Jayme Anne Brown

UX DESIGNER & RESEARCHER

Case Study Presentation

About Me

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)
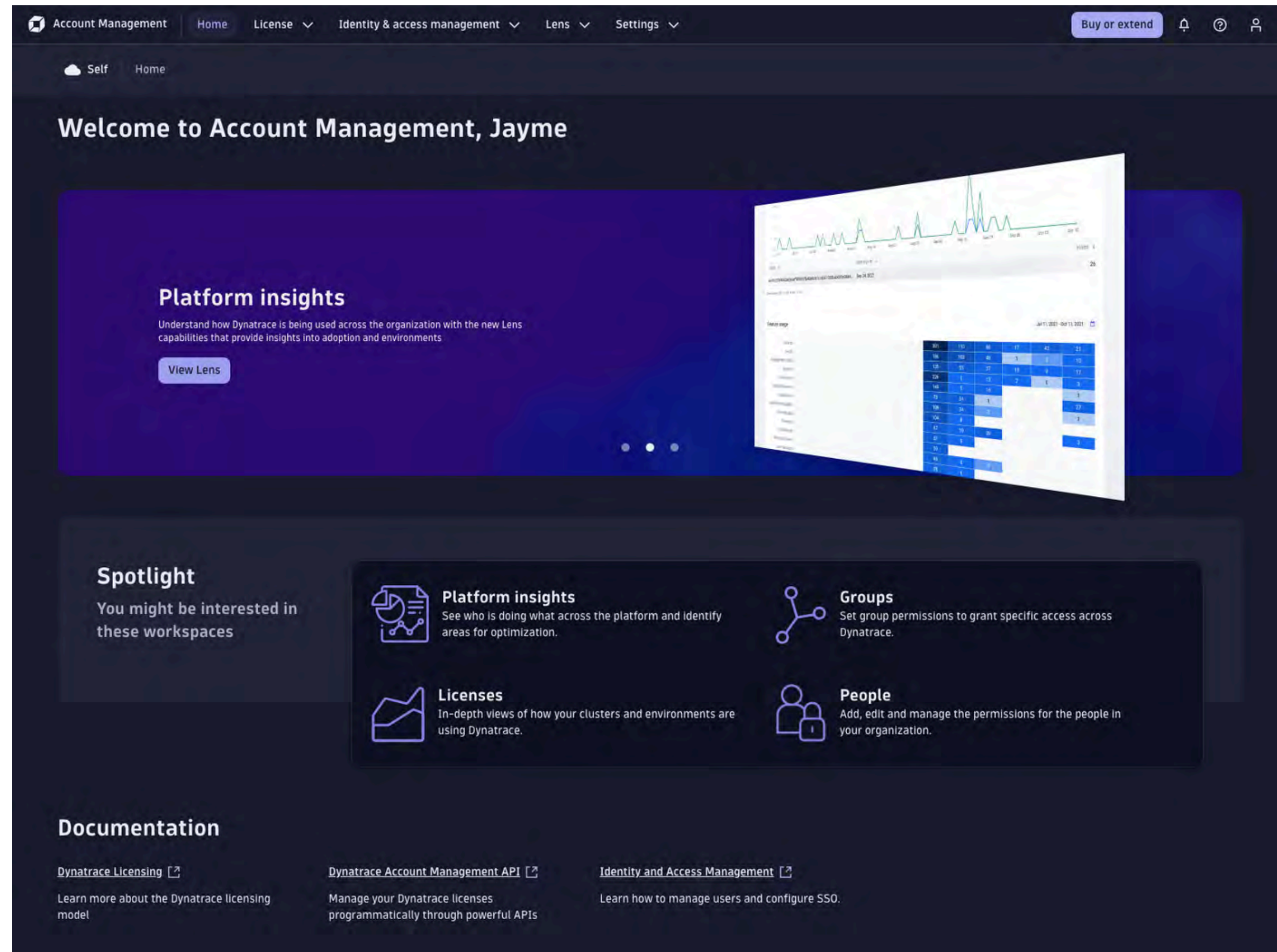
Account Management

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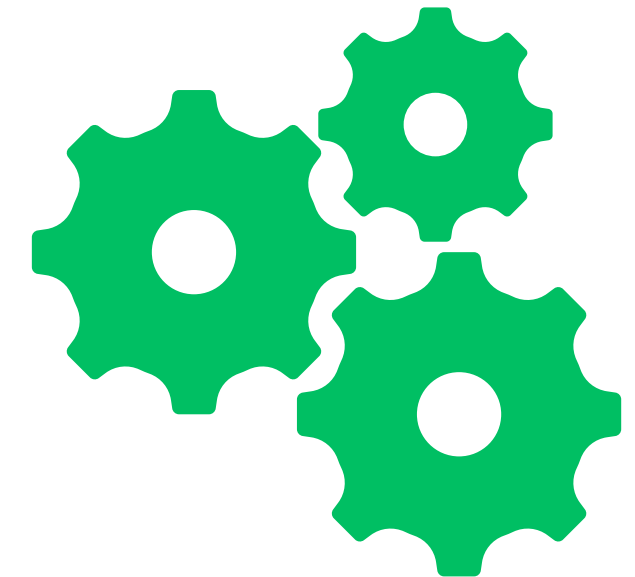
- Finance admins
- Permissions and security admins
- "DT Champion"
- Team admins
- Internal users
  - PMs/Engineers
  - CSMs/PSs
  - Licensing
  - Sales

