

# Jayme Anne Brown

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UX DESIGNER & RESEARCHER

Case Study Presentation

# 1 ABOUT ME

# 2 CASE STUDY 1: ACCOUNT MANAGEMENT

# 3 CASE STUDY 1.5: GROUP MANAGEMENT

# About Me

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## The Basics

- 20+ years designing things!
- Web Designer → Creative/Design Director → Product Designer
- Anthropologist with a focus on business, design, and social relations

## The Fun Stuff

- Music lover - especially going to concerts!
- Animal welfare advocate - volunteer and activist in Detroit's dog rescue network
- Explorer - when is my next trip?
- Avid baker and amateur chef - I love to make food! (and eat it - especially pizza)



## CASE STUDY 1

# Account Management

### My Role:

UX Design Lead (also lead for AX Solution)

### Responsibilities:

- Qualitative research
- Competitive analysis
- User personas and journeys
- Information architecture
- Wireframes
- High fidelity mockups
- Prototypes

### Tools:

- Pencil and paper
- Miro
- Figma
- Jira

The screenshot shows the Dynatrace Account Management interface. At the top, there is a navigation bar with 'Account Management' and other options like 'Home', 'License', 'Identity & access management', 'Lens', and 'Settings'. A 'Buy or extend' button is also visible. Below the navigation, a 'Self' and 'Home' button are present. The main header says 'Welcome to Account Management, Jayme'. The interface is divided into several sections: 'Platform insights' (with a 'View Lens' button), 'Spotlight' (listing workspaces like 'Platform insights', 'Licenses', and 'Groups'), and 'Documentation' (links to 'Dynatrace Licensing', 'Dynatrace Account Management API', and 'Identity and Access Management'). On the right side, there is a large, partially visible dashboard with a line graph and a heatmap.

## THE USERS



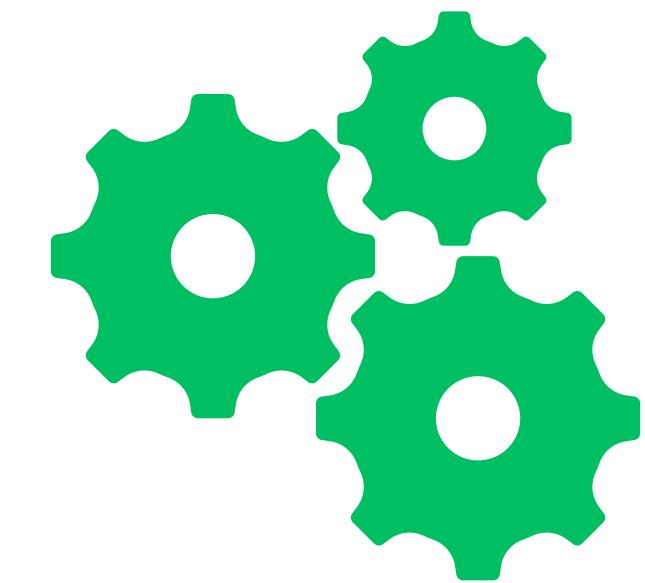
- Finance admins
- Permissions and security admins
- “DT Champion”
- Team admins
- Internal users
  - PMs/Engineers
  - CSMs/PSs
  - Licensing
  - Sales

## THE PROBLEM



- Too many different locations for managing and monitoring:
  - licenses and subscriptions
  - users and SSO access
  - platform adoption and environment health.
- Designed by engineers

## THE PROJECT

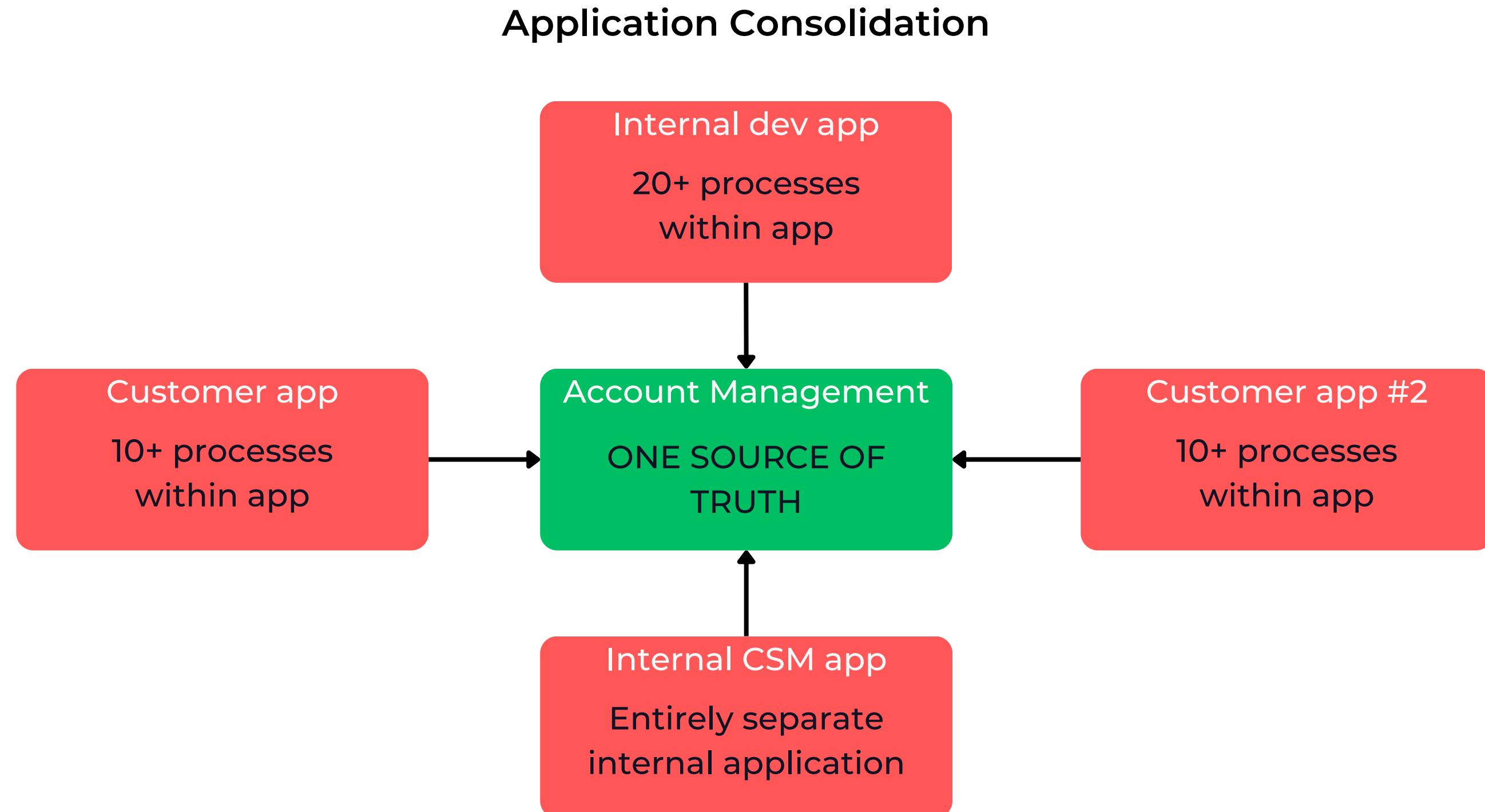


Consolidate these spaces into a singular customer portal

# RECOGNIZING AND ACKNOWLEDGING THE PROBLEM

## Collaborators:

- Product managers
- Licensing managers
- CSMs
- Product Specialists
- Engineers
- UX Writers
- UX Designers



