

The Ksquare Group

Project Initiator Form (PIF)

Case Study - Extended Version



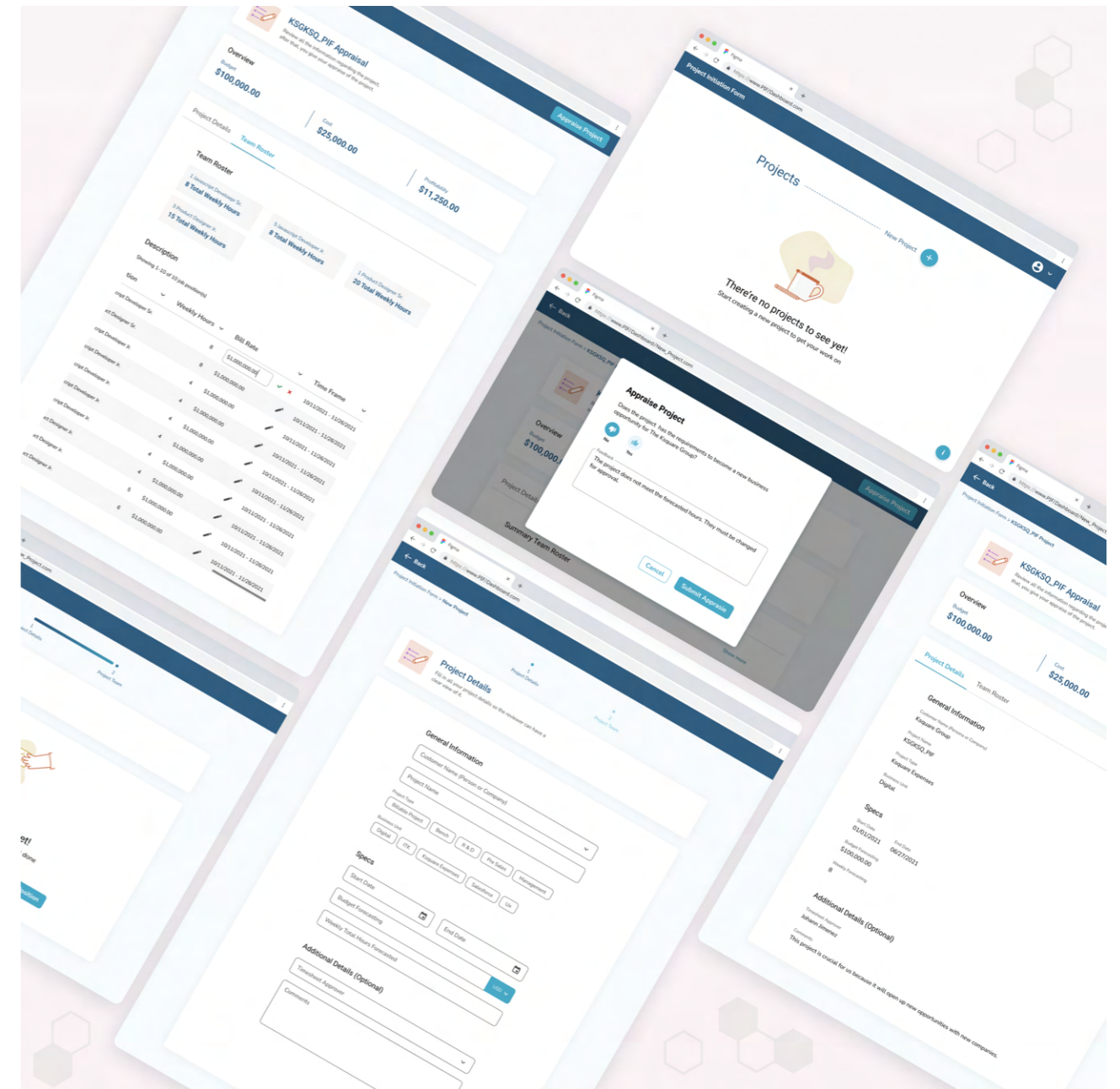
Project Overview

The product

Project Initiator Form (PIF) is a web app designed to scope, track & manage relevant data for new in-house projects.

Project Duration

For this project, we had a roadmap of four weeks that started on October 14, 2021 and lasted until November 5, 2021.



Project Overview

The problem

Project Managers didn't have a centralized process to create new projects that also allowed them to control the status and visibility among stakeholders and upper management.

The goal

Design a web app to scope, track & manage relevant data for new in-house projects.



Project Overview

Our Role

For this project, we used a design process called Double Diamond which is divided as follows:

1. **Discovery** - How users solve the problem now.
2. **Define** - User personas and needs.
3. **Develop** - Prototype several potential solutions.
4. **Deliver** - Test with end users.

Responsibilities

- Understand how the experience of the platform they used for the creation of projects was.
- User stories
- User journey map
- Information Architecture
- User flows
- Paper wireframes
- Low and high-fidelity mock-ups
- Benchmark
- Usability testing

Understanding the User

- User Research
- Pain Points
- Proto Personas
- Problem Statement
- User Journey Map

User Research

Summary

Working collaboratively with Project Managers and Product Owners, we discovered through a user journey map the limitations of the previous platform. Analyzing this information helped us determine the needs and opportunities for the new system.

There was no approval process and only one person in charge of starting a new project. As a result, in the new system, we opened things up to allow for three different types of users; project initiators, project co-creators, and project appraisers.



PIF (Project Initiation Form)

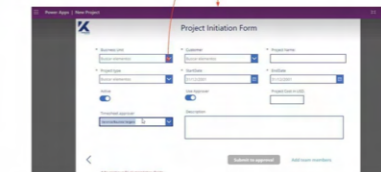
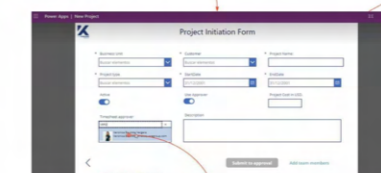
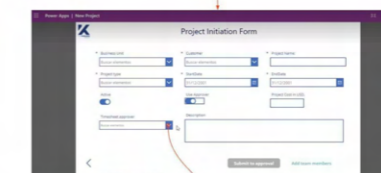
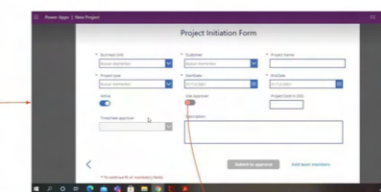
PIF Main Page



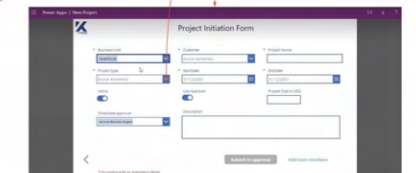
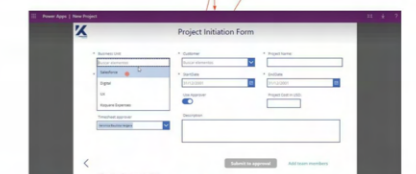
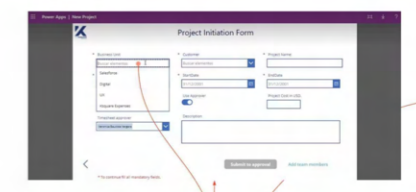
Users
Grish or Carol are
responsible for
filling out the PIF.