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

Application Consolidation

Internal dev app

20+ processes within app

Customer app

10+ processes within app

Account Management

ONE SOURCE OF TRUTH

Customer app #2

10+ processes within app

Internal CSM app

Entirely separate internal application

1. EMPATHIZE　　**2. CONCEPTUALIZE**　　**3. DESIGN**
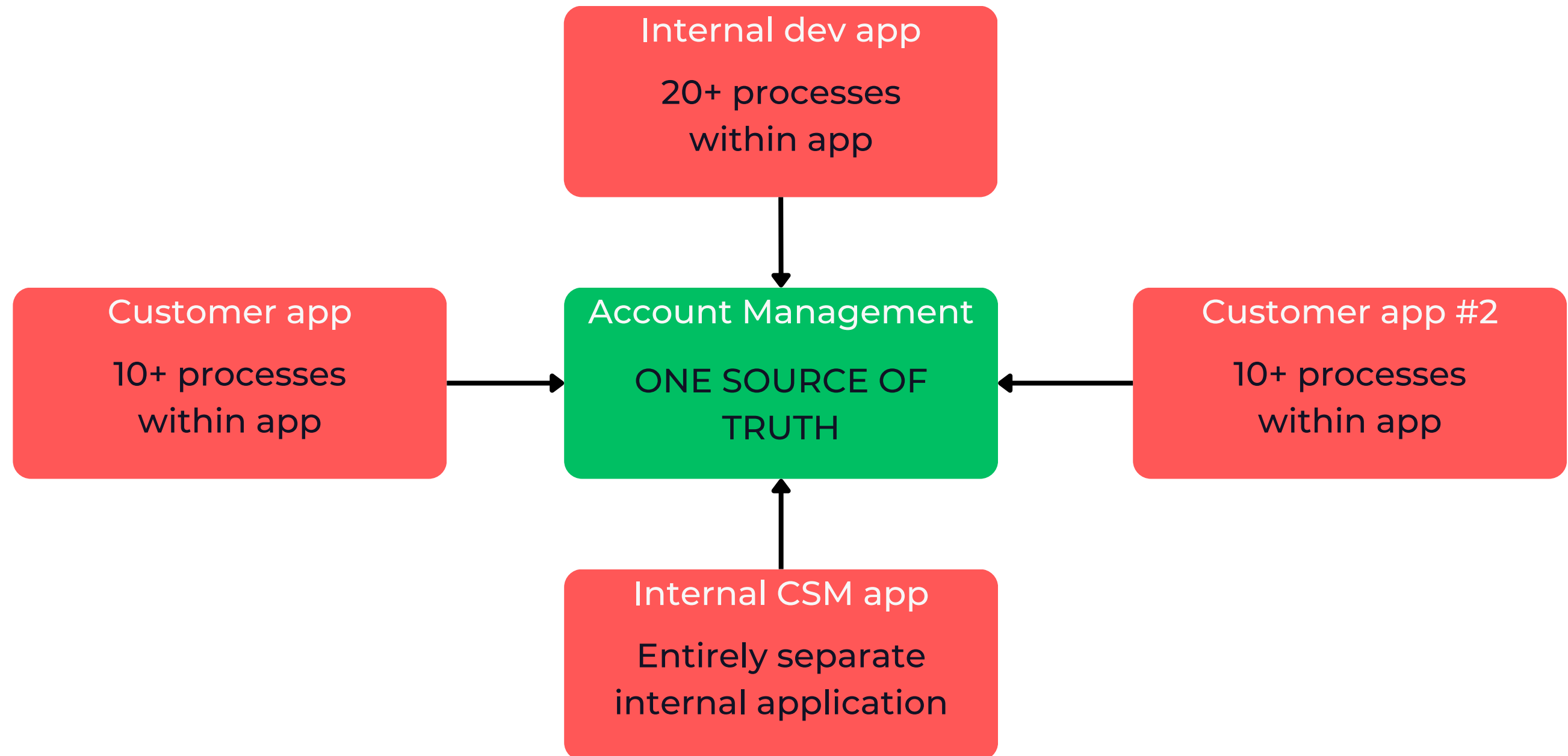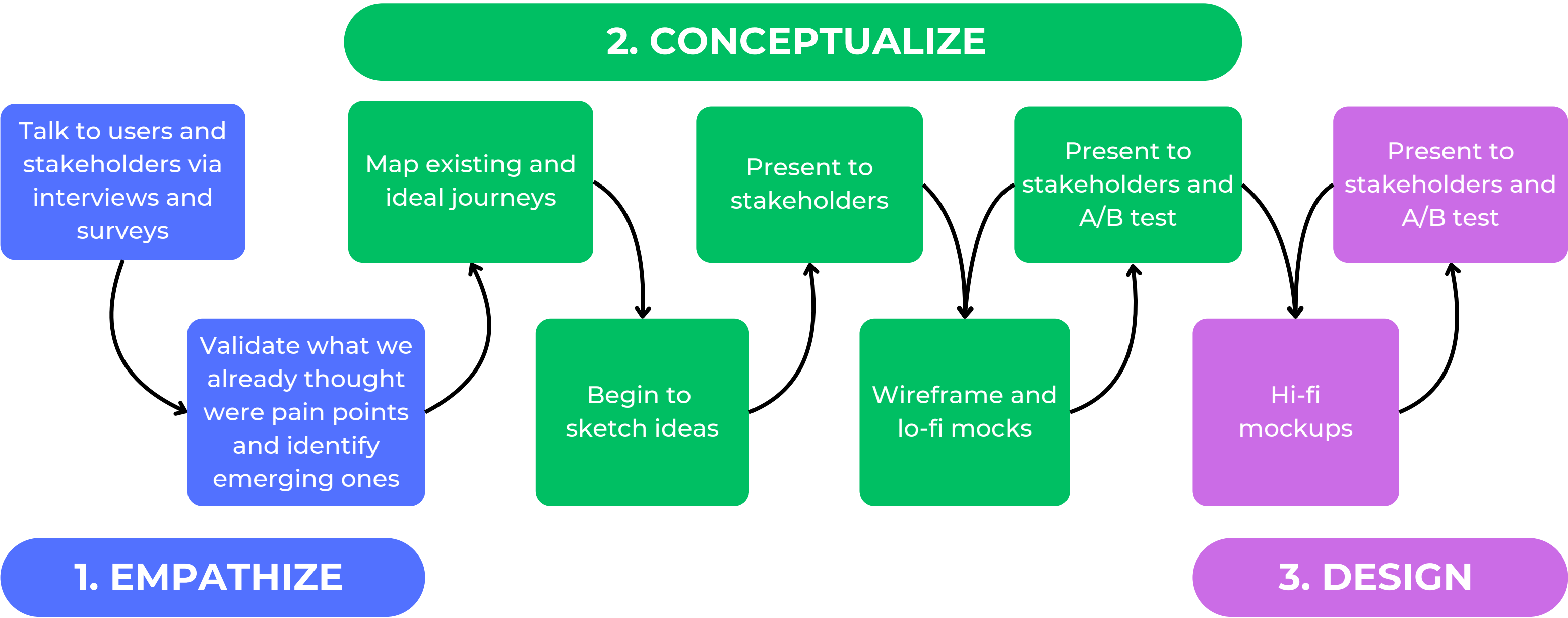
THE APPROACH

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!

1. EMPATHIZE

LEARNING ABOUT USERS

D1

Licensing | Sales | Partners | Devs | Executives | Support | Product Specialists | CSMs

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

Devs

Account status
Bugs
User permissions
Environment permissions

Search

Dev/Eng journeys

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

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

CSMs

Account renewals
Account adoption
Acct license review
Account health

App landing page?
- access commonly and recently used applications

CSM/PS Journeys

ci360 > 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
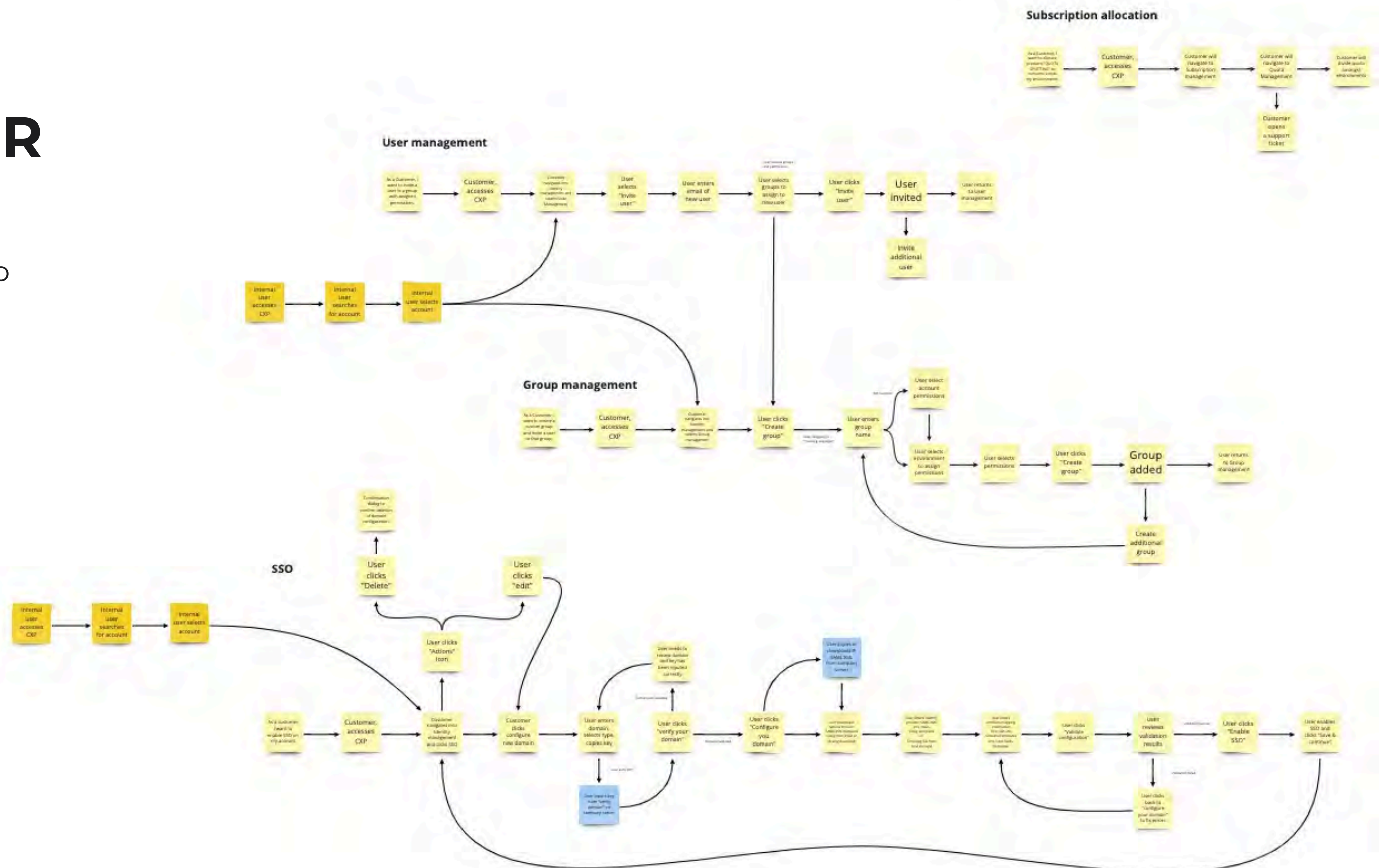
- Classify wants and needs to prioritize build

