Task Manager

Track your activities and improve your work process.

Case Study - Extended Version

Project Overview

The product

Our Task Manager is a tool created to automate and improve your agile work processes. It will help your company to have better communication within teams because you will be able to create processes for different departments, track your activities, and automate them through rules management and AI. All of this will help you reduce planning time, allowing you to focus your efforts on other areas like innovation.

Project Duration

5 months

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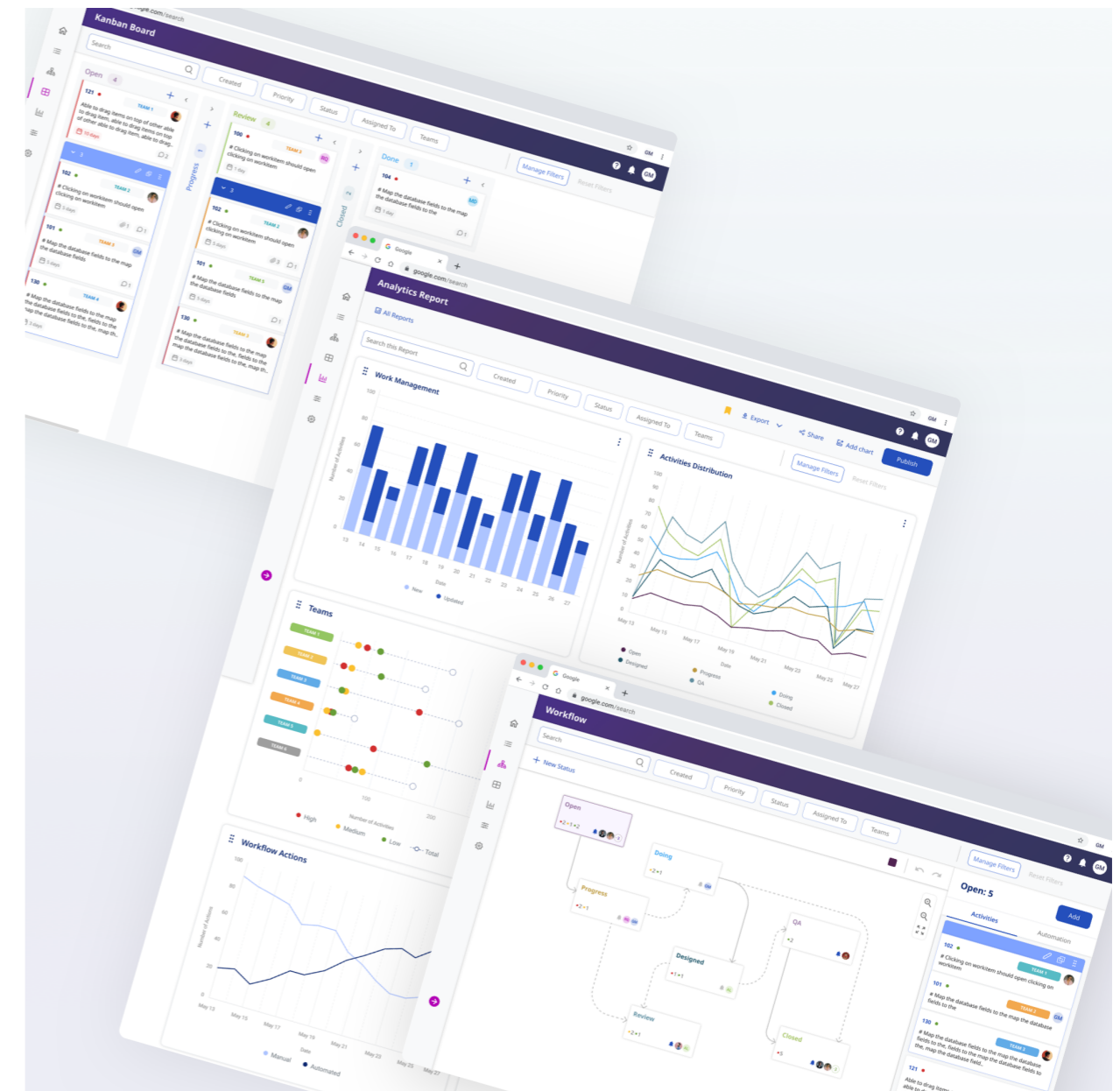
Project Overview

The problem

More and more companies are working with agile methodologies due to their need to adapt to the challenges of the world and transform themselves digitally. A digital transformation must be based on a strong automation process.

Before the pandemic, agile methodologies were important, but now they have become essential. Companies seek to be more competitive, improve their productivity as well as plan in an agile way and make decisions more quickly to be able to deal with uncertainty and constant changes.

The goal

Design a solution that allows organizations to:
- Work collaboratively
- Automate complex workflows in a company
- Have a total visualization of the activities and processes that happen within a company
- Track activities
- Make better decisions that improve the work process of a company
- Reduce manual interventions
- Increase productivity
- Better communication between departments

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Project Overview

Our Role

Our expert team faced this problem using a Human - Centered Design approach. We started by doing a workshop with stakeholders to understand the business needs. Then we began the discovery phase to understand the target, goal and people needs. Next, we spent time reviewing the current system in order to totally redesign it and build new functionalities. Once we had a clear understanding of the existing system and needs, we began creating user journeys, wireframes, a design system and high-fidelity mockups. All these designs were simultaneously validated to confirm that they met the business and people needs.

Responsabilities

- Research to understand the requirements, business objectives and user needs
- Organize design tasks and priorities taking into account business objectives and user needs
- Wireframes
- High fidelity design
- Prototyping
- Validation with client
- Hand off with developers
- Participation in demos to review progress and resolve doubts

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Understanding the User

- User Research
- Personas
- User Journey Maps

User Research

Summary

In the initial workshop we used tools that helped us to map the stakeholders, both direct and indirect, define the new features for the application, and understand more about the product through a brand personality tool.

We also established the Mission Statement, Value Propositions, Business Goals and scope for the project. Finally, we identified our target and main competitors, both direct and indirect. Then we used tools such as Journey Maps to help us to visualize what the user was doing in each of the current screens of the system. In this way we were able to identify the feelings and opportunities to improve in the redesign.

We also mapped the information architecture, which helped us to understand how the navigation was currently organized so we could identify what we needed to improve. Once we had a clear understanding of the existing system and needs, we began creating user journeys, wireframes, a design system and high-fidelity mockups.

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Pain Points

Poor communication

Communication between teams within the company often fails, and this affects productivity causing frustration and stress on employees.

Lack of process visualization

The lack of visualization of the processes doesn't allow us to make effective decisions that help us improve since we cannot identify problems and areas of opportunity easily.

Manual processes

The management of activities and tasks in a project is done manually or through spreadsheets, making it a time-consuming and tedious process prone to errors that affect productivity and results.

Decentralized analytics

The use of external analytics systems and third-party applications made the discovery of insights time consuming and sometimes inaccurate due to the lack of coordination between platforms.

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Persona

Natalia

- 32 years
- Houston, TX
- Project Manager

Bio

Natalia is a Project Manager who works in a tech company. She is an organized and responsible person, and most of the day is spent in meetings since she needs to be informed of everything that happens within a project. She currently works remotely and seeks to be in constant communication with her team because she is in charge of carrying out and accomplishing the tasks of the entire project on time.

"
Communication is always the key, but it becomes more complex remotely.
"

Goals & Motivations

- Have a better communication between teams
- Have full visibility of the activities and processes of a project
- Automate tasks and activities in a company
- Improve work process inside and outside the company
- Organize activities and tasks so they take less time and effort in the future
- Increase productivity

Frustrations

- Organizing activities and tasks manually requires a lot of time and effort
- Communication between teams is difficult, and it becomes more complex remotely
- If we do not have analytics that tell us how we are doing, we cannot make decisions to improve our work process

