

Knowing When to Break the Rules



The Inside Intercom World Tour 6.8.2016



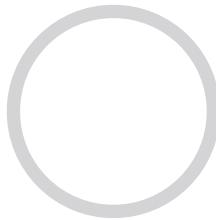


Open up our process

Open up our process
Push our craft

The beginning

2011



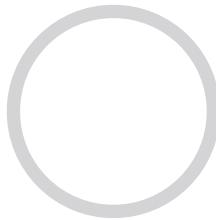
Content Recommendation Tool





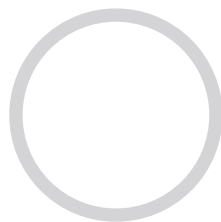
1. Brief
2. Research
3. Low-Fidelity
4. Scope
5. Visual
6. Code
7. QA
8. Code Review
9. Testing
10. Deploy

2011



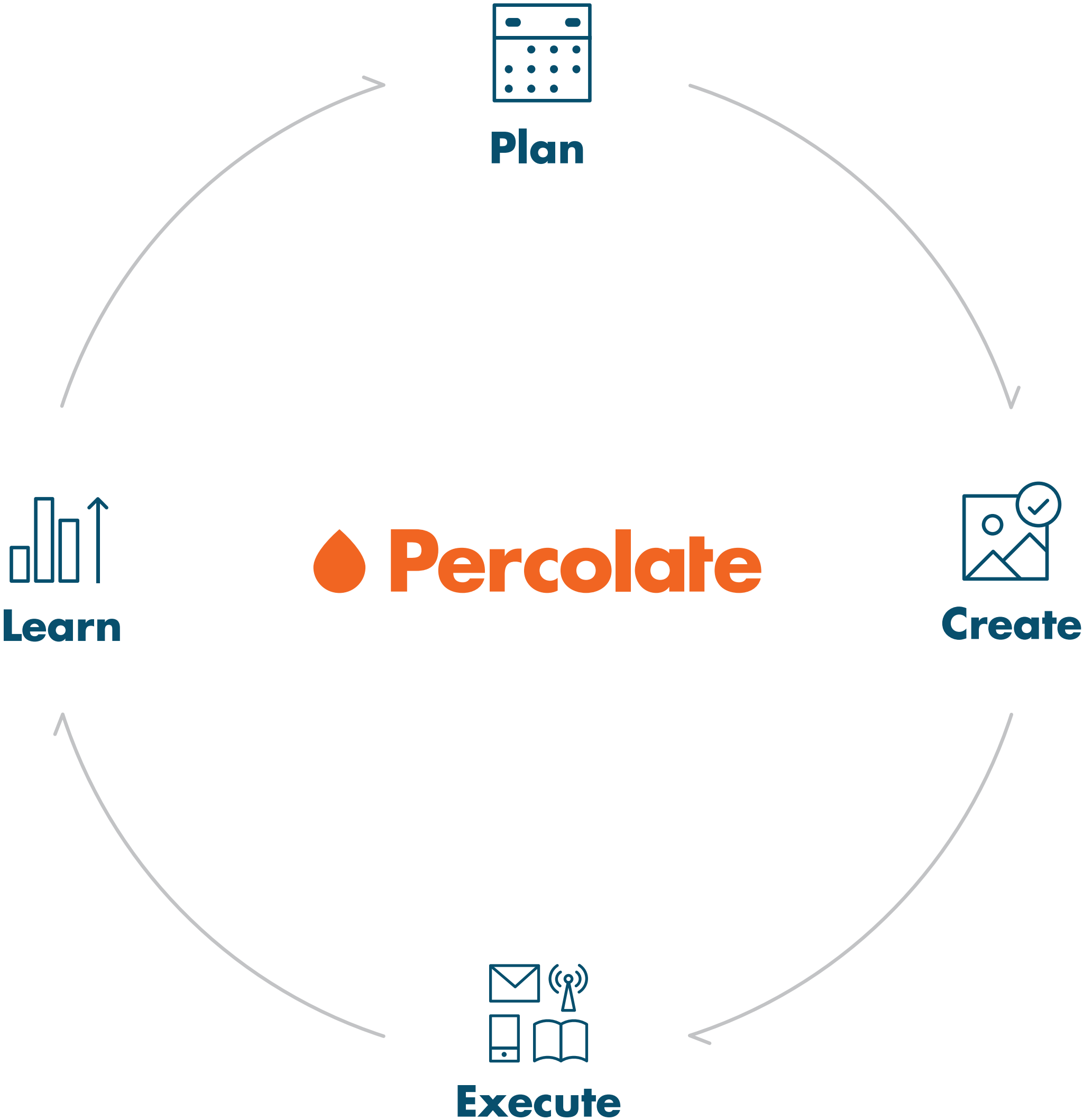
Content Recommendation Tool

2011 - 5 Brands



Content Recommendation Tool

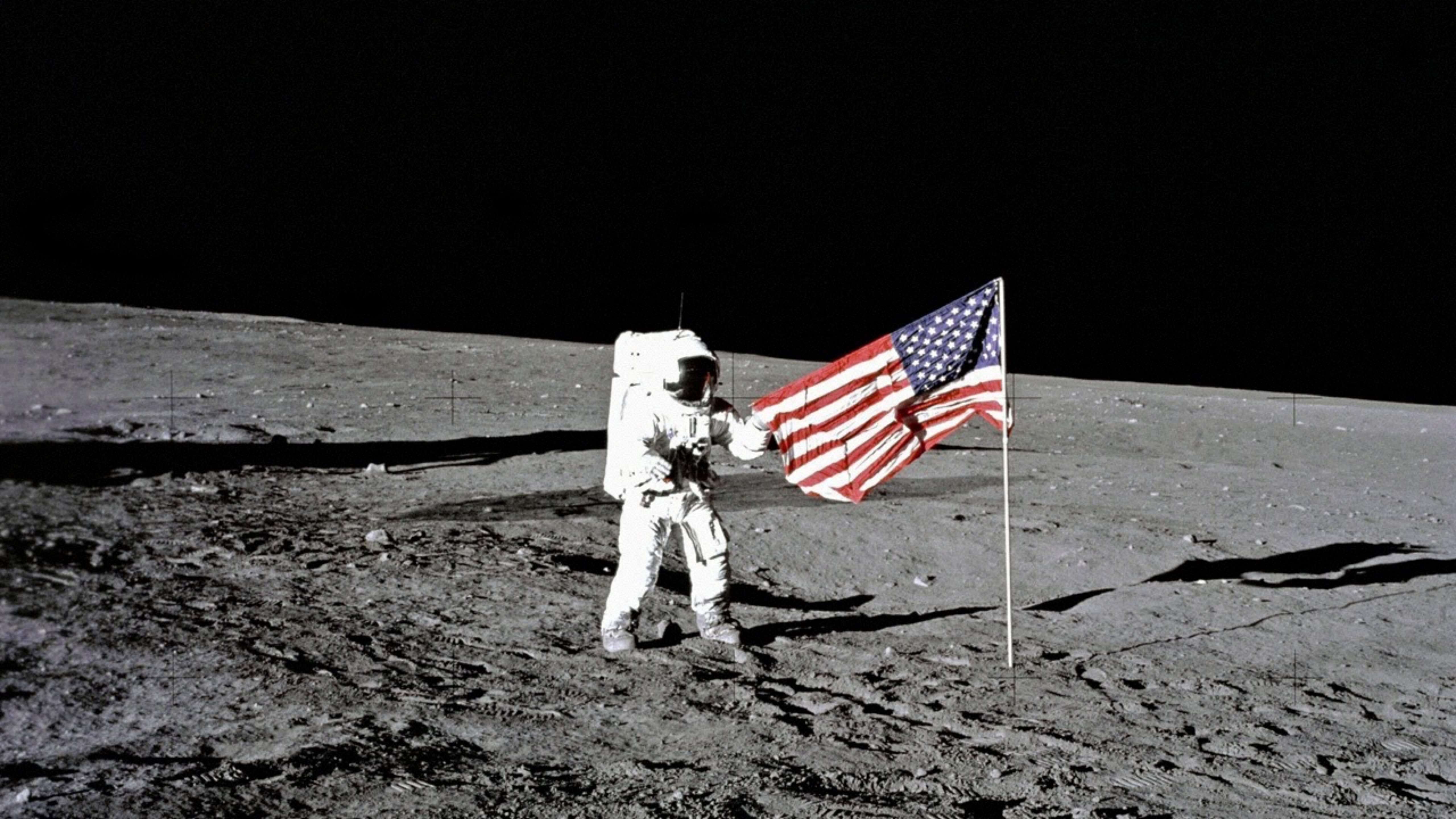
