

Chris Elliott

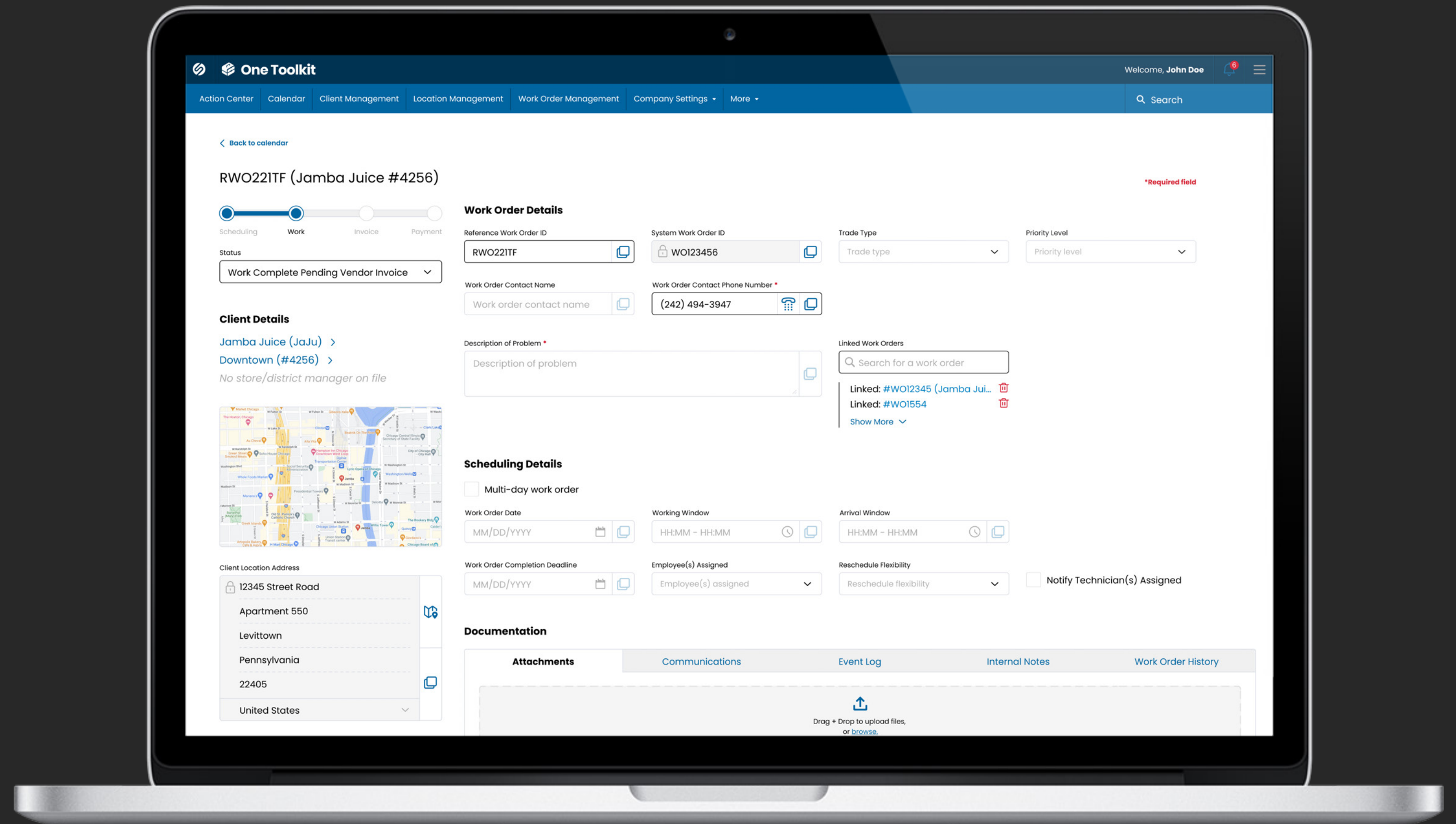
UI/UX & Product Design Portfolio

Case Study: *One Toolkit* Business Management SaaS Application



Overview

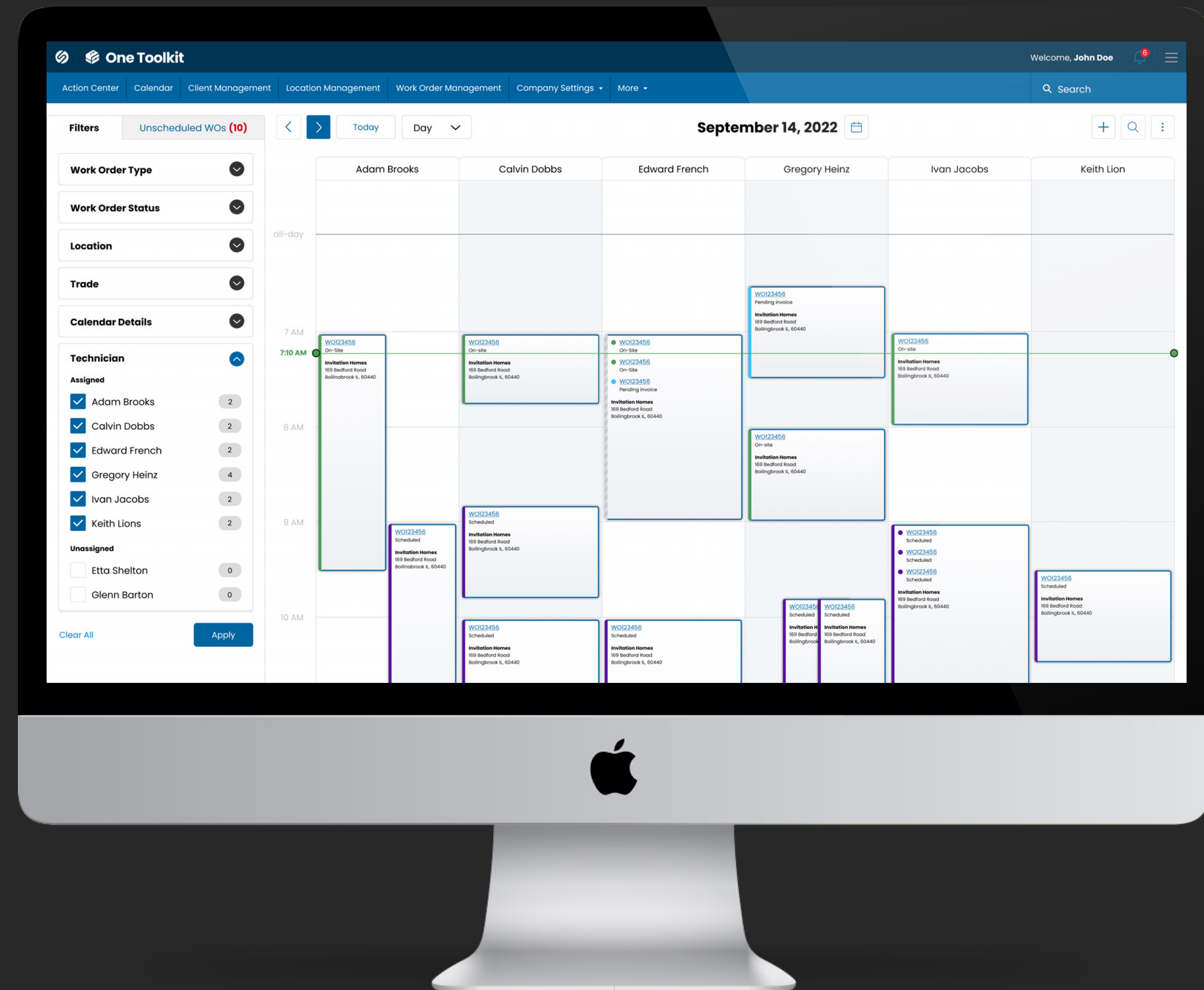
- A web-based SaaS application for small- to medium-sized facility maintenance businesses.
- Target users ranged from very tech-savvy to mom-and-pop shops with limited computer literacy.
- Stakeholders included:
 - product owners, UX architects, and developers,
 - affiliates beta-testing the product prior to launch, and
 - departments across the organization who work with affiliates and the jobs we send to them.
- A successful design would permit management of complex types and large amounts of data in an intuitive and user-friendly manner.
- Starting with the existing design system and iterating on it would be needed to meet the unique design challenges of a data-heavy, customer-facing product.



My Role

As the project's sole UI designer, I was responsible for interpreting the wireframes given to me by the UX designer through the lens of the design system. I worked closely with the project's UX researcher and product owner to analyze user feedback and data gathered from user testing sessions. This allowed me to synthesize improvements to user flows and data formatting as part of the UI design phase.

I was responsible for delivering development-ready, pixel-perfect screens for multiple key areas of the product necessary for MVP launch. If any questions arose during development, I was responsible for coordinating with stakeholders to determine the best course of action, and providing the development team with instructions.



Discovery & Wireframes

Core jobs to be done for a user were:

- intake of new customers and work orders,
- scheduling work orders and dispatching technicians,
- managing customer, location, work order, employee, and company information,
- generating invoices and billing customers, and
- creating and managing workflows.

Initial wireframes from the team's UX Architect drew heavily on existing layout solutions in other company products. Through iteration and user testing it was expected for me to arrive at high-fidelity designs consistent with the established design system, but tailored to the unique audience for this product and those users' needs and limitations. Emphasizing human-centered design and accessibility was a key goal of the design process from the start.