How can we be sure
that the users are
following the most
efficient path
according to users
preferences?

Use Approver



Business Unit



Pain Points

All fell on one person

The entire process fell on one person who had to fill in all the information for the project.

No way to edit or delete the request

There was no way for users to edit the information or delete it if required.

No different users for approval

There were no different users, meaning that as the project progressed, it could not be reviewed for approval or rejection.

Problem statement

Our project managers need a solution that gives them a clearer image of their project control, status, tracking, approval, or rejection because they are responsible for multiple projects.

Proto Persona 1



I like to give my best and find new clients for the company.

Nithin

- 👤 35
- 📍 Arizona
- 📁 Project Manager

Bio

Nithin is a Project Manager with six years of experience. He is customer-obsessed and desires software that helps him better manage his control over his clients' projects. He believes giving good results to his clients is essential because that speaks very well of him.

Goals & Motivations

- Having a platform that helps him have better management of project administration.
- Deliver complex business solutions with his teams.
- Follow-up on projects to make sure they align with upper management's expectations.

Frustrations

- The process of doing a project is long, and he have to fill in all the data to see if it is correct or not.
- There is no process where someone else reviews the project.

Proto Persona 2



I love having challenges in my day-to-day life as I learn new things that help me work better.

Javier

👤 42

📍 Mérida

📁 Director of
Salesforce

Bio

Javier is a Director of Salesforce with ten years of experience delivering projects for companies specialized in financial services and automotive expertise. He holds an extensive background in consulting and managing nearshore teams for customers.

Goals & Motivations

- Have my clients' information in one place for easy access.
- Assemble the team for my clients depending on their needs.
- Set up complex programs for the development of companies.

Frustrations

- There is no platform where I can see my client's record at a glance.
- There is a web app that helps us to create teams for clients. However, it lacks many functionalities such as adding and editing team members, approving or rejecting project requests, etc.

Proto Persona 3



Manuel

👤 50

📍 Mérida

👜 Lead

Accountant

Bio

Manuel is a lead accountant with eight years of experience in delivering financial reports for his company. He ensures everything is in order and all the numbers add up so that there are no losses in the company.

Goals & Motivations

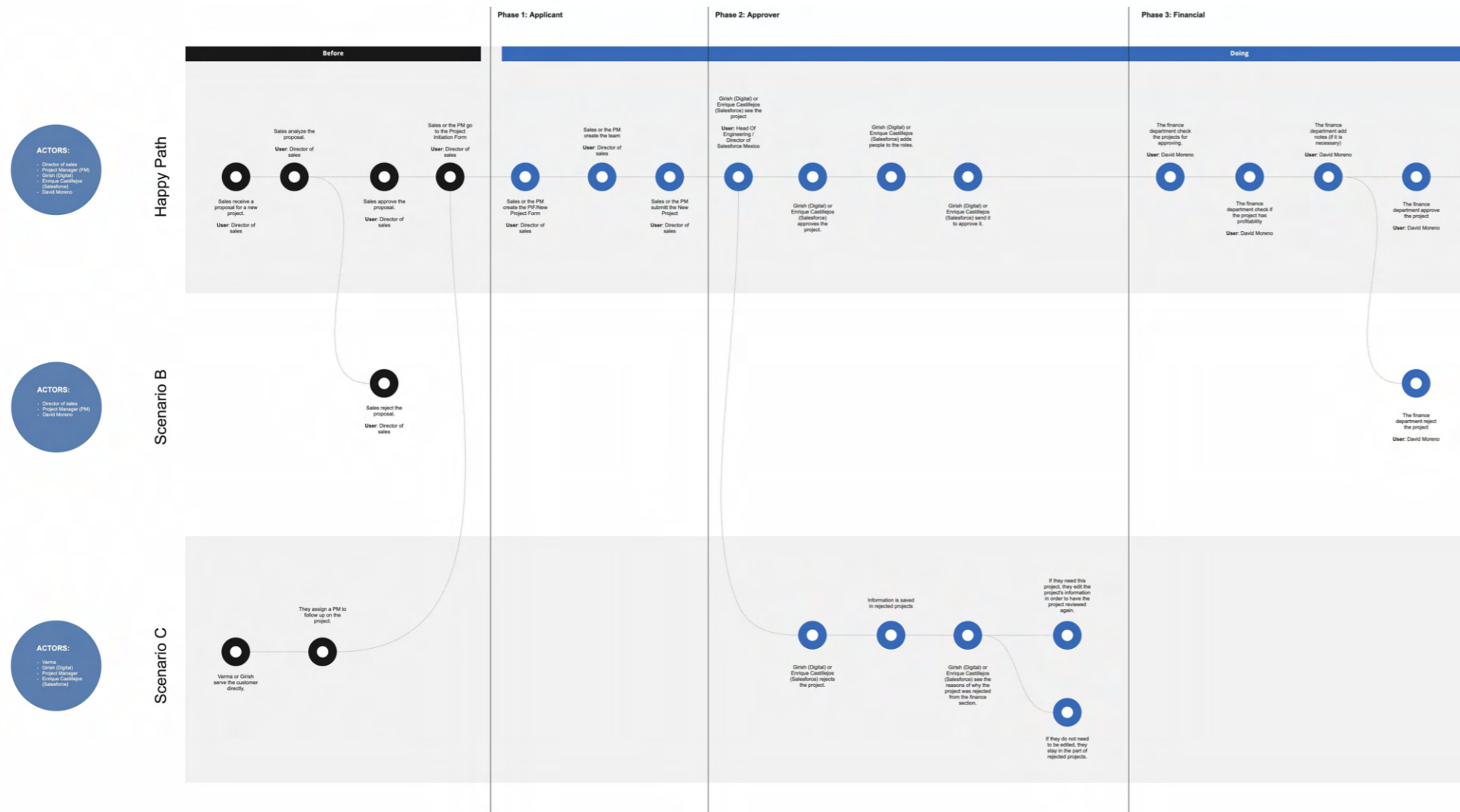
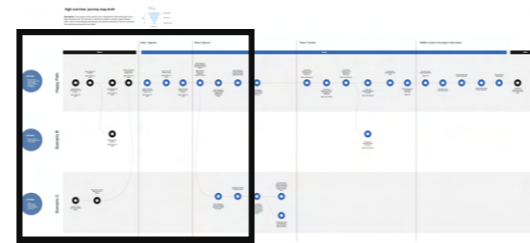
- Have everything clear and organized on a platform to do my job better.
- An overview of the company's projects' cost, budget, and profit.
- Have user information broken down for better control.

Frustrations

- There is no platform where I can see my client's record at a glance.
- Not being able to approve or reject projects based on my criteria.

I like to have everything organized to understand the company's finances better.

User Journey Map



Once we did our research and created the proto-personas, we started to map the user flow to get a clear understanding of how the new experience would be, linking these three new user types.

