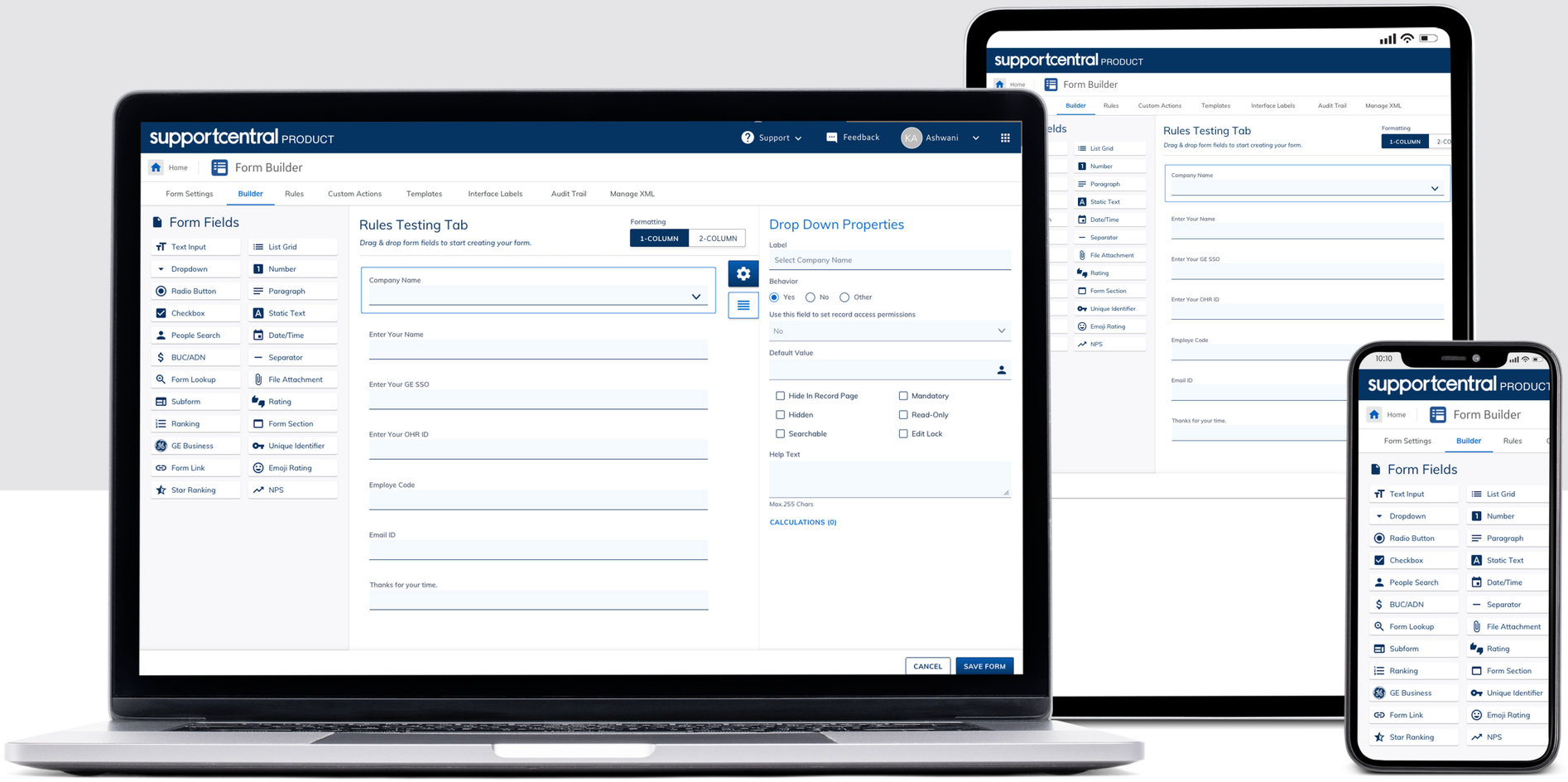


Forms Overview

Forms is the easy way to create and share online forms and manage your data. Forms is the next generation of SupportCentral Dataforms that allows you to build web forms to collect information, store, sort, filter, and report on data, create charts on the basis information store.

Forms is compatible across all modern desktop and mobile browsers connected to the GE Intranet. Desktop compatibility includes IE 9, 11, Google Chrome, Firefox, Safari and for mobile IOS, Android & Blackberry. Forms can be shared with All GE members with SSO and outside GE members, whether individually or in DLs.