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.

Engage + Consume - Explore + Discover

As a **customer**, I need the ability to search and filter my audit logs to discover who deleted a user group and when.

- **DT Value:** Low time and effort to implement
- **DT Value:** Reduces time spent on parse logs for customer requests
  - **Support:** 1.5hr/week
  - **Developers:** 1.5hr/week
- **Customer Value:** Users will have more control over their audit log data
- **Customer Value:** Solves paint-point
- **Customer Value:** Immediate answers to their audit log questions

Manage + Configure - Tailor + Adjust

As a **customer**, I need the ability to allocate DEMs to my environments.

- **DT Value:** Less time spent managing subscriptions for customers
- **DT Value:** Passive growth opportunities
- **Customer Value:** Greater control and flexibility to manage their subscriptions
- **Customer Value:** Alleviates frustrations for lack of ability to manage subscriptions

Monitor + Share - Observe + Monitor

As a **customer**, I want to view my account subscription consumption.

- **DT Value:** Passive growth opportunities
- **Customer Value:** Ability to plan for future contract renewals or growth
- **Customer Value:** Ability to monitor their consumption

As a **customer**, I want to view how my company/users are using Dynatrace.

- **DT Value:** Less time spent on creating and delivering reports to customers
- **Customer Value:** Provides insights instantly at anytime to review and understand engagement of Dynatrace
- **Customer Value:** Access to this information to all customers, not just premium

As an **internal user**, I want to view the health of my accounts quickly.

- **DT Value:** Provides greater UX/CX satisfaction
- **DT Value:** Customer retention and stickiness
- **DT Value:**
- **Customer Value:** Proactively notified of account health issues
- **Customer Value:** Ensures customer is getting the most of DT through coaching and enablement

2. CONCEPTUALIZE

MAPPING USER JOURNEYS
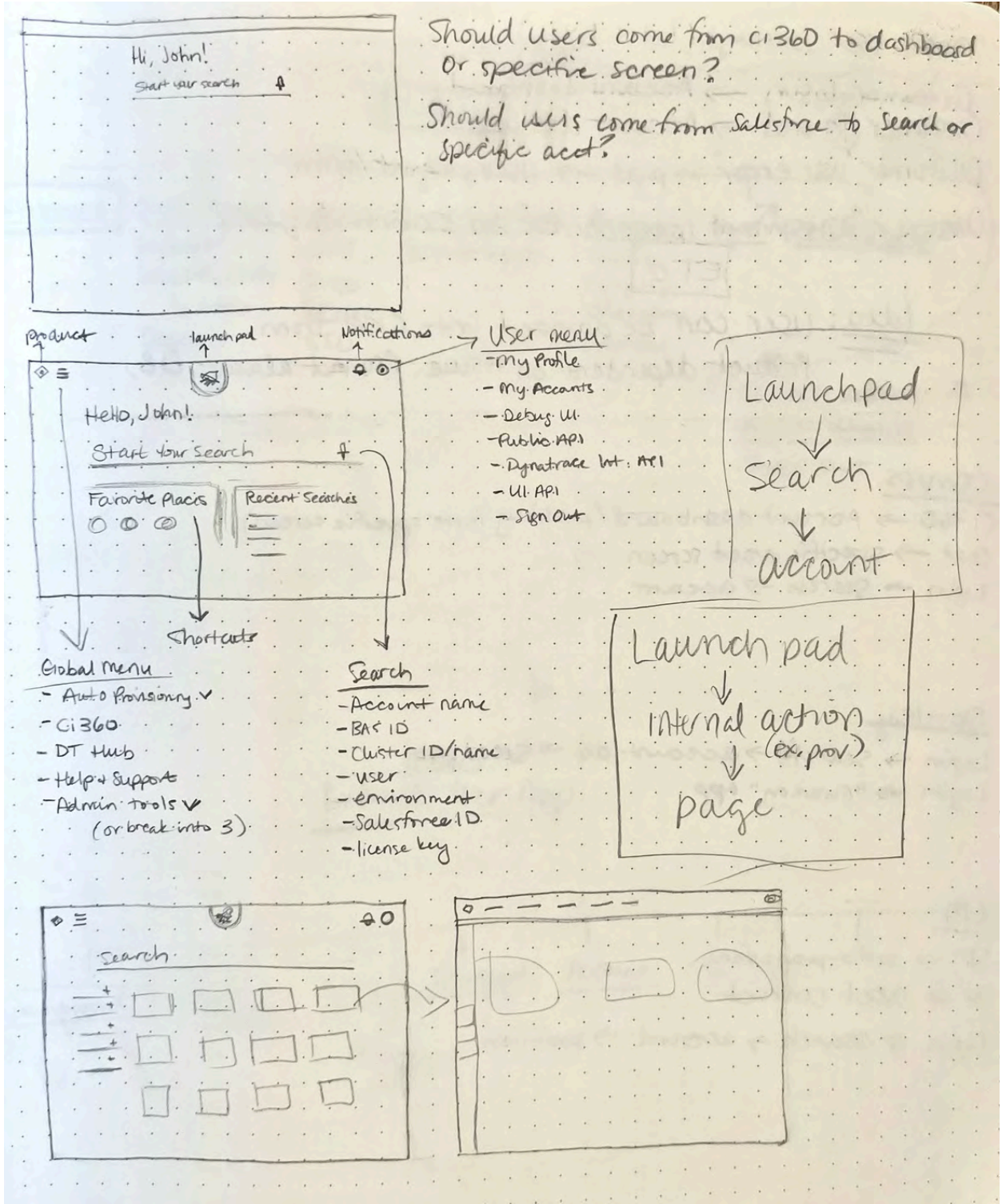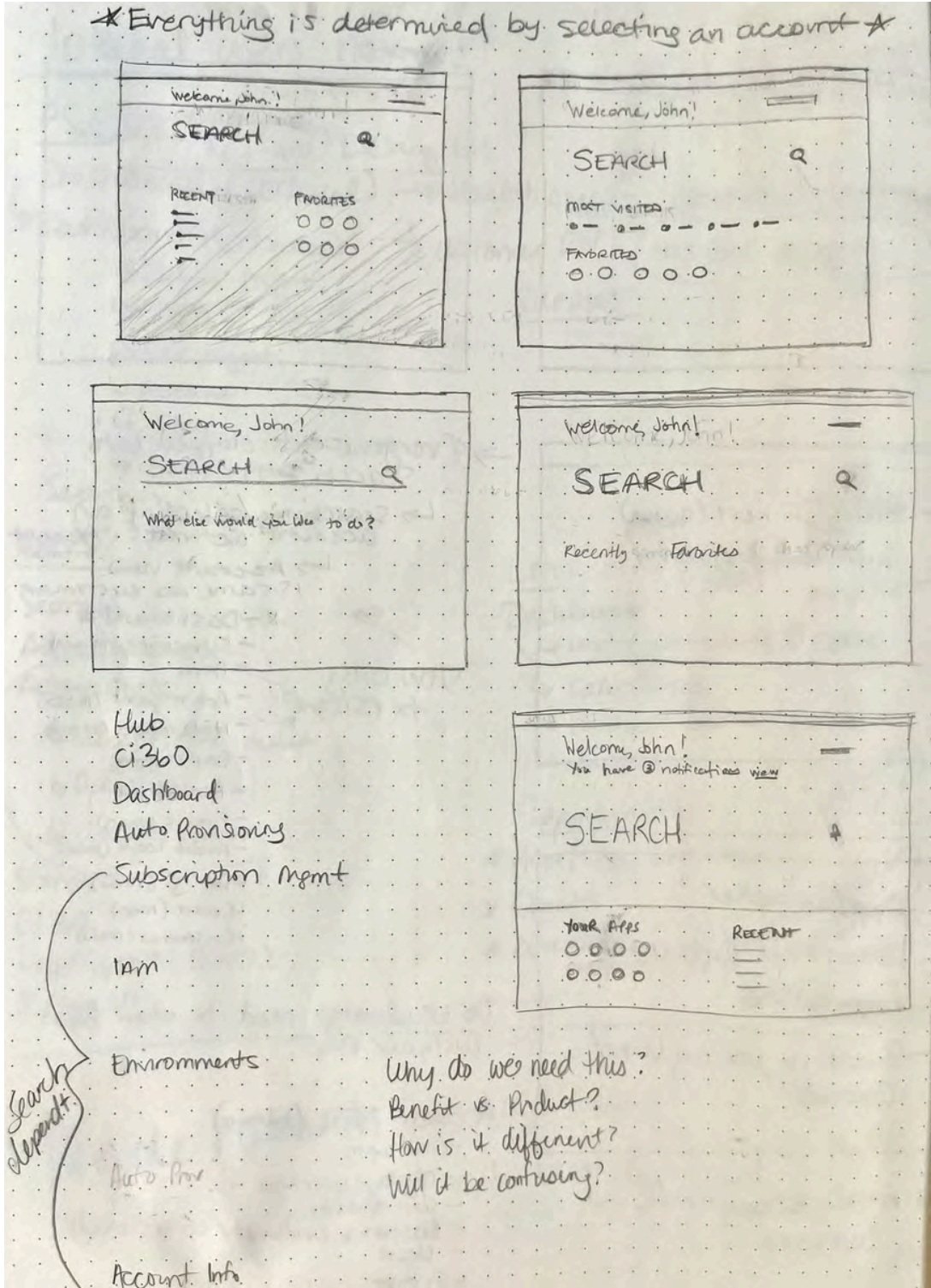
Use cases were translated into ideal user flows.