## CASE STUDY 1: ACCOUNT MANAGEMENT

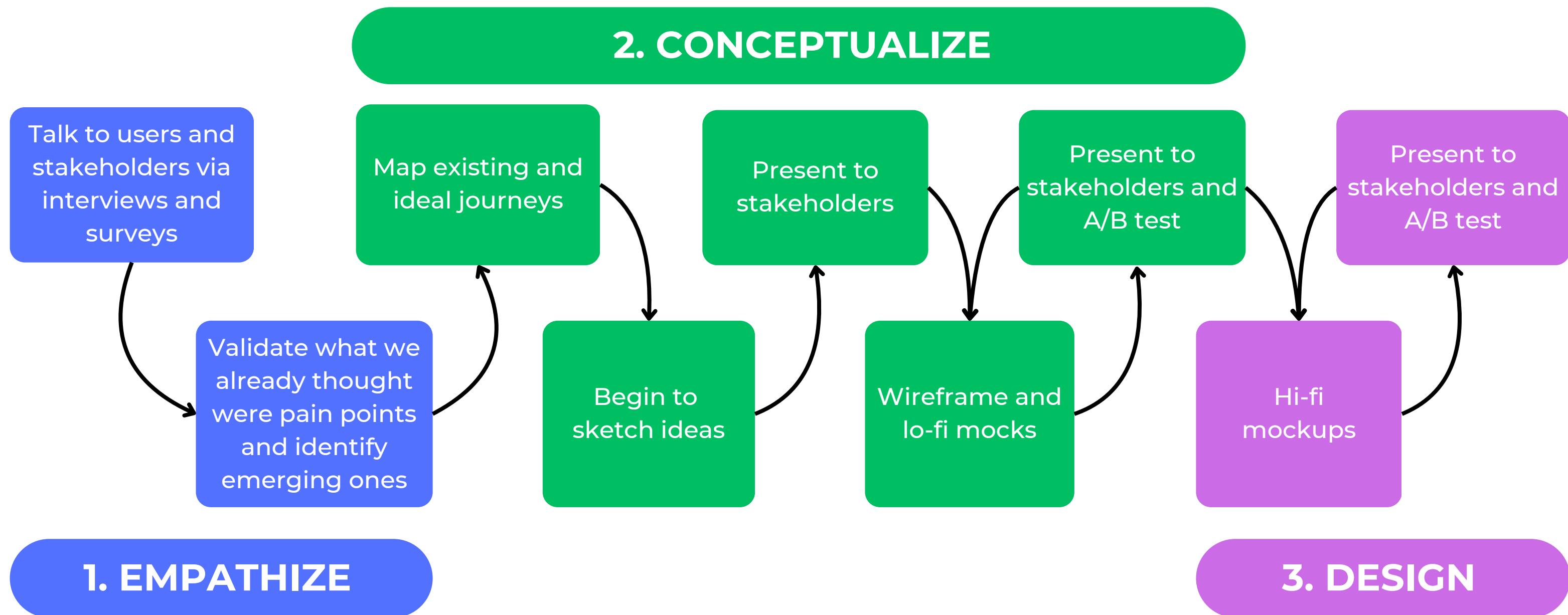
1. EMPATHIZE

2. CONCEPTUALIZE

3. DESIGN

# THE APPROACH

A rough timeline was created in the roadmap and I began looking at how I would design an MVP.



## 1. EMPATHIZE

# **Define expectations and realities around creating a holistic AM portal.**

- Understand user wants and needs
- Define frustrations and pain points
- Compare with industry

1. EMPATHIZE

# USER INTERVIEWS

- 15 internal IDIs
- 5 external IDIs
- 1 focus group

## Question examples:

Top five places you visit (within multi-apps)?

Why those places?

What is your goal when visiting?

What actions do you do repeatedly?

Why did you reach out to CS?

Biggest complaint?

Preferred path?

Ideal gain from new service?

I love  
“Internal  
CSM app”

I want to save  
time with  
automation

Better  
navigation; I  
can't find  
anything!

→ Premium Prod Specialist - DI mgr  
“Prudential” (SAAS) Live Chat  
- Monitors Chats - implemented Chat capture  
- going into multiple err per week  
Applications  
MC, BAS, G360  
\* Customers are usually admin team, and then other developers + app team.  
More involved w/ licensing information  
- splitting host groups  
Review PS →  
- 50k + gets a health check  
- G360 super helpful  
- Renewals is major goal  
Premium prod specialist - typical through calls + email  
BAS useful for emergency contacts  
me cannot pull emergency contacts  
Typical access is through Intercom  
→ Interim page to post in

1. EMPATHIZE

# LEARNING ABOUT USERS

## Licensing

- 1) New logos
- 2) Perform growth
- 3) Subscription renewal
- 4) Approve/reject opp
- 5) Register customer
- 6) Churn account

### Feedback:

- Ideally, a simplified Salesforce provisioning queue pulled into CXP
- Would be nice to know failed AutoProv opps
- High-functioning search
- Consult for provisioning (contracts) redesign
- Do not want more clicks than they have now
- *Current consensus: dashboard not needed*

### LM

Login > Search > Account Dashboard > Specific area  
SF > Auto provisioning  
SF > Account contract

## Sales

- 1) New logos
- 2) Perform growth
- 3) Subscription renewal
- 4) Approve/reject opp
- 5) Register customer
- 6) Churn account

## Partners

## Devs

Account status  
Bugs  
User permissions  
Environment permissions



## Executives

## Support

Bugs  
Technical issues  
VCT with Chris Anders & support team

## Product Specialists

Account review - 1/month per acct  
User activity  
User permissions  
Bugs  
Live chat  
Account adoption Coaching sessions

### Account Reviews

Internal  
DT contacts  
Conversations  
TODO

### Environment Links/General Notes

### License consumption

**Adoption**  
User activity  
Chat activity  
Product usage

### Product configurations

Entity organization  
Services  
RUM  
Cloud & Virtualization  
Synthetics  
Alerting profiles  
Problem notifications  
API  
Dashboards

## D1

## CSMs

Account renewals  
Account adoption  
Acct license review  
Account health

App landing page?  
+ access commonly and recently used applications

### Dev/Eng journeys

Login > Search > Account Dashboard > Specific Area  
Login > Commonly used app  
Product environment > Account dashboard/Spec area

### CSM/PS Journeys

c360 > Account dashboard or specific area of CXP  
Chat > Specific area of CXP (IAM, Env Mgmt, etc.)  
Login > Search > Account Dashboard  
Product environment > Account dashboard/launchpad  
Cluster > Account dashboard/launchpad

1. EMPATHIZE

## COMPETITIVE ANALYSIS

How were other companies approaching a holistic account management system?



1. EMPATHIZE

## DEFINING OBJECTIVES

After initial research was completed, clear objectives for designing the new interface and experience were revealed: **Take the complex and make it very simple.**

Centralized portal for completing tasks and managing information.

Source of truth with a reliable data pipeline.

Automation of processes and more customer self-service.

## 2. CONCEPTUALIZE

**Use research insights to solve pain points and implement a build strategy.**

- Define personas
- Build user journeys and architecture
- Classify wants and needs to prioritize build