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User Journey Map

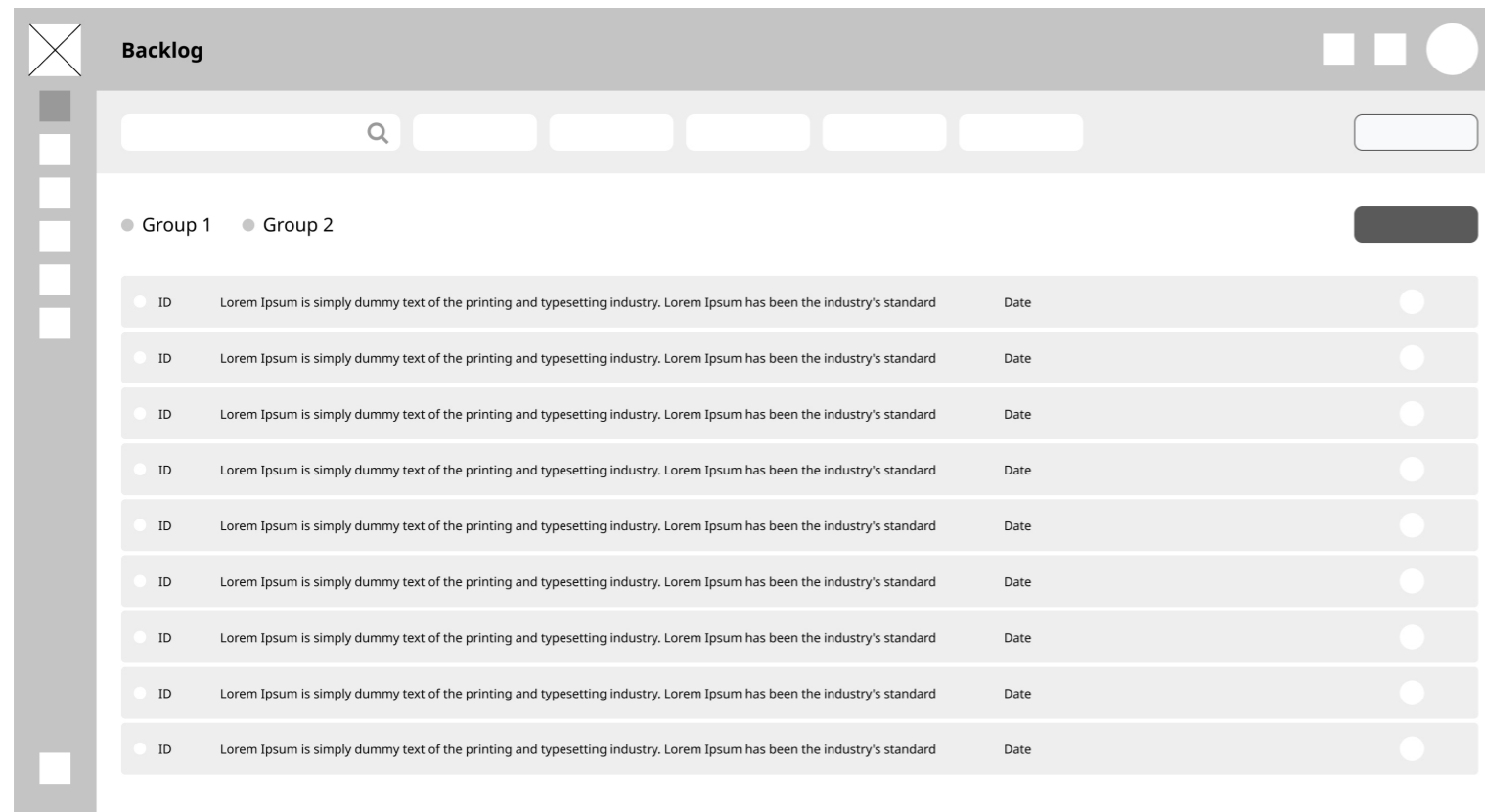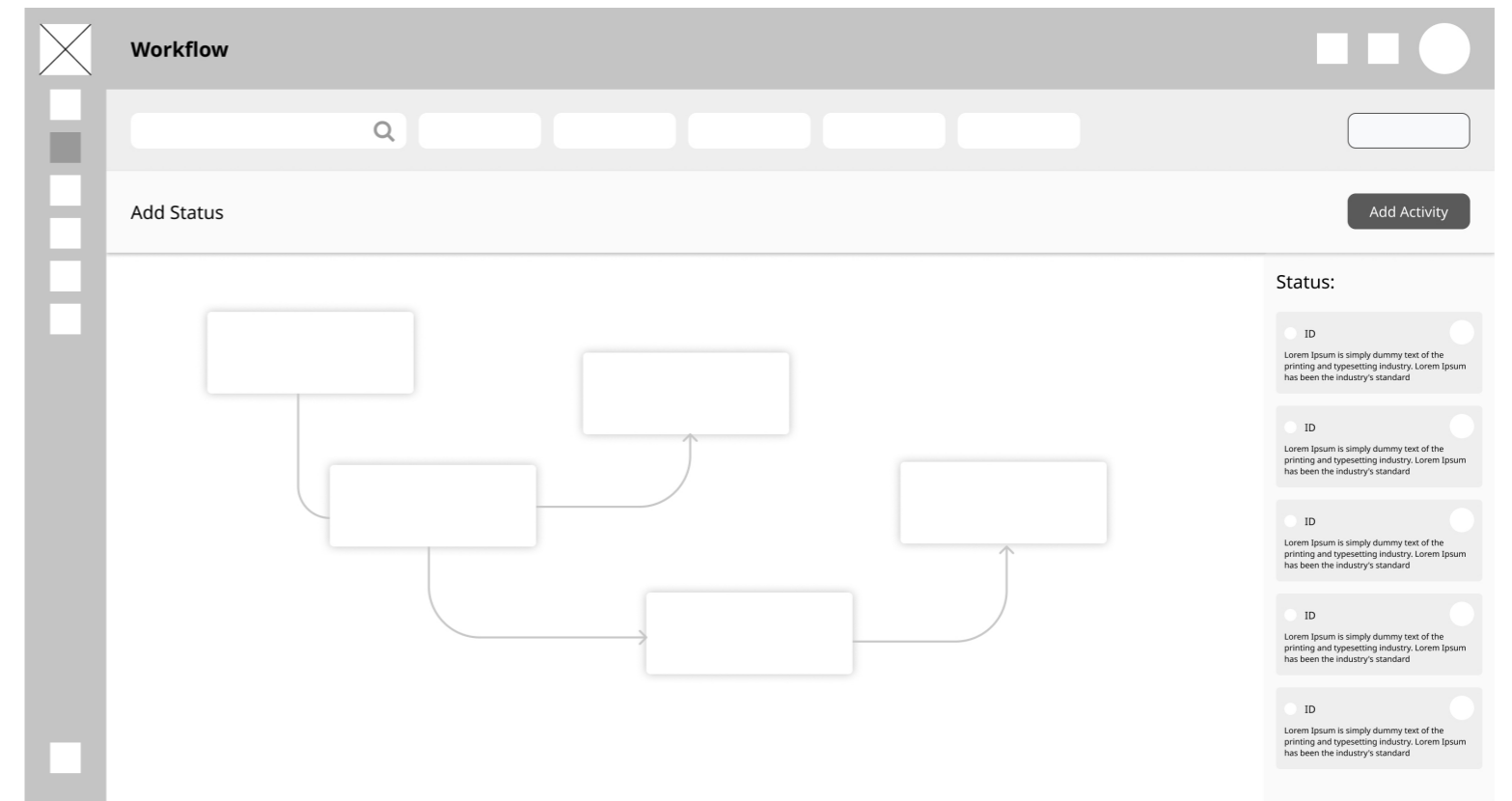|	Login	Onboarding	Discovery	Backlog	Workflow	Kanban Board	Analytics	Rules Manager	Configuration
Doing	- Login with Microsoft Account or other account	- Review the complete onboarding - Understand the most important functionalities - Have a guide to understand where to start	- Start to see how certain functionalities work - Click on all the menus to see what is in each one	- Find new activities - Add activities - Prioritize work - Group work	- Track my activities in a workflow view - Find new activities - Add activities - Prioritize work - Group work	- Track my activities in a Kanban view - View and keep track of my activities and stages within a process - Move and organize my tasks - Prioritize work - Group work	- Visualize the performance and productivity of the team in relation to activities and tasks - Make better decisions that impact the work process	- Configure conditions and actions that automate the work process	- Configure and customize the system
Thinking	- Will it be easier if I have a Microsoft account?	- Where do I begin? - What is the first thing to do?	- What will each of the menus do? - How much will I be able to do in the system? - How much will the system help me?	- How can I create groups? - How can I group activities? - How can I order activities?	- What does my process look like? - Can my process be improved upon? - Where is the work getting stuck? - What are my bottlenecks?	- How can I create groups? - How can I group activities? - How can I create new statuses?	- How do I improve my processes? - How are people working? - What has been done/automated in the past?	- What rules can I define to reduce my others workload? - What can I do to make my outcomes more consistent/measurable? - How do I get the right work to the right people?	- How do I set this once and forget it? - How can I customize and configure my system?
Feeling	😄	🧐	🙂	🙁	☹️	😁	🧐	🤓	🙁
Pain Points	- Do I have to give you my credit card? - Doubts the value of the product	- I don't know where to click - I don't know where to start - I don't know if by clicking, I will be able to return to onboarding or is it only once - Can I start differently and not by onboarding?	- I don't know where to click - I don´t know where to start	- The grouping of activities is not clear - I don't understand what manual and automated groups are - It's hard to find the activities I need	- Not being able to create activities, only new states - It is difficult to move the workspace and workflow - It's hard to find the activities I need	- Drag and drop functionality is not clear - When there are many statuses, there is no visibility at first sight - It's hard to find the activities I need	- I can't create reports from my analytics - I can't export my analytics - I can't customize my analytics	- It's hard to create rules - I don't know how to connect the rules created so that the system takes them into account	- I can't customize the system - I don't understand the relationship of these screens with the rest of the system - There is a lot of data that is repeated here and in the rest of the system, I do not understand what the difference is
Opportunities	- Empower word of mouth - Have a lot of promotion in the marketing area - Show subscription plans and free trial option clearly	- Show the features in order, so that we can guide the user in the recommended steps to follow - Offer the option to turn on and off the on boarding	- Display the menu in suggested order to guide the user in their actions	- Show some complementary text to help the user understand manual and automated groups - Help the user to create groups through some on boarding - Add a filter section to help the user find the activities easily and quickly	- Add the option to create activities in the Workflow - Enable the functionality of moving the workspace in a simple and natural way - Add a filter section to help the user find the activities easily and quickly	- Enable drag and drop functionality clearly and naturally - Allow to collapse and expand statuses to have visibility of all - Add a filter section to help the user find the activities easily and quickly	- Add functionality to create reports with the option to export in different formats - Add functionality to customize charts for different reports	- Show a help text so that the user understands what the Rules Manager does - Guide the user to create conditions and actions and how they help automate the system	- Show a help text so that the user understands what to do in Configurations - Clearly and easily distinguish all the functionalities that can be done in Configurations - Enable the On Boarding option to guide the user to understand the relationship between Configurations and the rest of the system

