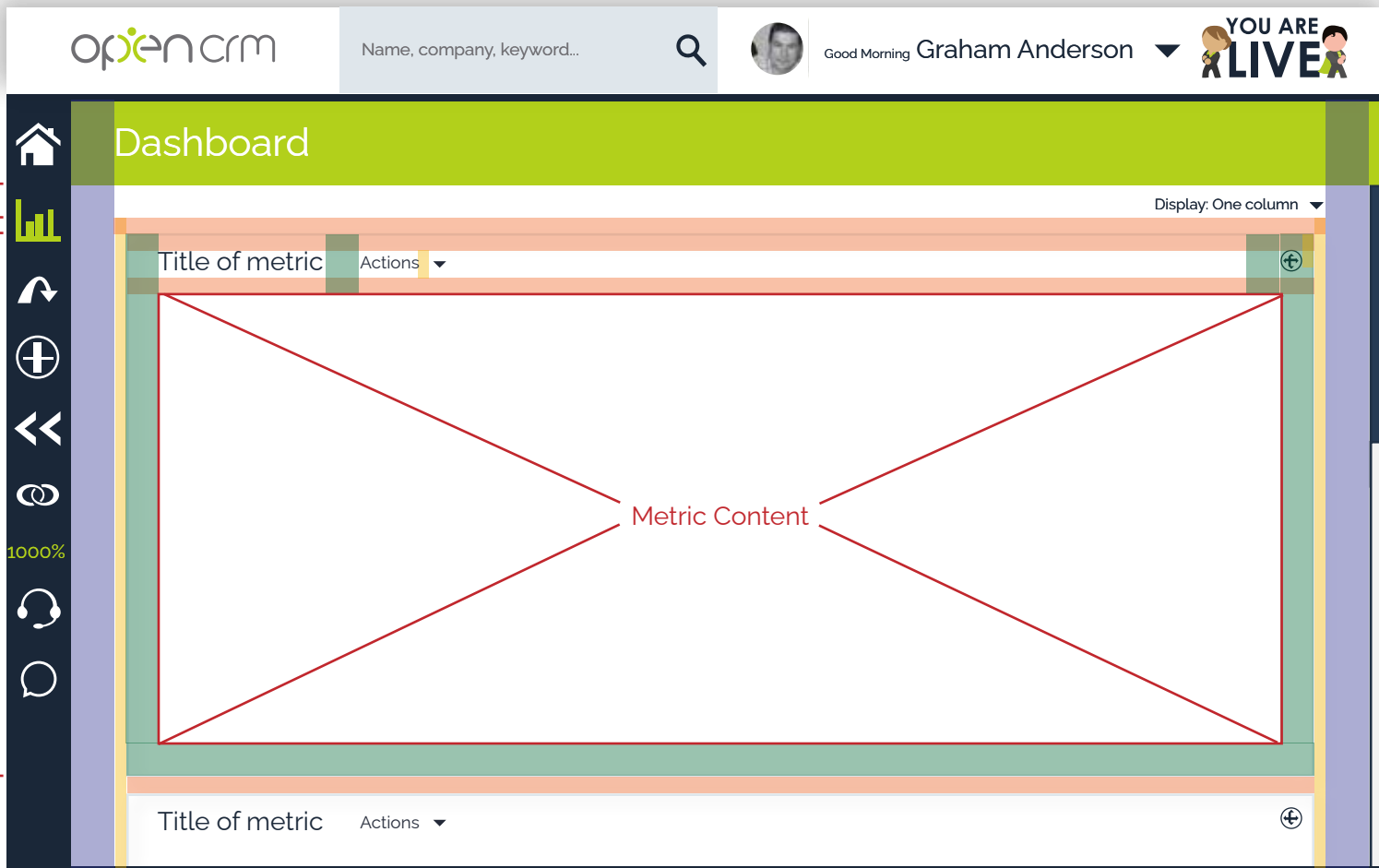


Display Options:



Move (and Expand?)