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."
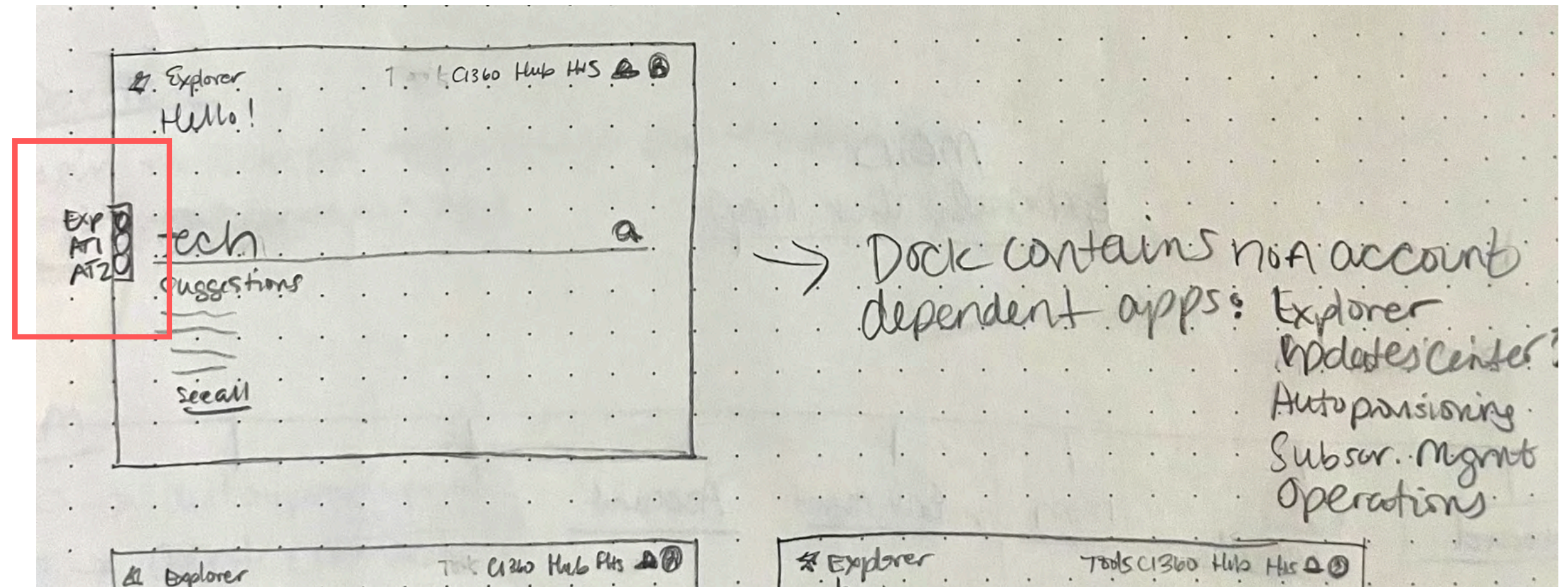
2. CONCEPTUALIZE