## 2. CONCEPTUALIZE

# IDENTIFYING USE CASES

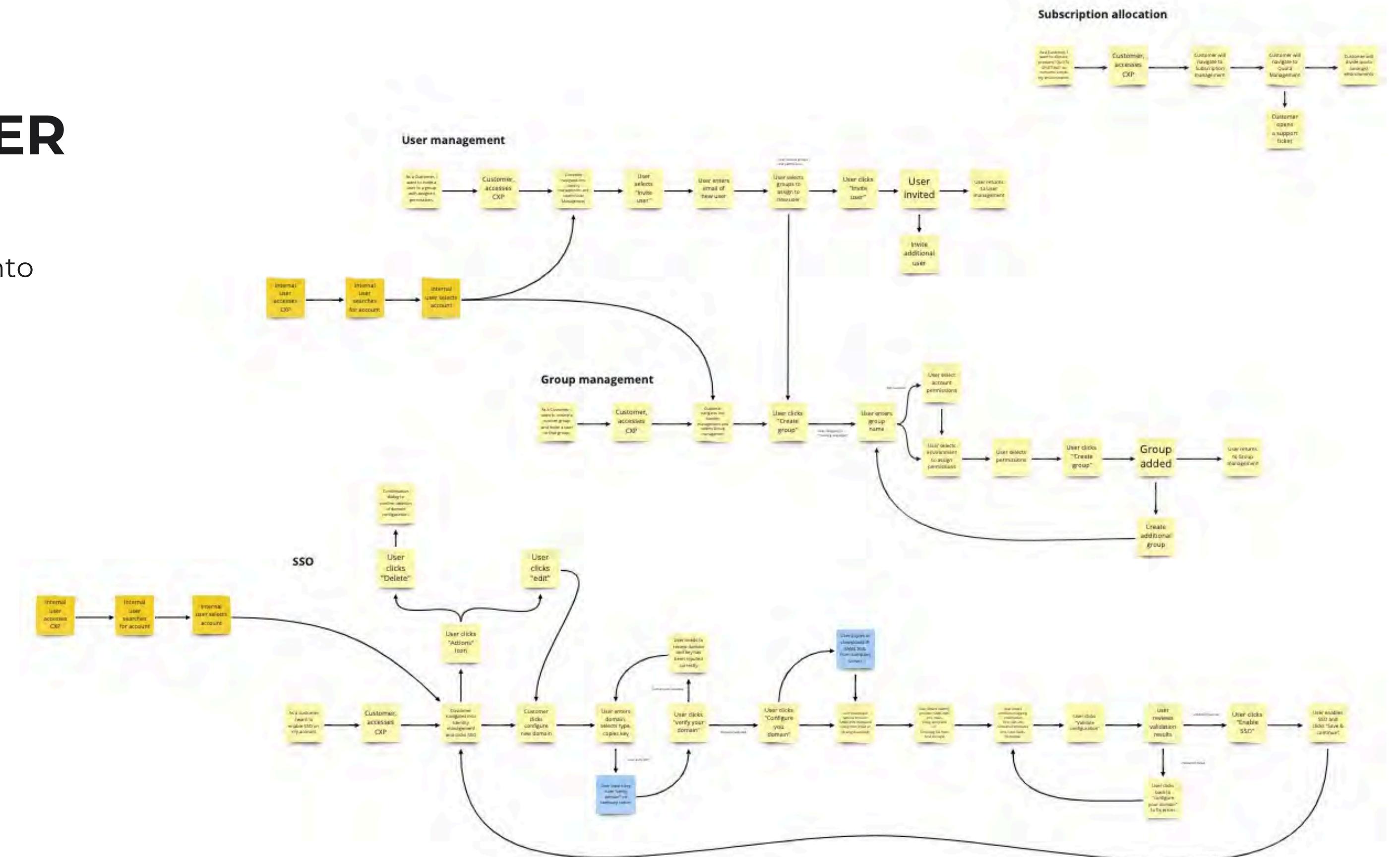
These are only 3 of the dozens of use cases I worked through to help define the over all the personas I was working with.



## 2. CONCEPTUALIZE

# MAPPING USER JOURNEYS

Use cases were translated into ideal user flows.



## 2. CONCEPTUALIZE

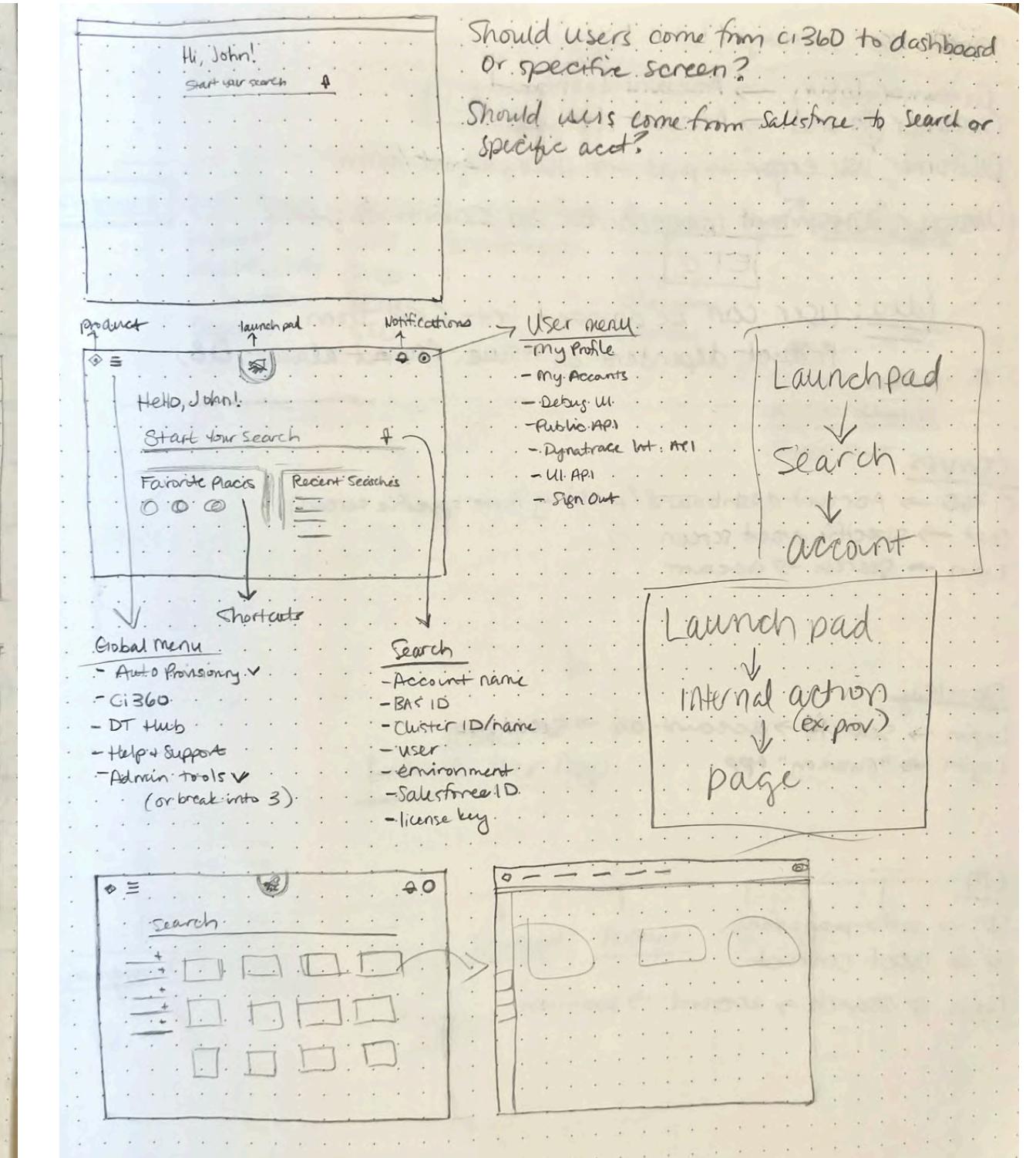
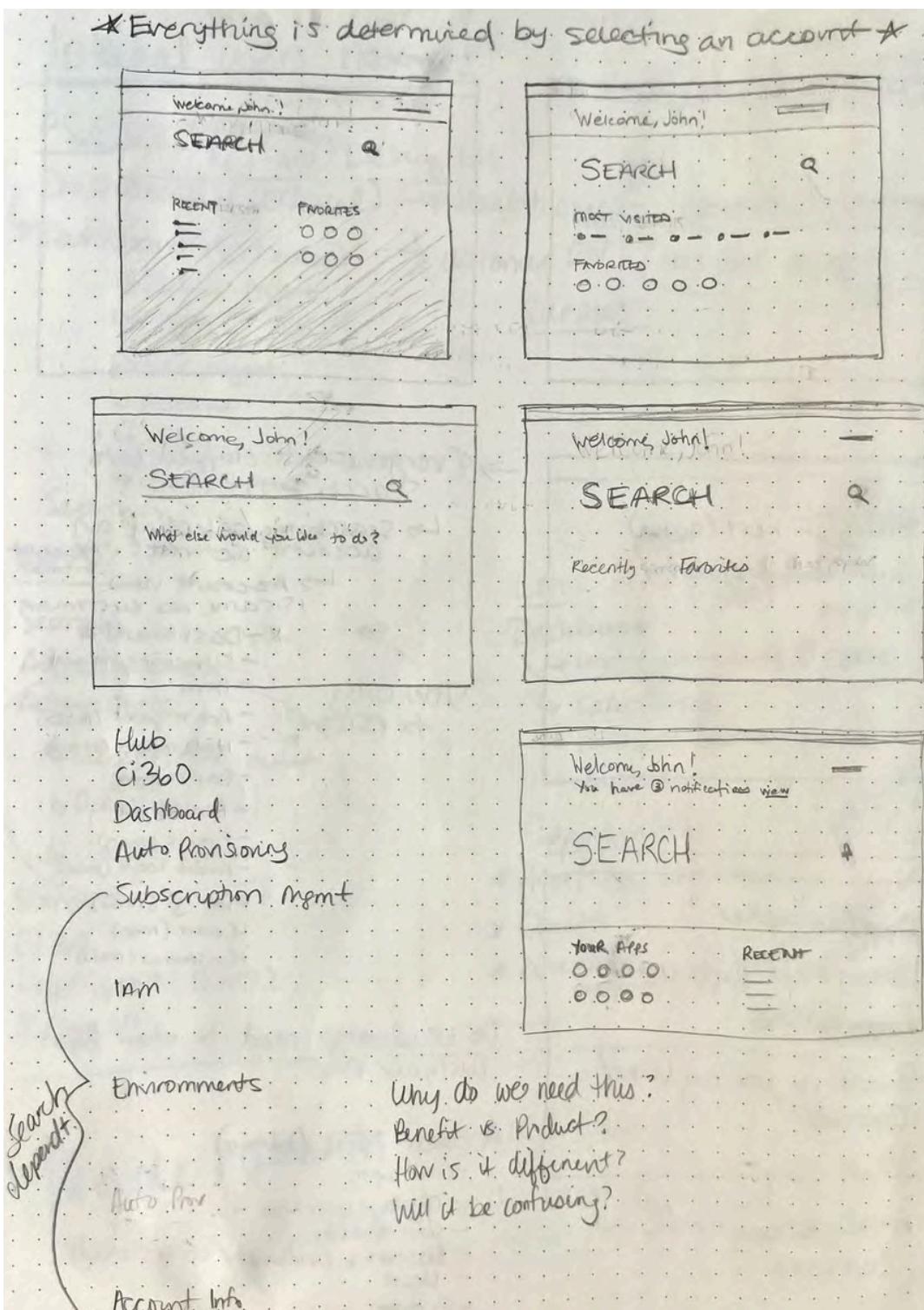
# SKETCHING IDEAS: “LAUNCHPAD”