2016 - 800+ brands



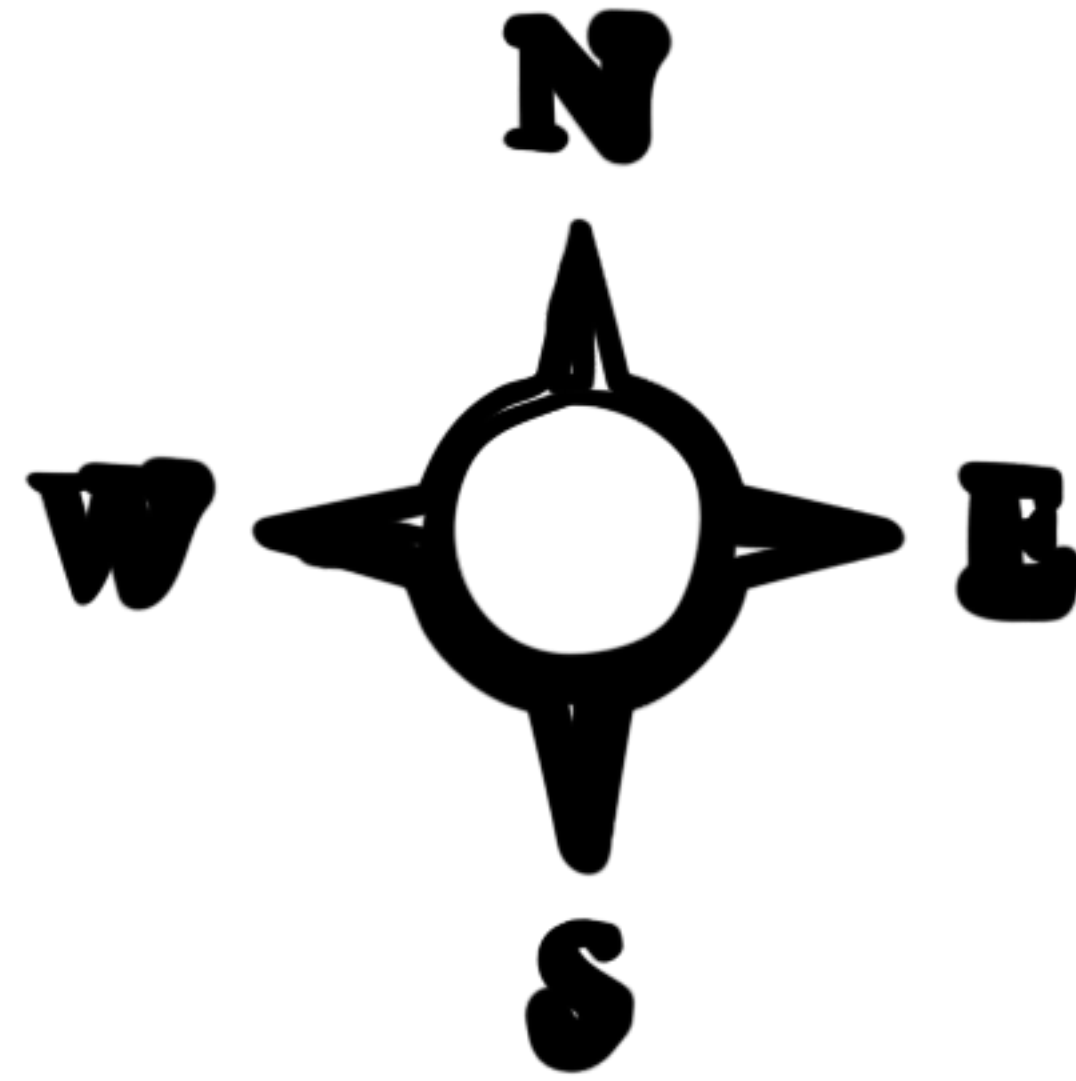


New stuff

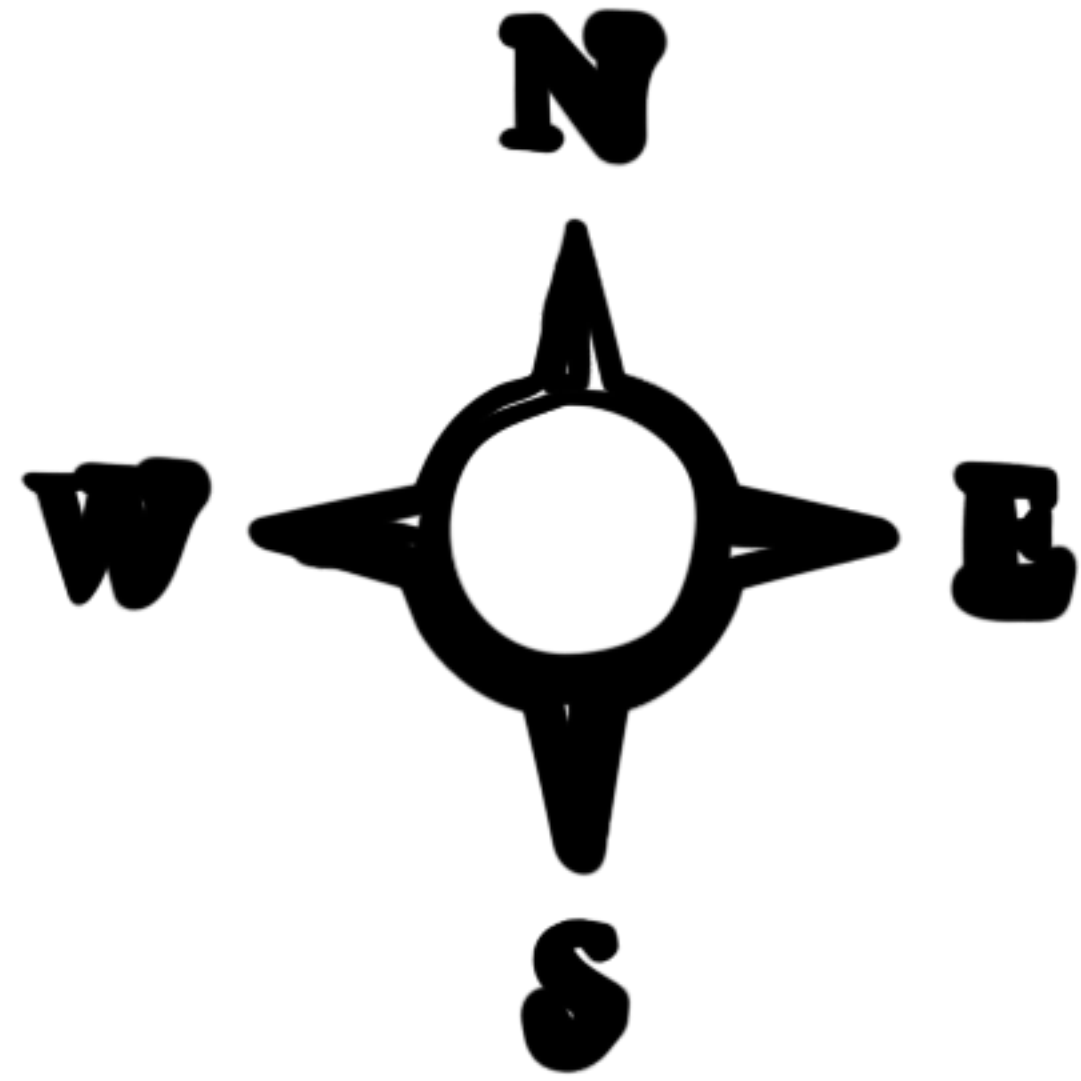
Refinements



**Figuring out
how to evolve**



Rules

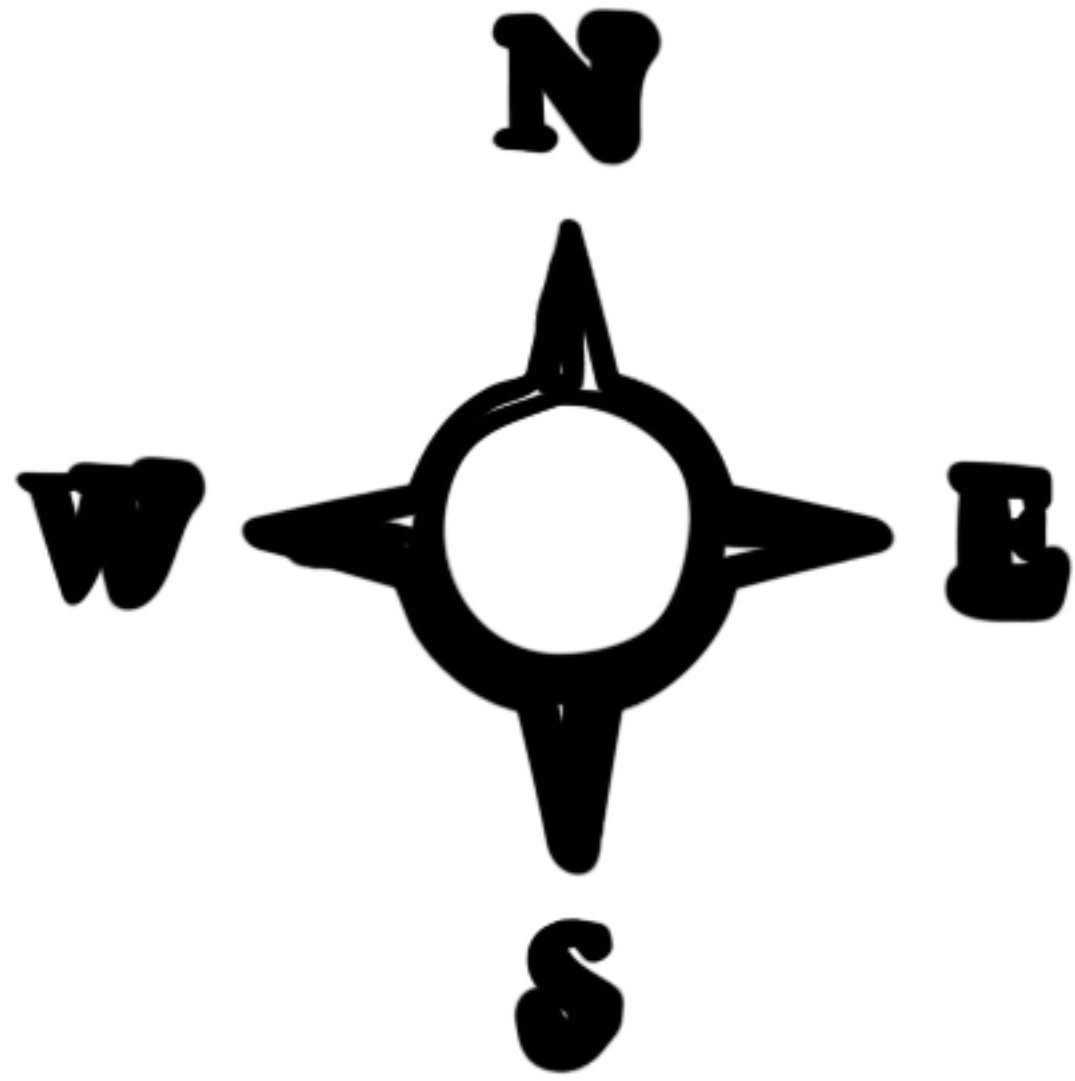


Rules

+



Tensions



Rules

+



Tensions

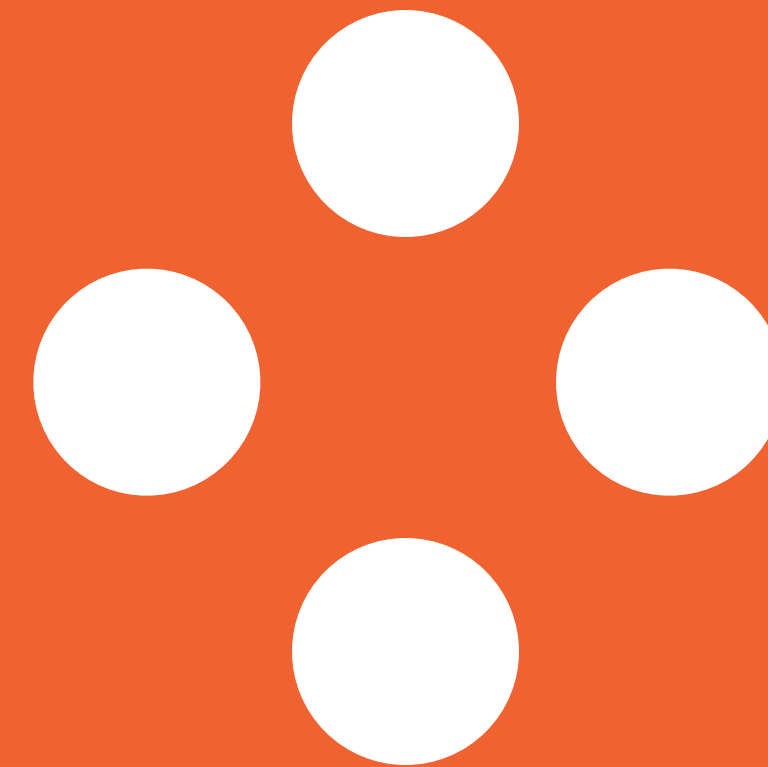
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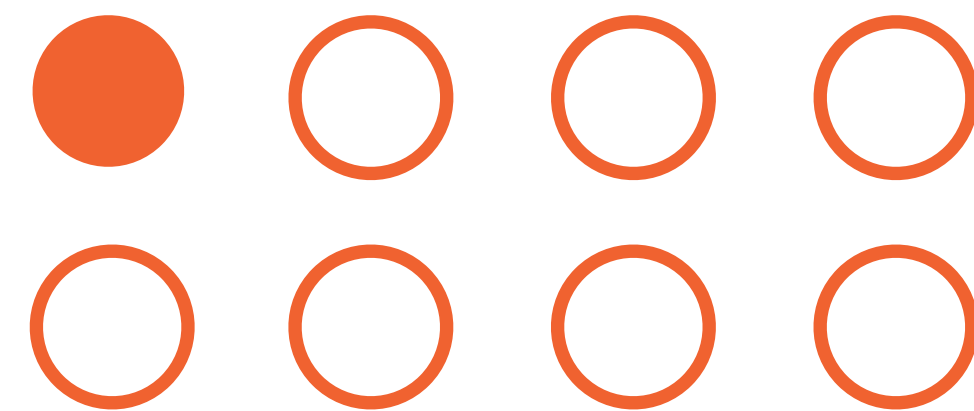
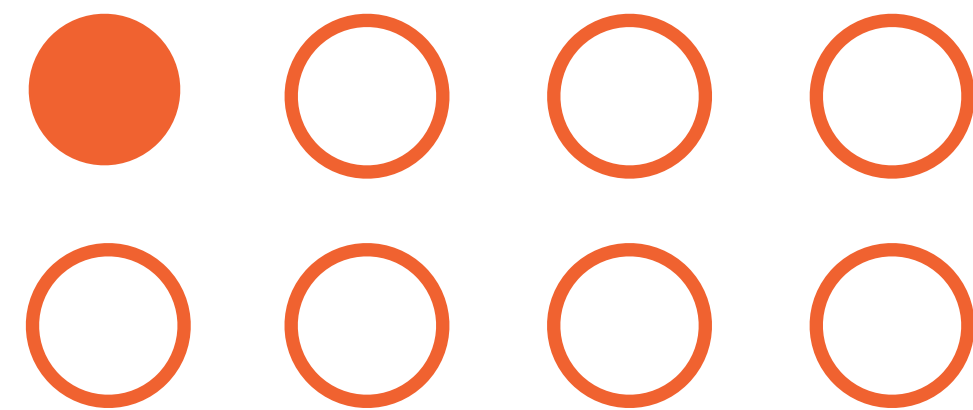
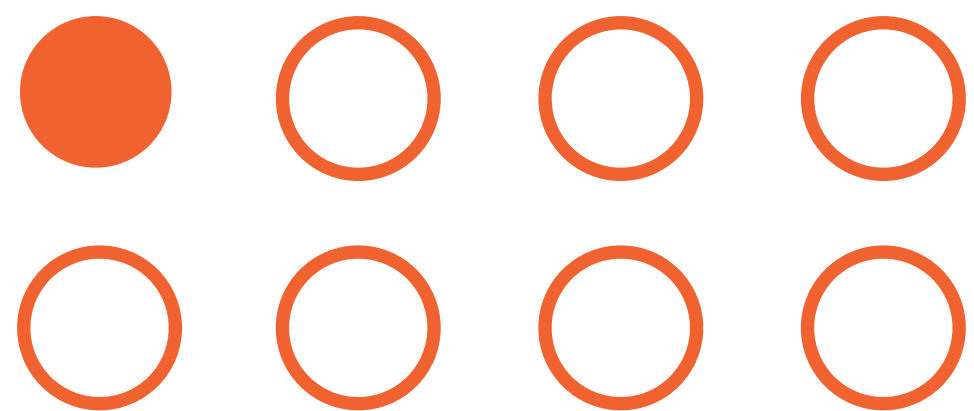
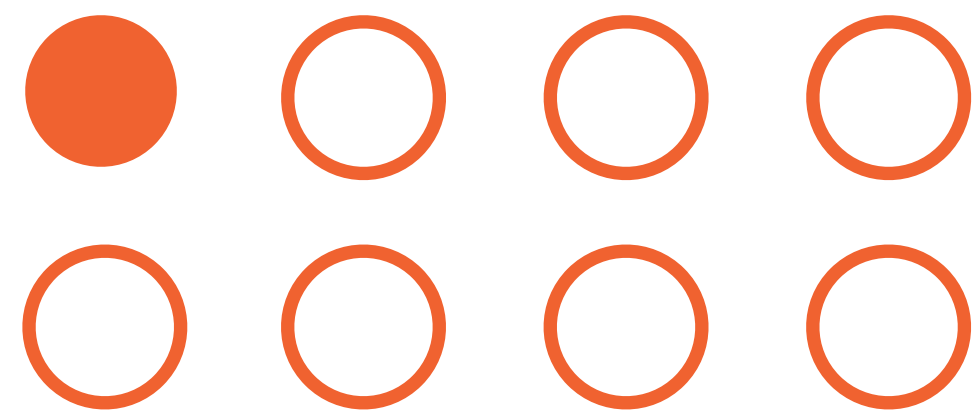
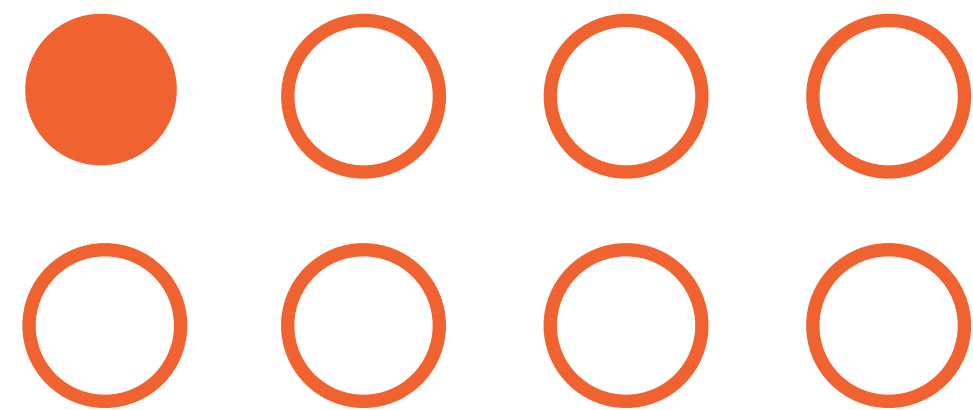
Experiments