Starting the Design

- Digital Wireframes
- Business Rules
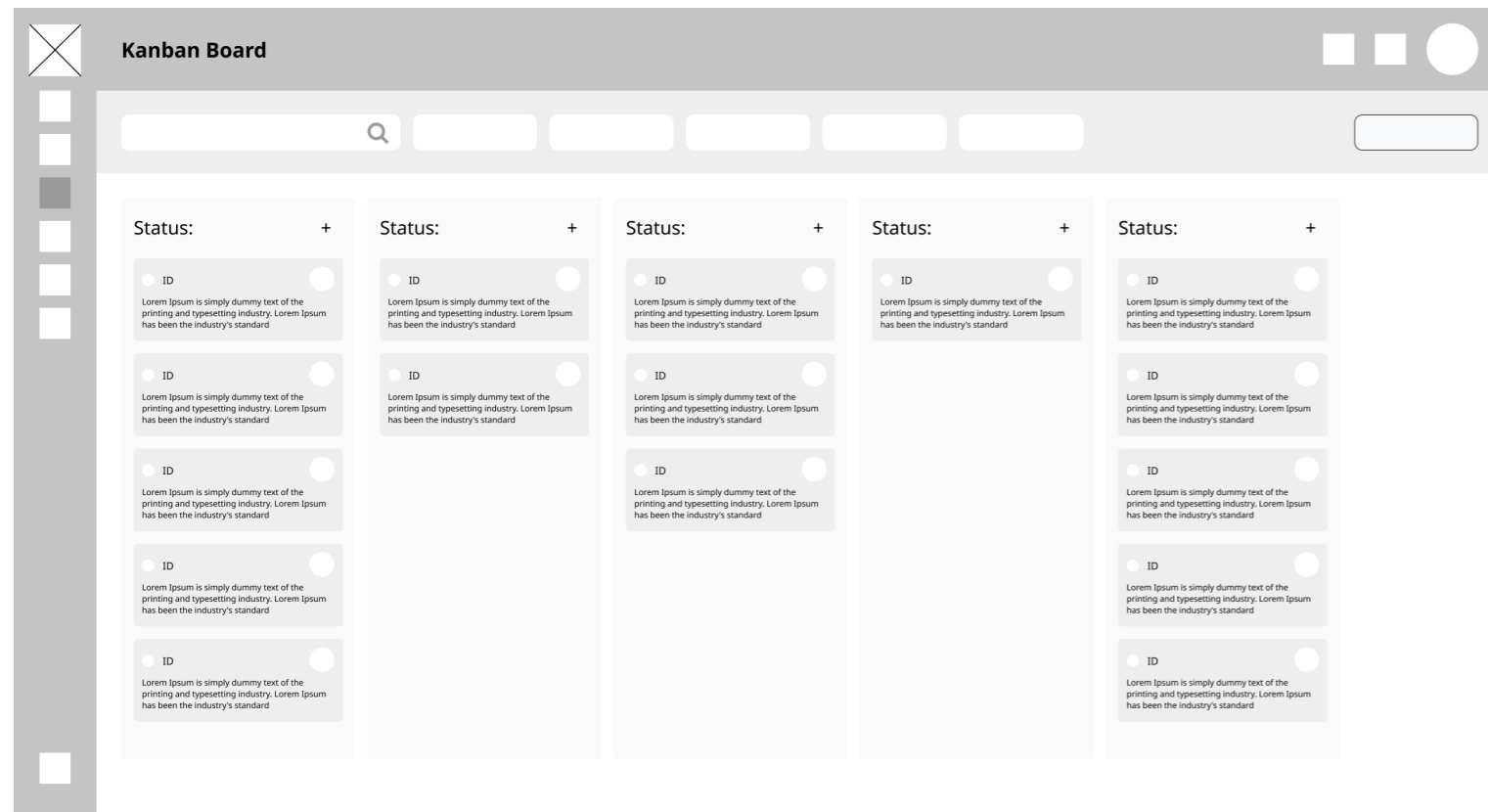
Digital Wireframes

Backlog

On this screen you will be able to view all the activities in a list.
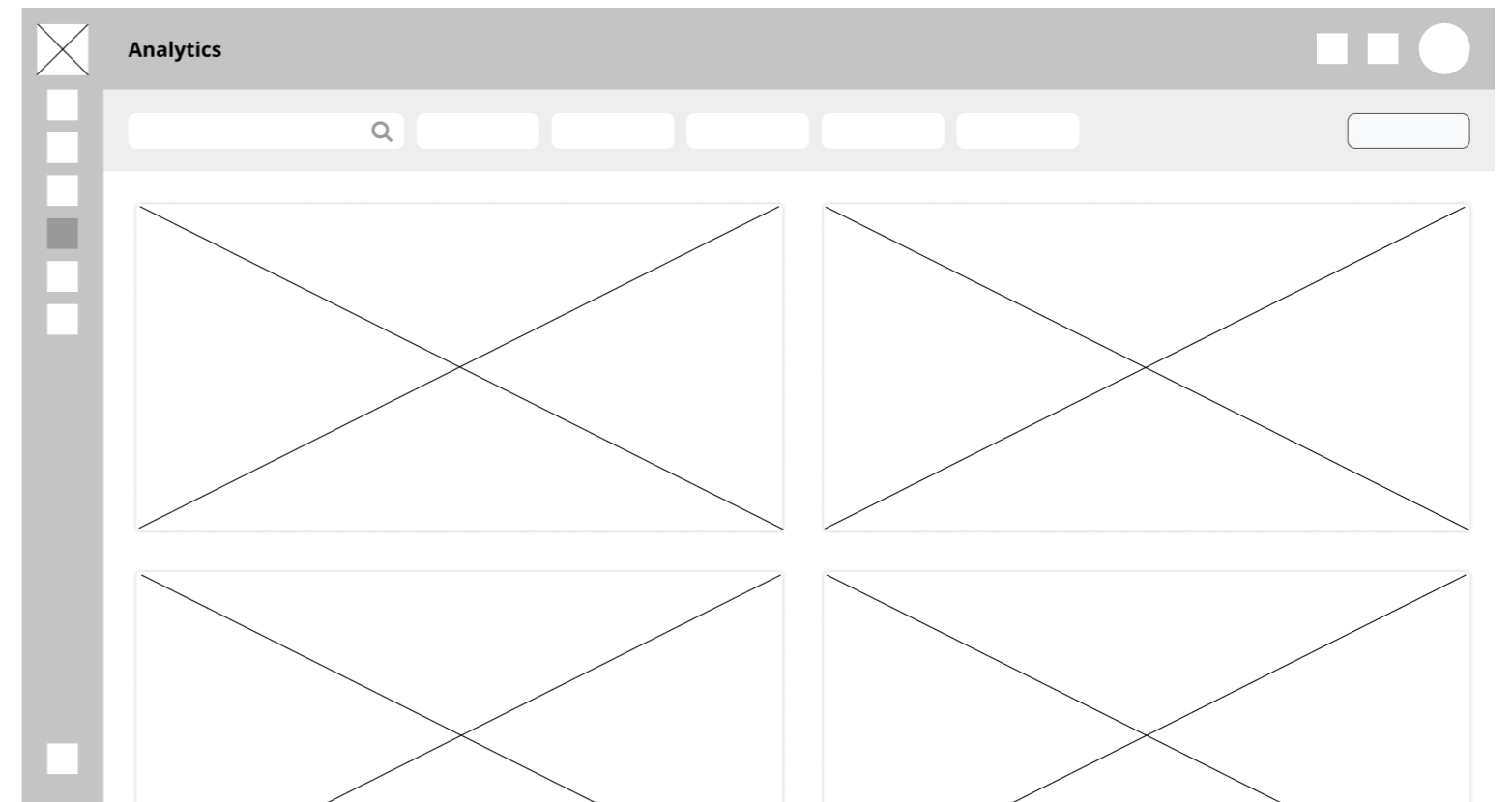
Workflow