- Ideal for internal users (engineers, sales, licensing, CSMs, etc.)
- Cumbersome experience for external users (customers)

All was not lost



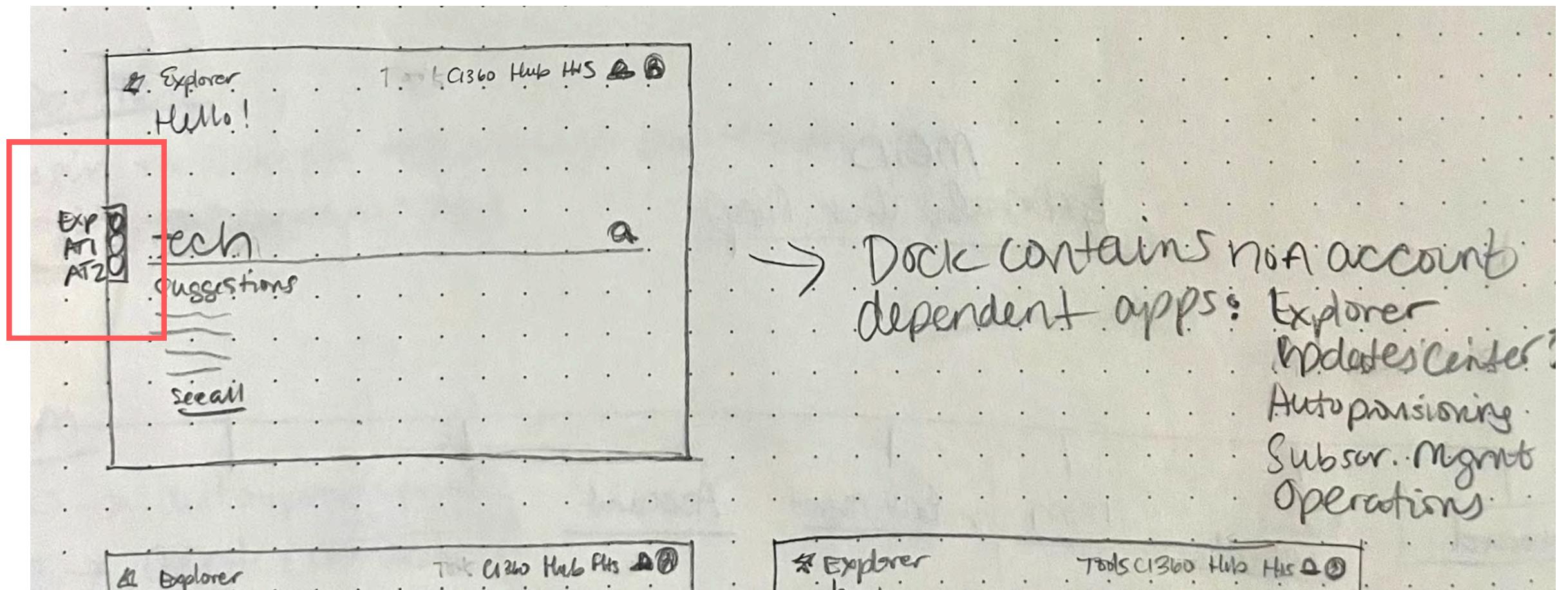
The launchpad idea was adopted by the platform team and can be seen in Dynatrace 3rd Gen, renamed as “Launcher.”



## 2. CONCEPTUALIZE

# SKETCHING IDEAS: APPS

- 💡 • Because AM sat outside the platform, I approached it as its own entity, with its own apps
- Forego traditional top navigation for a “dock” feature. Each section within AM would be its own app
- ✗ • Eventually discarded due to “tech and time limitations”