Top Level Problems & Requirements

PROBLEMS

- Form based tedious and long interface to create a new Form.
- Form is old web application with limited features and long process to create Form.
- Hidden Navigation user invest lot’s of time to find the link.
- Too many clicks to take action.
- Lacking intuitiveness, Average Time for Form creation and Error Occurrence rate is very high
- User are not happy when they do important activities like manage form, set rules, custom actions and share the form inside and outside GE user

REQUIREMENTS

- Scalable and fully responsive interface using latest framework
- New attractive design with smooth transitions.
- Need to redesign the user flows and functionalities.
- Reducing the training/support efforts for the user.
- Need WYSIWYG (What You See Is What You Get) interface.
- Make current application more accessible and effective to user.
- Modernize the application technology stack.

UX Strategy

EXECUTION

- Communication & Collaboration with stakeholder.
- Analysis and understand the old application.
- User research with end user to know the pain points
- Task analysis, User journey and User flow.
- Ideation/Group Dicussions
- Wireframe & Prototype.
- Creation of UI design(mockup).
- Outcomes & Future recommendations.

TESTING & DESIGN AUDIT

- UX Design Audit
- Usability testing.

My Role

- Manage the project activities
- Communication with stakeholder
- Conduct & Participate in group dicussions
- Brainstorming on solution approach
- User Journey Mapping, User Flows
- Sketching, Wireframing, UI Design, Testing

Tool Used

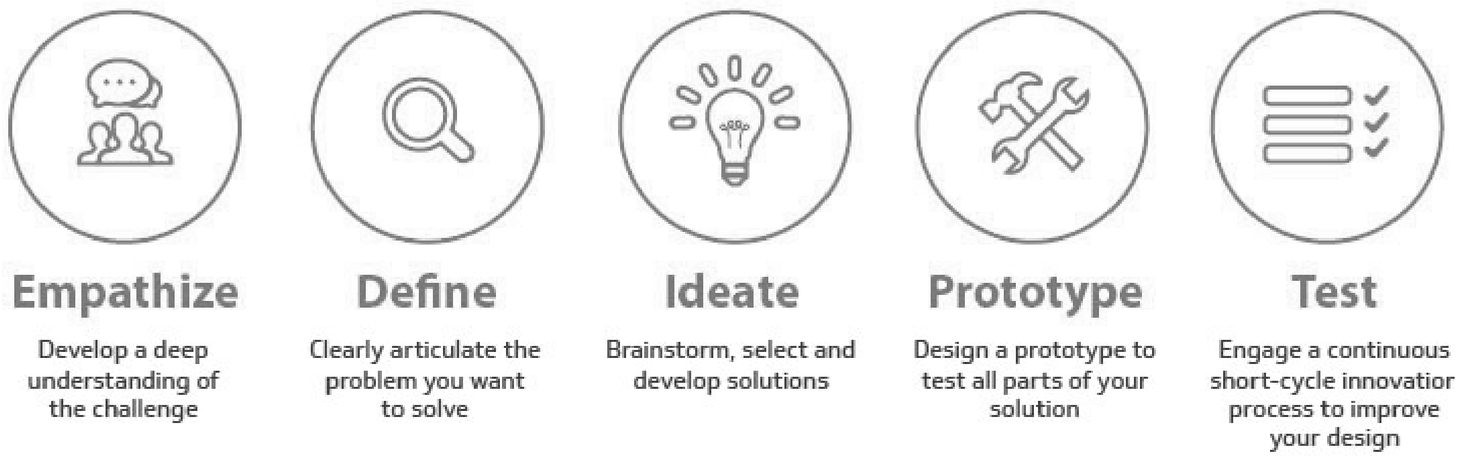
- Sketch
- Adobe Creative Cloud
- Invision
- Kanban
- Microsoft Excel
- Microsoft Powerpoint

Technology Constraints

- HTML
- CSS
- JavaScript
- Angualr

Design Process

We follow Agile UCD process that combines Robust Strategic and UX Framework with the speed of iterative design and development with users.