Starting the Design

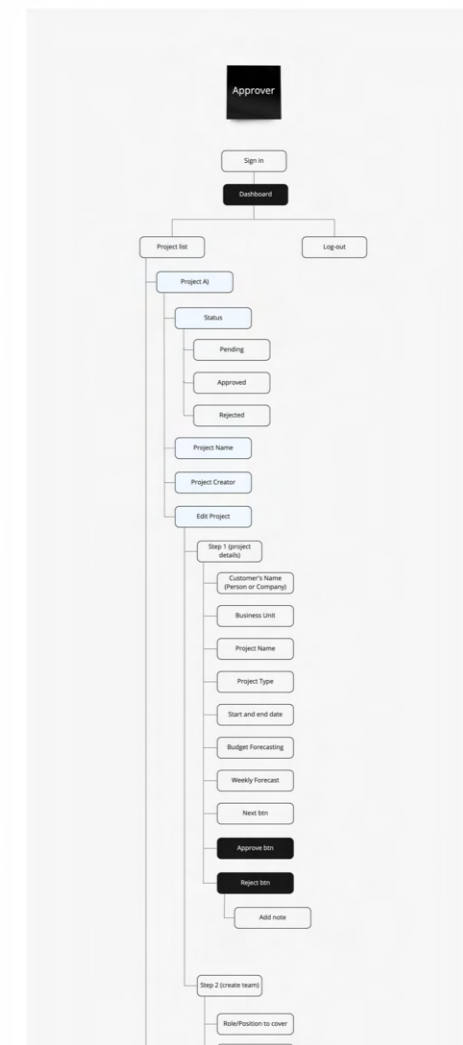
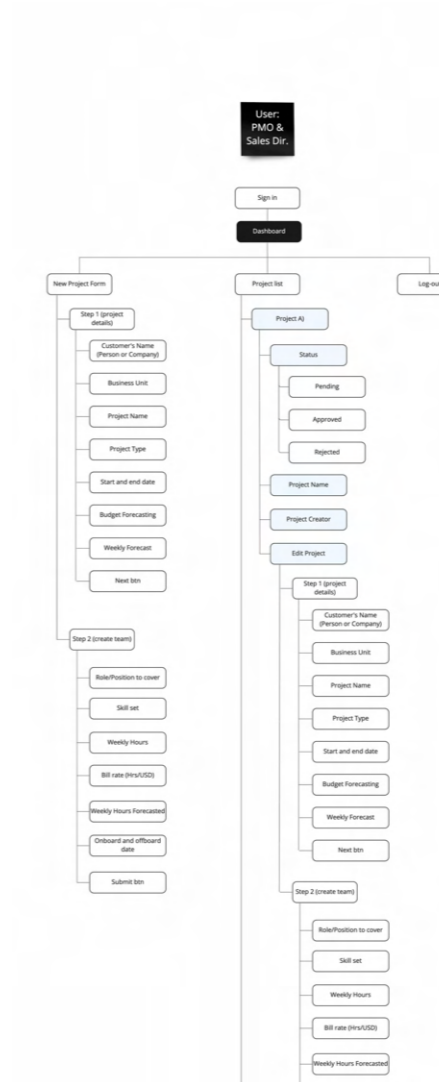
- Site Map
- Design Considerations
- Paper Wireframes
- Low Fidelity Mock-ups

Site Map

Process

In the discovery process, we found that the new system required three types of users (project initiator, project co-creator, and project appraiser), each with different needs.

Based on the above, the information architecture of the three users was drafted.



Design Considerations

Simple Interface

With our knowledge of UX and the benchmarking results, we considered that it would be a good idea to have a simple design system so as not to confuse the users.