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
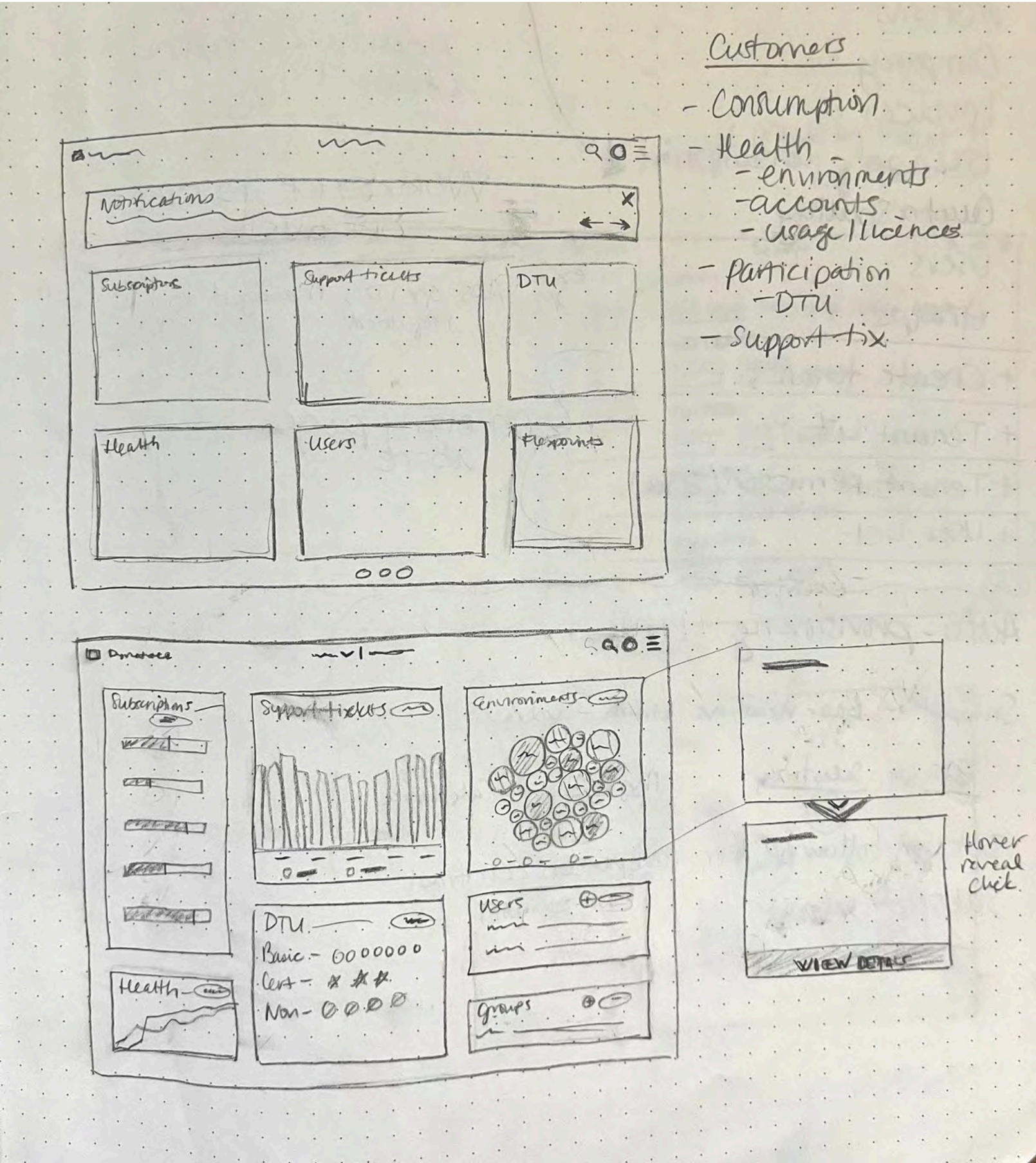
2. CONCEPTUALIZE