Requirement Gathering

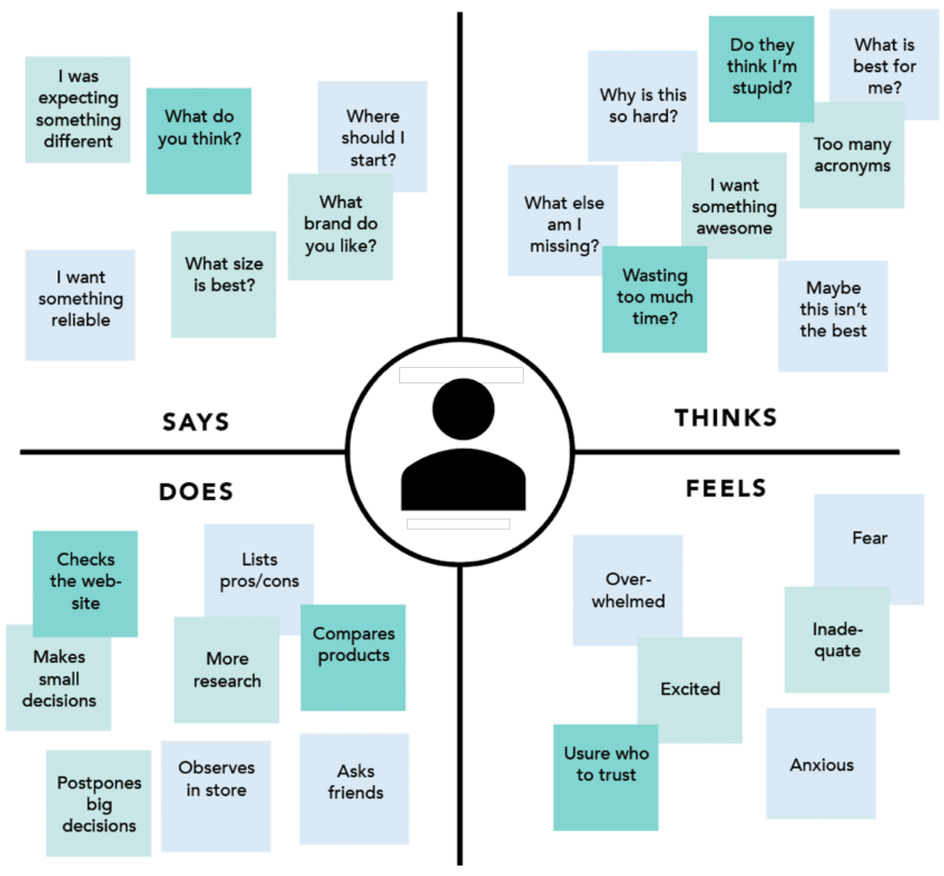
(communicate with GE project Managers)

- Business Requirement
- User Requirement
- Technicial Requirement
- Project Goals

Define Problem

- Analyze the Observations
- Emapthy Mapping
- User persona
- User journey
- Report

Empathy Map



User Personas

Gabe Davis

Gabe is a full time employee in GE/Genpact. He has 12 years of experience as Product Manager. He is Managing all product launches working with design, production, digital marketing, press, e-commerce and sales teams. Product launches include creating product story, packaging, photography, web content, sales collateral and training documents.

Key Goals & needs

- Want to create and edit the form much faster.
- Compatible across all modern desktop and mobile, browsers connected to the GE Intranet
- Very Interactive smooth transitions

User Details

Age: 39

Gender: Male

Marital Status: Married

Place: Boston, USA

Education: Master

Pain Points

- Form based tedious process and long interface to create a new Form
- Confusing UX-UI Hidden Navigation
- Multiple steps to complete any task

Education

Low — High

Income

Low — High

Tech Expertise

Low — High

Domain Expertise

Low — High

User Persona

Bethany

Beth is a full time employee in Genpact. She has 10 years of experience as Customer relationship Manager. She is looking to drive customer behaviour with an integrated and full funnel marketing approach. Having held positions in marketing, strategy, analysis and operations.

Key Goals & needs

- Modernise the application technology stack
- Self explanatory and Reduce the training and support efforts for the user.
- Should be fully responsive and upfront interface

User Details

Age: 36

Gender: Female

Marital Status: Married

Place: Chicago, USA

Education: MBA

Pain Points

- Eliminate multiple code bases to reduce maintenance/ support cost.
- Compatibility and similar Behaviour
- Manage, create and shared custom form inside and outside GE.