All was not lost

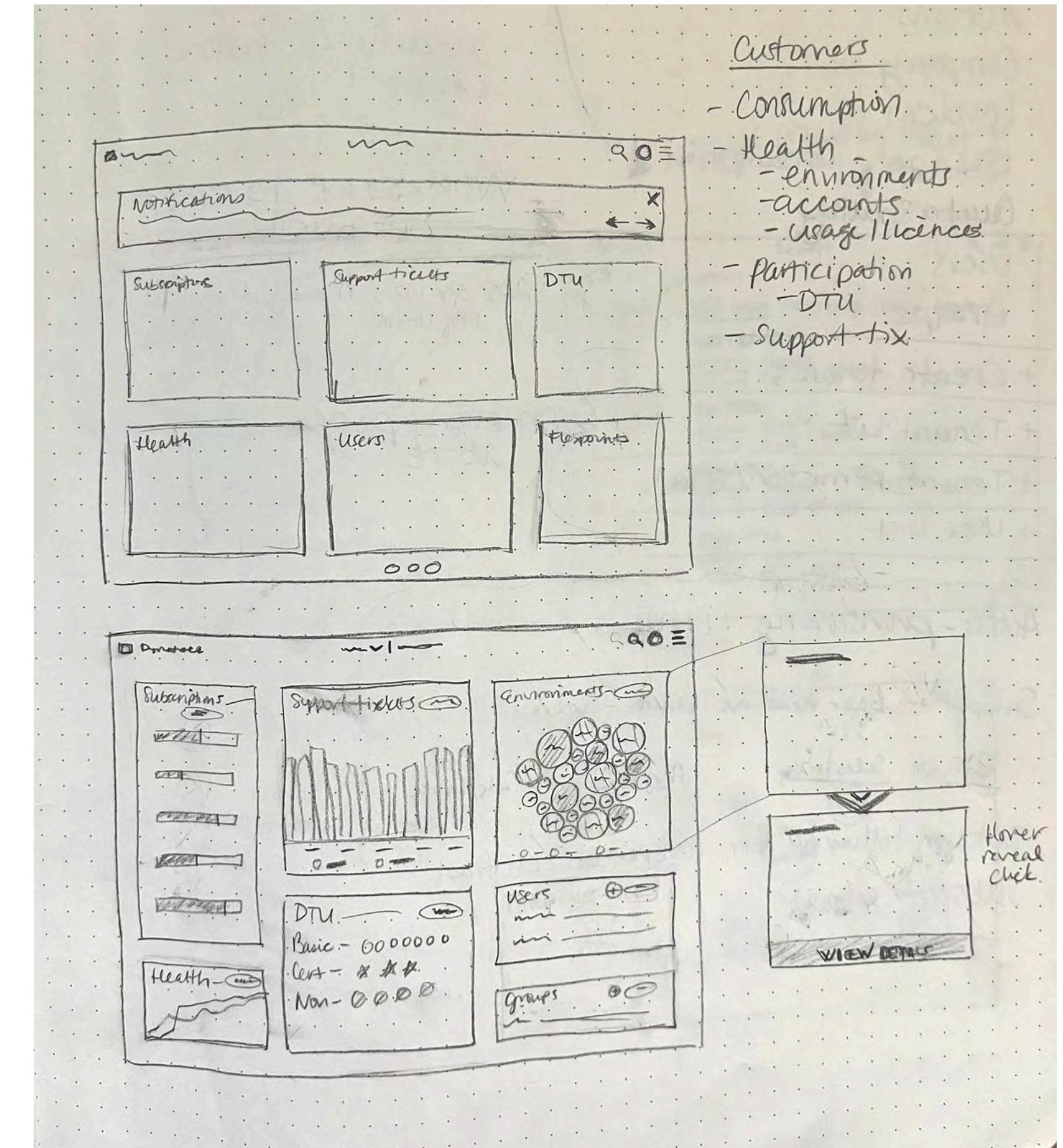


The dock idea was also adopted by the platform team and is now visible within Dynatrace 3rd gen

## 2. CONCEPTUALIZE

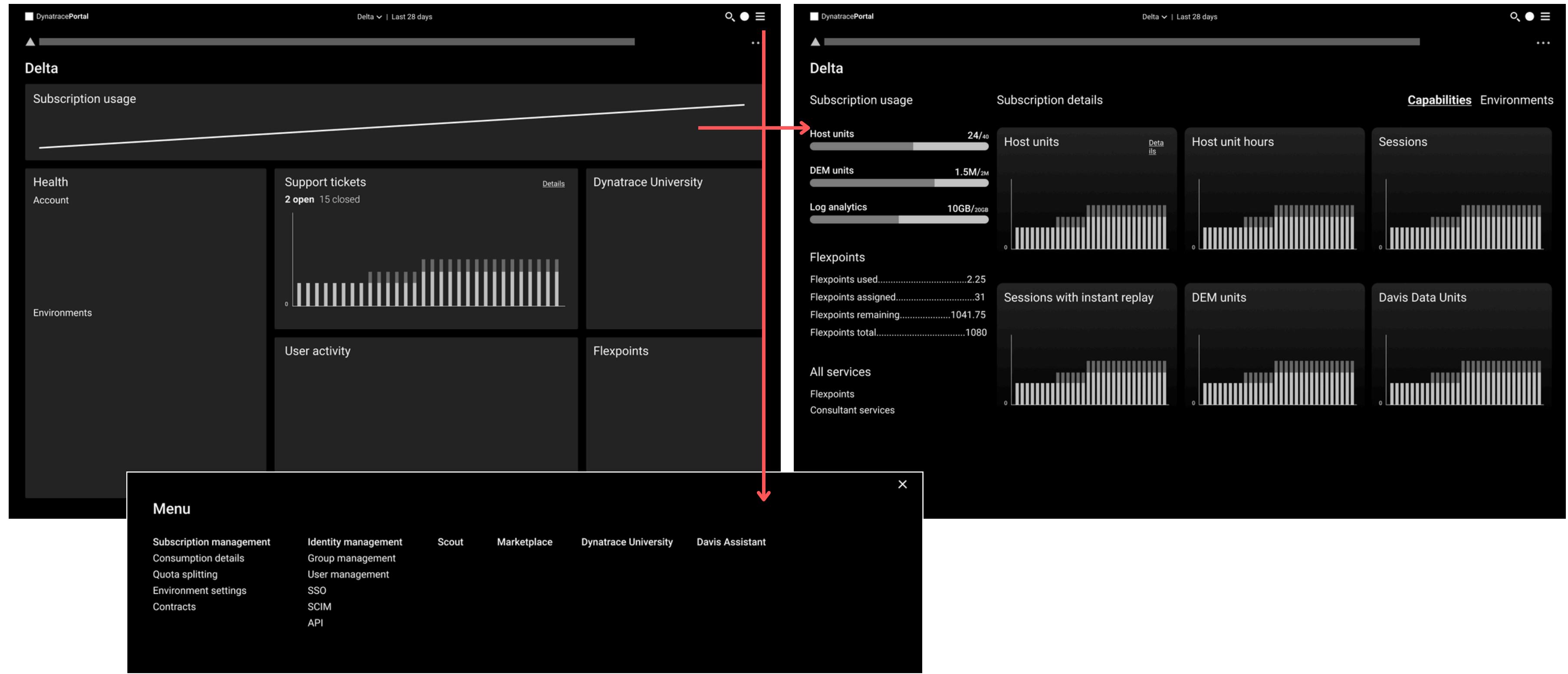
# SKETCHING IDEAS: DASHBOARDS

- Bring adoption and monitoring experiences into the new app
- One stop shop for all users
- This idea was parlayed into the “Lens” feature