On this screen you will be able to view all the activities in a workflow.
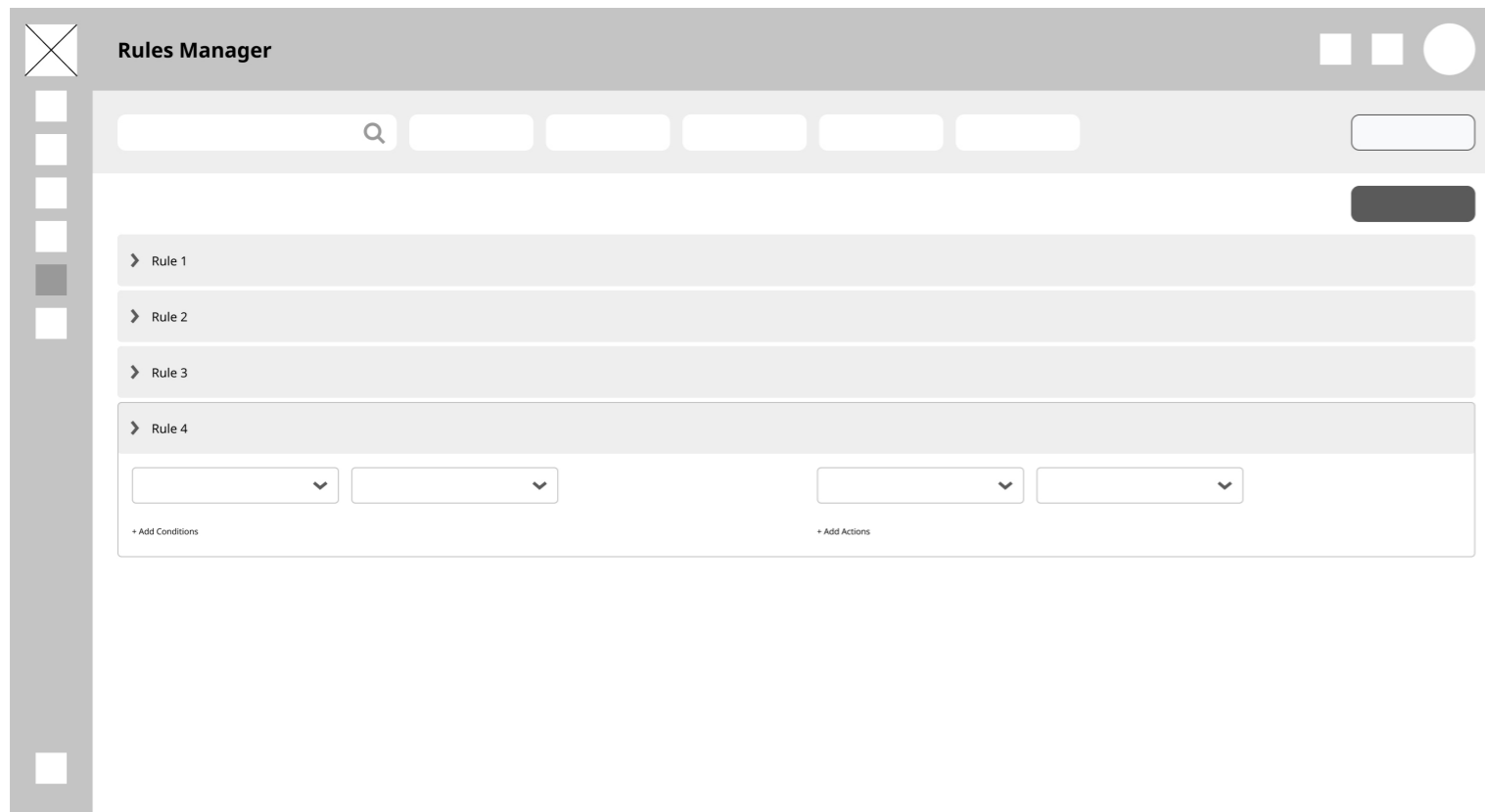
Digital Wireframes

Kanban Board

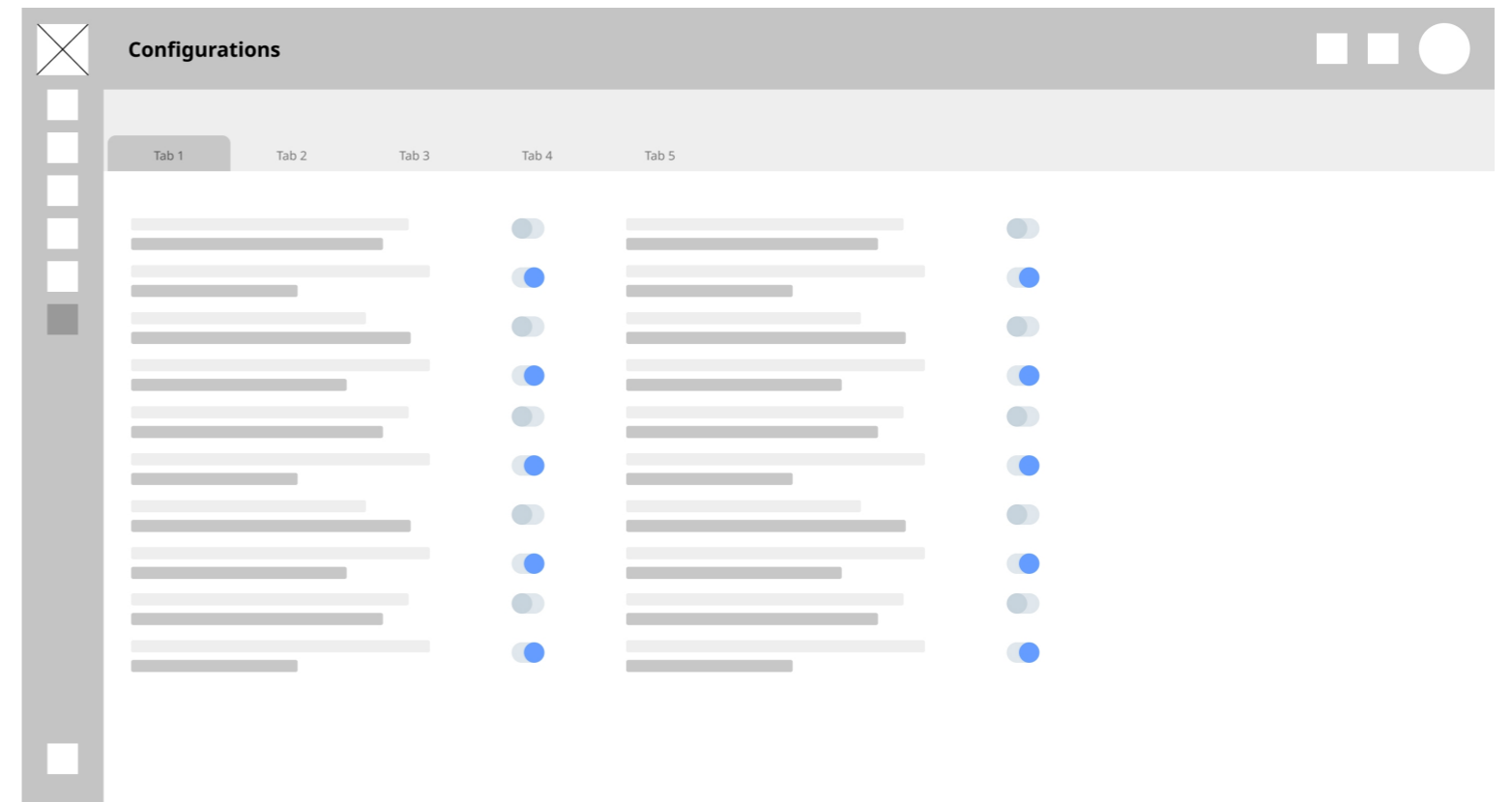On this screen you will be able to view all the activities in a Kanban view.

Analytics

On this screen you will be able to view everything you need for data analysis.

Digital Wireframes

Rules Manager

On this screen you will be able to create and manage rules to automate activities.

Configurations

In this screen you can configure everything related to the system.