Create a Work Order

① Client Information

Client Name Client ID Primary Contact Name Primary Contact Phone Number

Primary Phone Number Primary Email Address Client HQ Address

② Work Order Information

Work Order ID Work Order Address Description of Problem

Work Order Contact Name Work Order Contact Phone Number

Service Level Agreement <

Special Notes (Internal)

③ Work Order Scheduling

Wednesday, May 11, 2022

Working Window: 8:00 AM - 9:00 AM

Arrival Window: 7:00 AM - 10:00 AM

Work Order Deadline Date (Optional)

☐ Flexibility to Reschedule

Technician(s) Assigned

☒ Adam Brooks

☐ Calvin Dobbs

☐ Edward French

☐ Gregory Heinz

☒ Notify Technician(s) Assigned

Schedule Work Order

Unscheduled WOs

Invitation Homes WO1234567

169 Bedford Rd., Bolingbrook, IL 60440

Leaking faucet

Invitation Homes WO1234567

169 Bedford Rd., Bolingbrook, IL 60440

Leaking faucet

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Leaking faucet



Visual Design

- Maintaining consistent branding with the rest of the company’s products was easily accomplished by starting all unique designs either from an existing component in the design system, or by utilizing standardized properties like colors, border-radii, and spacing to build an object from the ground up.
- Emphasis was placed on clean and clear layouts, with explicit interaction states (hover, active, etc) to aid less-savvy users in understanding intuitively how different areas of the product work.
- WCAG 2.0 accessibility and design integrity were defended—and acceptable compromises sought—whenever developers encountered roadblocks.
- Additional accessibility features such as dark mode and high contrast mode were kept in mind during the design process in order to streamline design and development of those features at a later date.

Technician 

Technician 

Assigned

☒

 Adam Brooks

4

☒

 Calvin Dobbs

3

☒

 Edward French

2

☒

 Gregory Heinz

5

☒

 Ivan Jacobs

1

☒

 Keith Lions

3

Unassigned

☐

 Etta Shelton

0

☐

 Glenn Barton

0

Client Name *

Client Name

Add Selection 

What would you like to add?

Select one

☐

 Work Order

☒

 Event

Next

☒

 New client location?

Primary

Secondary

Primary Status 

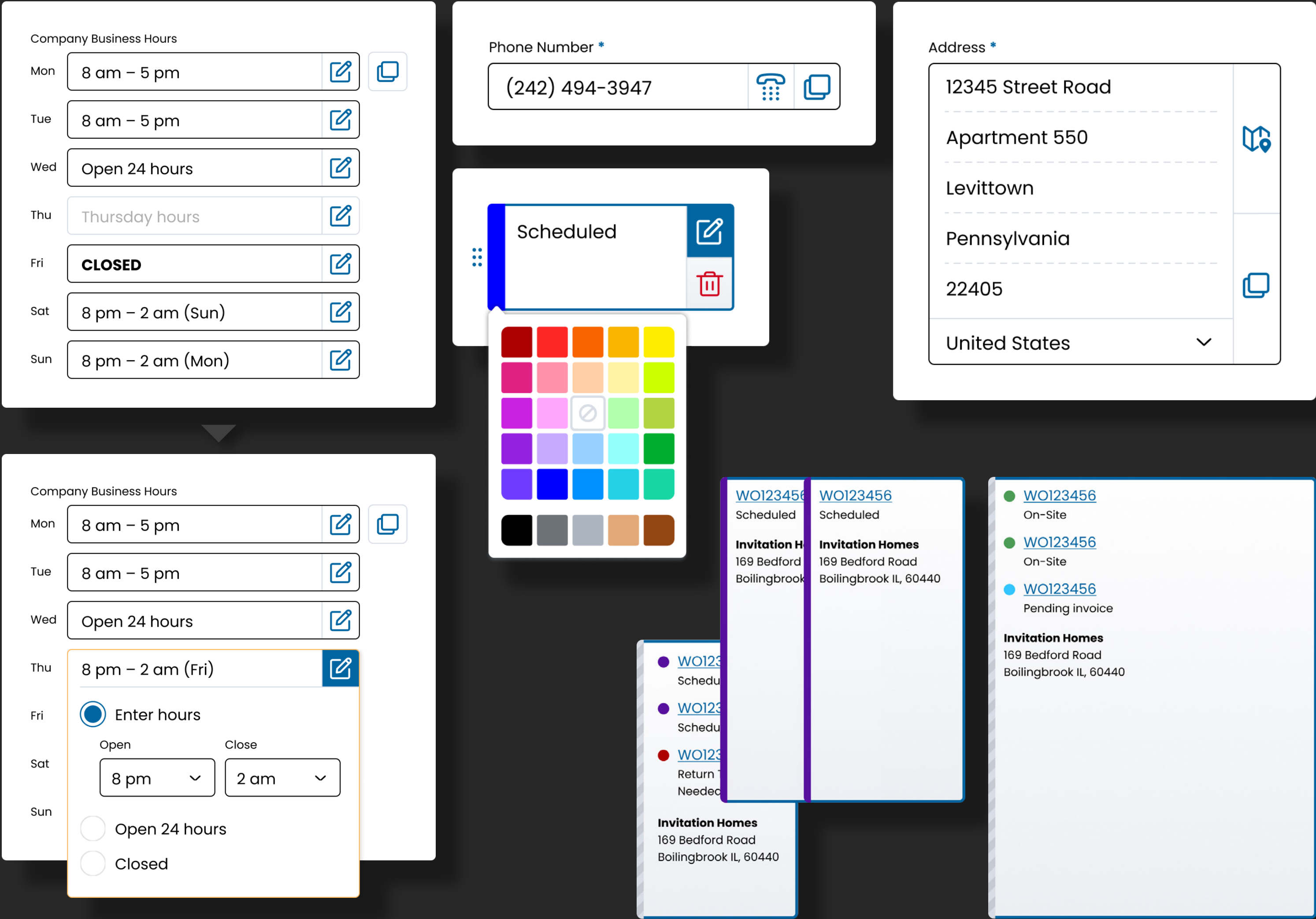
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Chris Elliott | chriselliott.art | chris@chriselliott.art | c-e.art/linkedin