## 2. CONCEPTUALIZE

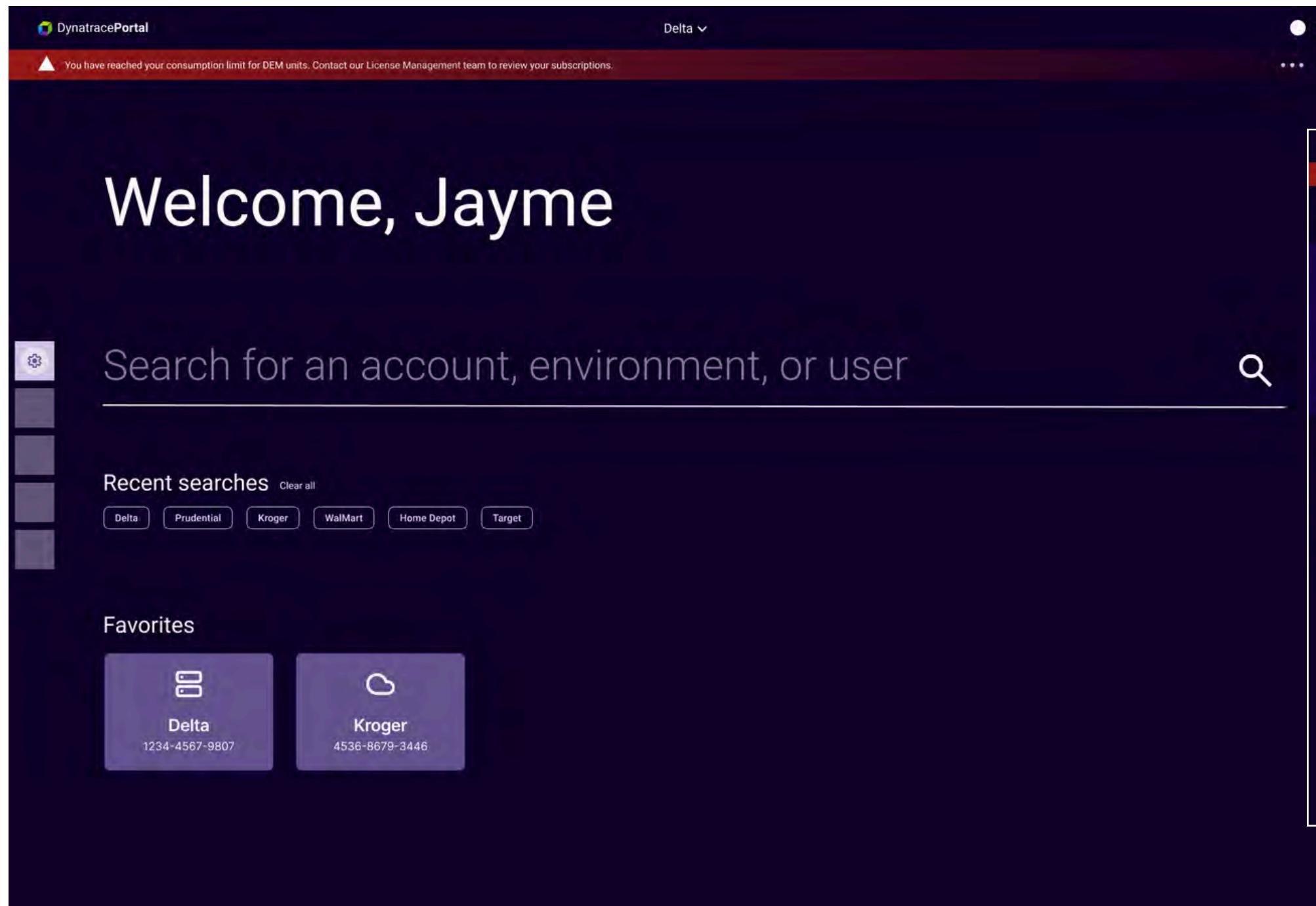
## LO-FIDELITY/EARLY DESIGNS



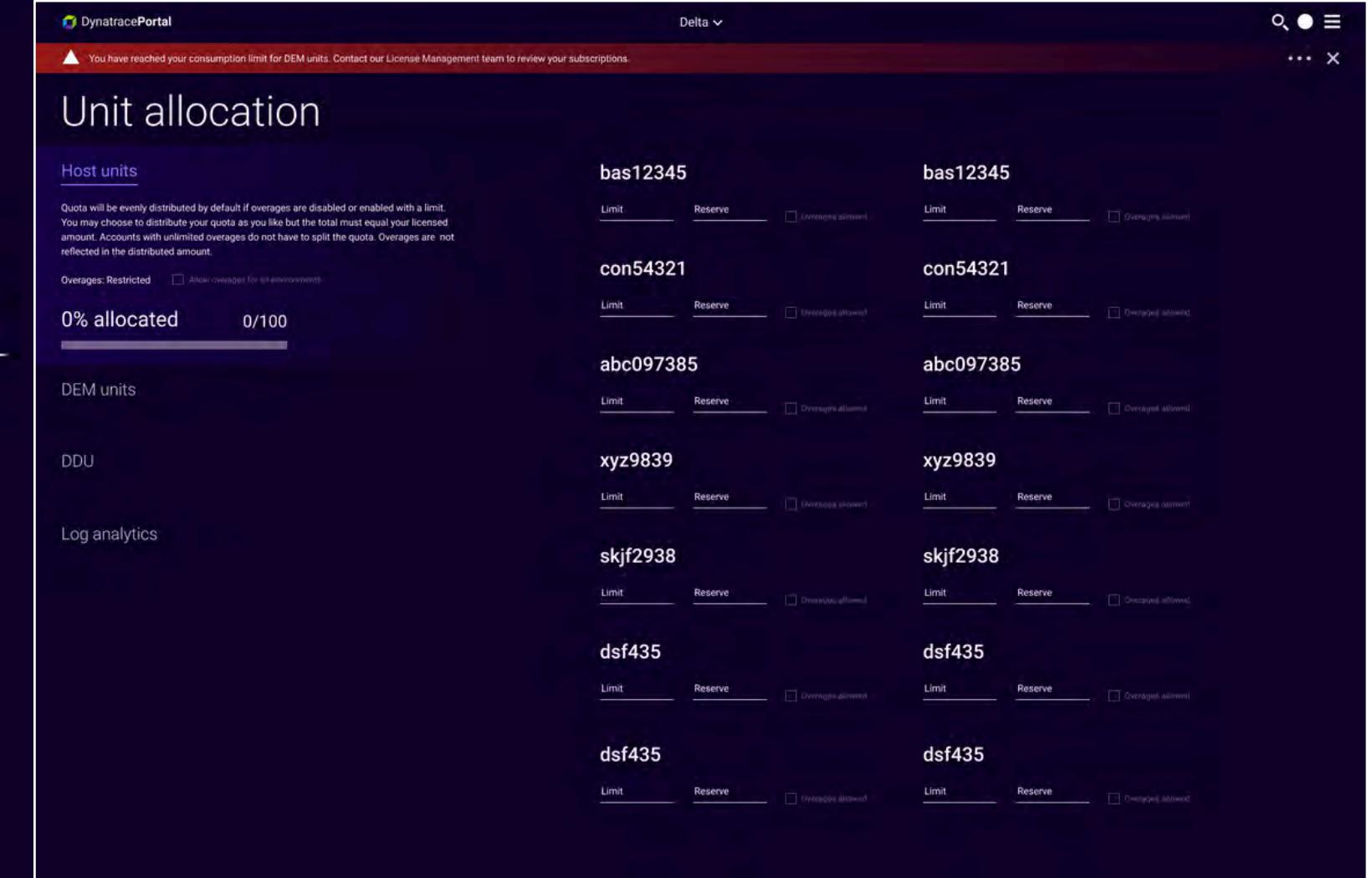
## CASE STUDY 1: ACCOUNT MANAGEMENT

### 2. CONCEPTUALIZE

### LO-FIDELITY/EARLY DESIGNS



This wireframe shows the Dynatrace Portal home screen. At the top, there is a red header bar with the text "You have reached your consumption limit for DEM units. Contact our License Management team to review your subscriptions." Below the header is a large "Welcome, Jayme" message. A search bar is positioned below the welcome message, with the placeholder text "Search for an account, environment, or user". To the right of the search bar is a magnifying glass icon. Below the search bar is a "Recent searches" section with a "Clear all" link and a list of recent searches: Delta, Prudential, Kroger, WallMart, Home Depot, and Target. To the right of the recent searches is a "Favorites" section with two items: Delta (1234-4567-9807) and Kroger (4536-8679-3446). The main content area is a dark blue background with a light blue header bar containing the Dynatrace logo and the word "Delta".



This wireframe shows the Dynatrace Portal Unit Allocation screen. At the top, there is a red header bar with the text "You have reached your consumption limit for DEM units. Contact our License Management team to review your subscriptions." Below the header is a section titled "Unit allocation". The screen is divided into two main sections: "Host units" and "DEM units". The "Host units" section shows a table of accounts with their names, limits, and reserves. The "DEM units" section shows a table of accounts with their names, limits, and reserves. The "DEM units" section includes a note: "Quota will be evenly distributed by default if overages are disabled or enabled with a limit. You may choose to distribute your quota as you like but the total must equal your licensed amount. Accounts with unlimited overages do not have to split the quota. Overages are not reflected in the distributed amount." There is also a checkbox for "Allow overage for DEM environments". The "DEM units" section includes a note: "Overages: Restricted" and a checkbox for "Allow overage for DEM environments".