LO-FIDELITY/EARLY DESIGNS
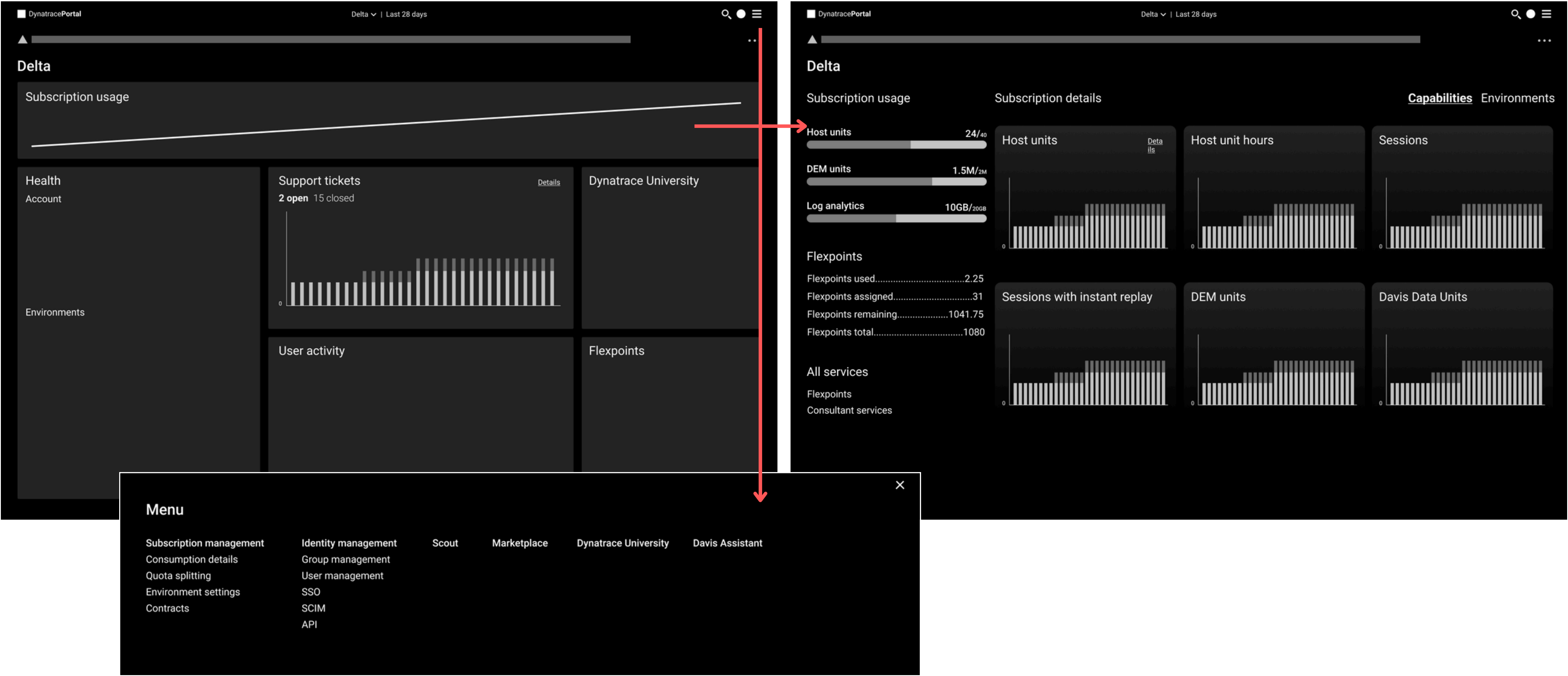
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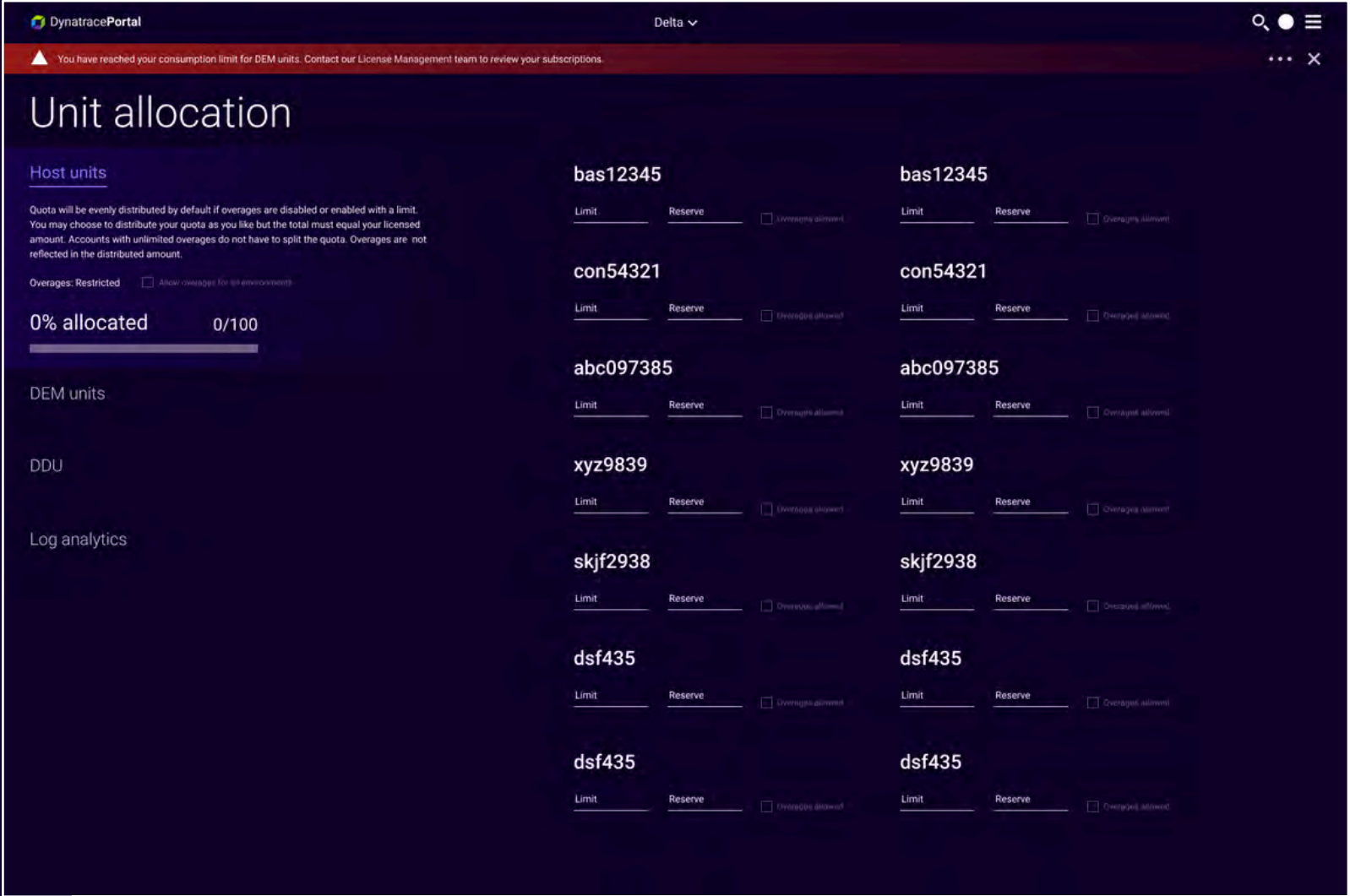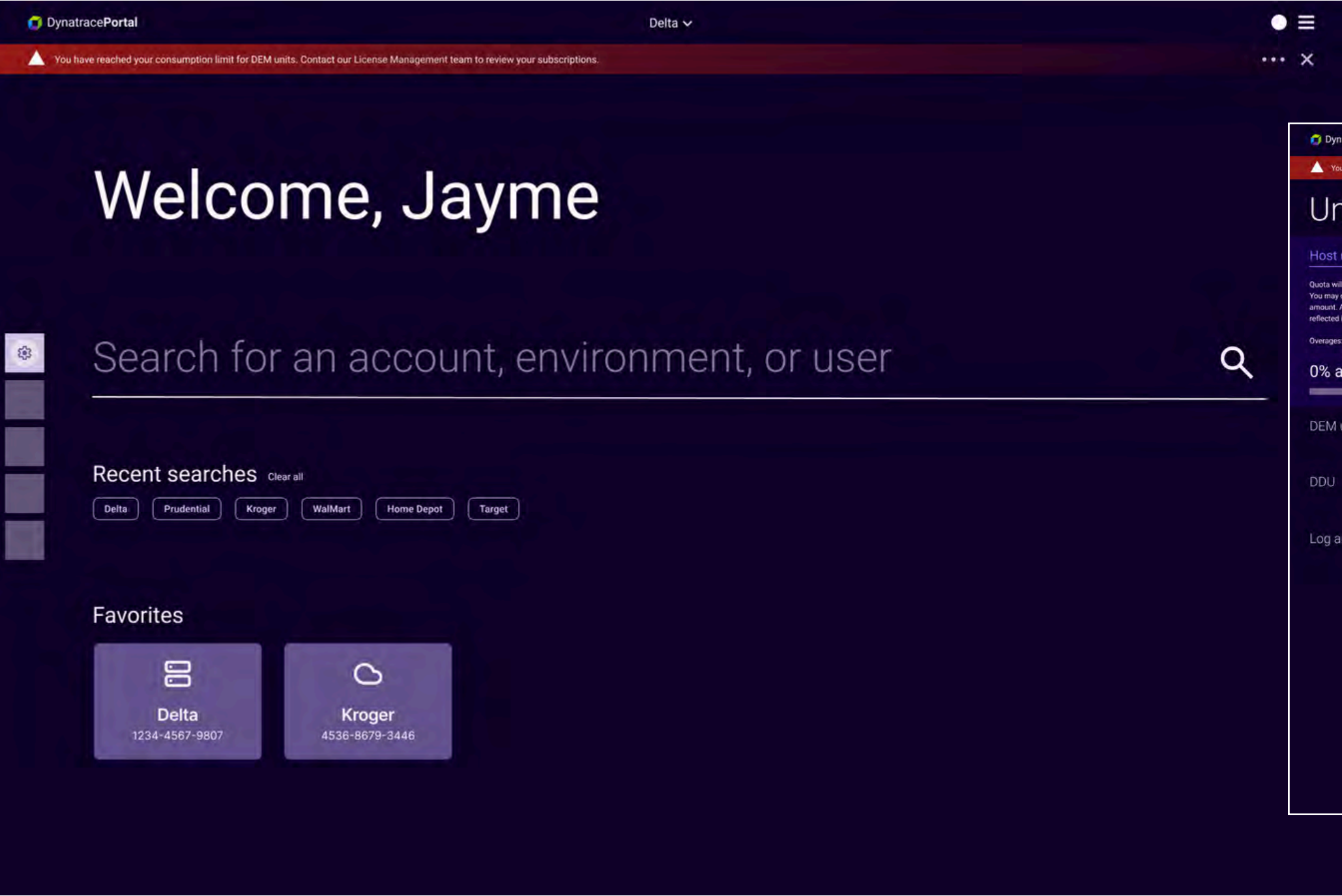
2. CONCEPTUALIZE