Education

Low — High

Income

Low — High

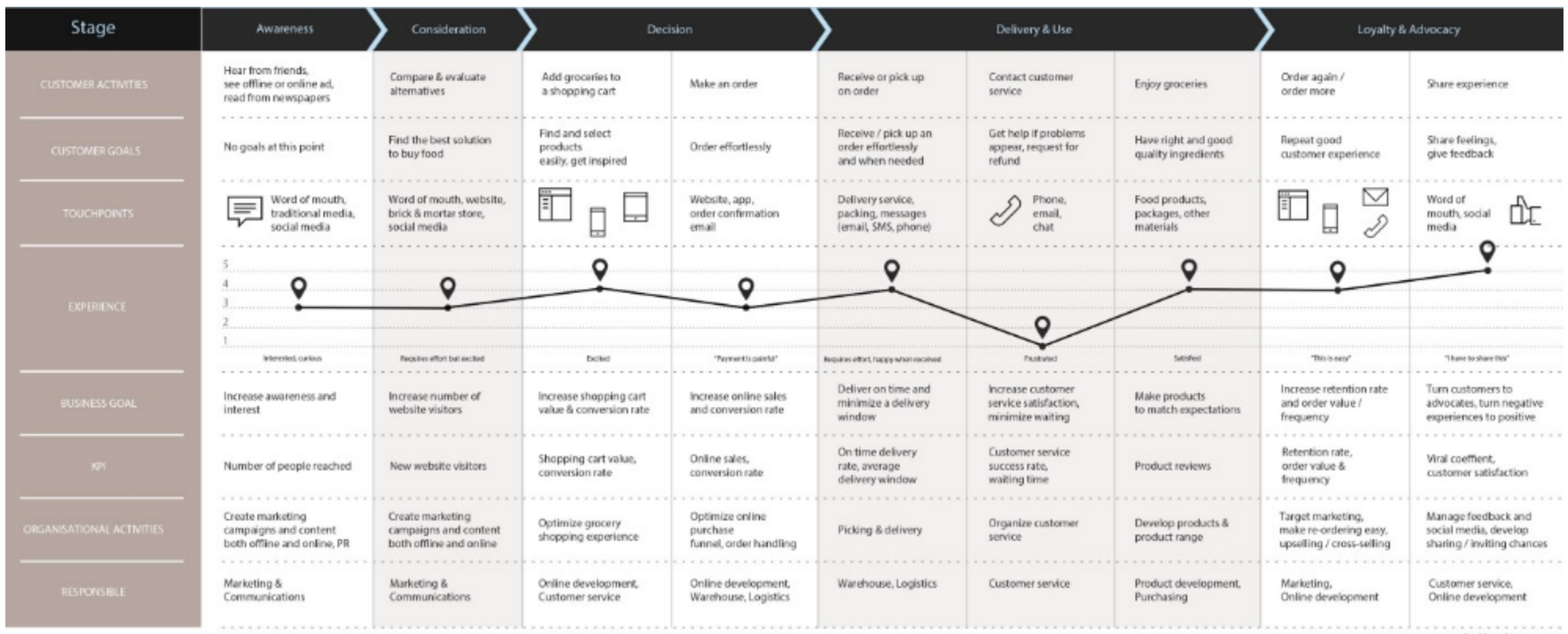
Tech Expertise

Low — High

Domain Expertise

Low — High

User Journey Map



User Problems Statements

Users are really concern about time while creating Form and filling required information in the Form.

They don’t want hidden information. They want to see upfront whatever they created or edited in existing forms.

Instead of creating new form every time, User want such interaction where they reuse their previously created form in another workflow.

User want such interaction where they easily set up the rules, conditions and apply custom actions on the new and existing Form.

User want easy & trustable flow through which they can share the Form inside and outside GE network and also manage the shared Form.

User don’t want the tedious process and long interface to create a new Form.