Business Rules

Key Requirements

- Web Version
- A single solution for users and administrators
- Pre-established library
- Support agile business processes
- Data driven for rapid configuration
- Data analytics and customizable reporting
- Fully configurable workflows
- Integrated machine learning for work assignment and prioritization
- Rules based automations

Refining the Design

- Mockups
- High - Fidelity Prototype
- Accessibility
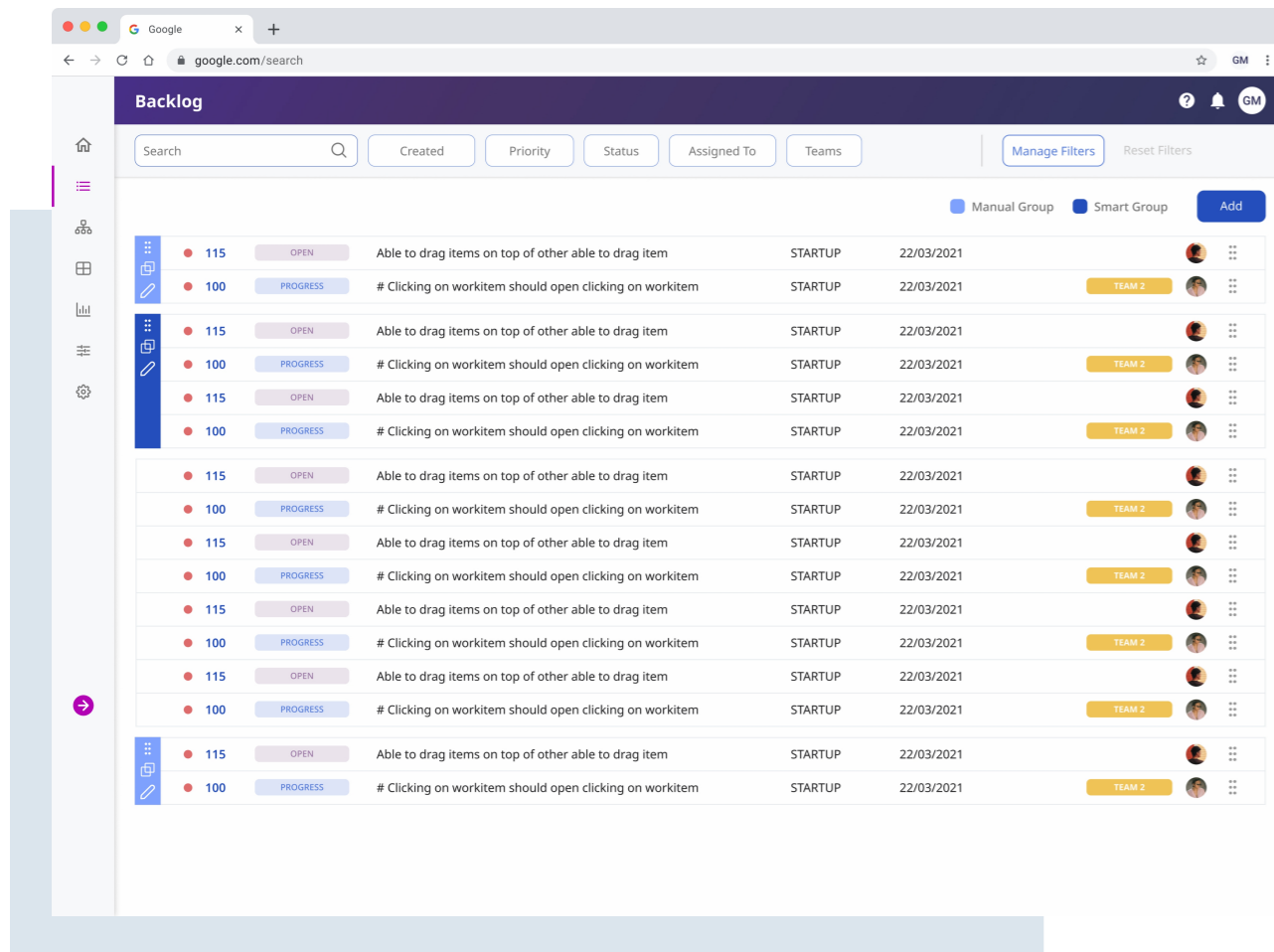
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Mockups

Backlog
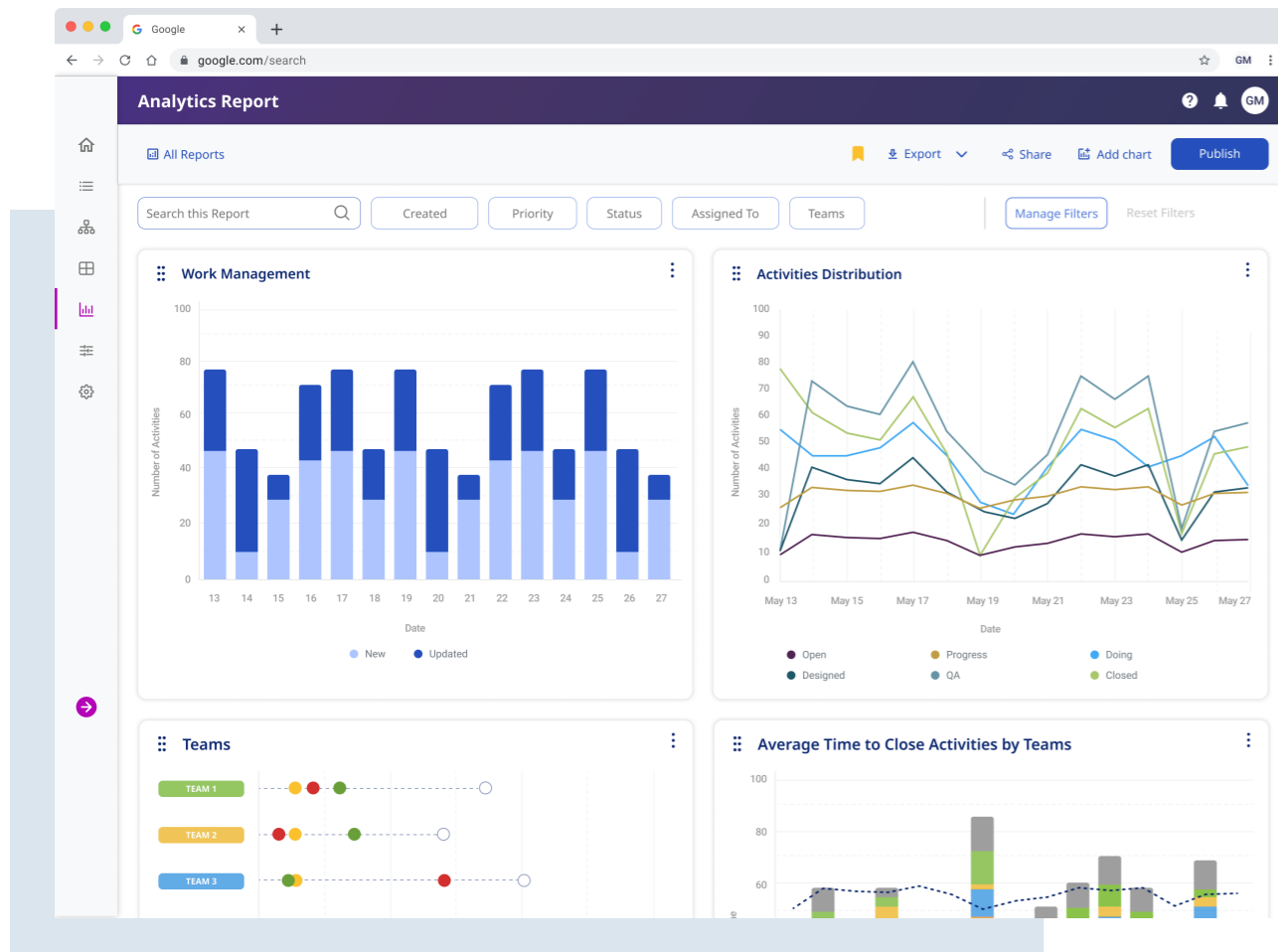
On this screen you will be able to view all the activities, their information and their processes in a list. You can edit, move, group, filter, delete and/or add new activities.
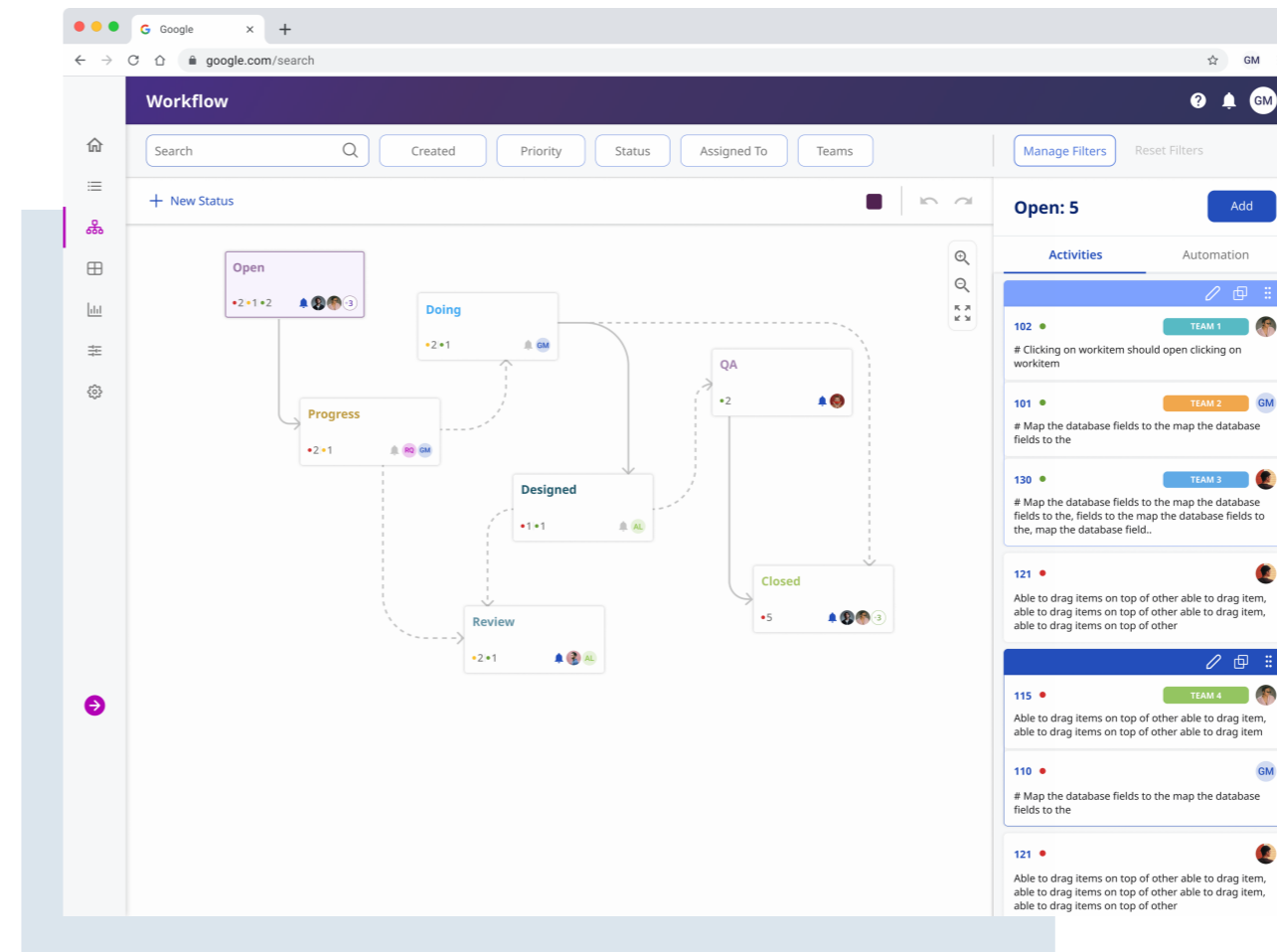
Workflow