- Move - So Users can change the order they view the widgets.
- Expand? - If the User could make the sections larger in height. I think this would be useful when viewing larger bits of data? Not essential if this is hard to implement.



Reports - All Reports should load visually like they do already in the module, just adhering to the spacing rules as stated above. More than likely, H and V scrolling will be need to fit content within the given area.

Highcharts - The only changes I would like to the Highcharts is making sure all the colours are those set out in the V4 Style Guide on the WIKI, and the text is all navy (#1A2738) and Raleway.

Dashboard - Grid & Fields and Grid

Target Pipeline Actions ▾ ⓘ

Pipeline 1 May - 31 May

Graph Component...

Target Breakdown: 01 May - 31 May

Target:	£40.00
New Business:	£4.00
Renewal:	£44.00
Other:	£8.80
Combined Total: £96.80	

Pipeline: 01 May - 31 May

Target:	£40.00
New Business:	£4.00
Renewal:	£44.00
Other:	£8.80

100px
20px

Target Pipeline Actions ▾ ⓘ

--Period-- ▾ Start Date: dd-mm-yyyy 📅 End Date: dd-mm-yyyy 📅 User: --Admin-- ▾

← APPLY ✓ →

Dashboard - Just Grid

Comission Tracker Actions ▾ ⓘ

Type of Product	Current Month		Current Quarter		Year to Date	
	Comission:	Bonus:	Comission:	Bonus:	Comission:	Bonus:
--None--:	0.05	£30.00	0.05	£30.00	0.05	£30.00
Existing Business:	0.10	£40.00	0.10	£40.00	0.10	£40.00
Other:	0.50	£10.00	0.50	£10.00	0.50	£10.00
Total:	0.65	£80.00	0.65	£80.00	0.65	£80.00

Indicator only - Final figure with finance

Dashboard - Mini Calendar

Key Metrics (View) Actions ▾ ⓘ

September 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Spacing Dimensions:

- 40px
- 30px
- 20px
- 15px
- 10px

Dashboard - Grid & Fields and Grid & Links

Key Metrics (View) Actions ▾ ⊕

Metrics	Count
Mariah	0
Montgomery	12
Christopher	045
Demetrius	600
Bob	50
Alexander	48
Annabelle	59
James	2
Evangeline	7
Remington	46
Christopher	52

There should be a minimum of 10px gap after the text in a grid before the bg ends.

Links Actions ▾ ⊕

Name
Twitter - OpenCRM
LinkedIn - OpenCRM
Sales Forecast
Support Dashboard

- Spacing Dimensions:
- 40px
 - 30px
 - 20px
 - 15px
 - 10px

Same dimensions and design can be used for all other widgets which have the same components. EG - KPIs, Expiring Sales Orders, Invoices by User/Cost Centre

Recurring Sales Orders Actions ▾ ⊕

Start Date: --Period-- ▾ dd-mm-yyyy 📅 End Date: dd-mm-yyyy 📅 User: --Admin-- ▾

Cost Centre: --Period-- ▾ Company: Recurring Type: --Period-- ▾

← APPLY ✓ →

Order ID	Subject	Company	Total	Assigned To	Recu
Mariah	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Lorem ipsum dolor	£120.00	John Jameson	1 Mo
Montgomery	Duis molestie interdum metus	Duis molestie	£275.00	Terry Redding	2 Mo
Christopher	At viverra dui ullamcorper sed.	At viverra dui	£800.00	Judith Greenings	1 Mo
Demetrius	Praesent aliquam interdum vitae.	Praesent aliquam	£49.00	Bob Hackett	1 We
Bob	Nam vel varius mi.	Nam vel	£70.00	Joe Jones	1 We
Alexander	Suspendisse tincidunt neque non augue placerat.	Suspendisse tincidunt	£15.00	Joe Jones	1 Ye
Annabelle	Non tempus lectus faucibus. Duis molestie mattis	Non tempus lectus faucibus	£183.00	Terry Redding	1 Mo

HERE'S SOME OF THE ICONS I HAVE USED FOR THIS PART OF THE SYSTEM DESIGN.