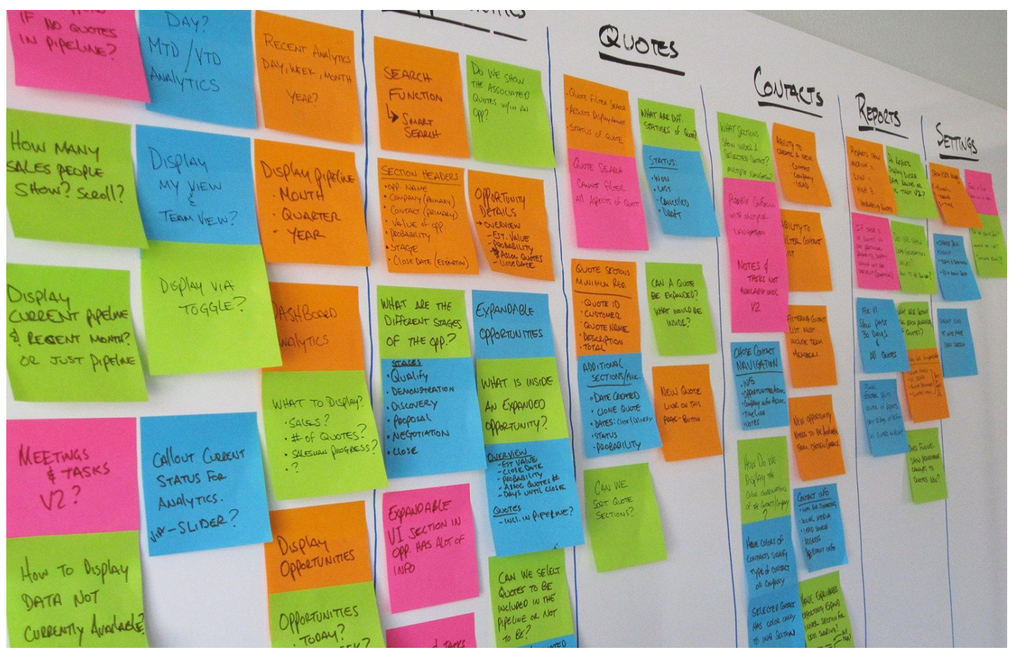
User want scable responsive behaviour which is compatible across all modern desktop and mobile devices.

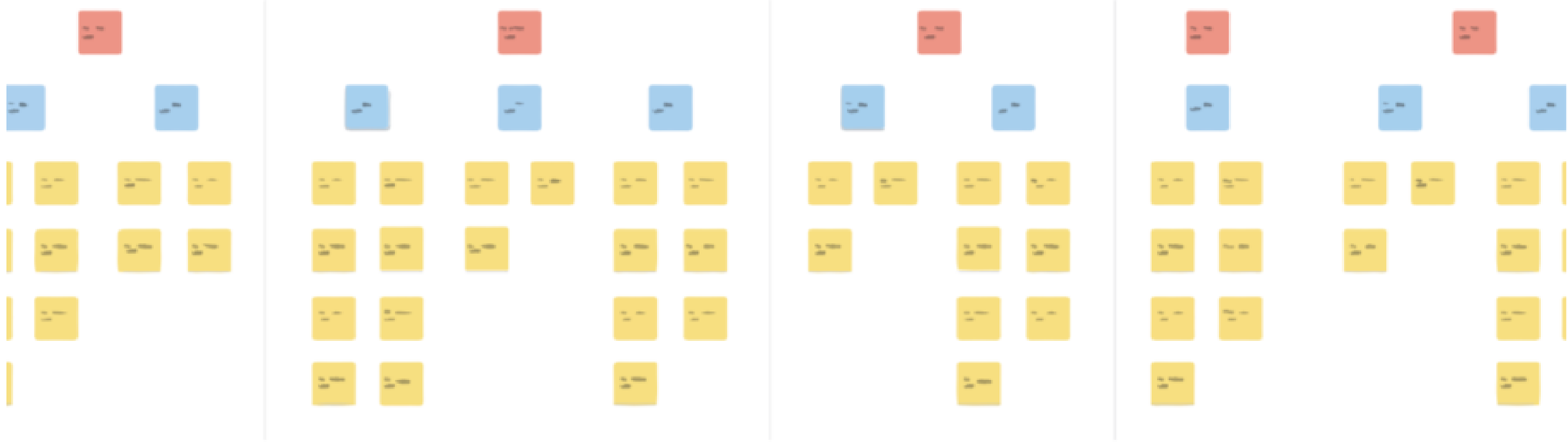
User want some predefined form template to speed up the work

Ideation/Group Discussion

- Brainstorming session with team to explore the ideas
- Matched the output with business needs.
- Draw Initial sketch for the concept.
- User Flow