Consistency across the platform

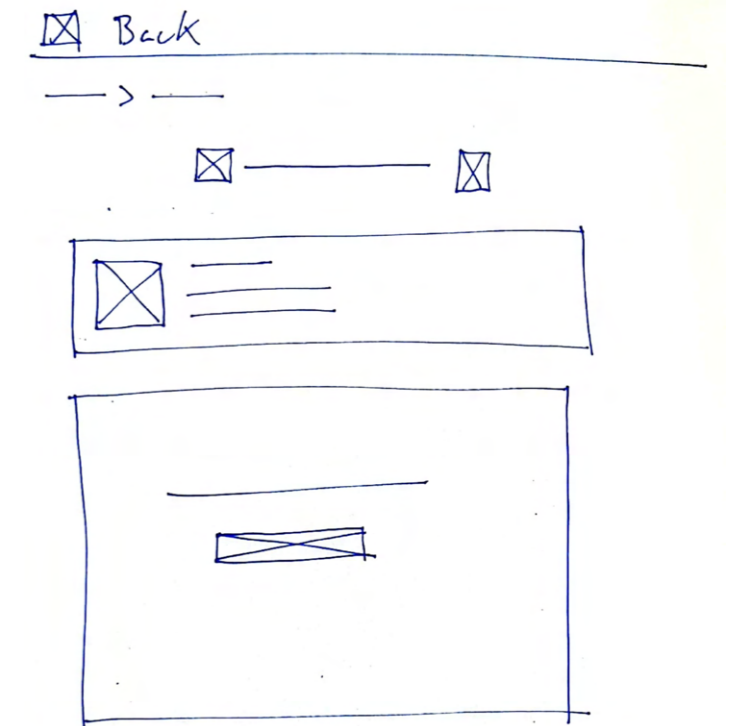
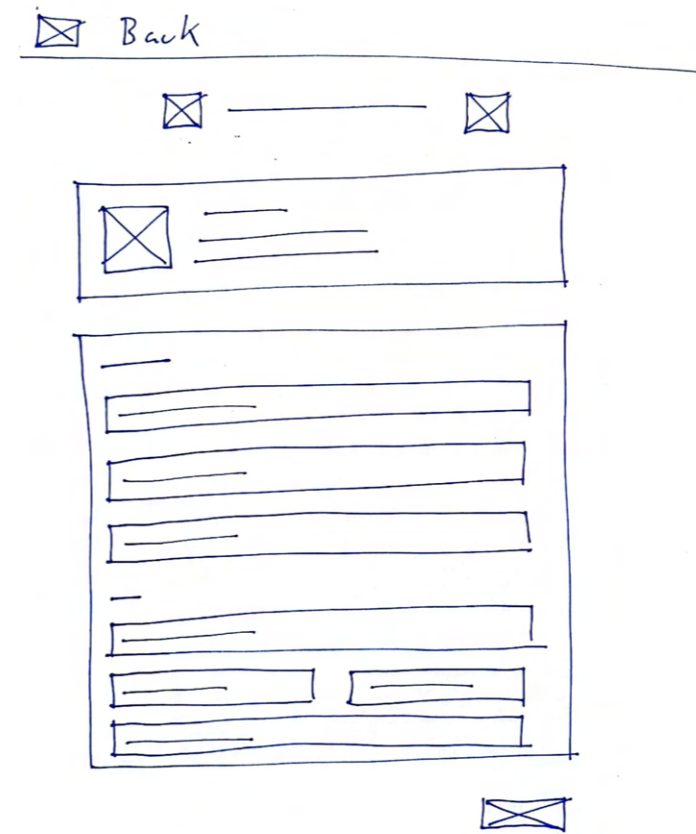
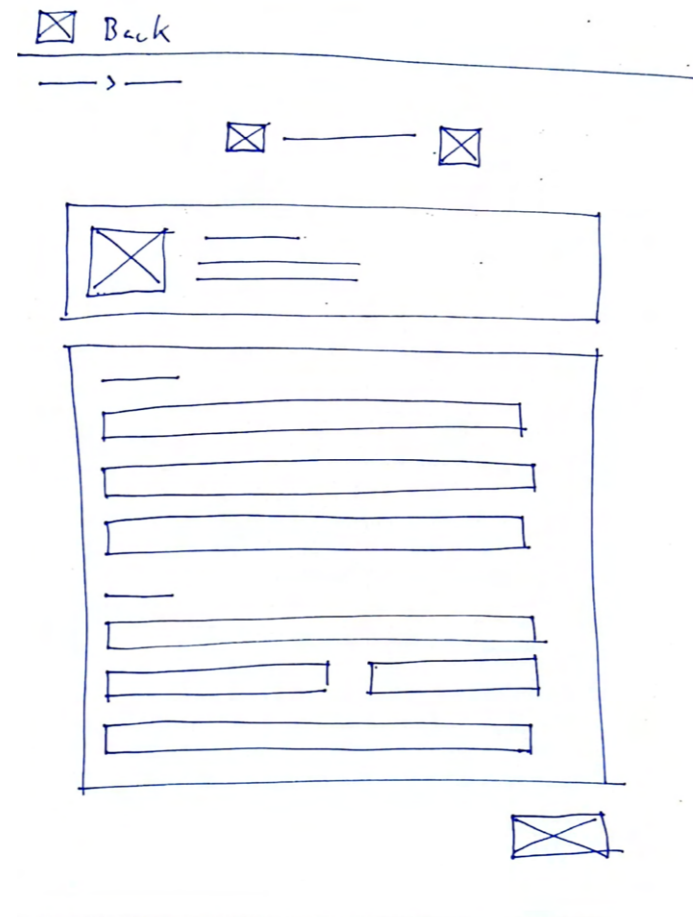
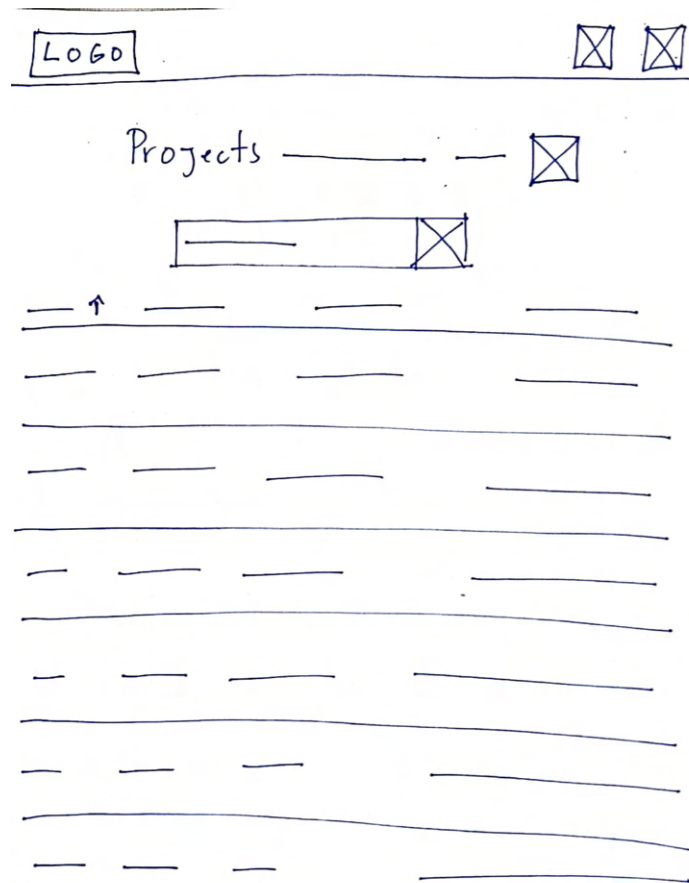
For users to have a good experience, there must be consistency across the platform.

Clear Microcopy

We considered that this system should have a clear and precise microcopy to make it more understandable to the user.