Account	Limit	Reserve	Overage allowed
bas12345			<input type="checkbox"/>
con54321			<input type="checkbox"/>
abc097385			<input type="checkbox"/>
xyz9839			<input type="checkbox"/>
skjf2938			<input type="checkbox"/>
dsf435			<input type="checkbox"/>
dsf435			<input type="checkbox"/>
dsf435			<input type="checkbox"/>

## 2. CONCEPTUALIZE

# KEY TAKEAWAYS

Working through sketches and wireframes helped **define priority features** and what it would take to build a product that could cater to internal and external customer needs.

Defined what could and couldn't be done in the timeframe.

Design system was built in tandem with AM portal.

Priority of design and launch for each section.

### 3. DESIGN

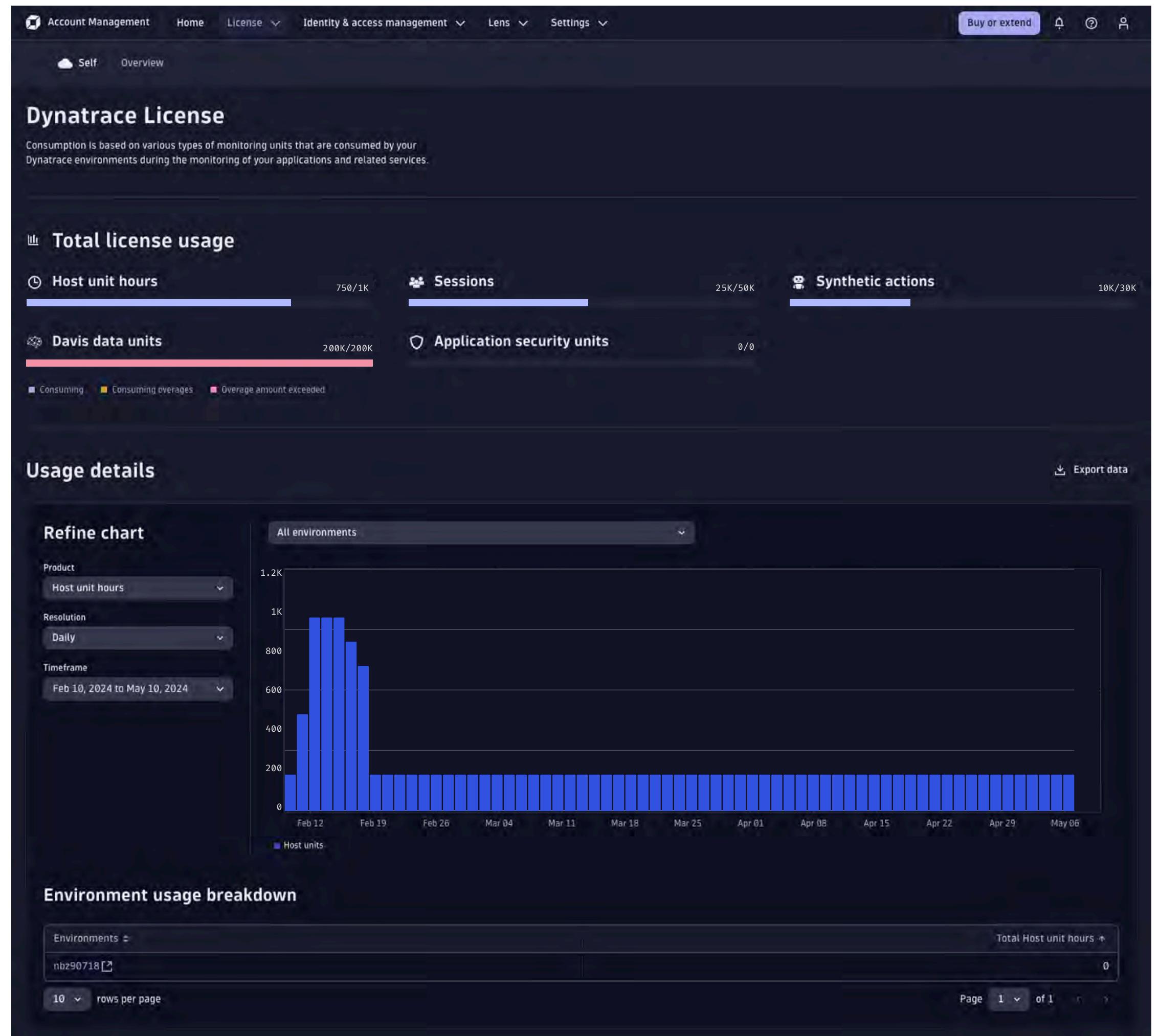
**Use results from empathy and concept stages and apply them to strategic implementation.**

- Design system creation and AM portal creation was symbiotic
- Desktop was prioritized
- License visualization first, IAM second

## 3. DESIGN

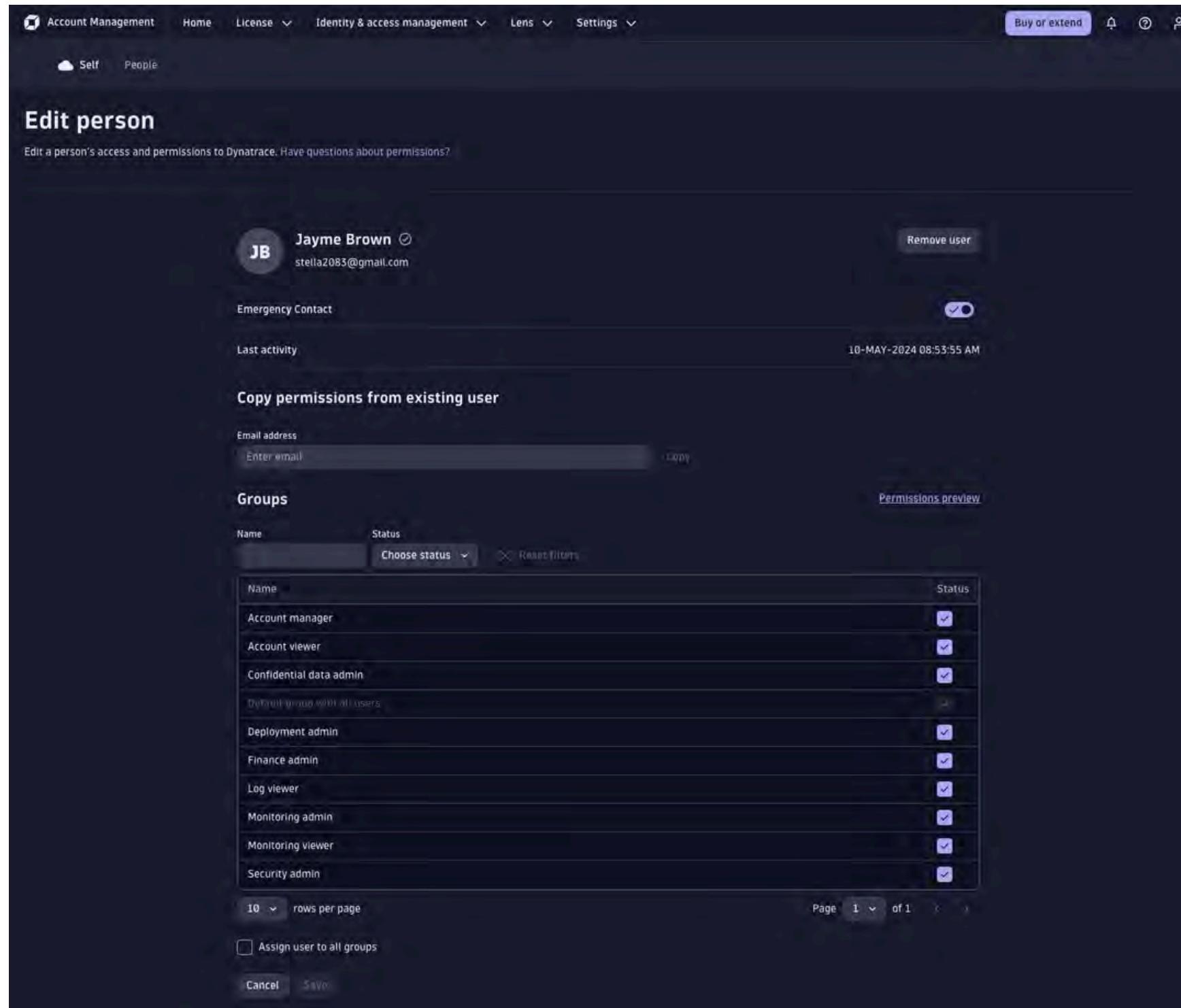
## MVP LAUNCH

- Implementation of current pay-per-capability model
- License overview that would give reliable, timely data about license usage



## CASE STUDY 1: ACCOUNT MANAGEMENT

### 3. DESIGN    MVP LAUNCH



**Edit person**

Edit a person's access and permissions to Dynatrace. Have questions about permissions?