Specialized Components

Several unique components designed for this product included:

- a component for entering complex business and customer-preferred hours, including accomodation for “next-day” closing time and 24-hour businesses,
- a work order status customizer that allows the user to change the ordering, titles, and colors of statuses,
- an “aggregator” calendar object which intelligently detects if multiple work orders are scheduled for the same location at the same time, and combines those calendar events into a unified card to reduce visual clutter, and
- data fields built with smart action buttons (call, go to location on map, copy to clipboard) designed to prevent users from needing to “click into” the field in order to use the information it contains, thus reducing accidental editing of data.

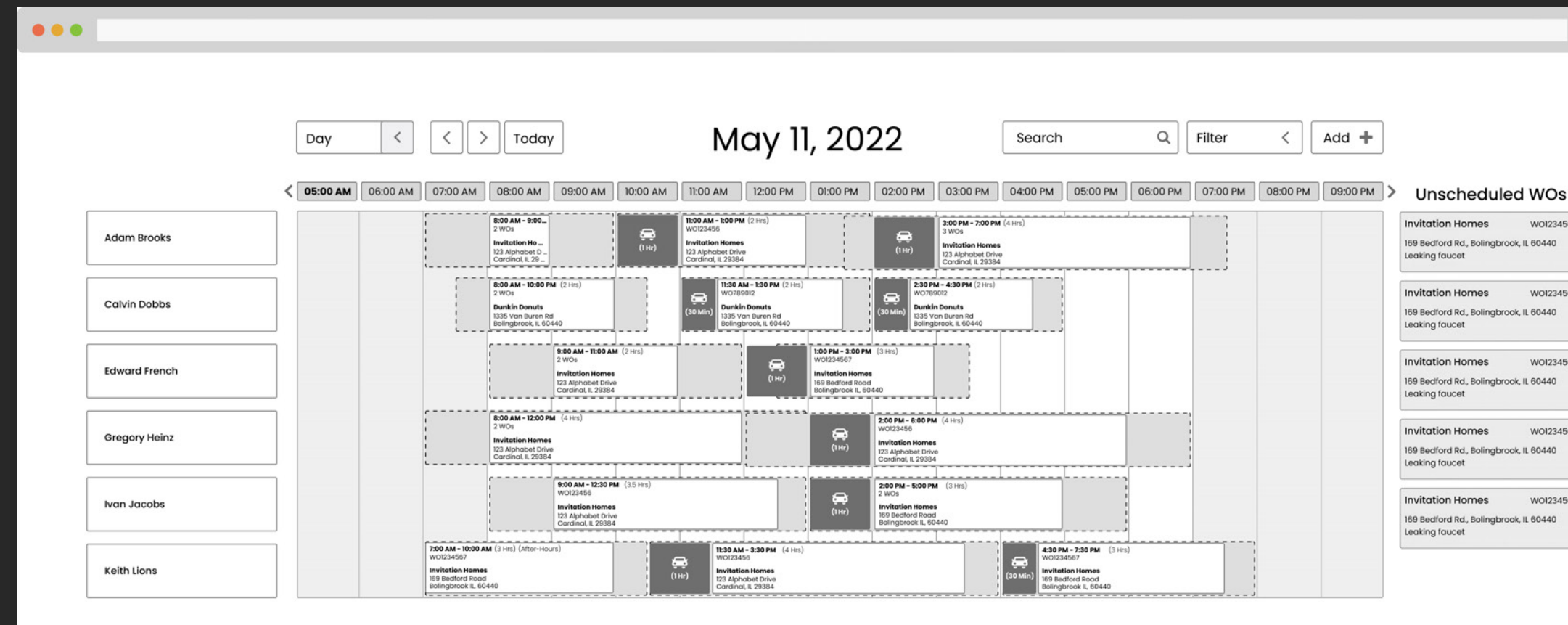


User Testing

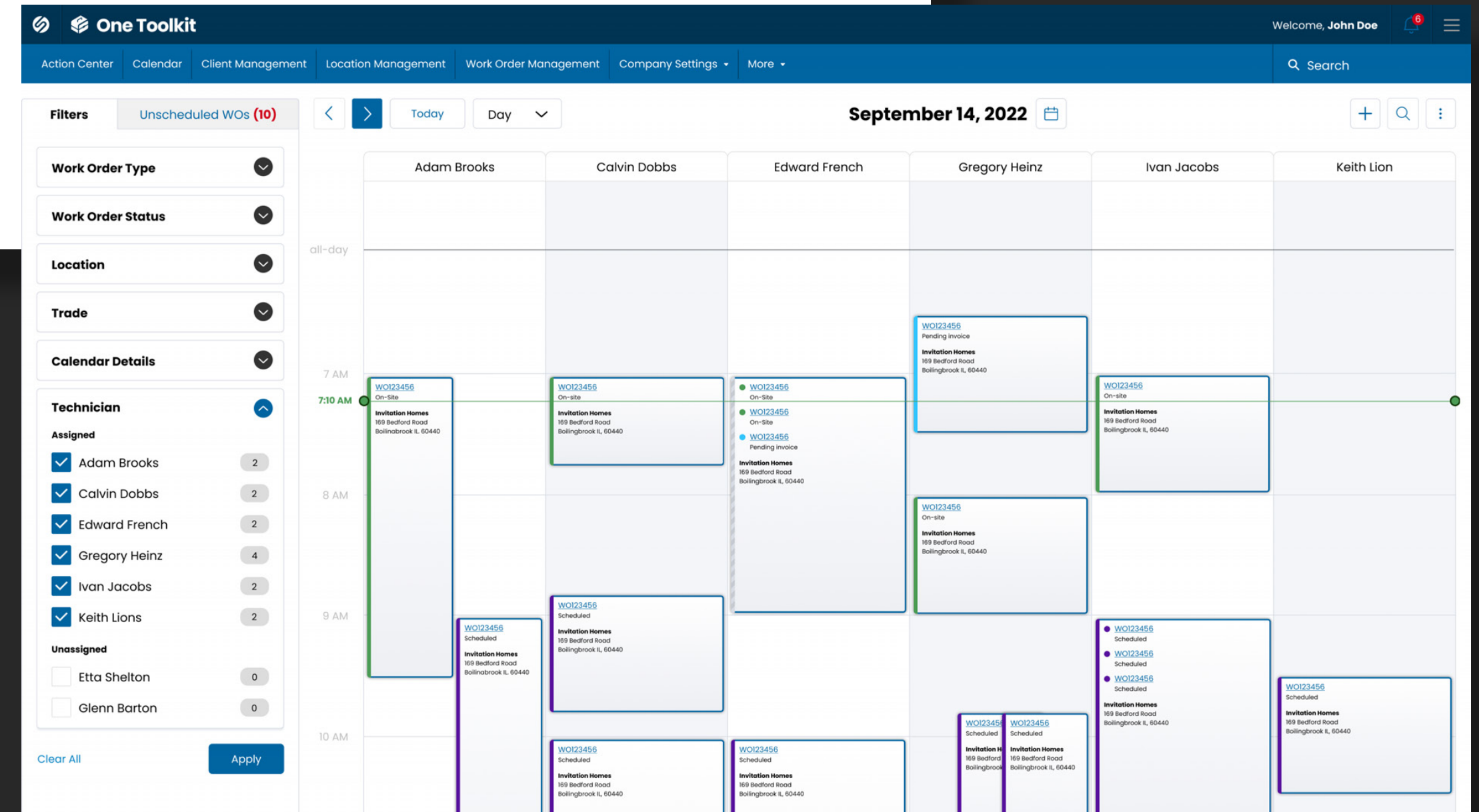
- Conducted in rounds roughly 2-3 weeks apart, with agile time in-between to implement findings from prior round and to design new areas of the product.
- Testing began in the wireframes stage and continued through design and development cycles, with a live beta-testing period prior to MVP launch.
- Process included the user sharing their screen over Zoom while being guided by the UX Architect.

An interesting discovery from user testing was the finding that many users found the company's existing approach to dispatch calendars (with time oriented along the horizontal rather than vertical axis) to be confusing and cluttered; this resulted in a change of approach for this product, with potential for the change to filter back to other products over time.