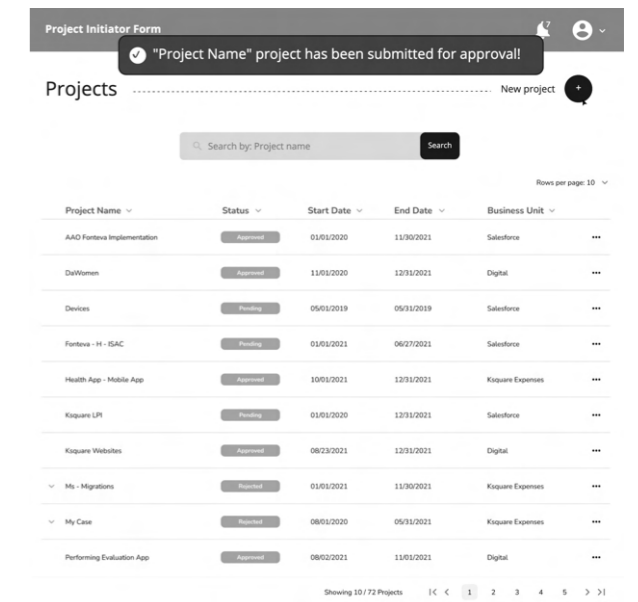
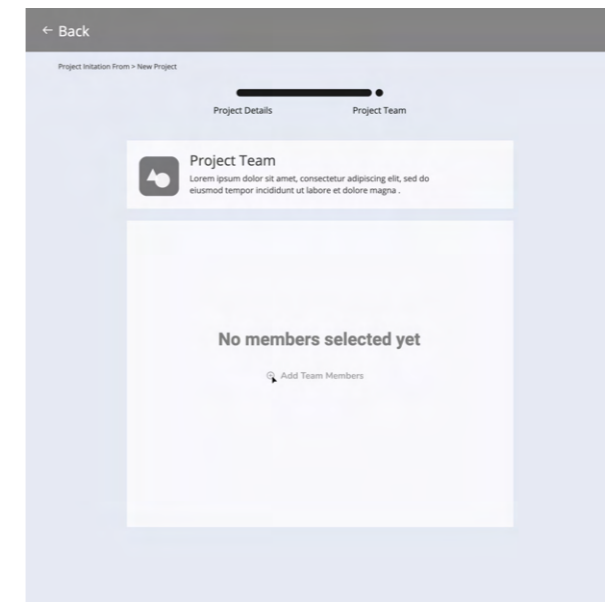
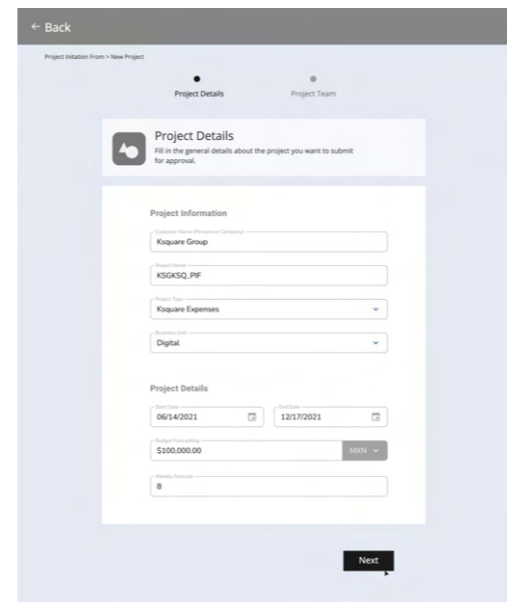
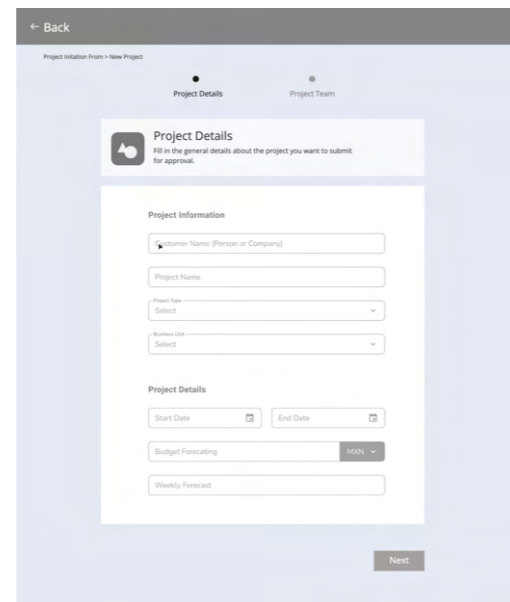
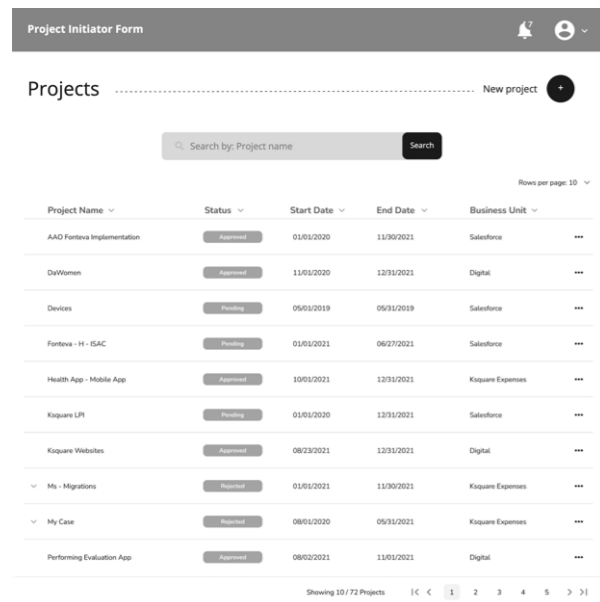
Paper Wireframes

The next step was to create paper wireframes using design principles to determine how the information should be distributed.



Low Fidelity Mock-ups

Based on the above, the low fidelity mock-ups were created to determine the patterns required to meet the three users' objectives and provide them with a good user experience.



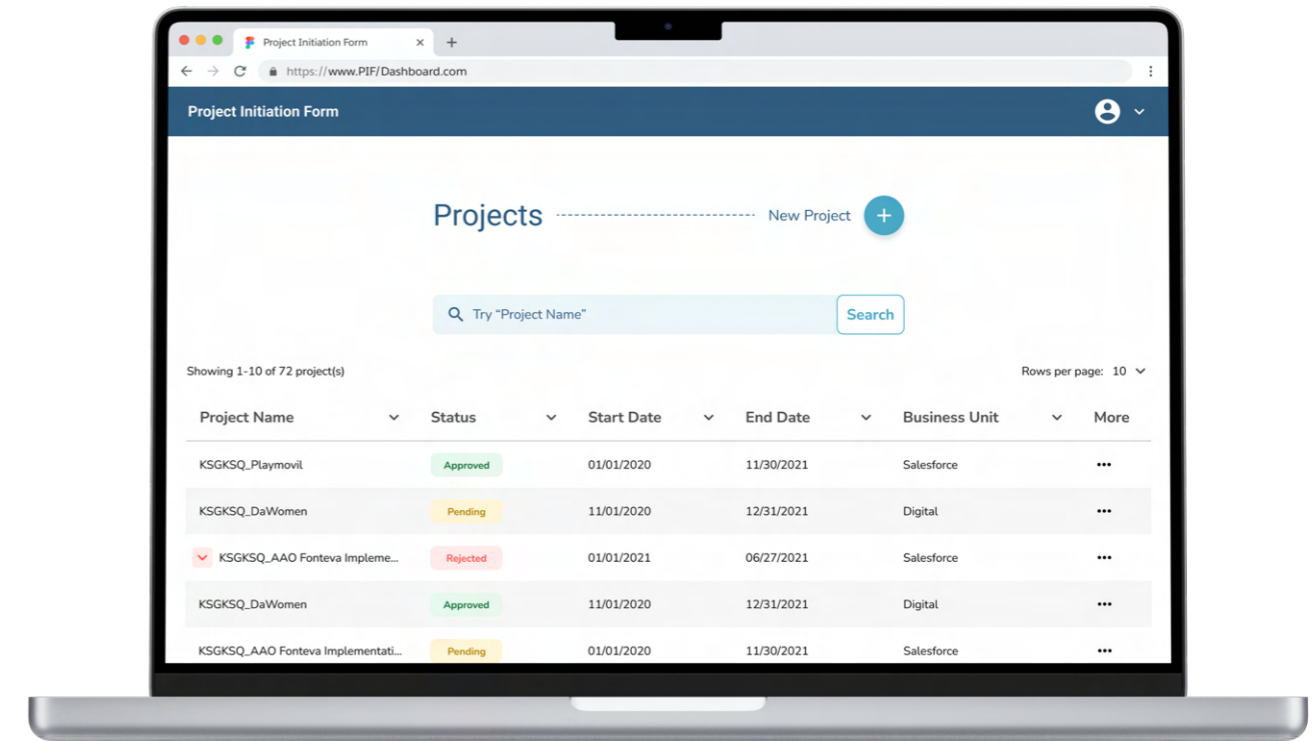
Refining the Design

- Mock-ups
- Prototype

Mock-ups

The next step was to create the high-fidelity mock-ups, which were more manageable once we had the information structure and needs of the three users in the system.

These high-fidelity mockups went through a validation process within the Product Design team to generate a good user experience.