**Jayme Brown**   stella2083@gmail.com

**Emergency Contact** 

Last activity 10-MAY-2024 08:53:55 AM

**Copy permissions from existing user**

Email address  

**Groups**

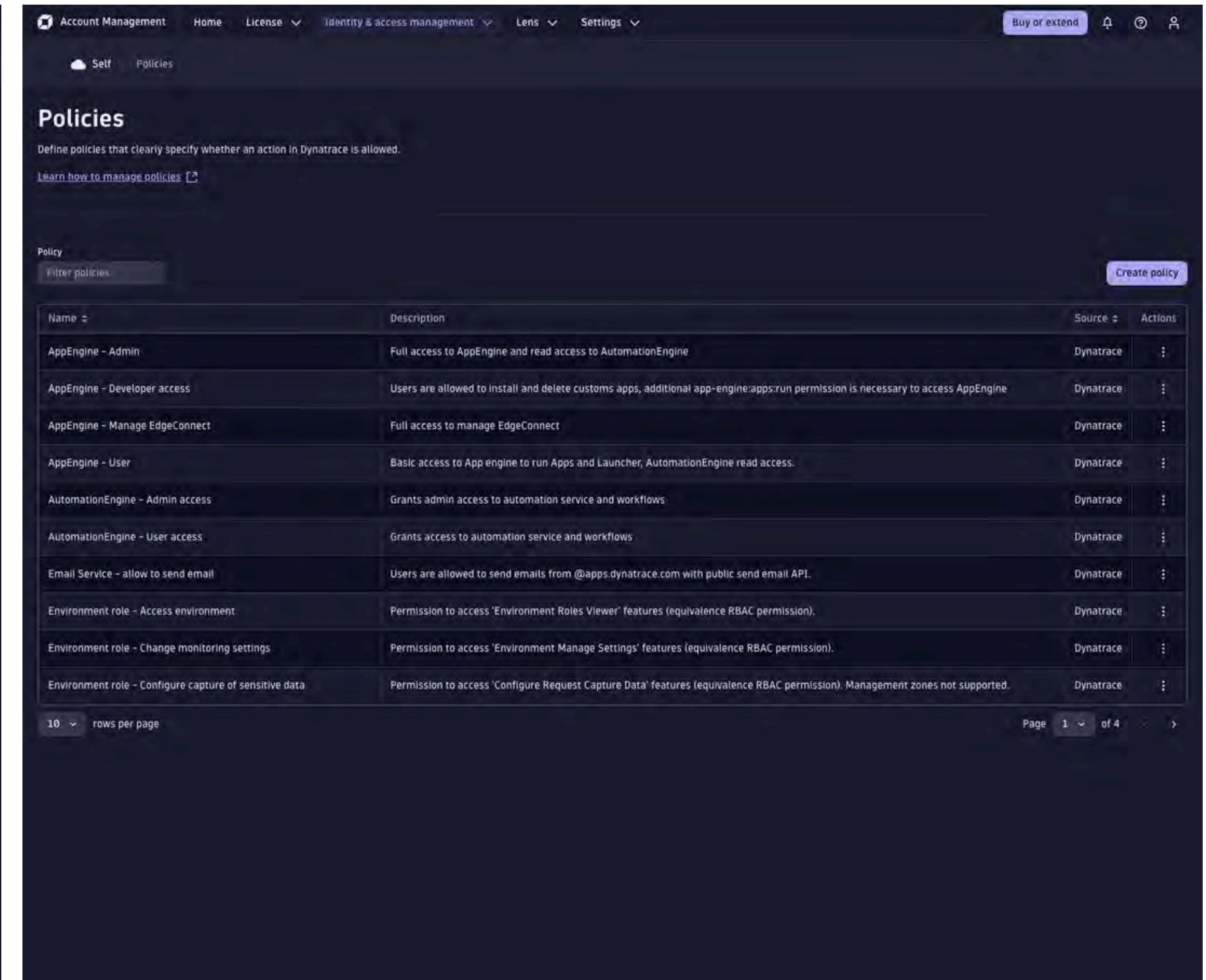
Name	Status
Account manager	<input checked="" type="checkbox"/>
Account viewer	<input checked="" type="checkbox"/>
Confidential data admin	<input checked="" type="checkbox"/>
Dynatrace group with all users	<input checked="" type="checkbox"/>
Deployment admin	<input checked="" type="checkbox"/>
Finance admin	<input checked="" type="checkbox"/>
Log viewer	<input checked="" type="checkbox"/>
Monitoring admin	<input checked="" type="checkbox"/>
Monitoring viewer	<input checked="" type="checkbox"/>
Security admin	<input checked="" type="checkbox"/>

10 rows per page  

Assign user to all groups 

**Remove user** 

**Buy or extend**   



**Policies**

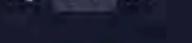
Define policies that clearly specify whether an action in Dynatrace is allowed.

[Learn how to manage policies](#)

**Policy** 

**Create policy**

Name	Description	Source	Actions
AppEngine - Admin	Full access to AppEngine and read access to AutomationEngine	Dynatrace	
AppEngine - Developer access	Users are allowed to install and delete customs apps, additional app-engine:apps:run permission is necessary to access AppEngine	Dynatrace	
AppEngine - Manage EdgeConnect	Full access to manage EdgeConnect	Dynatrace	
AppEngine - User	Basic access to App engine to run Apps and Launcher, AutomationEngine read access	Dynatrace	
AutomationEngine - Admin access	Grants admin access to automation service and workflows	Dynatrace	
AutomationEngine - User access	Grants access to automation service and workflows	Dynatrace	
Email Service - allow to send email	Users are allowed to send emails from @apps.dynatrace.com with public send email API	Dynatrace	
Environment role - Access environment	Permission to access 'Environment Roles Viewer' features (equivalence RBAC permission)	Dynatrace	
Environment role - Change monitoring settings	Permission to access 'Environment Manage Settings' features (equivalence RBAC permission)	Dynatrace	
Environment role - Configure capture of sensitive data	Permission to access 'Configure Request Capture Data' features (equivalence RBAC permission). Management zones not supported	Dynatrace	

10 rows per page 

**Buy or extend**   

## CASE STUDY 1: ACCOUNT MANAGEMENT

### 3. DESIGN

# ITERATIONS

- Implementation of subscription model

Clear subscription terms

Clear budget consumption

Addition of cost in context of data usage



Easy account selector

DV of forecast model

“Event” reporting

Capability and environment details

3. DESIGN

## DESIGN HIGHLIGHTS

Paying close attention to user reactions during the testing process allowed me to gauge the true impact of a concept. **I was looking for joy, ease, and efficiency during my tests.**

Use empathy and evidence to help stakeholders buy in to ideas.

Don't be afraid to try something new.

Design is never perfect or done.

## RESULTS & IMPACT

- Overall favorable reception; positive interactions in the Community, with customers eager to provide feedback and recommend additional features.
- New features helped increased customer renewal rates.
- Provided a new tool to help sales acquire new logos.



## LESSONS LEARNED

- Do the research up front and BE HONEST about what features are realistic for the timeframe.
- Leave enough time for iteration and A/B testing.
- LESS IS MORE! Be clear and concise in what you are asking of the user.



# THANK YOU

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