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

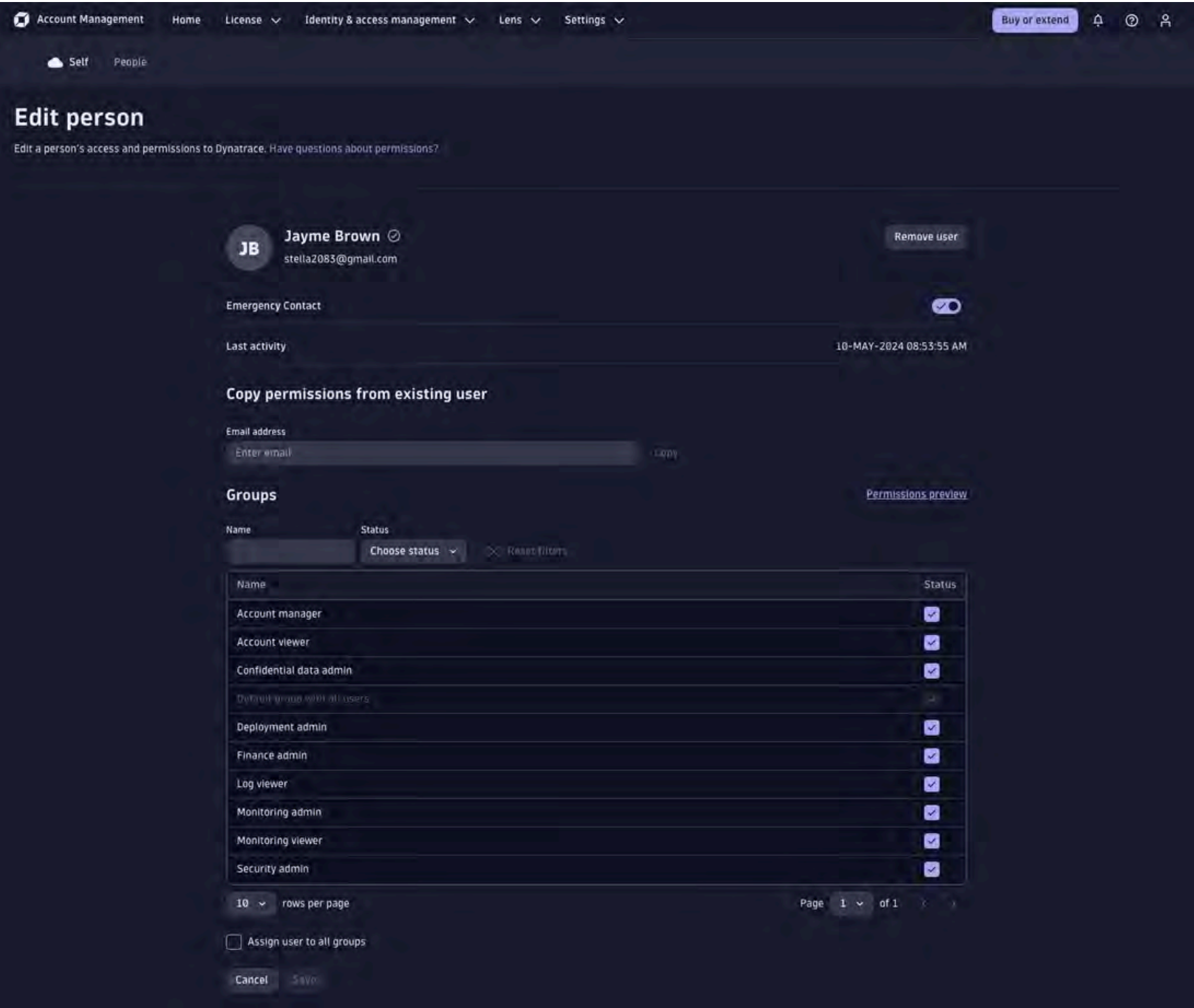- License visualization first, IAM second