On this screen you will be able to view all the activities, their information and their processes in a workflow. You will be able to edit, move, group, filter, delete and / or add new activities, as well as create new statuses, customize them and even edit and move your workflow.

Mockups
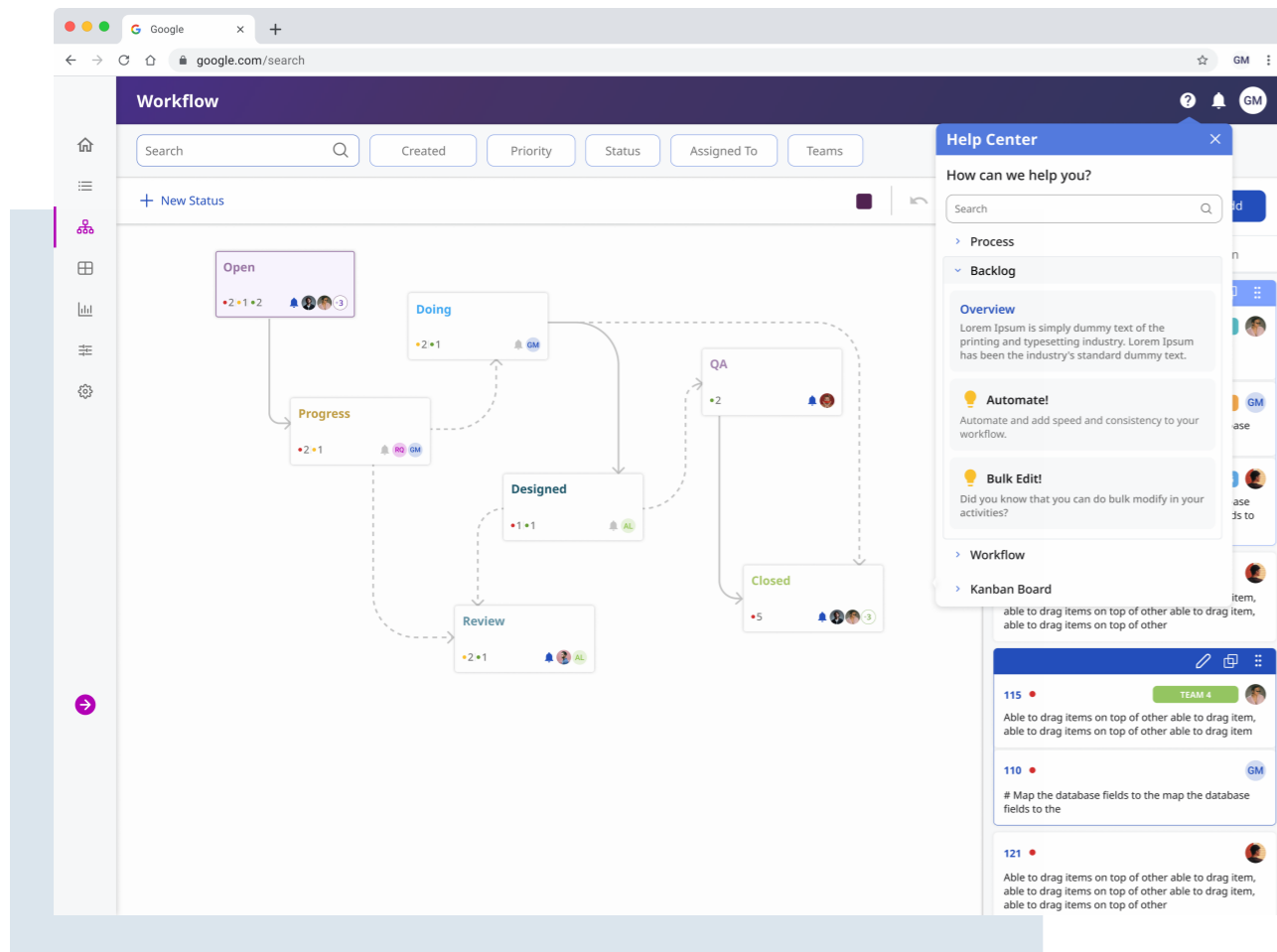
Help Center

The user may access a Help Center at any time, as well as receive tips and recommendations to improve their experience for each screen.
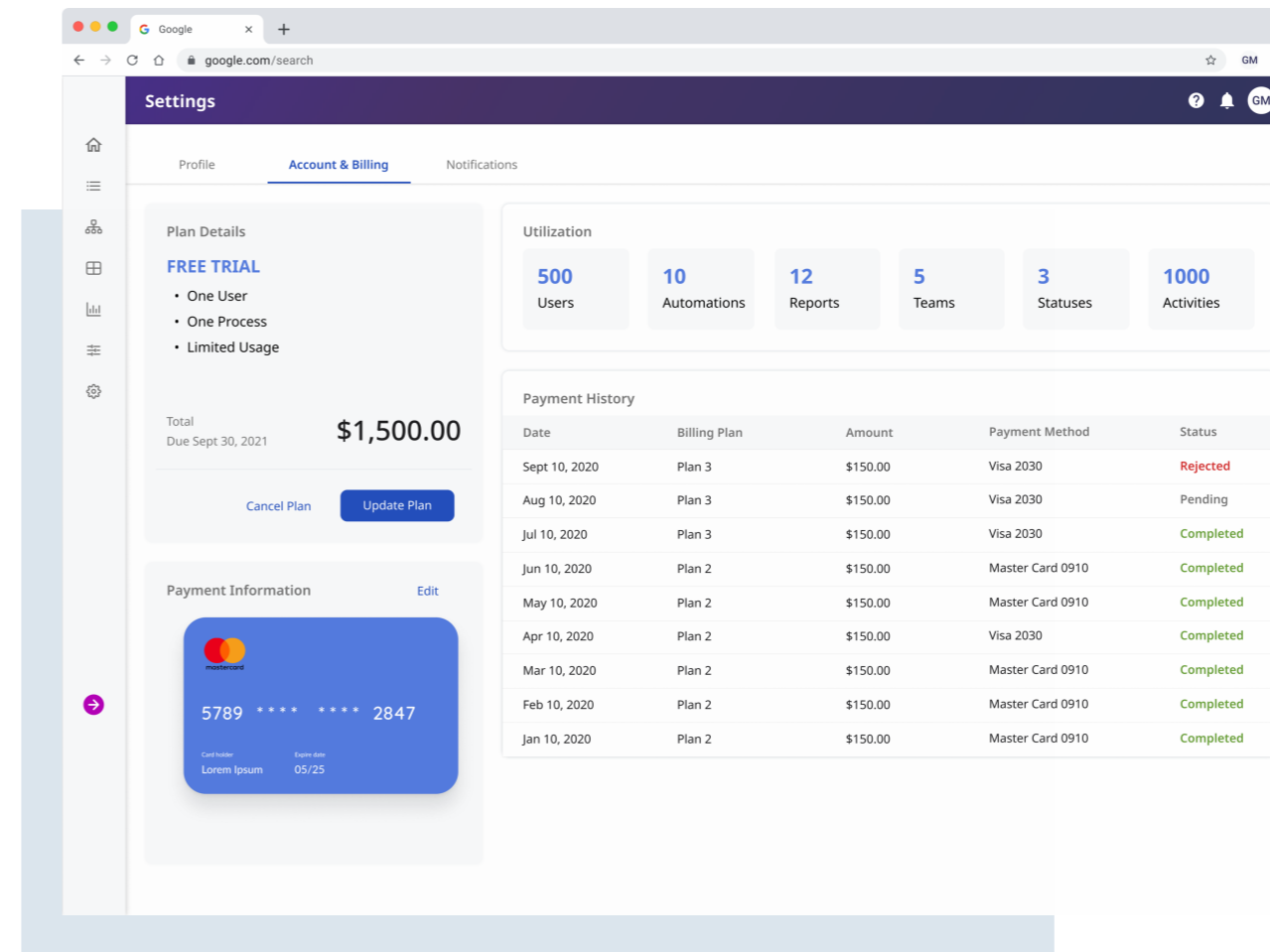
Settings

On this screen you can manage everything related to your profile, account, billing and notifications.