Mock-ups

The screenshot shows a web browser window with the URL <https://www.PIF/Dashboard.com>. The page title is "Project Initiation Form". Below the header, there is a "Projects" section with a "New Project" button. A search bar contains the text "Try 'Project Name'" and a "Search" button. Below the search bar, it says "Showing 1-10 of 72 project(s)" and "Rows per page: 10". A table of projects is displayed with the following columns: Project Name, Status, Start Date, End Date, Business Unit, and More. The table contains 10 rows of project data. A dashed arrow points from the table in the screenshot to the table in the adjacent block.

Project Name	Status	Start Date	End Date	Business Unit	More
KSGKSQ_Playmovil	Approved	01/01/2020	11/30/2021	Salesforce	...
KSGKSQ_DaWomen	Pending	11/01/2020	12/31/2021	Digital	...
KSGKSQ_AAO Fonteva Impleme...	Rejected	01/01/2021	06/27/2021	Salesforce	...
KSGKSQ_DaWomen	Approved	11/01/2020	12/31/2021	Digital	...
KSGKSQ_AAO Fonteva Implementati...	Pending	01/01/2020	11/30/2021	Salesforce	...
KSGKSQ_DaWomen	Approved	11/01/2020	12/31/2021	Digital	...
KSGKSQ_Fonteva - H - ISAC	Rejected	01/01/2021	06/27/2021	Salesforce	...
KSGKSQ_DaWomen	Appraising	11/01/2020	12/31/2021	Digital	...
KSGKSQ_DaWomen	Draft	11/01/2020	12/31/2021	Digital	...
KSGKSQ_DaWomen	Approved	11/01/2020	12/31/2021	Digital	...

PIF Homepage

A data table presents a list of all the projects so users can access any information they may need.

Project Name	Status	Start Date	End Date	Business Unit	More
KSGKSQ_Playmovil	Approved	01/01/2020	11/30/2021	Salesforce	...
KSGKSQ_DaWomen	Pending	11/01/2020	12/31/2021	Digital	...
KSGKSQ_AAO Fonteva Impleme...	Rejected	01/01/2021	06/27/2021	Salesforce	...

Mock-ups

Project Details

A restructured form with best practices allows users to fill in the required fields of a project.

Project Type

Business Unit

Project Initiation Form > New Project

1 Project Details 2 Project Team

Project Details
Fill in all your project details so the reviewer can have a clear view of it.

General Information

Customer Name (Person or Company)

Project Name

Project Type

Business Unit

Specs

Start Date End Date

Budget Forecasting USD

Weekly Total Hours Forecasted

Additional Details (Optional)

Timesheet Approver

Comments

0/1000

Mock-ups

https://www.PIF/Dashboard/New_Project.com

Add New Position

Role Position

Job Position: Javascript Developer Sr. Skill Set: (3) skills selected

Specs

Weekly Hours Forecasted: 20,000 Bill Rate (Hrs/USD): \$245.00 USD

Onboarding Date: 10/11/2021 Offboarding Date: 11/26/2021

Buttons: Cancel, Add New Position

Add New Position

Adding a job position is now more accessible as the information is better presented.

Project Initiation Form - KSGRSQ_PIF Project

Project Details

Read carefully the general details or edit them if it is necessary and then click Next.

General Information

Customer Name (Person or Company): Ksquare Group
Project Name: KSGRSQ_PIF
Project Type: Ksquare Expenses
Business Unit: Digital

Specs

Start Date: 01/01/2021 End Date: 06/27/2021
Budget Forecasting: \$100,000.00
Weeks Forecasting: 8

Additional Details (Optional)

Threshold Agreement: Johann Jimenez
Comments: This project is crucial for us because it will open up new opportunities with new companies.

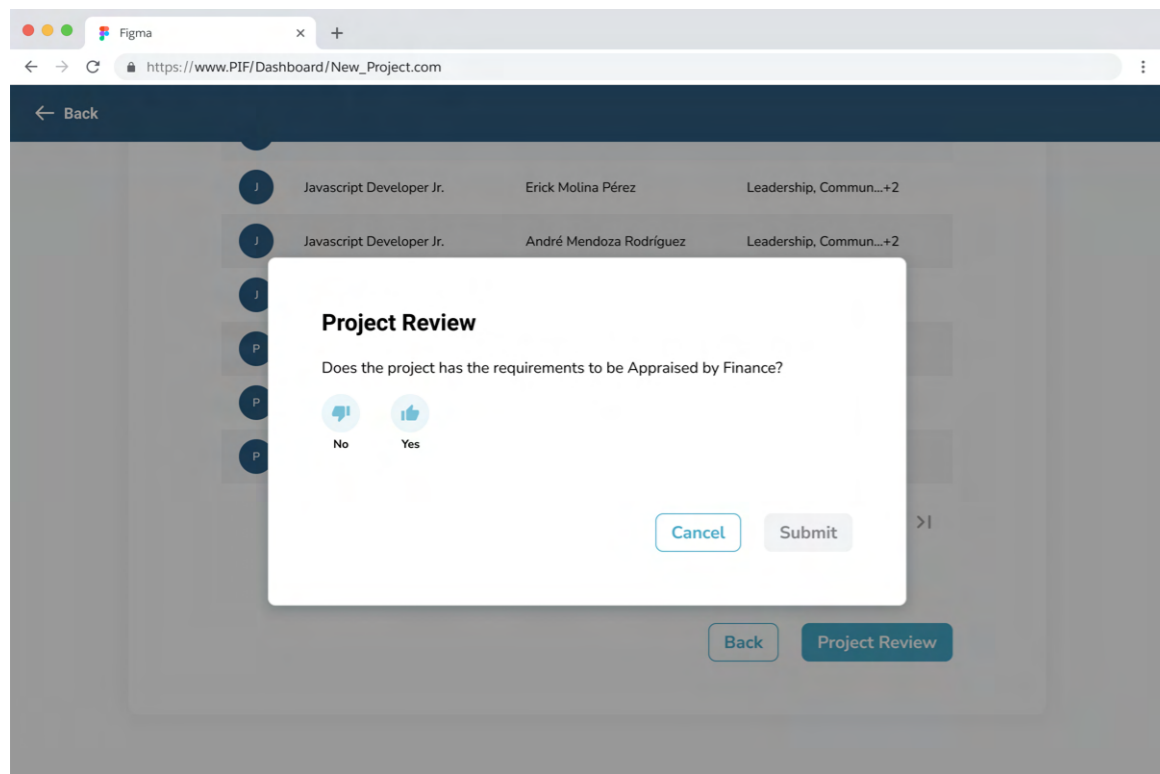
Buttons: Next

Review Project Information

A visual hierarchy was created to review the project and make it easier to follow.