3. DESIGN

MVP LAUNCH

- Implementation of current pay-per-capability model

- License overview that would give reliable, timely data about license usage
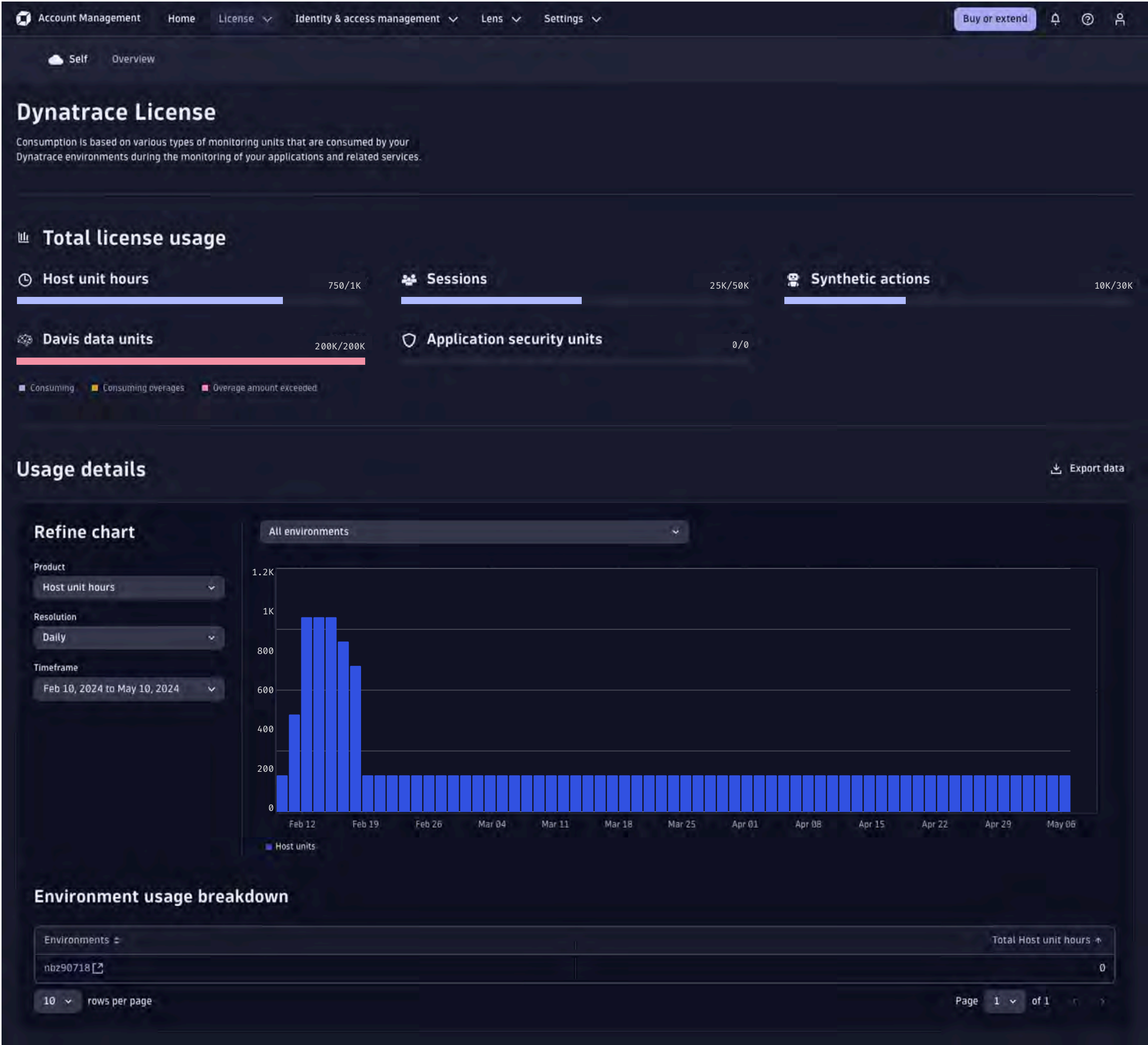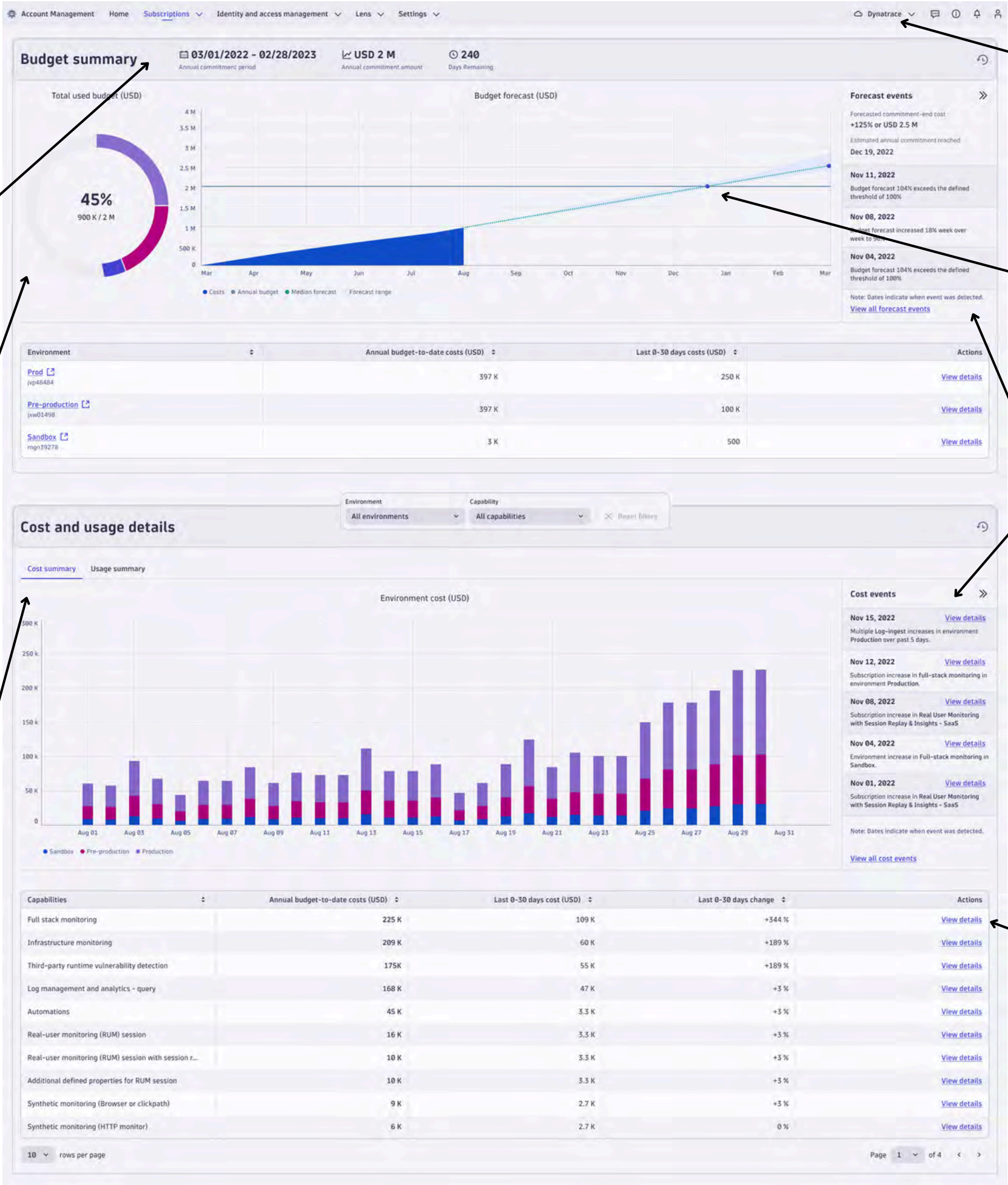
3. DESIGN   MVP LAUNCH
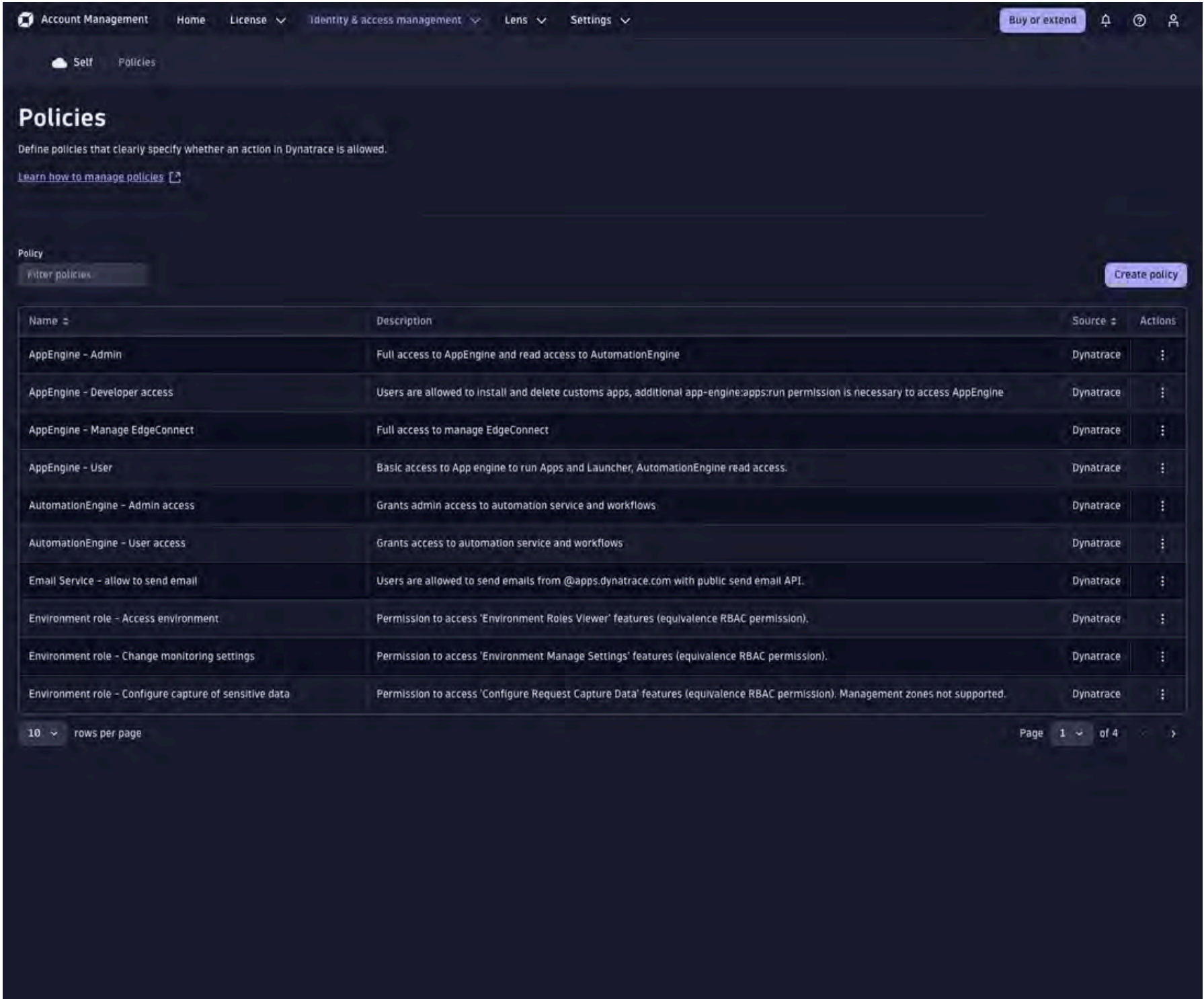
3. DESIGN

ITERATIONS

- Implementation of subscription model

Easy account selector

Clear subscription terms

Clear budget consumption

DV of forecast model

"Event" reporting

Addition of cost in context of data usage

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