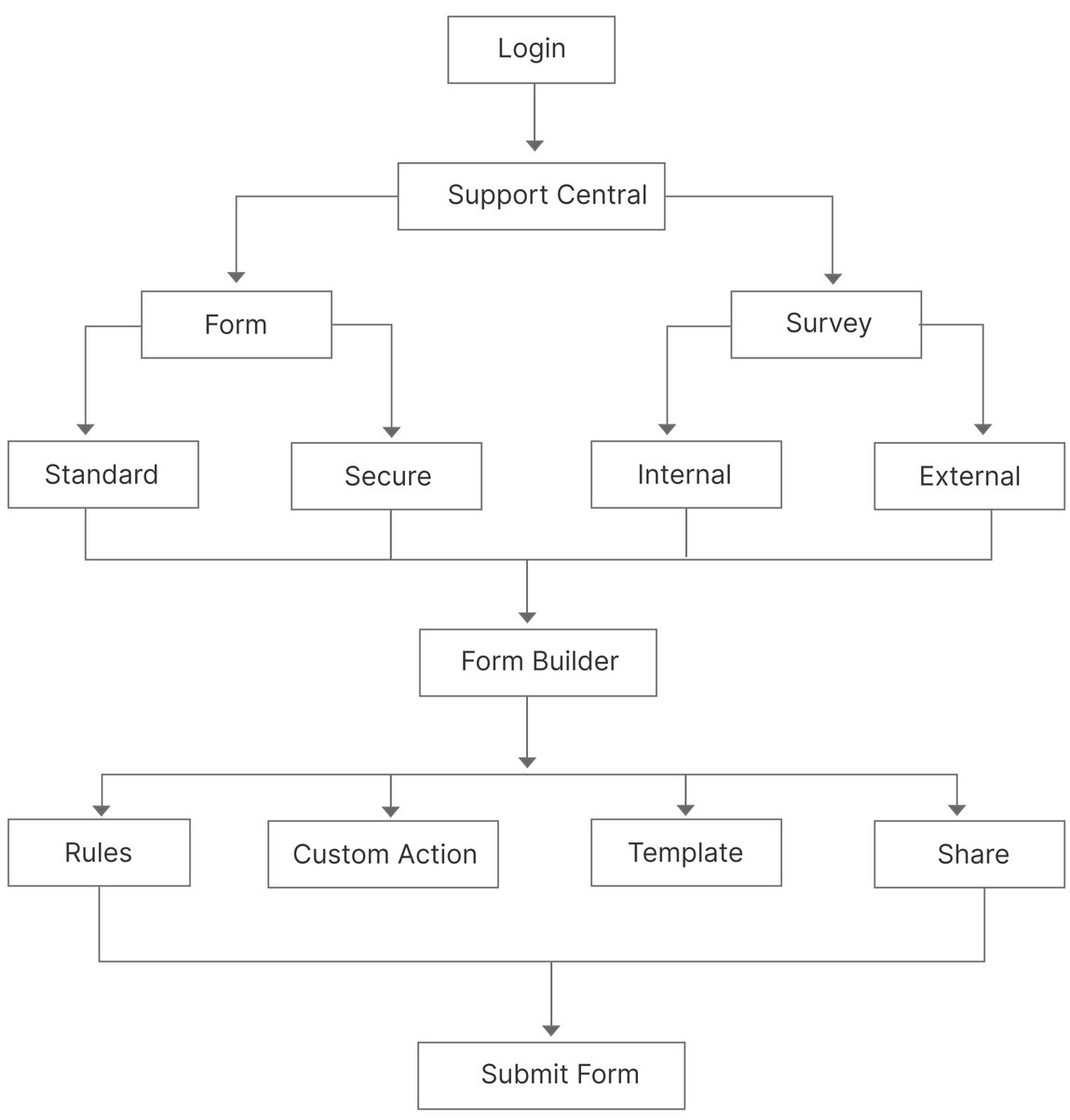
Brainstorming Session





User Flow

User flow is the path taken by a user on a website or app to complete a task. This path is divided into a series of steps that the user takes from the entry point towards a successful outcome the final action (signup, purchase, etc.).



Agile Delivery Sprint

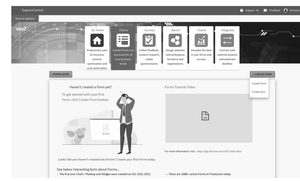
Every sprint had a set of features to be delivered considering their complexity. There was a UX designer assigned to each of the features. A UX designer worked on his deliverables in the form of flows, wireframes to business and other stakeholders.