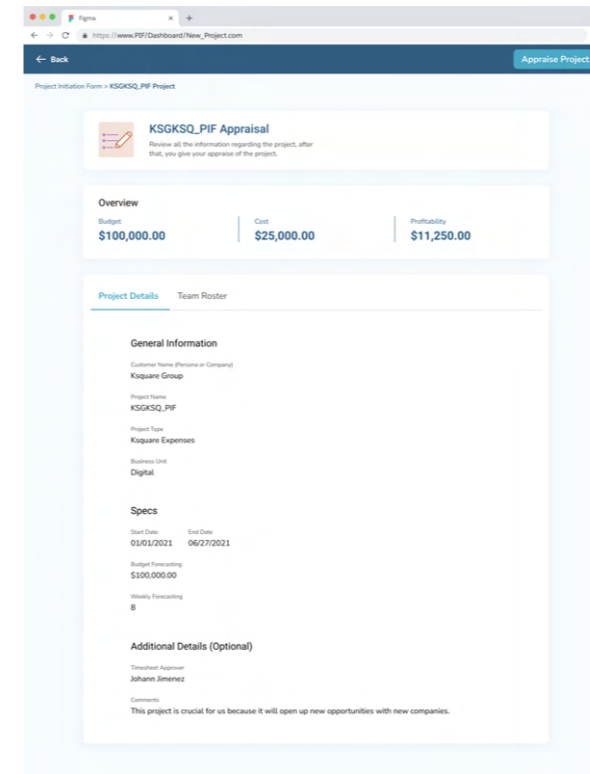


Mock-ups



Dialog Project Review

A new way of approving or rejecting projects was implemented.



Appraise Project

An overview was created to show the budget, cost, and profitability.

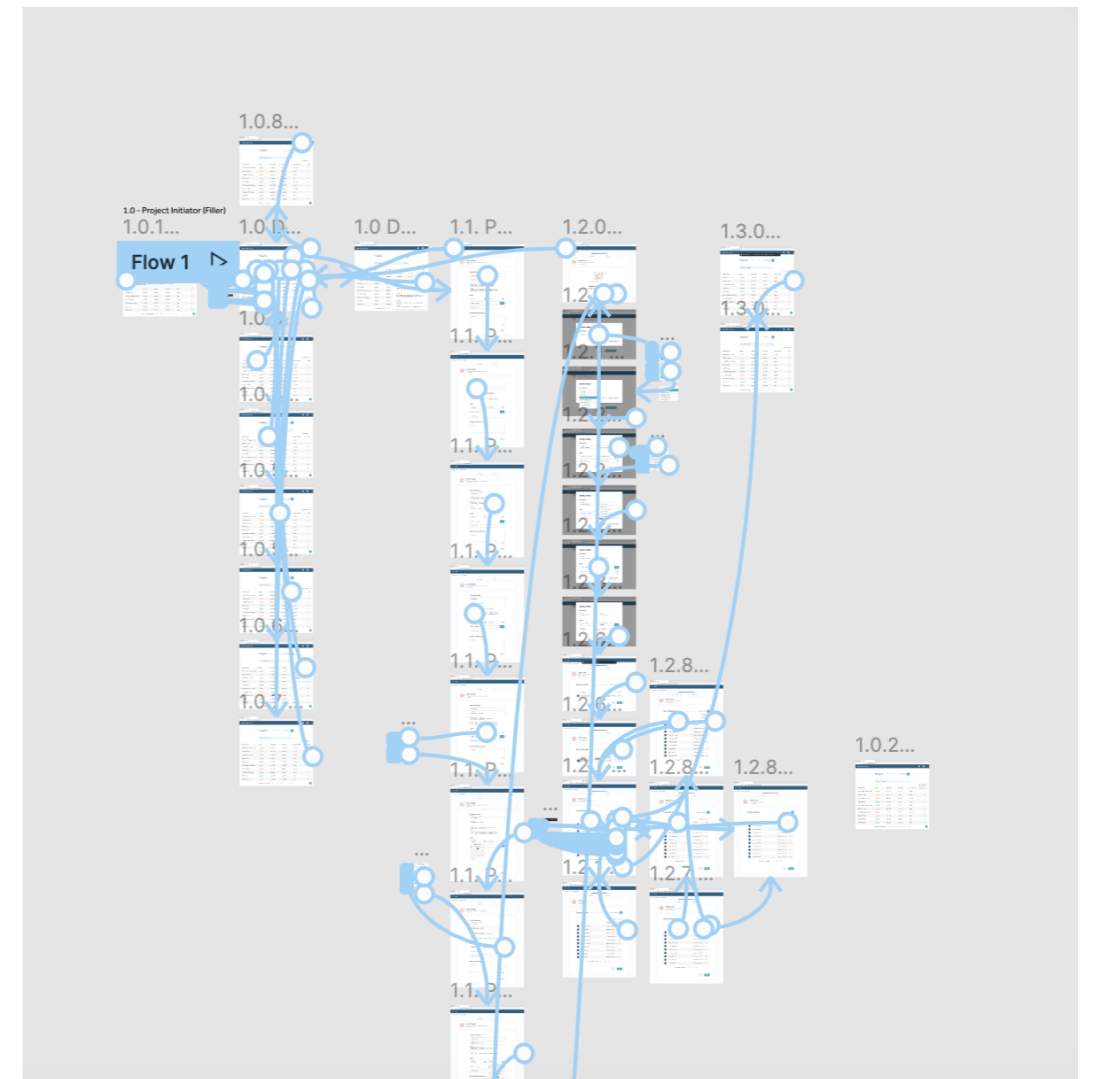


Prototype

Prototype Link

Project Initiator:

<https://www.figma.com/proto/JKk3Y2IBBIGr3II0HFXXUr/PIF?node-id=548%3A17466&scaling=min-zoom&page-id=473%3A5366&starting-point-node-id=548%3A17466>