ALL ICONS IN THE SYSTEM HAVE BEEN BUILT FROM SCRATCH. IT HAS ALWAYS BEEN OUR INTENTION TO USE AS MUCH ORIGINAL DESIGN AS POSSIBLE FOR OPENCRM.

I'M PROUD OF EACH ICON AND HOW RECOGNISABLE THEY ALL ARE; I TOOK A LOT OF TIME GETTING THESE PIXEL PERFECT!

- ◀ ▶ LEFT & RIGHT
- 📅 MINI CALENDAR SELECTOR
- ↕ MOVE
- ✓ APPLY
- 🏠 HOME
- ✎ EDIT
- 📊 DASHBOARD



TO WORK OUT HOW THE DASHBOARD LAYOUT WOULD WORK, WE HAD A MEETING. THESE MOCKUPS AND WIREFRAMES HELPED ILLUSTRATE THE OPTIONS TO THE TEAM OF DEVELOPERS AND MANAGEMENT. SO WE COULD CONSIDER HOW BLOCKS COULD BEHAVE AT DIFFERENT SIZES.

THIS PART OF THE PROJECT WAS A REALLY GOOD EXAMPLE OF HOW WE HAD TO WORK AS A TEAM, AS MANY DIFFERENT MINDS ARE BETTER THAN ONE. BY THE END OF THE CON-CALL WE WERE ON TRACK, EVERYONE KNEW WHAT THE PLAN WAS AND HOW WE WERE ALL GOING TO MOVE FORWARD TO DEVELOP THIS COMPONENT.

EXAMPLE DESIGN FOR A TWO COLUMN LAYOUT OF THE DASHBOARD

open CRM Name, company, keyword... **YOU ARE ALIVE**

Dashboard Display: Two column

Recurring Sales Orders

Start Date: --Period-- dd-mm-yyyy End Date: dd-mm-yyyy

Cost Centre: --Period-- Company: AP

Order ID	Subject
Mariah	Lorem ipsum dolor sit amet, consectetur adipiscing
Montgomery	Duis molestie interdum metus
Christopher	At viverra dui ullamcorper sed.
Demetrius	Praesent aliquam interdum vitae.
Bob	Nam vel varius mi.
Alexander	Suspendisse tincidunt neque non augue placerat.
Annabelle	Non tempus lectus faucibus. Duis molestie mattis.

Target Pipeline

Pipeline 1 May - 31 May

Graph Component...

Comission Tracker

Type of Product	Current Month		Current Quarter		
	Comission:	Bonus:	Comission:	Bonus:	C
--None--:	0.05	£30.00	0.05	£30.00	0.
Existing Business:	0.10	£40.00	0.10	£40.00	0.
Other:	0.50	£10.00	0.50	£10.00	0.
Total:	0.65	£80.00	0.65	£80.00	0.

Indicator only - Final figure with finance

Key Metrics (View)

September 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

THIS IS AN EXAMPLE OF THE DASHBOARD IN THE 2 COLUMN LAYOUT.

WE ARE HOPING TO INTRODUCE A NEW MASONRY STYLE, DRAG AND DROP, RESPONSIVE LAYOUT FOR THIS DASHBOARD.

FOR THIS TO BE POSSIBLE I HAVE TO WORK OUT THE MINIMUM AND MAXIMUM WIDTHS WE CAN SET EACH WIDGET WITHIN THE DASHBOARD TO BEFORE IT BECOMES TOO SMALL AND UNREADABLE.

I HAVE TO SEND AS DETAILED AS POSSIBLE INSTRUCTIONS ON TO THE DEVELOPERS SO THEY KNOW EXACTLY HOW THE DASHBOARD SHOULD BEHAVE AT DIFFERENT BREAKPOINTS WITHIN DIFFERENT SIZE VIEWPORTS.

THIS IS QUITE THE CHALLENGE BUT A GREAT EXAMPLE OF WHAT CONSIDERATIONS GO INTO UX/UI DESIGN TODAY.



ABI GEDYE

BA HONS
UX / UI CASE STUDY

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