



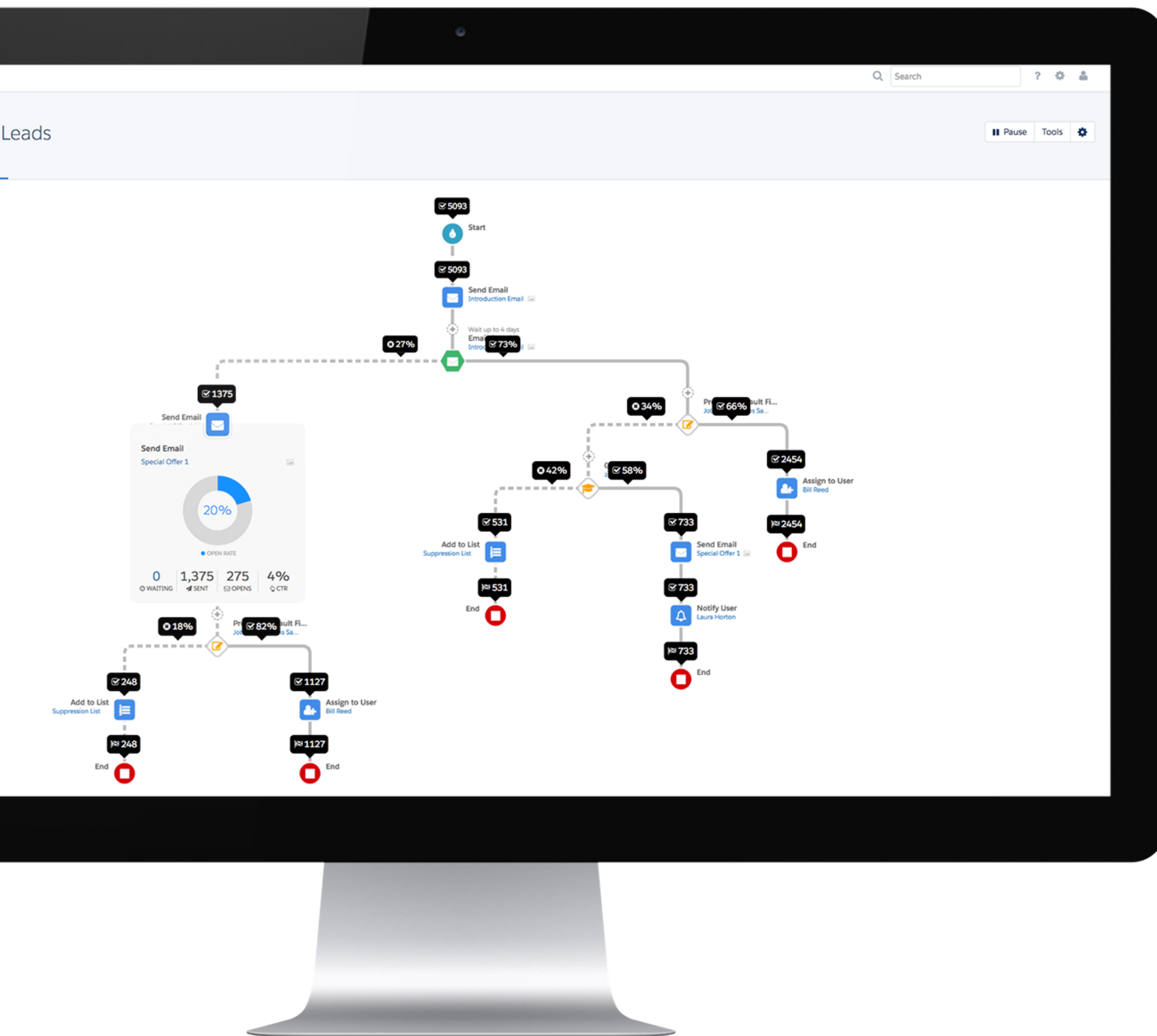
INVITING

EXPERIMENTATION

BY DESIGN

“With a complex piece of UI, if you don’t simplify it enough, people can’t figure out how to use it. But if you swing too far in the other direction and over-simplify it, you risk dismantling the very value that people are looking to access through the tool.”