Experiment 1

Design Groups



Rule



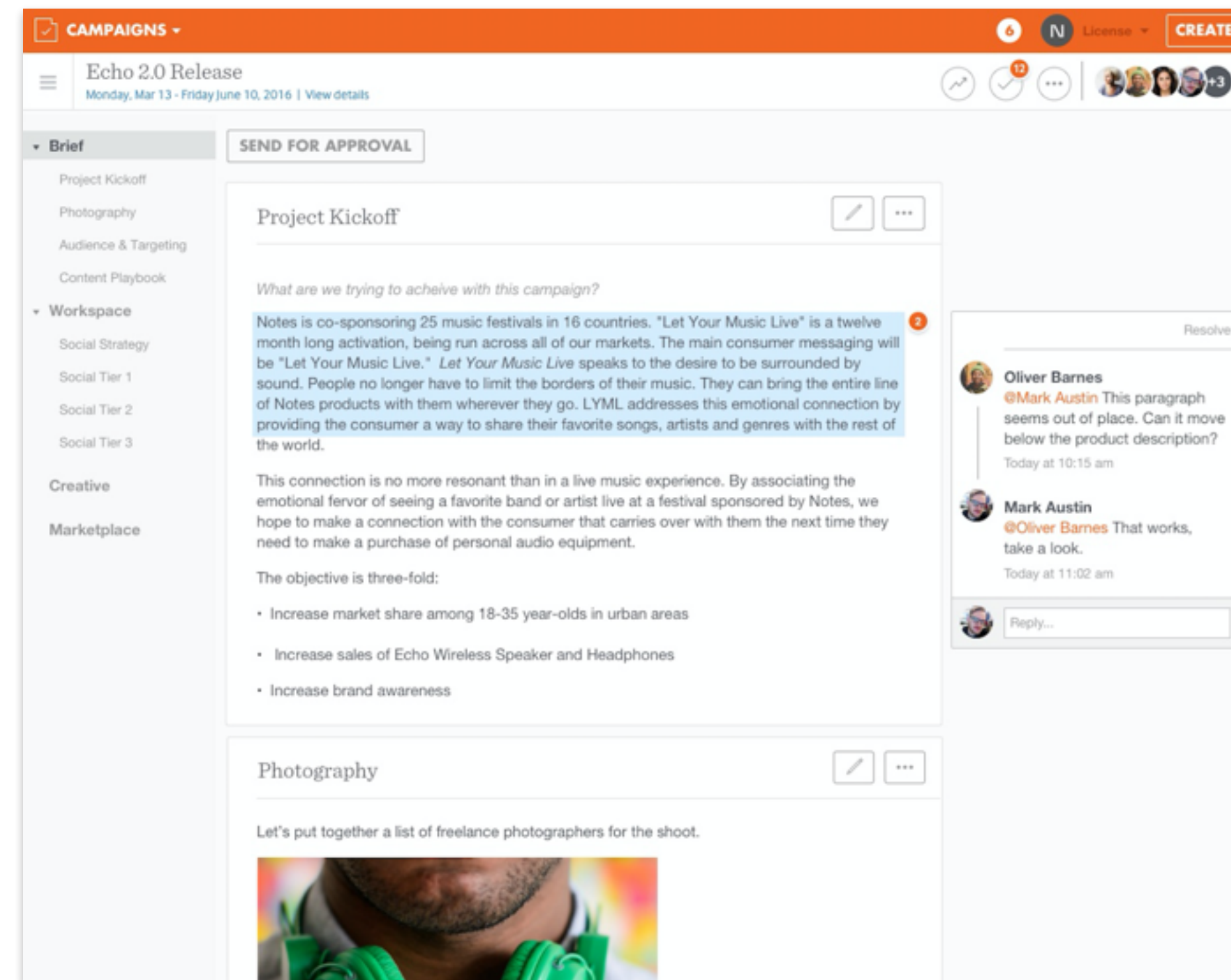
Tension



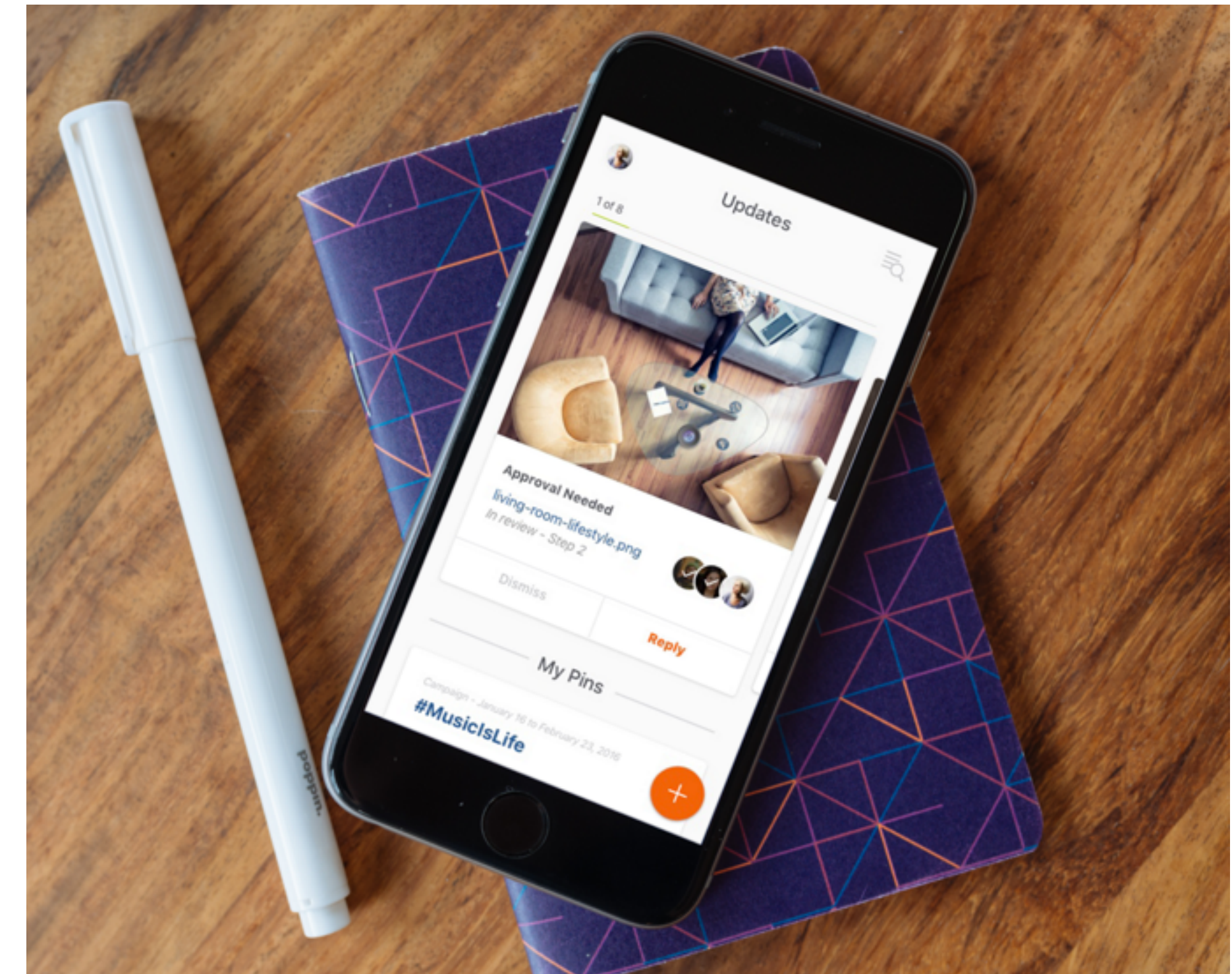


Experiment

Collaboration Tools



Mobile App

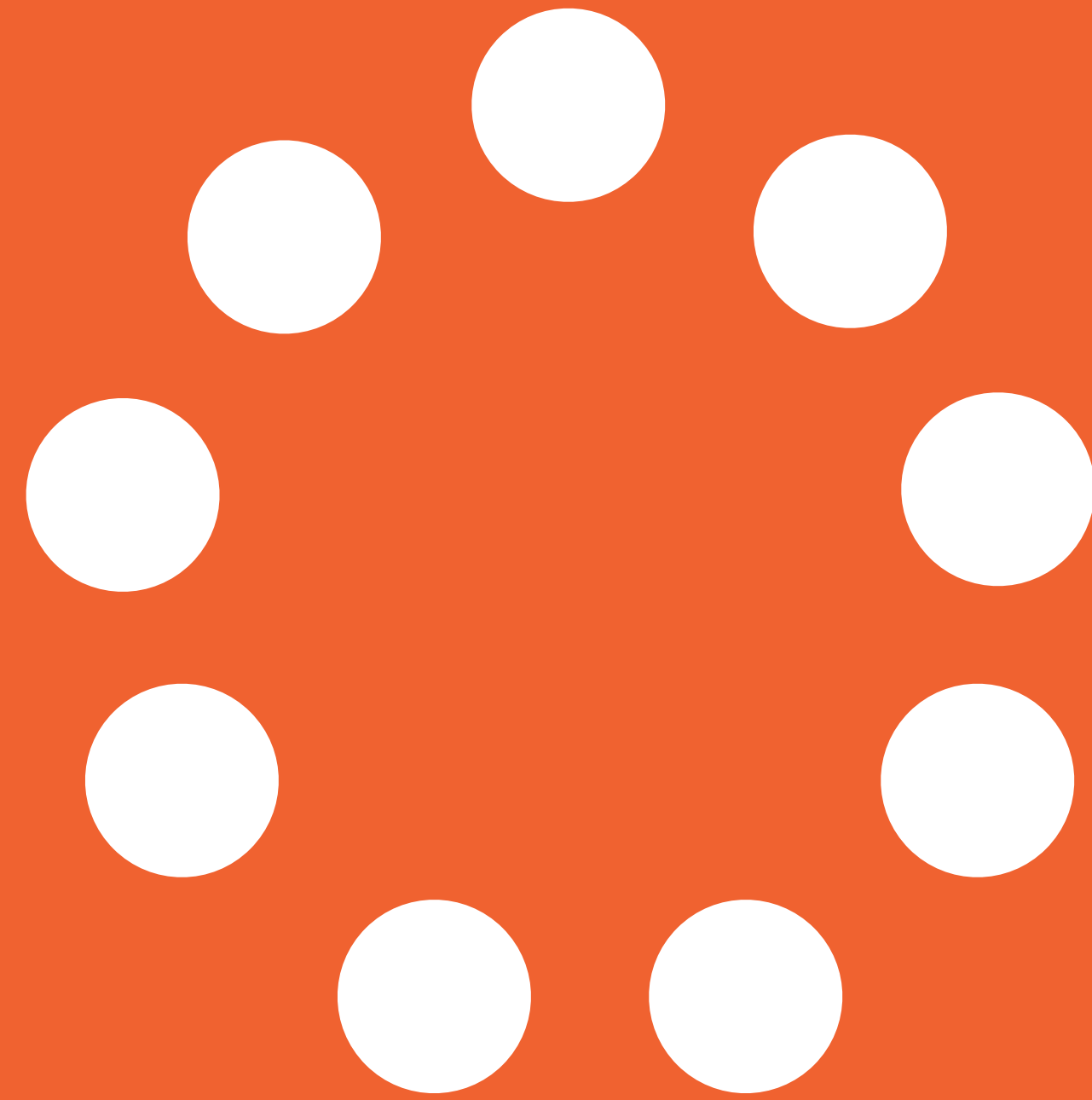
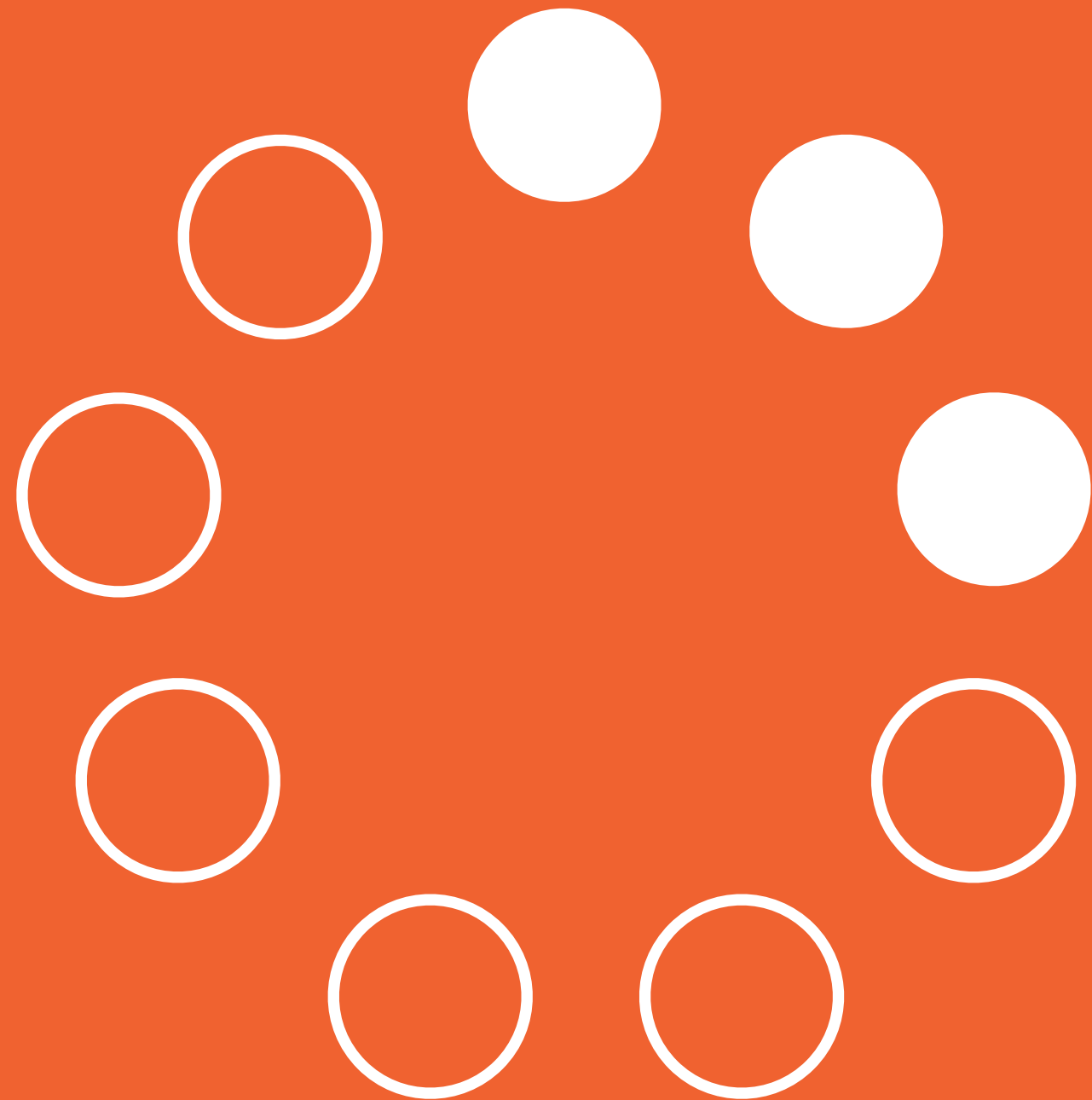


Learnings

- We are more open and share design work earlier
- Iteration is benefitted by multiple perspectives
- We use a weekly stand-up to plan our schedule