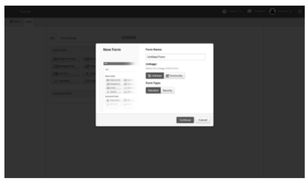
Prototypes

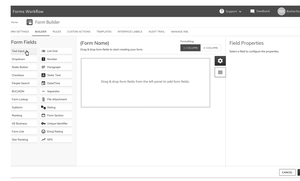
Experimental model of a proposed solution used to test or validate ideas, design assumptions and other aspects of its conceptualisation quickly & cheaply

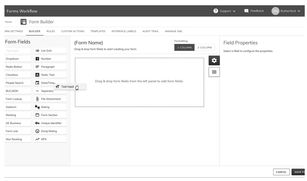
- Wireframe, Paper sketch etc.
- Design System/Guidlines
- High-fidelity Design
- Remarks to understand the design

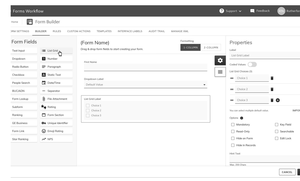
Wireframes

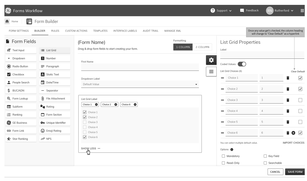


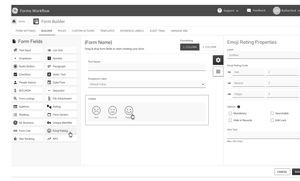


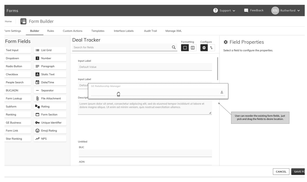


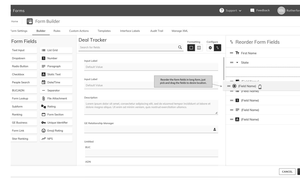


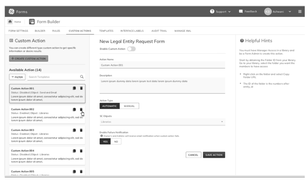


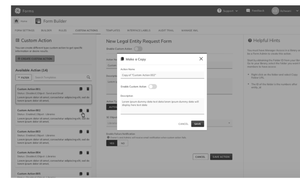


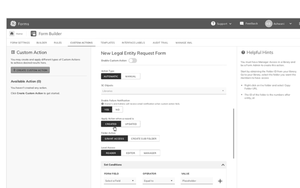


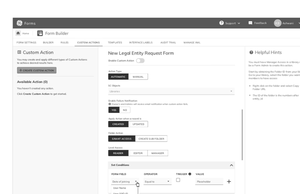


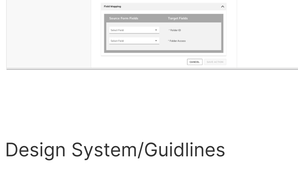




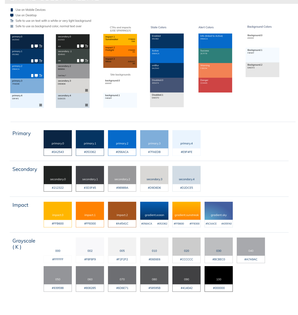


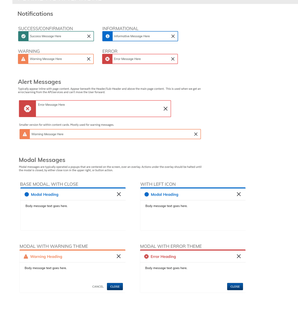


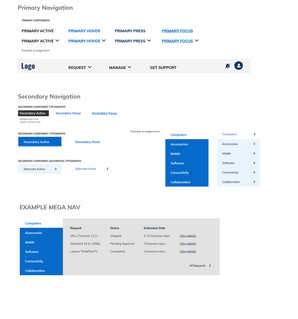




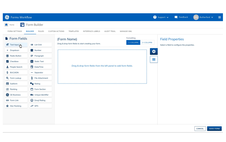
Design System/Guidlines

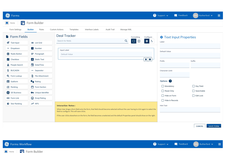


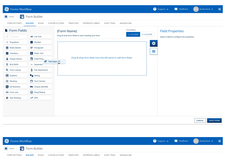


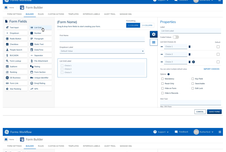


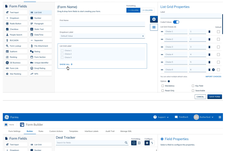
High-Fidelity Wireframes

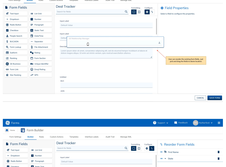


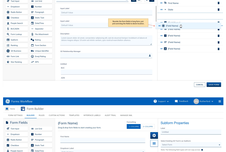


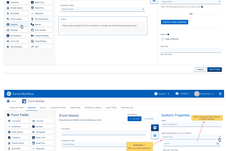


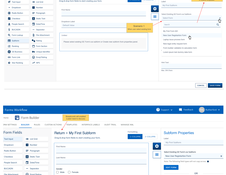


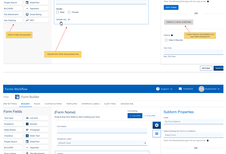


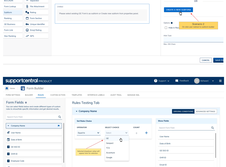


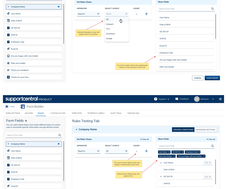


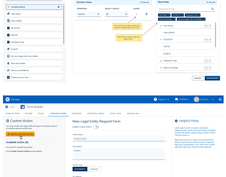


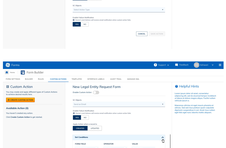


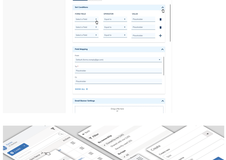












Testing & Design Audit

Through requirments gathering method we understand the business, User and technical requirements. now we check the business inputs with the business outcome results.

- UX Design Audit
- Usability Testing

UX Design Audit

A design audit is a quality assurance activity that’s goal is to review products and evaluate them from a user experience perspective to ensure it meets accessibility, user interface (UI) component continuity, and design unity requirements.

Points coverd in UX design audit

- Usability and UI issues
- Matching design with wireframes and guidelines.
- Heuristic evaluation
- Accessibility guidelines

Success criteria / Critical success factors

- With the help of quality enhancements purposed in new solution. we reduce the form creation time to 20 mins, with that quality percentage which was earlier 60% now increases to 90%.

  To achive this before working on the project we setup one KPI (Key Performance Indicators) and freeze the critical factors from the business, so that we can check the time and value added to the business.

  There is one miss from researchers they have not mention how to calculate time user will take on creating different types of form. Form creation time will vary from Form to Form, because few forms are very long, complicated and few are small and easy, so form creation time will not be the same. As a solution we have divided the form into three categories.