Mockups
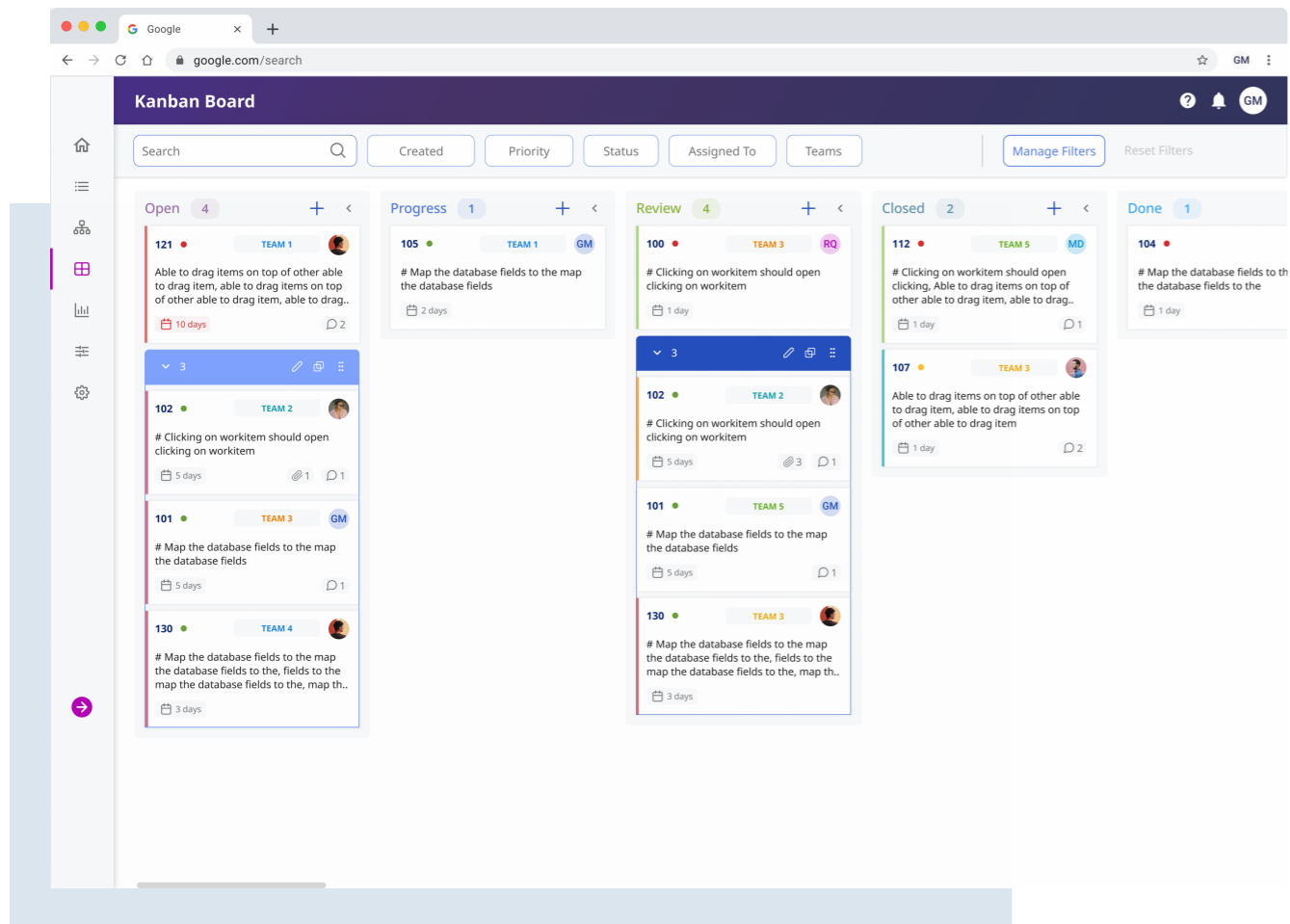
Kanban Board

On this screen you will be able to view all the activities, their information and their processes in a Kanban Board. You can edit, move, group, filter, delete and/or add new activities.
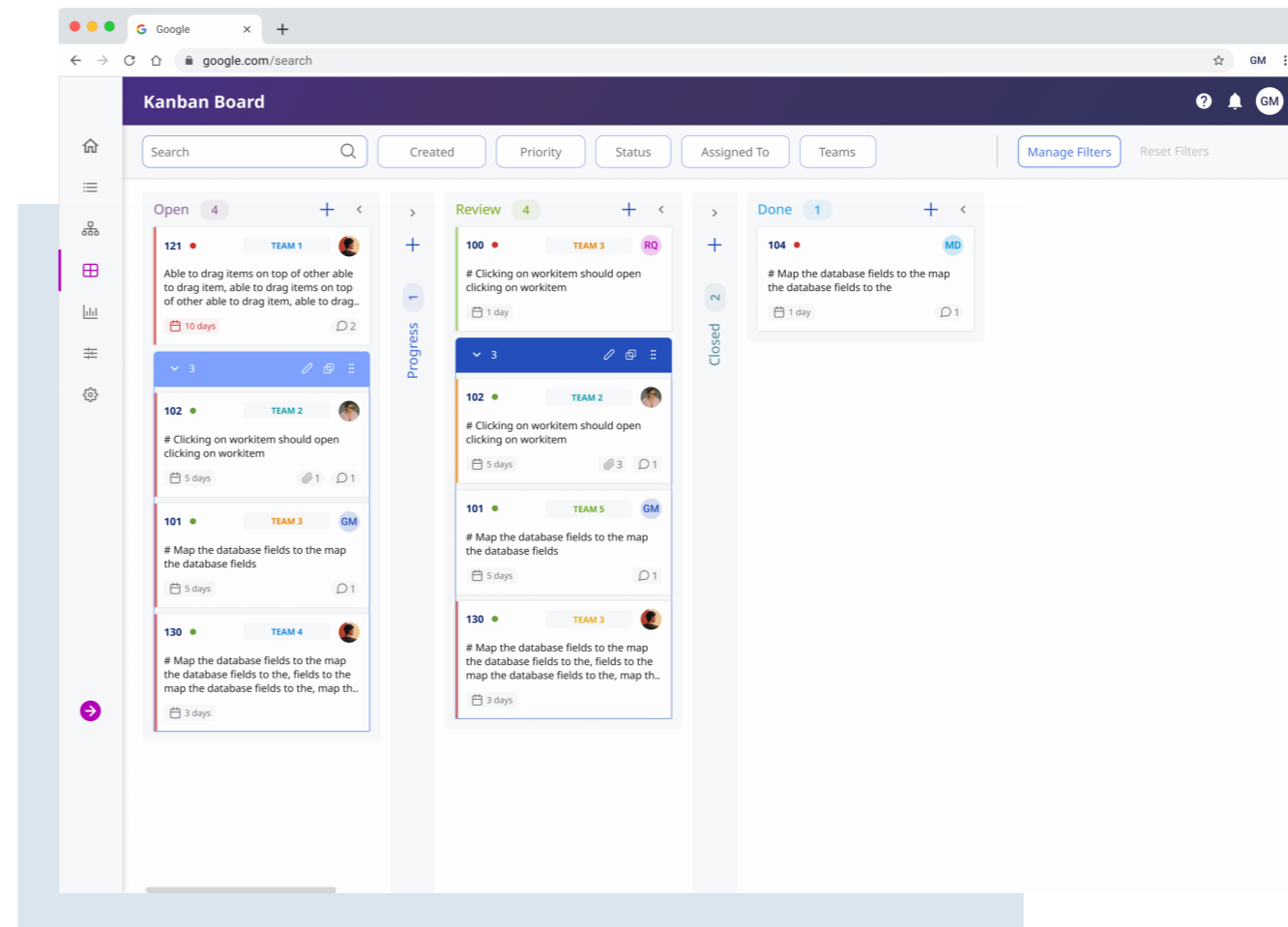
Kanban Board

You can also collapse statuses for a better visualization of your process.