Experiment 2

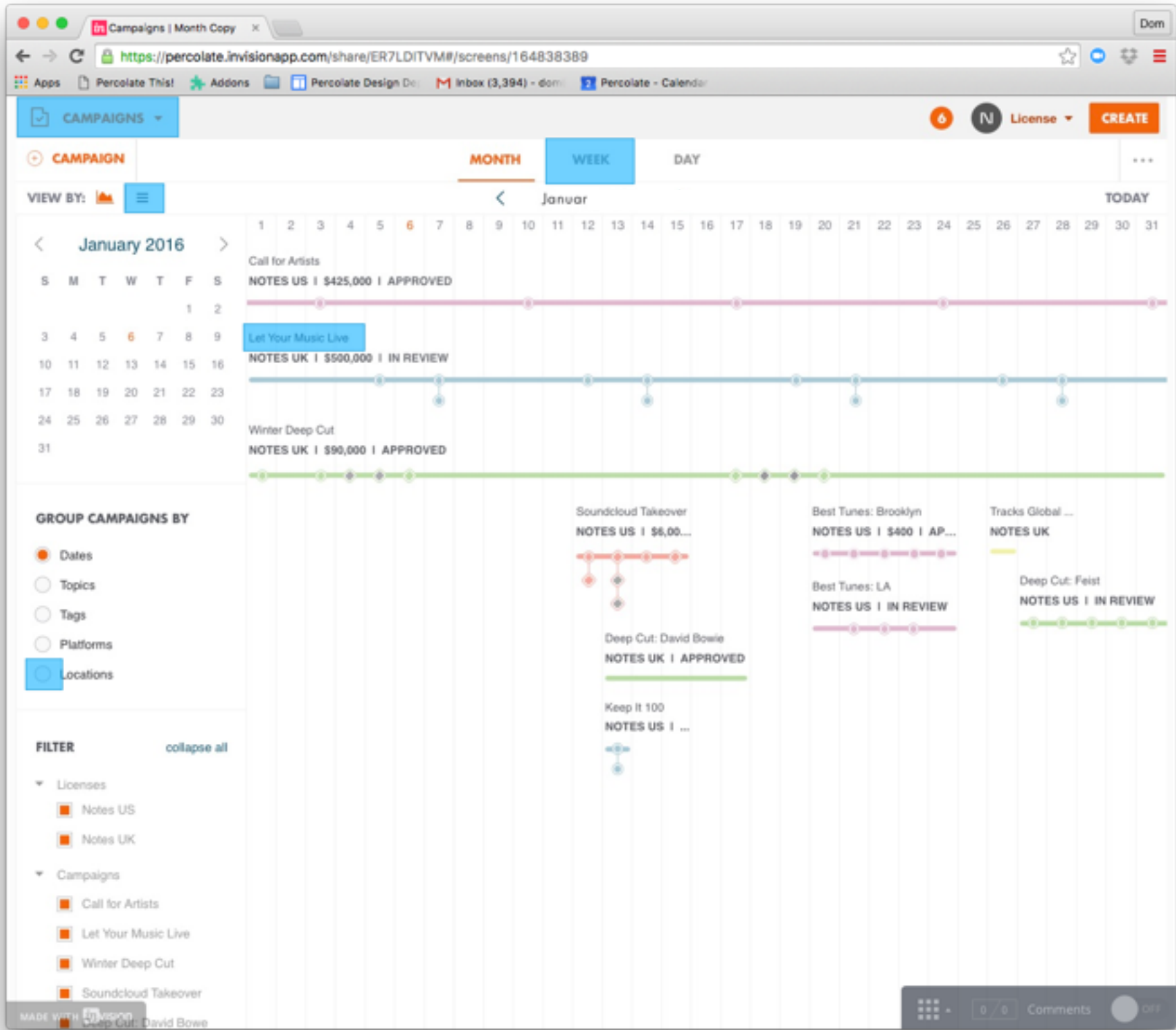
Design Partners



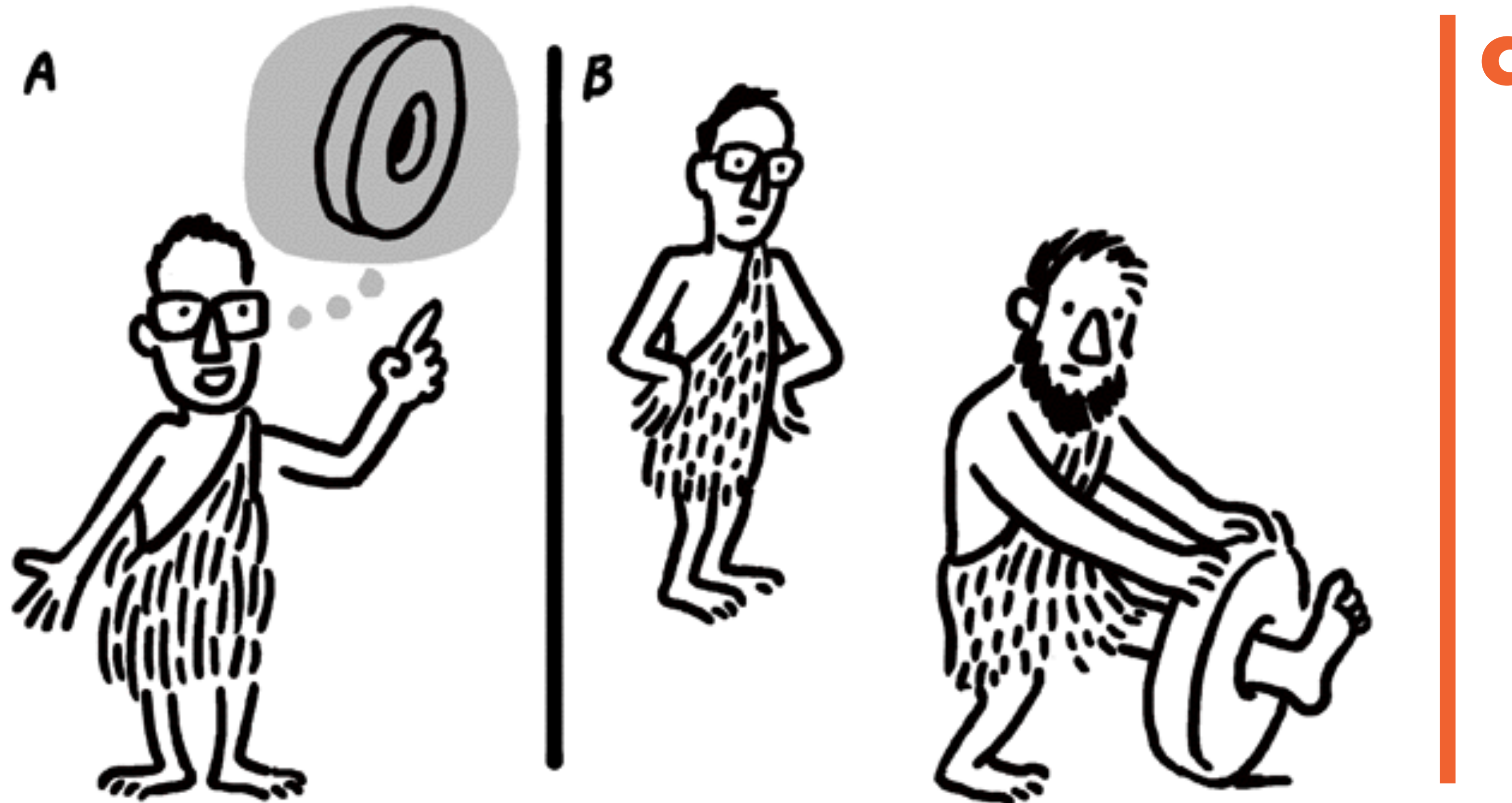
Rule



Jobs to be done



Tension



Experiment

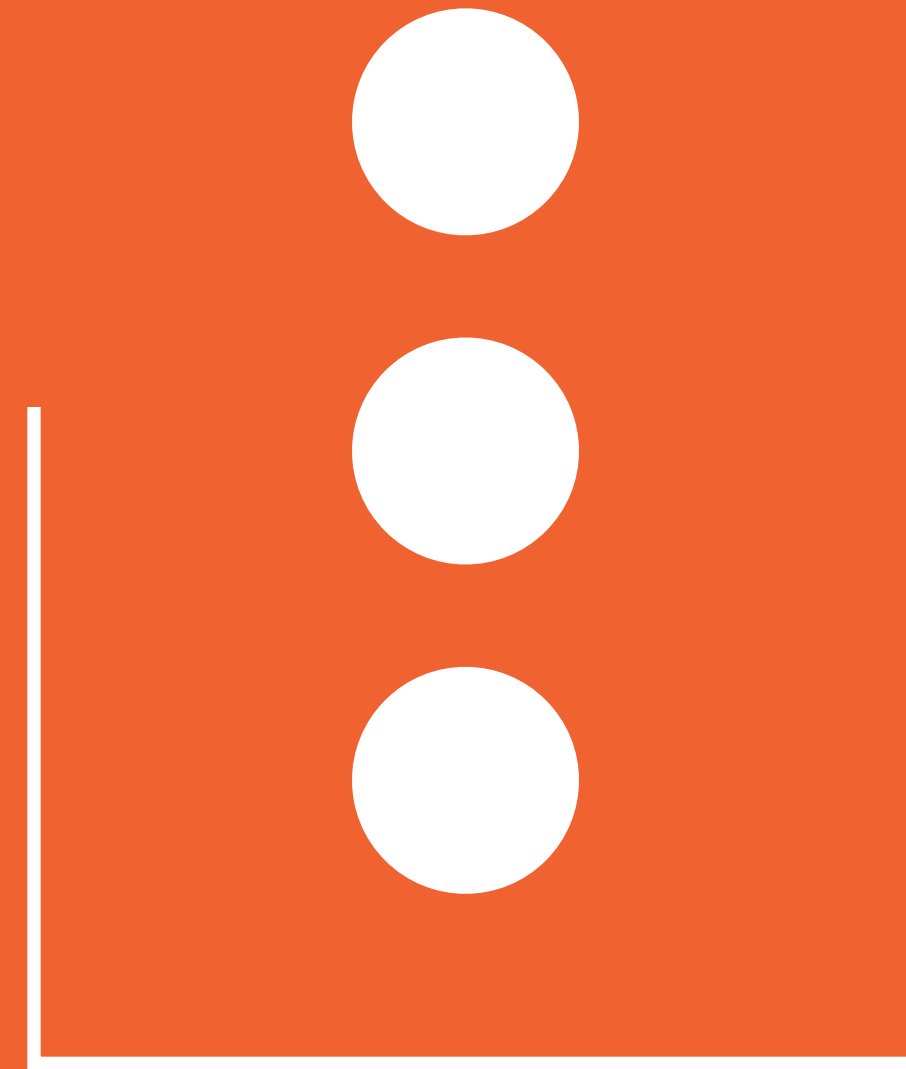
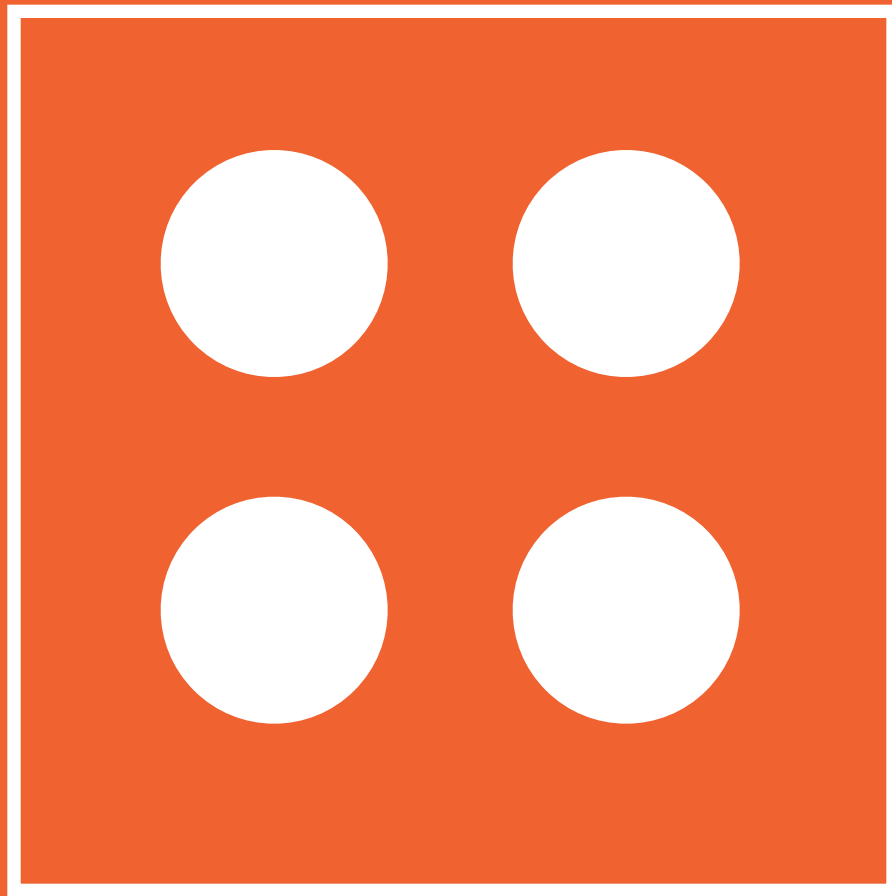


Learnings

- We're developing better relationships across the company
- We need to keep all design research options open
- Scheduling time with multiple customers is tricky

Experiment 3

Component Library



<div>Percolate</div>
<div>Styleguide</div>
<div>Home / Misc / Dropdown</div>
<div>No label</div>
<div><div>...</div></div>
<div>Long label, short options</div>
<div><div>This is a very long label that looks a little funky</div></div>
<div>Text label and open to the left</div>
<div><div>A label</div></div>
<div>Long option</div>
<div><div>...</div></div>
<div>Headings</div>
<div><div>Dropdown with headings</div></div>

Tension



Experiment

Primary Navigation

Created by Jeremy Bloom

Creative Preview

Creative Details

Description

Our current navigation structure is not prepared for the onset of Global Search, Business Maps, and Global Settings. The design team would like to update our outdated navigation bar in preparation of the large 2016 feature releases.