  - **Critical** (ex. Payment gateway & Personal details will verify with actual bank deatils and data is coming more than 3 server for exp Insurance form)
  - **Major** (ex. e-shopping cart, where card deatils check. Personal details are remain same, data coming from more than 2 server)
  - **Minor** (ex. Normal Contact us form, Registration Form and small surveys etc)

  Business team like the Form categories idea and give us a green signal to go ahead and measure it accordingly.

- Well-structured information architecture helped user to speed up Form creation & manage work. A good information architecture provide clear paths for website user, makes a site easier to navigate, remove hidden links and enhances the user experience.

- WYSWYG (what you see is what you get) interface help user to see immediately what they have changed in form design, and it accurately reflects the appearance of the finished product. In new interface user can easily add the form field on click or drag from the left panel and user can do the upfront customization for the form fields. WYSWYG interface user performs all action easily and confidently which help to reduce the training & support efforts.

- Scalable and fully responsive interface help user to quickly respond to your peers' requests for assistance and prevent avoidable project delays and mistakes. Responsiveness leads to better team collaboration and performance.

- Modernize the application technology stack help to improve the speed of new feature delivery, application scalability, and their performance to derive new value and eliminate multiple code bases to reduce maintenance/ support cost

- Accuracy : In new Design Interface (WYSIWYG), we purpose drag and drop functionality once user pick and drag any form field from left panel and rolover on the main form panel, field insert area is automatically highlighted and guide the user where he can place the field. User can also reorder the existing form fields. This feature guide and help the user to place the information accurately on right place.

- Features added to speedup the system

  - Search, Sort and filters functionality: with the help of these user can easily and quickly find any form from the list, apply and save the filters it help user to speedup his work.
  - Drag and drop functionality: with the help of drag user can quickly pick the field and place wherever he want in the form it help to speedup the form creation process.
  - Customization : In new design once user click on any form field. Customise field Property’s panel will open in right hand side with default properties. User can easily and quickly customize the form fields.
  - Templates & Subform encourage repeatability and efficiency. It takes a lot of time to create a something from scratch. The main benefit of using a email template is that it is already made. No additional time is needed to develop it. It is a great time saver as the template is ready to be applied immediately and easily customized.

Thank You