Mockups

Analytics

On this screen you will be able to view everything you need for data analysis and building reports. You will be able to create, customize, export, share, and publish them, as well as filter what you want to see.
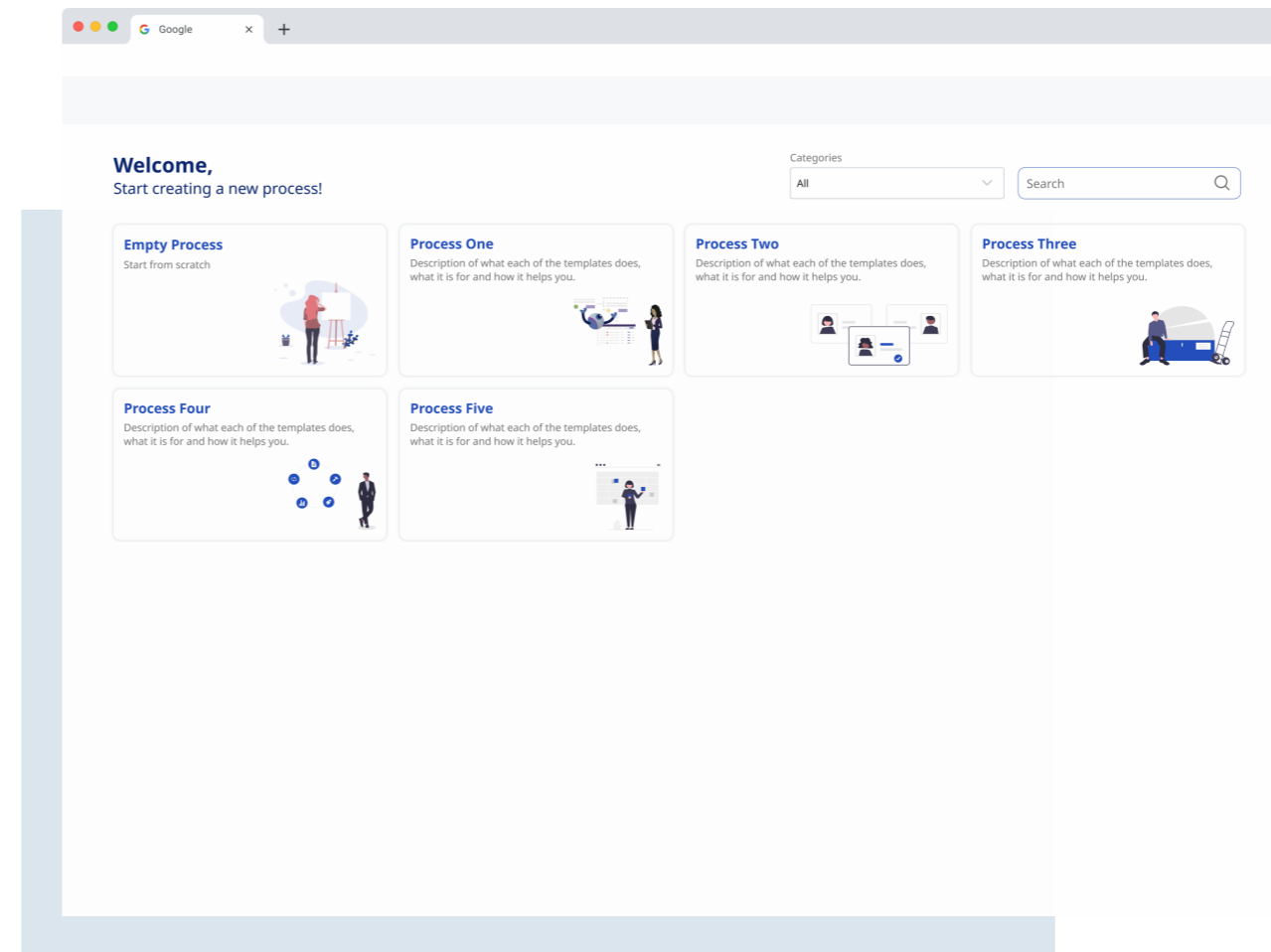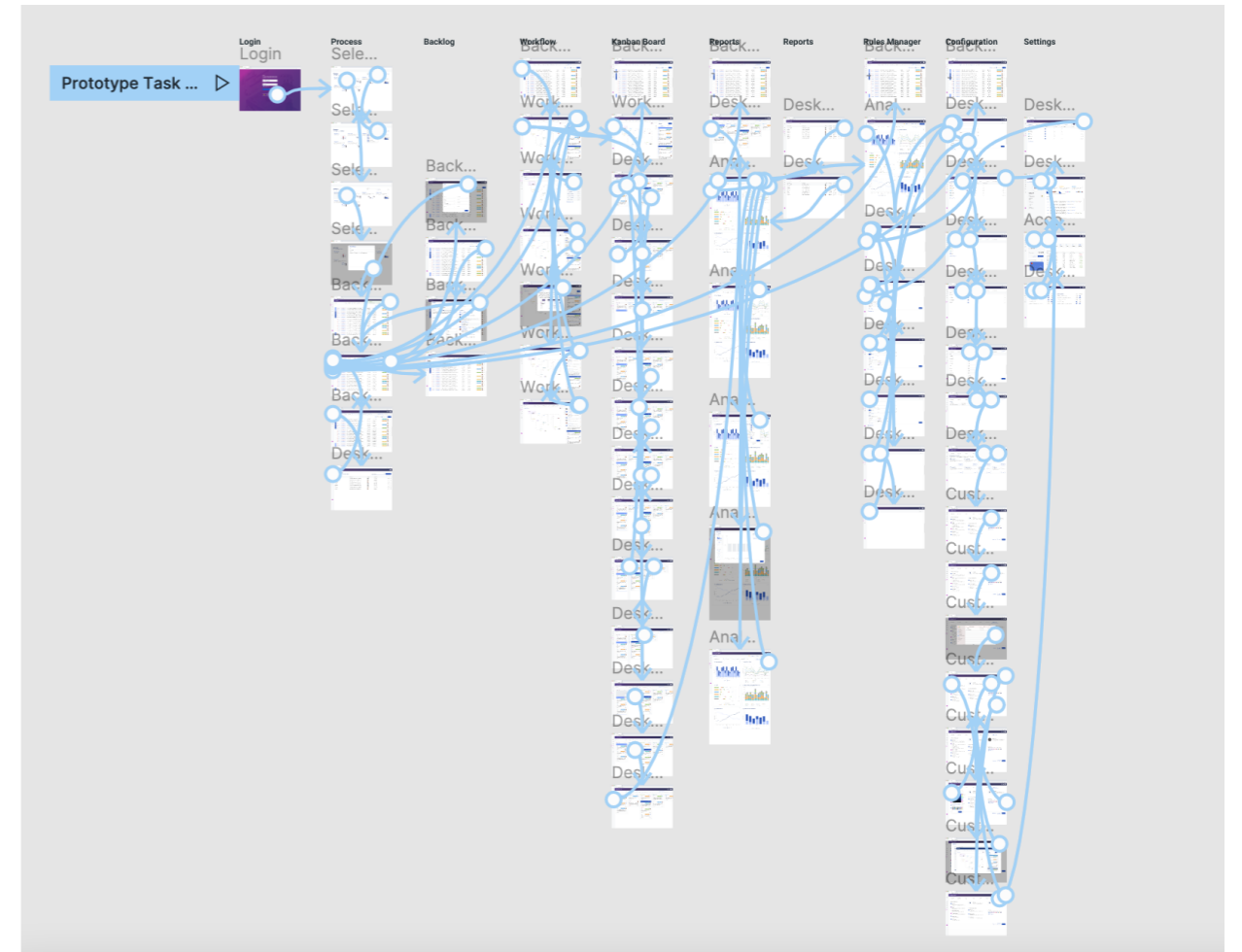
Process

On this screen you can view the processes created so far, as well as create new processes for the different teams and departments in your company.

High - Fidelity Prototype

Prototype Link

https://www.figma.com/proto/CYWk5ReKL0gzt139fD4P1e/Task-Manager-Prototype?page-id=0%3A1&node-id=2%3A73&starting-point-node-id=2%3A73&scaling=min-zoom

Design System

DS Link

https://www.figma.com/file/ekzZAii64h60MoRiVsMCcV/Task-Manager-DS?node-id=1%3A75

Accessibility

Accessibility considerations in current features

- Apart from colors, many icons and labels are used to guide the user in each action
- The system is designed to be customizable according to the colors selected by the user
- The font used is legible and of different sizes, but it is not smaller than recommended
- Components are large enough to be clickable
- Screens are designed with component consistency to help the user establish patterns of interaction and functionality

Going Forward

- Takeaways

Takeaways

💡 Learnings

- Spend more time on the research
- The business requirements and needs of the people should be the start of any project!
- Making a Design System from the beginning and iterating facilitates the work and consistency of the project
- Be in constant communication with the devs
- Work as a team
- A prototype is worth a thousand words!
- Validating not only with the client but with users is a must!
- Consider responsive design from the very beginning to avoid unnecessary effort down the line.
- Test the design of a screen in full to validate sizes and spacing before releasing it to development

Thanks for tuning in! 🙌