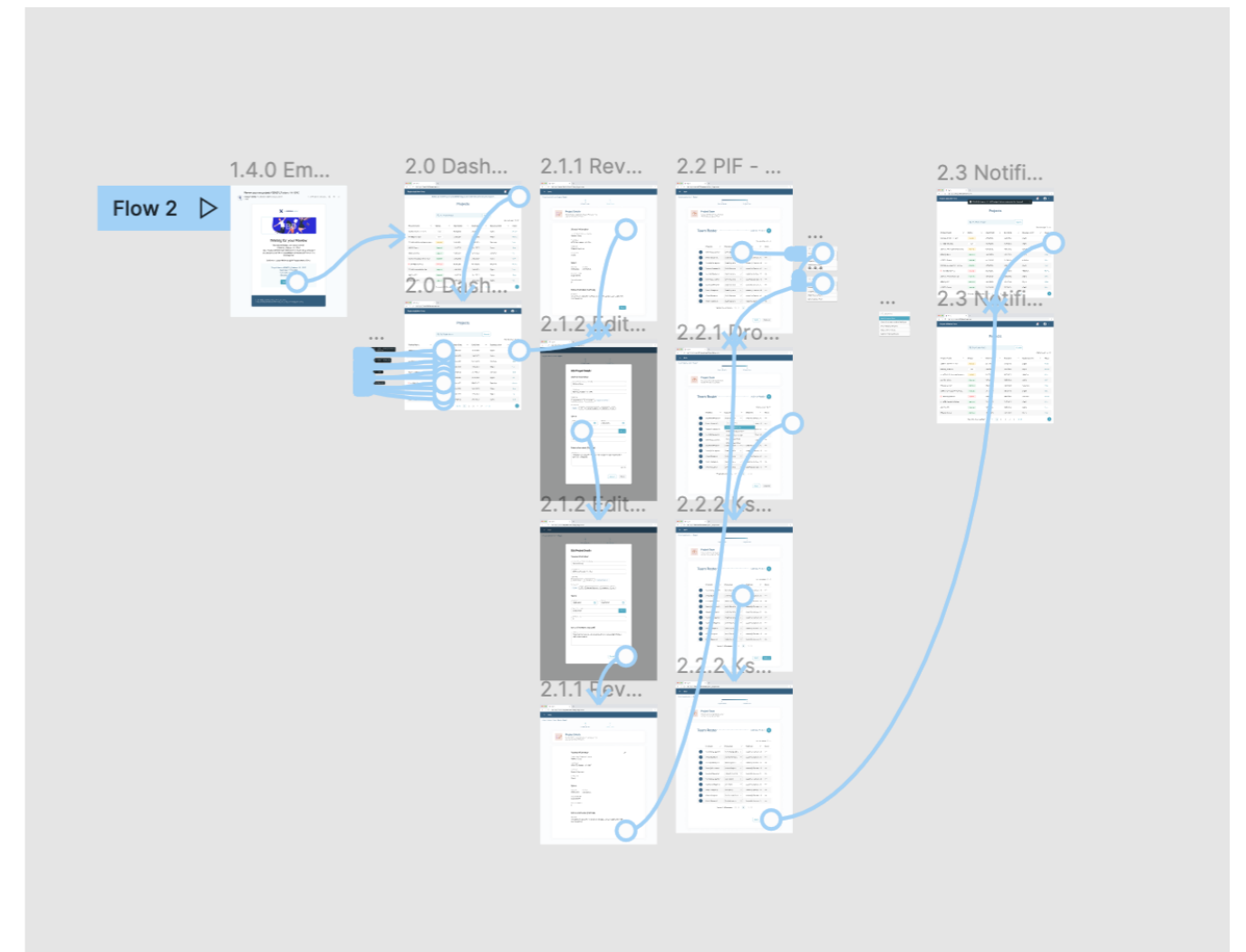


Prototype

Prototype Link

Project Co-creator:

<https://www.figma.com/proto/JKk3Y2IBBIGr3II0HFXXUr/PIF?page-id=473%3A5366&node-id=576%3A4331&viewport=300%2C48%2C0.22&scaling=minimum-zoom&starting-point-node-id=576%3A4331&show-prototype-sidebar=1>

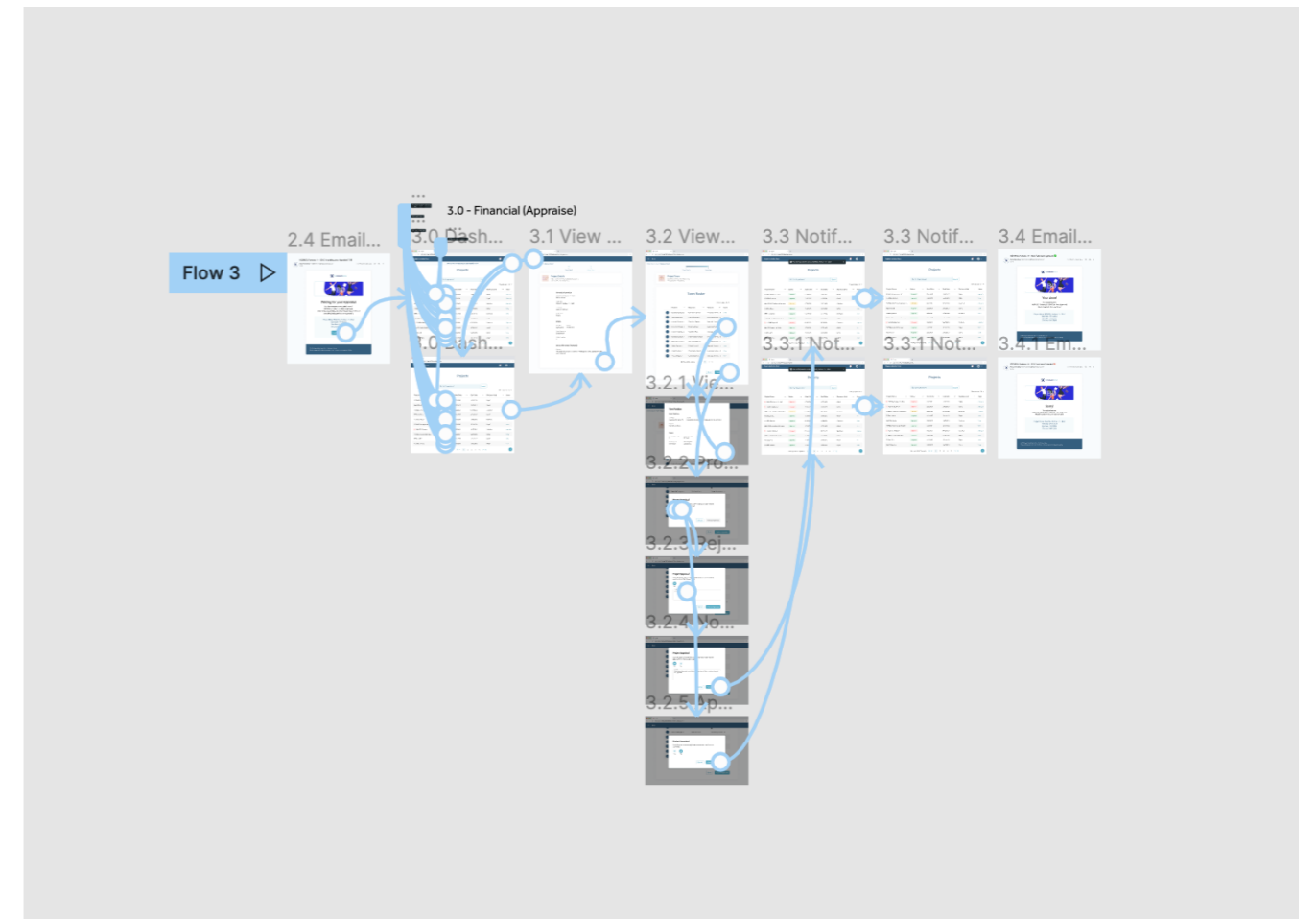


Prototype

Prototype Link

Project Appraiser:

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Going Forward

- Takeaways
- Next Steps



Takeaways

Learnings

- The Double Diamond design process helps designers work quickly and efficiently.
- It is good to establish your problem and the challenge.
- It is helpful to research existing platforms to see what can be improved.
- It is crucial to have a clear information architecture.
- Your user flow is the basis for a good user experience.



Next Steps

What's next?

Once the platform has been developed within the first iteration, the design team will be looking forward to the following tasks:

- Create improvements after gathering analytics on the user data.
- Link the platform with The Ksquare Group digital ecosystem.
- Give a broader spectrum of action to the project managers, such as deleting, creating, and updating multiple team positions at once.



**Thanks for
tuning in!**