Changes and functionality:

- Application dropdown appears on hover
- Leverage badge count accumulation near license dropdown
- Move 'Support' link into License Dropdown
- Move settings to application dropdown
- Minor visual design updates including: Circular avatars, create icon removal

Vision

navigation-20160...

SKETCH

2 MB

Navigation_2016...

JPG

1563 x 1012 | 171 KB

V1 Design

KP

Kimberly Peterson

Jeremy Bloom If this navbar is 100% width, how does it look on a page with our secondary navigation? Will that navigation also move to full-width? How will that look with content in the application that is still 940px wide?

2 months ago

JB

Jeremy Bloom

Elliott Romano I dont think we will show a badge if there are not any updates.

2 months ago

JB

Jeremy Bloom

Kimberly Peterson It's intended to expand to the width of the page.

2 months ago

KP

Kimberly Peterson

Jeremy Bloom is this navbar still 940px wide?

2 months ago

ER

Elliott Romano

Jeremy Bloom approving- curious what the 0 state for the "to do" badge is- probably just don't show it.

2 months ago

MS

Mary Liz Stunja

Could we offer a keyboard shortcut to switch between apps? (like how cntrl + Shift + tab works)

2 months ago

NB

Noah Brier

Left annotations on image. Looks good.

2 months ago

MS

Mary Liz Stunja

This is a design led change that stemmed out of "modernizing percolate design". The design team as all in alignment on the changes and I agreed to be the PM

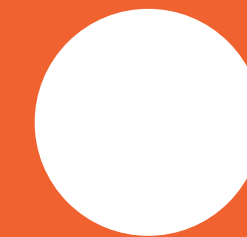
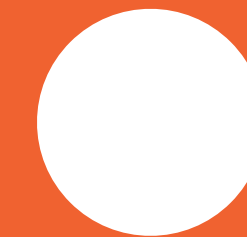
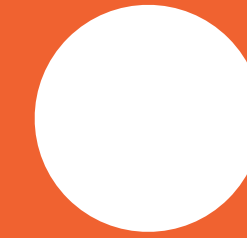
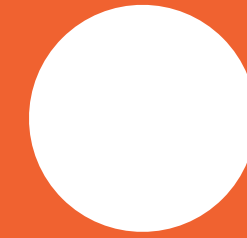
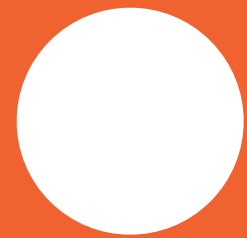
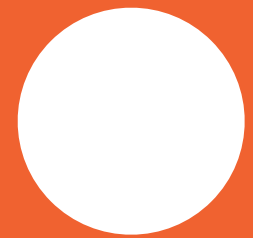
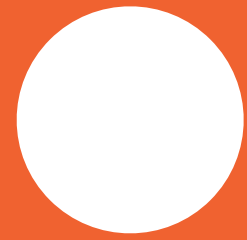


Learnings

- Visibility encourages collaboration from all disciplines
- We need to figure out how much feedback to give
- It takes time to get components into our sprints

Experiment 4

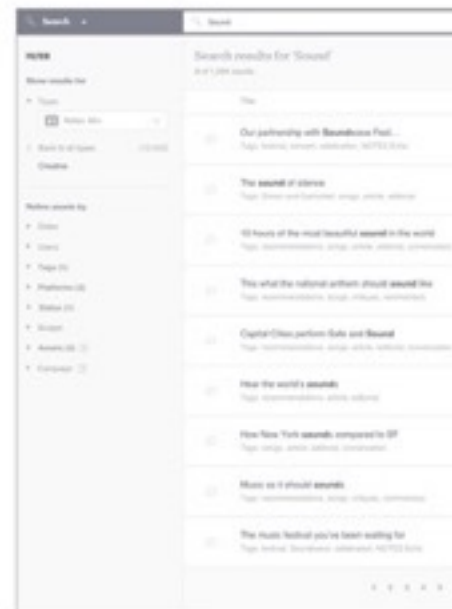
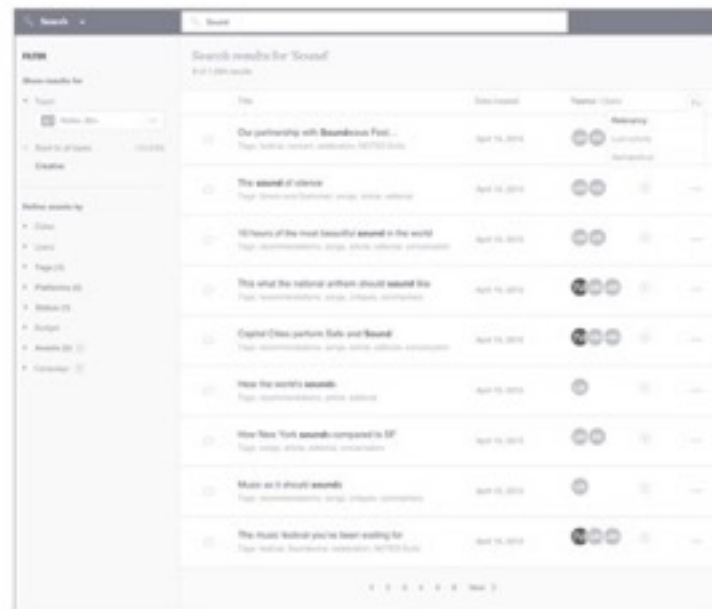
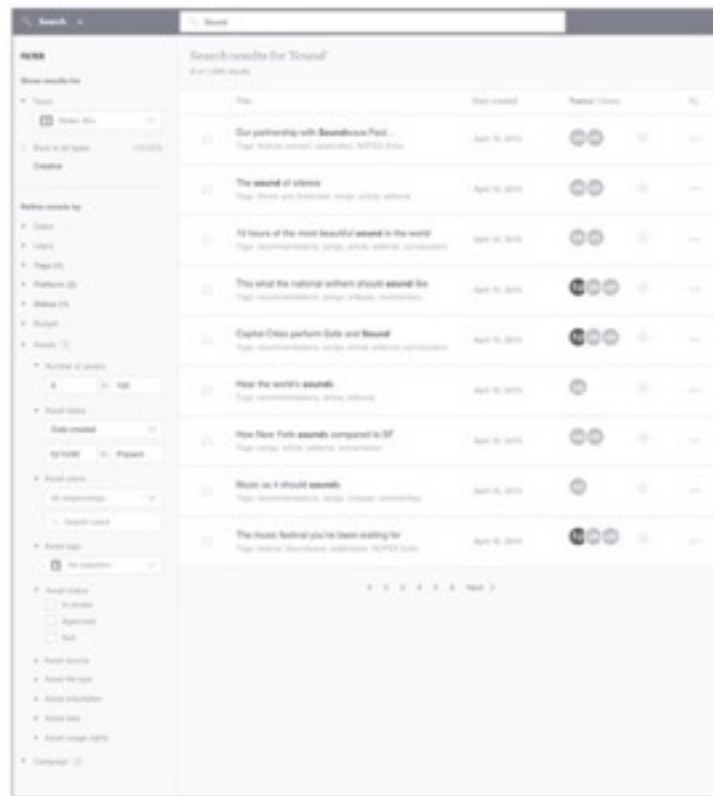
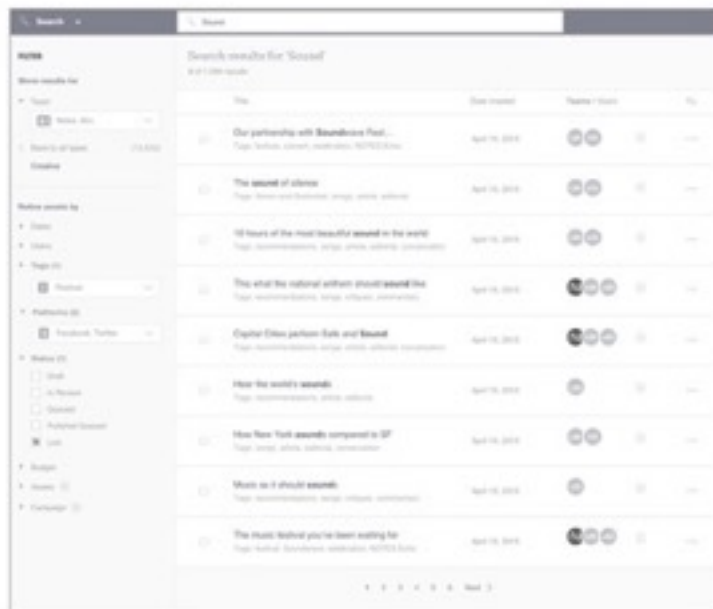
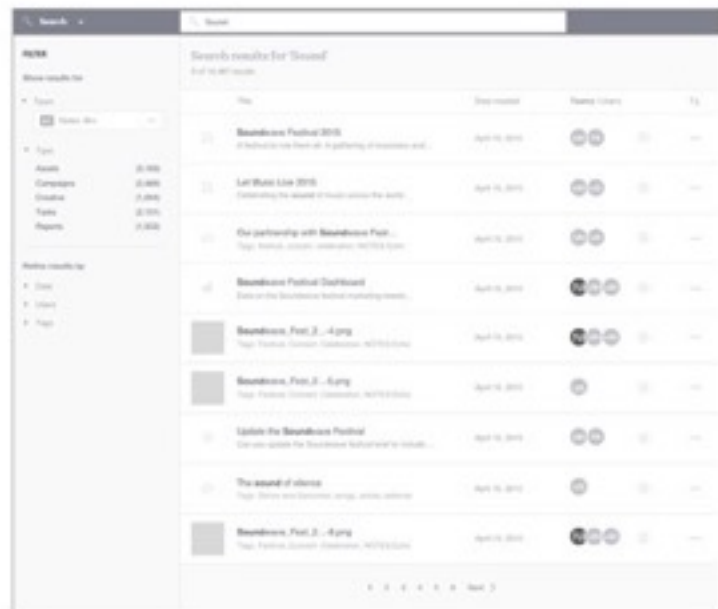
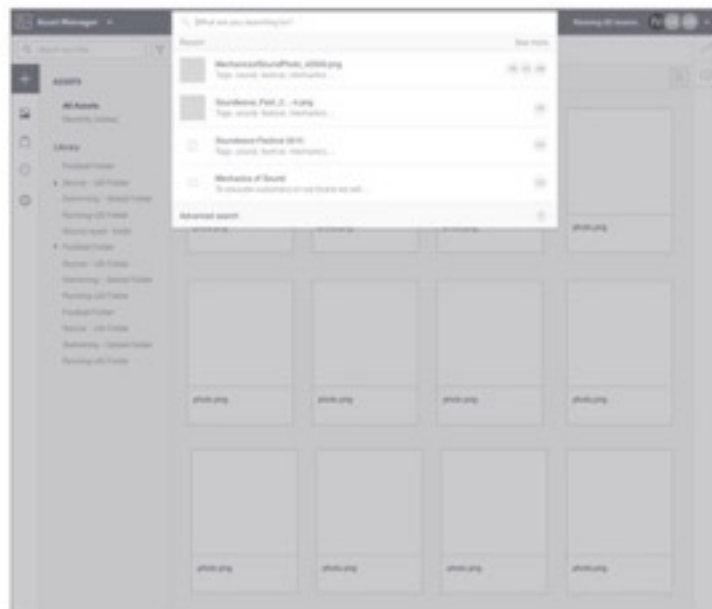
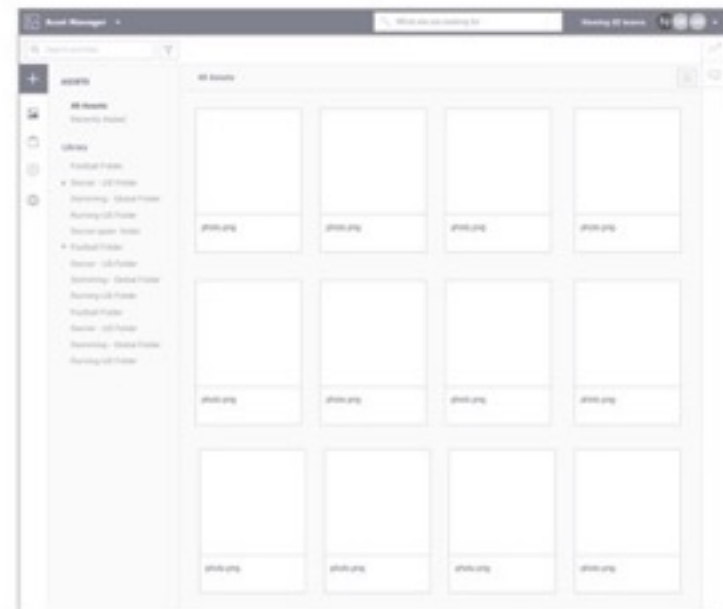
Visual Design