Wireframe:
horizontal calendar



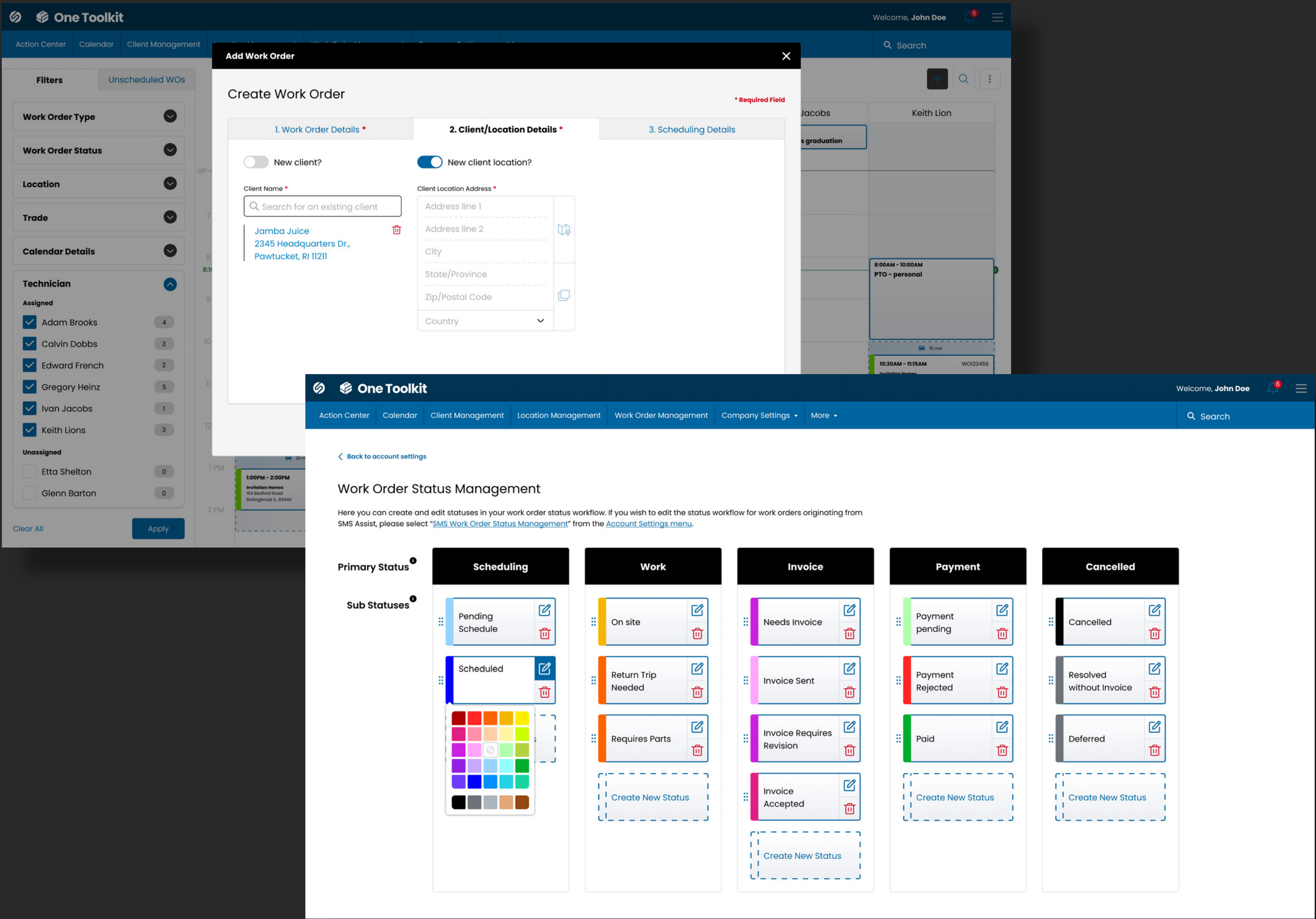
Prototype:
vertical calendar



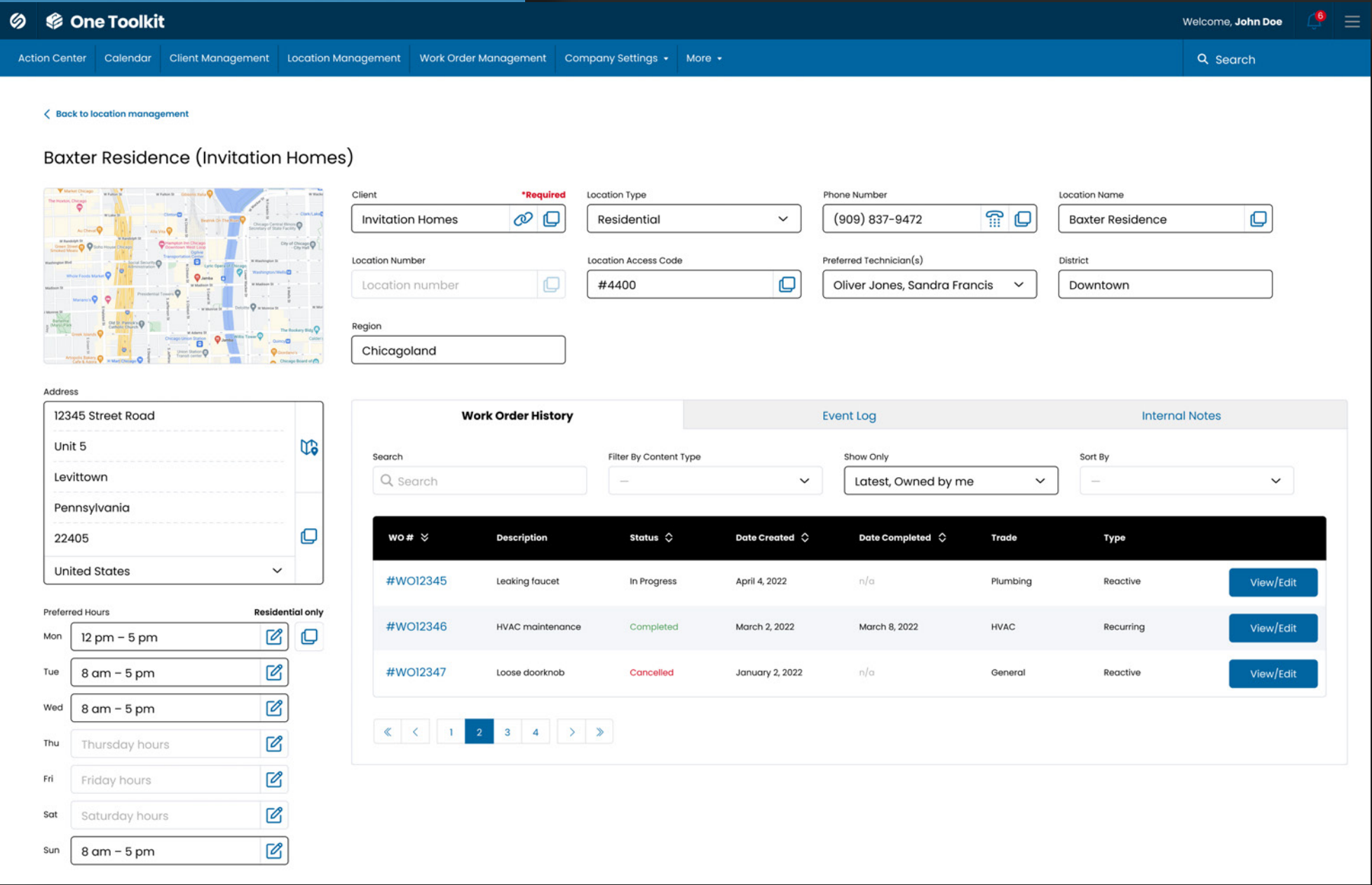
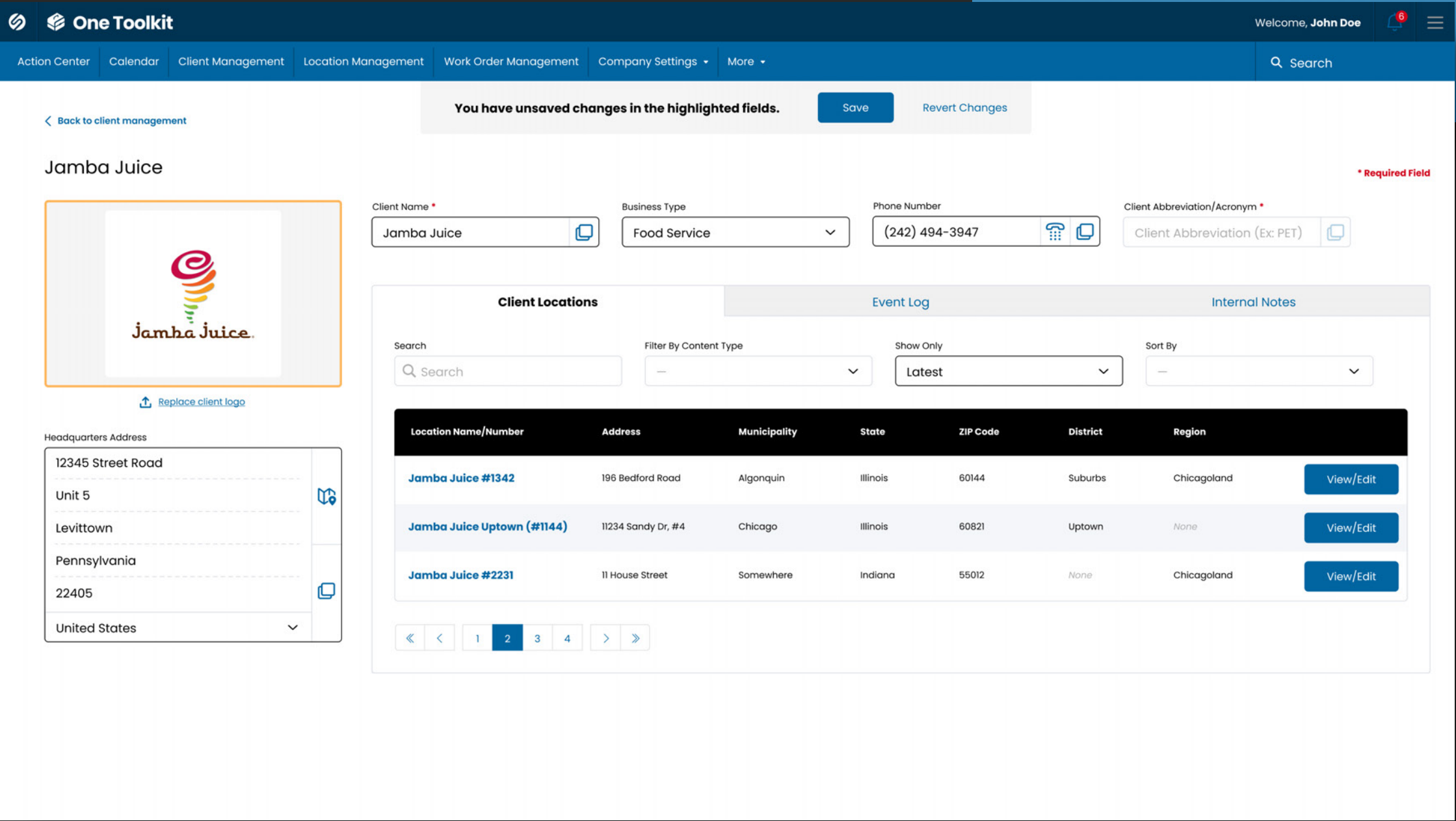
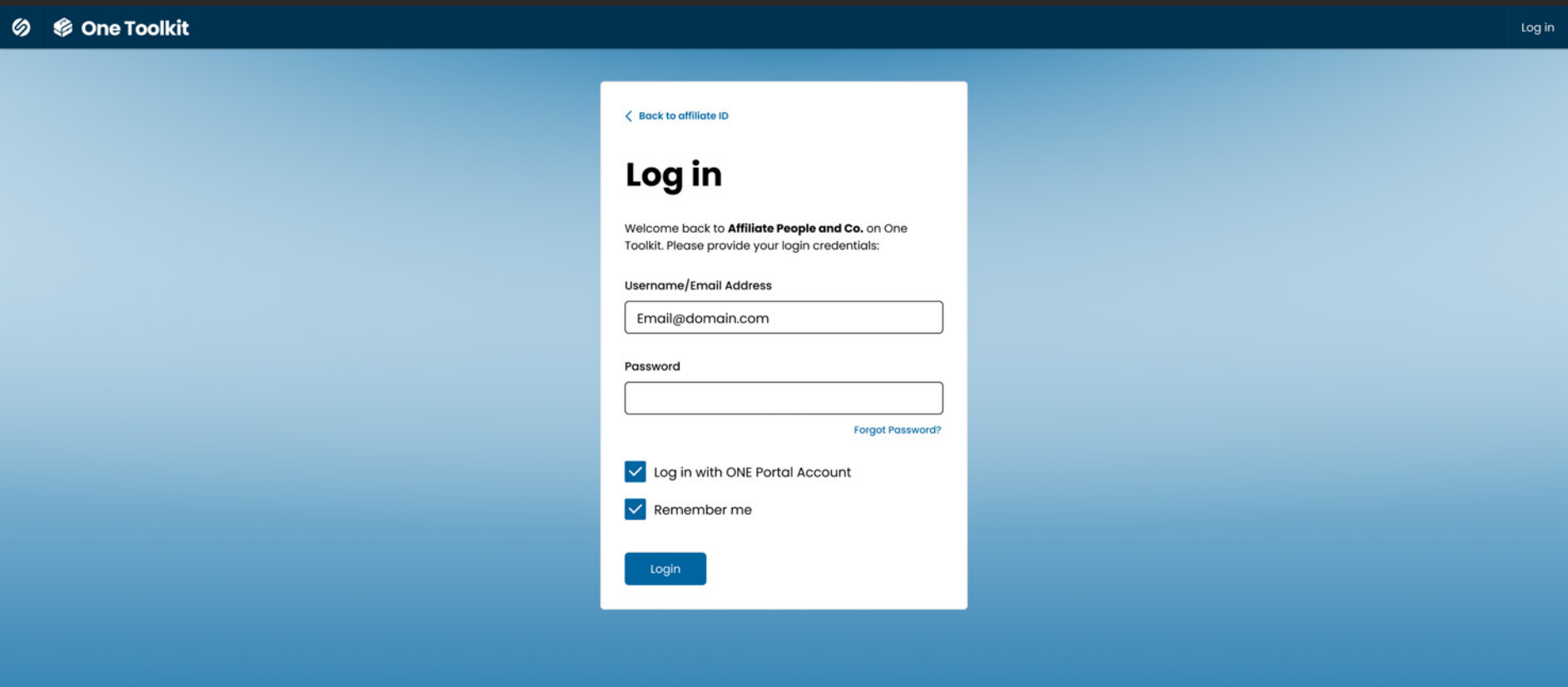
Results

While the product is not finalized, nor publicly launched yet, all MVP areas of the product have been designed and tested with users, with numerous beta testing users already interested in replacing their current business management solution with One Toolkit.

Components created for this product built upon the existing design system, and grew it to have new capabilities for handling complex data models and user inputs. These new design patterns will not be limited to just this product, with planned adoption by other offerings over time. Users stated multiple times that the clean layout with explicit interaction states makes the product easier to use than competitors' offerings, and more appealing to look at.



Results





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