Rule

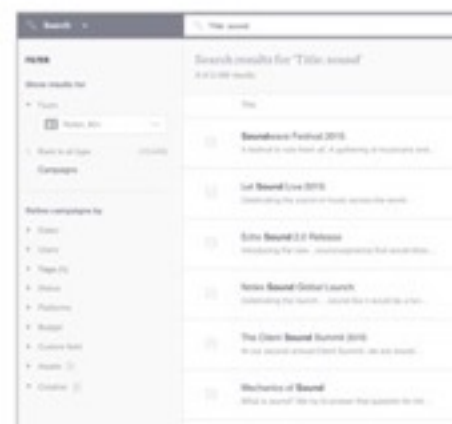
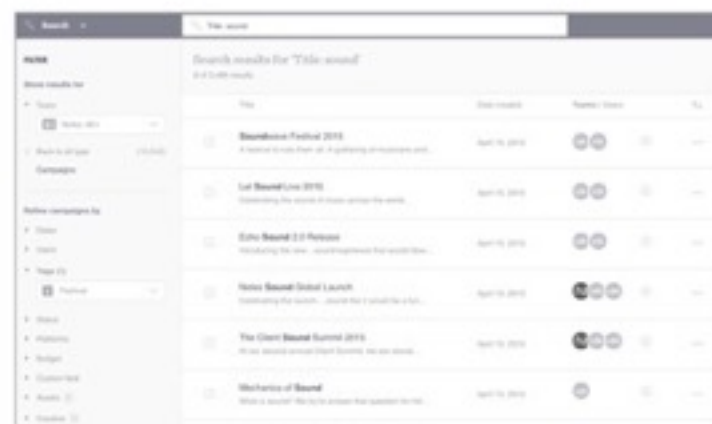
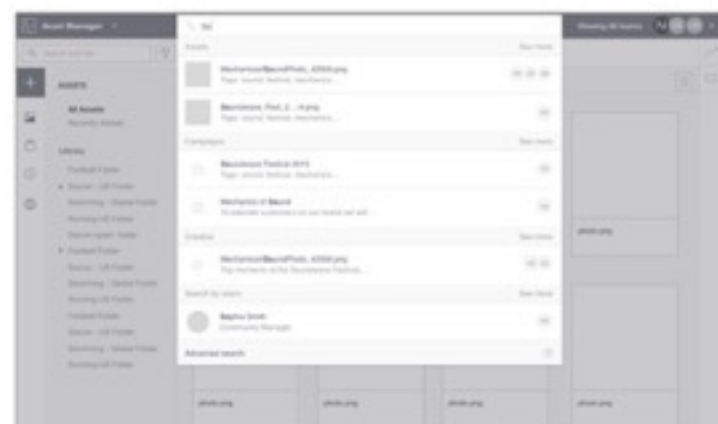
AS A GLOBAL MARKETING MANAGER

As a global marketing manager, I want to search for content published by my brands during last year's music festivals, so that I can find successful creative and assets and send them for reference to a team running a similar campaign this year.



AS A BRAND MANAGER

As a brand manager, I want to quickly locate by title the campaigns and creative my team is working on, so that I can jump in, review, and provide feedback.



Tension



Experiment

Title | 24px | Regular Title Clickable

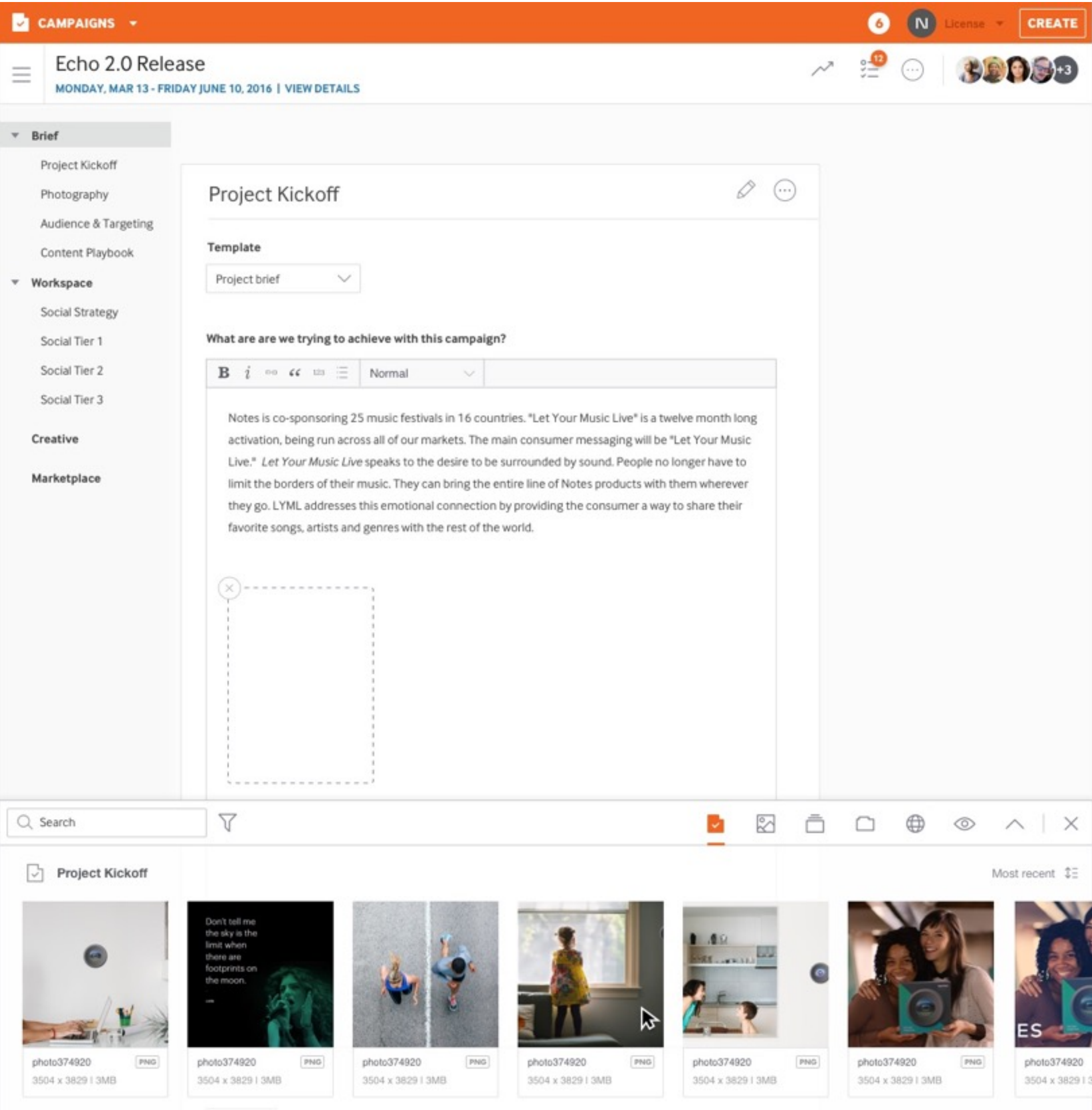
Header | 18px | Bold

Body 2 | 14px | Bold SECTION Form Header Link

Body 1 | 14px | Regular Link

Small Text | 12px | Regular Microcopy Error text for a form

BUTTON | 14px | XBold



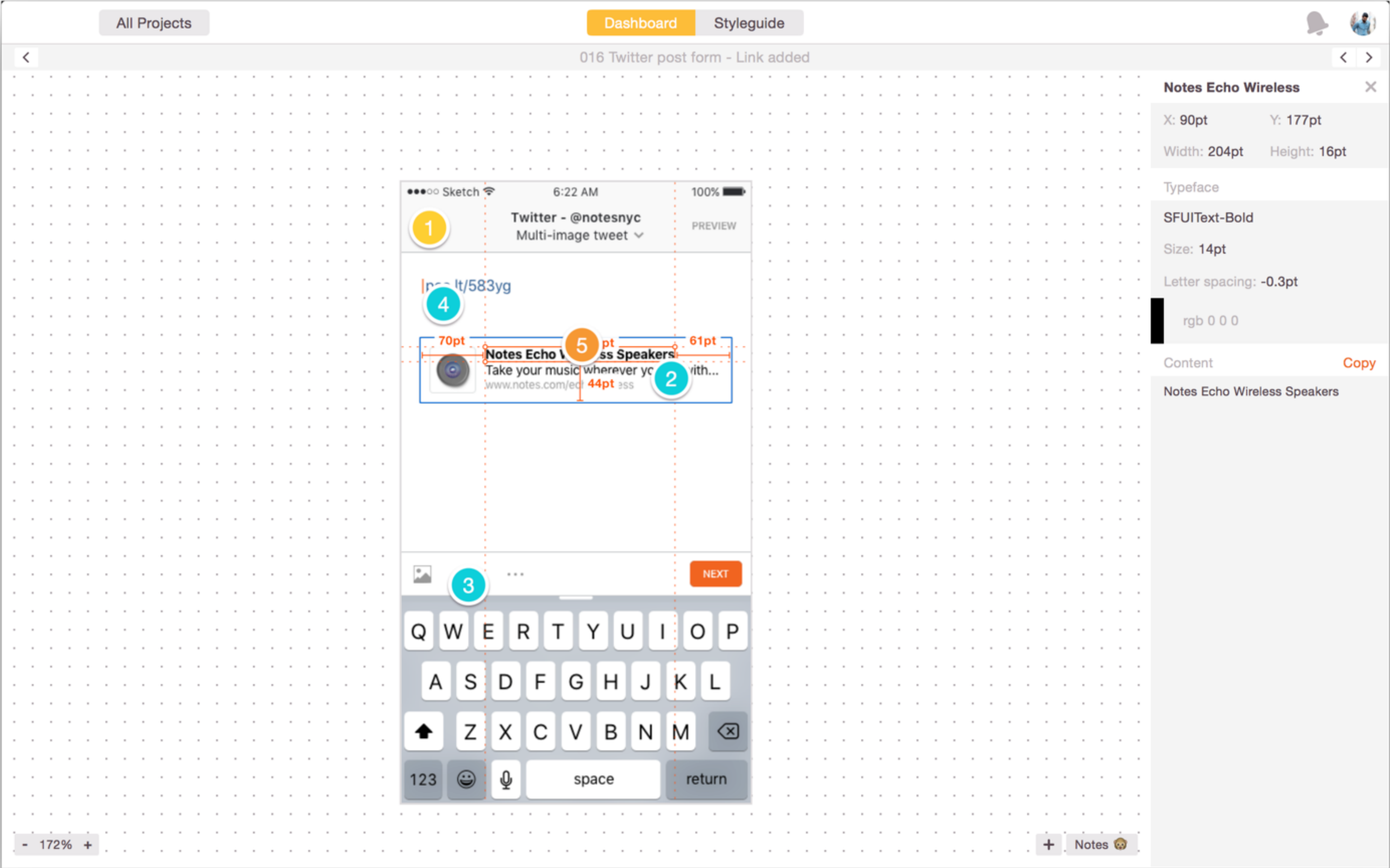
Learnings

- We're all on the same page with design changes
- It encourages accountability for improving our product
- It can be hard to prioritize projects amongst regular sprints

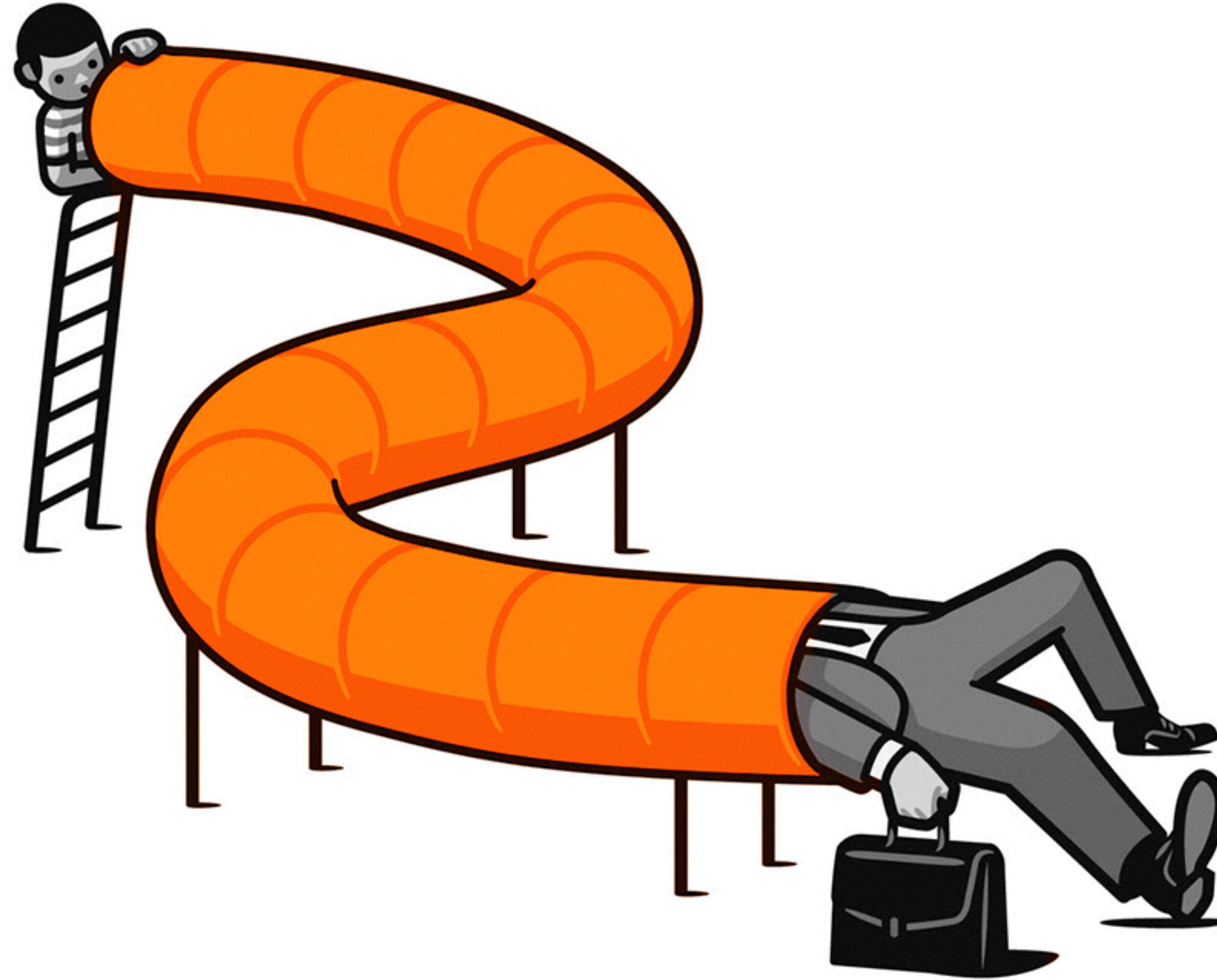
Experiment 5

Design Specs





Tension



Experiment

Global Custom Metadata Fields & Taxonomies - Functional Spec

Roles - Global Admin

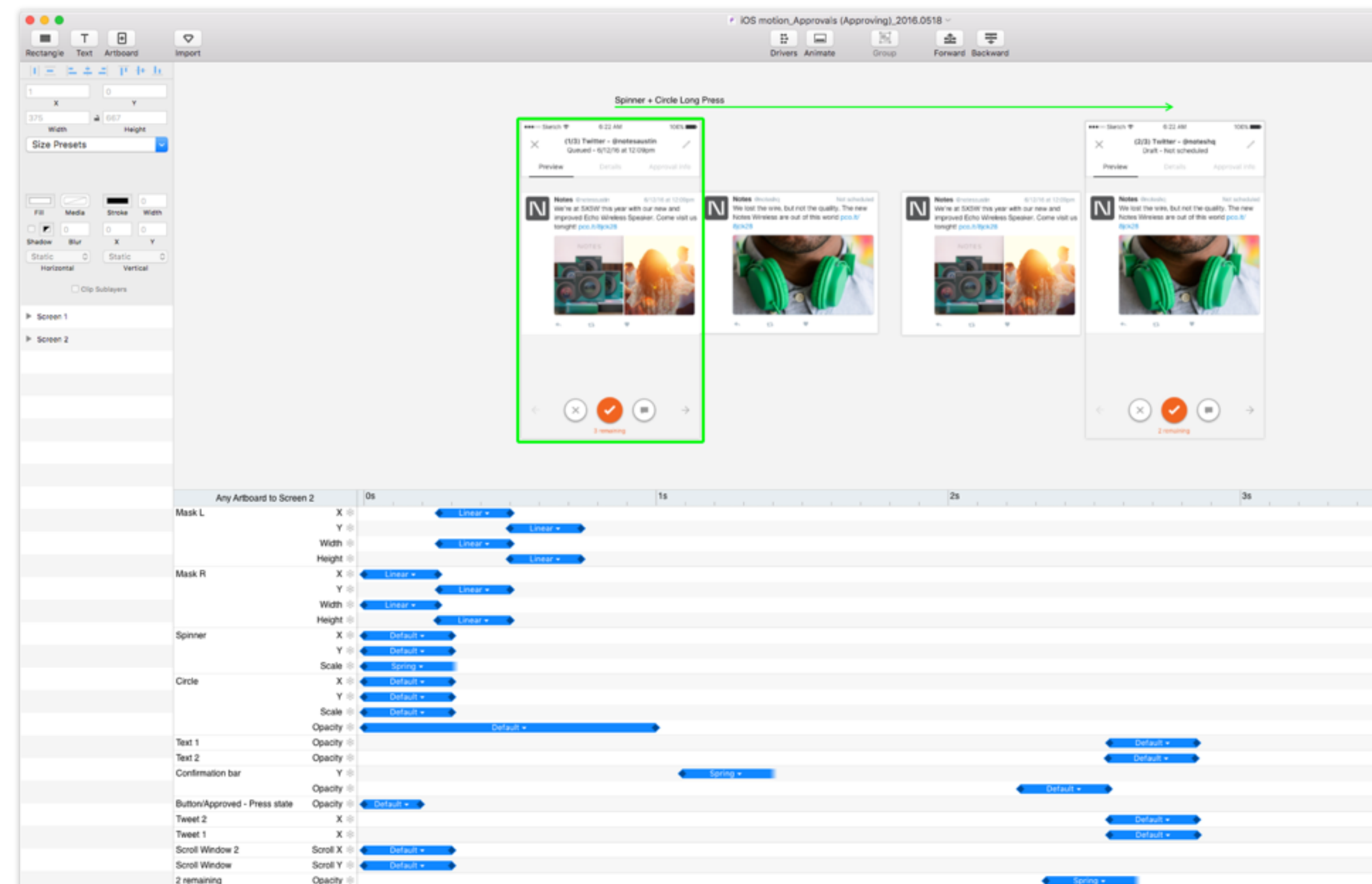
[Percolate campaign](#)

User Story 1:

As a metadata admin, I want to create a metadata schema / taxonomy and associate it *globally* with all licenses in my organization so that any changes I make to this schema / taxonomy become available across all licenses that it is associated with.

Workflow 1:

- 1.0 User clicks 'Add custom fields' button
- 1.1 User is brought to Form Builder. User fills out title and selects object type drop down. Note - This is the same workflow for creating a custom field that currently exists in Percolate (with the addition of object type)
- 1.2 User creates a custom field called 'Location'. User adds desired custom field context (label, helper text, etc.)
- 1.3 User clicks 'Create custom fields' once they've previewed their new field
- 1.4 A newly created custom field form titled 'Campaign Form Fields' is added to the list.
- 1.5 User clicks 'More' button from the list item and selects 'Distribute'
- 1.6 A license selection modal appears and the user selects Notes Global
- 1.7 The licenses newly associated with the form field appear under the 'Distributed' column



Learnings

- Extra information is helping us flag issues earlier
- We're looking to standardize documentation format(s)
- We need to figure out what projects need functional specs

Day 1836

**Our finely tuned process
became a barrier.
It became a routine.**

**We need to regularly
question our practices
to evolve.**

This is natural.
It's happening across
every part of our co.

***“It’s about keeping
your process in check.”***

- Elliott Romano





@abstractsunday



@hiutdenim