– Margaret Gould Stewart
VP of Product Design, Facebook



1 DISCOVERING
OPPORTUNITY

2 ASKING BETTER
QUESTIONS

3 DESIGN
PRINCIPLES +
PRODUCT **FOCUS**

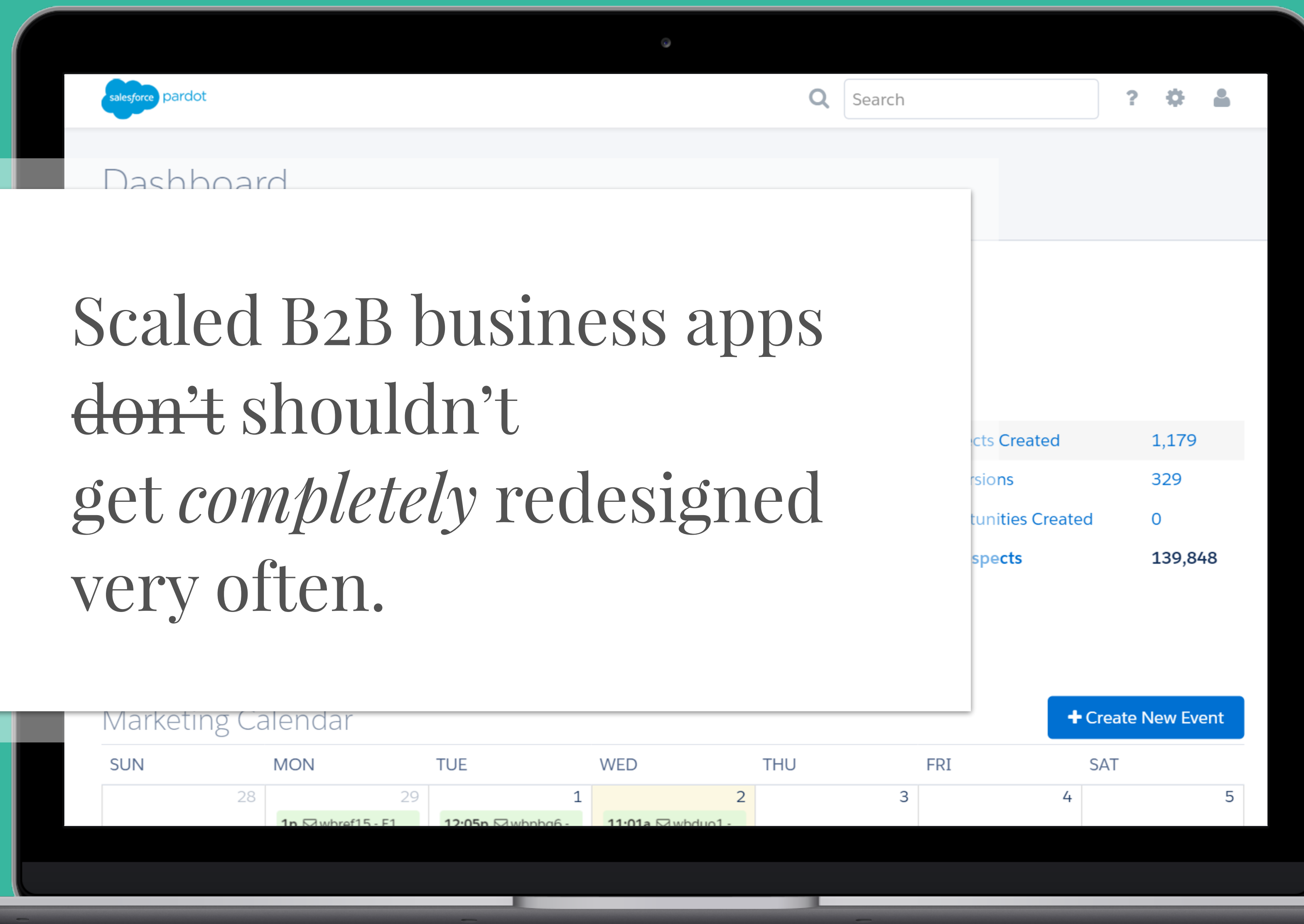
4 CLEAR CONCEPT
VALIDATION



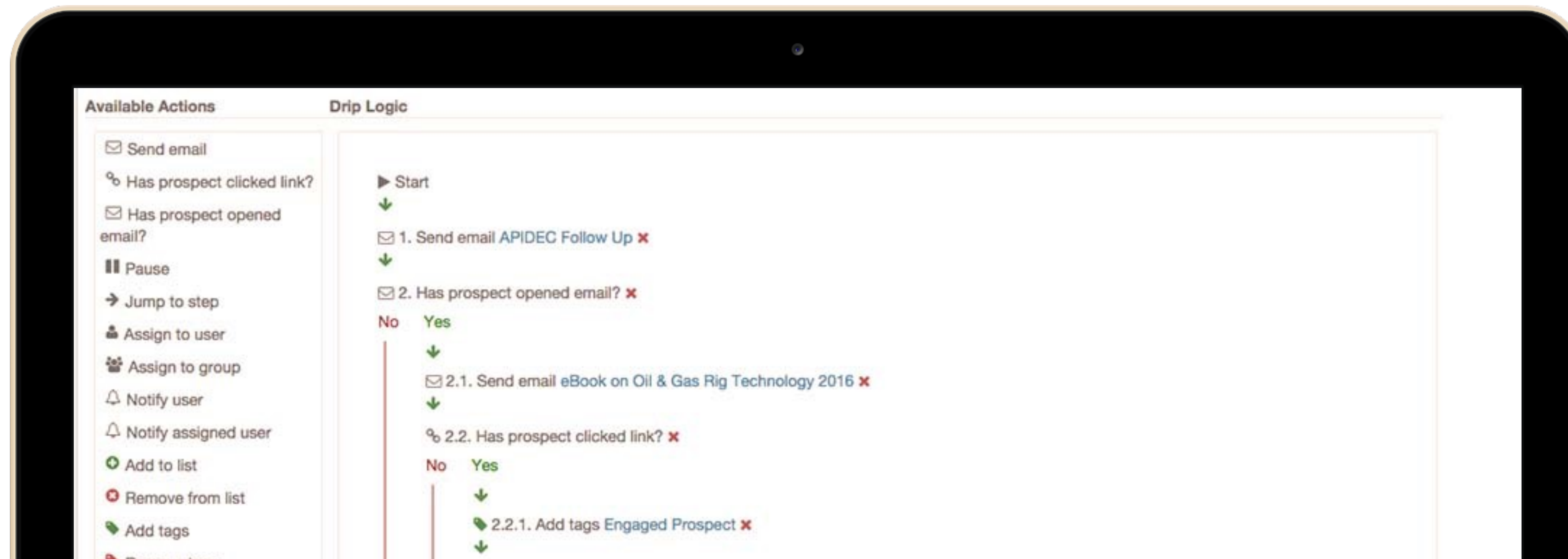
1

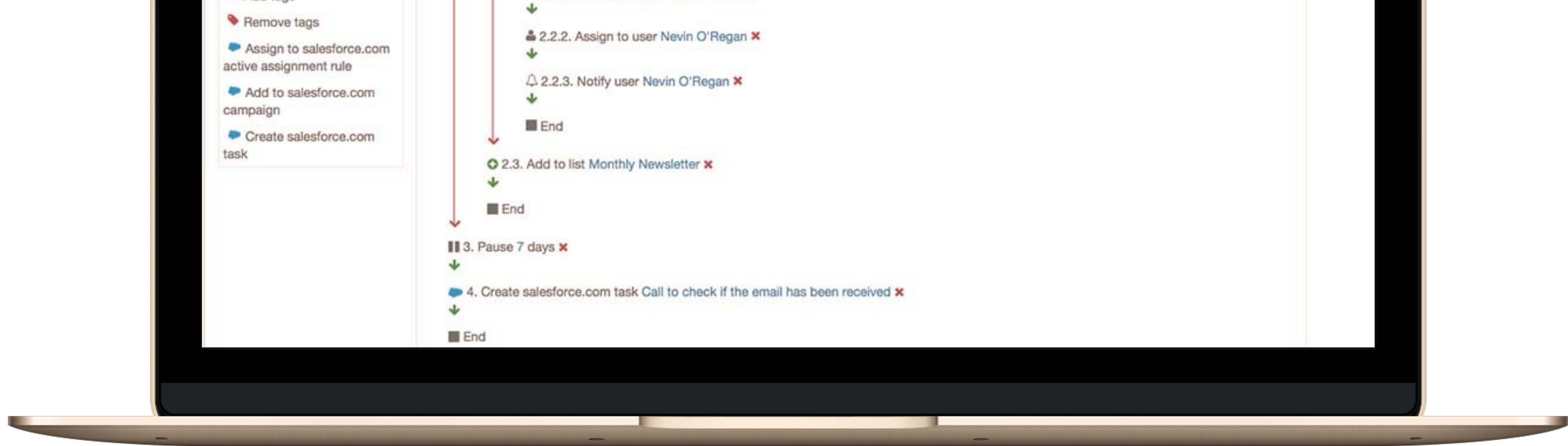
DISCOVERING OPPORTUNITY

Scaled B2B business apps
~~don't~~ shouldn't
get *completely* redesigned
very often.



BUT THIS
WASN'T CUTTING IT
FOR CUSTOMERS.





VISUALLY
UNSCALABLE

USABILITY
ISSUES

ROI-MULTIPLYING
USE CASE

The background features a faint, light blue network diagram on a darker blue background. The diagram consists of various geometric shapes (circles, diamonds, hexagons, and rectangles) connected by solid and dashed lines, suggesting a complex system or data flow.

“Just make it
like Visio.”

Quick Import Custom Refresh Import All External Data

Shapes

STENCILS | SEARCH

More Shapes >

Quick Shapes

Computers and Monitors

Network and Peripherals

Connectors

- Ring network
- Wireless access point
- Mainframe
- Switch
- Comm-link
- Virtual server
- Plotter
- Copier
- Multi-funct... device
- Projector
- Projector Screen
- Bridge
- Hub
- Modem
- Telephone
- Cell phone

Callout

Icons for callouts: bar chart, line graph, pie chart, etc.

Icon Set

Icons for status and data: thumbs up/down, Wi-Fi, etc.

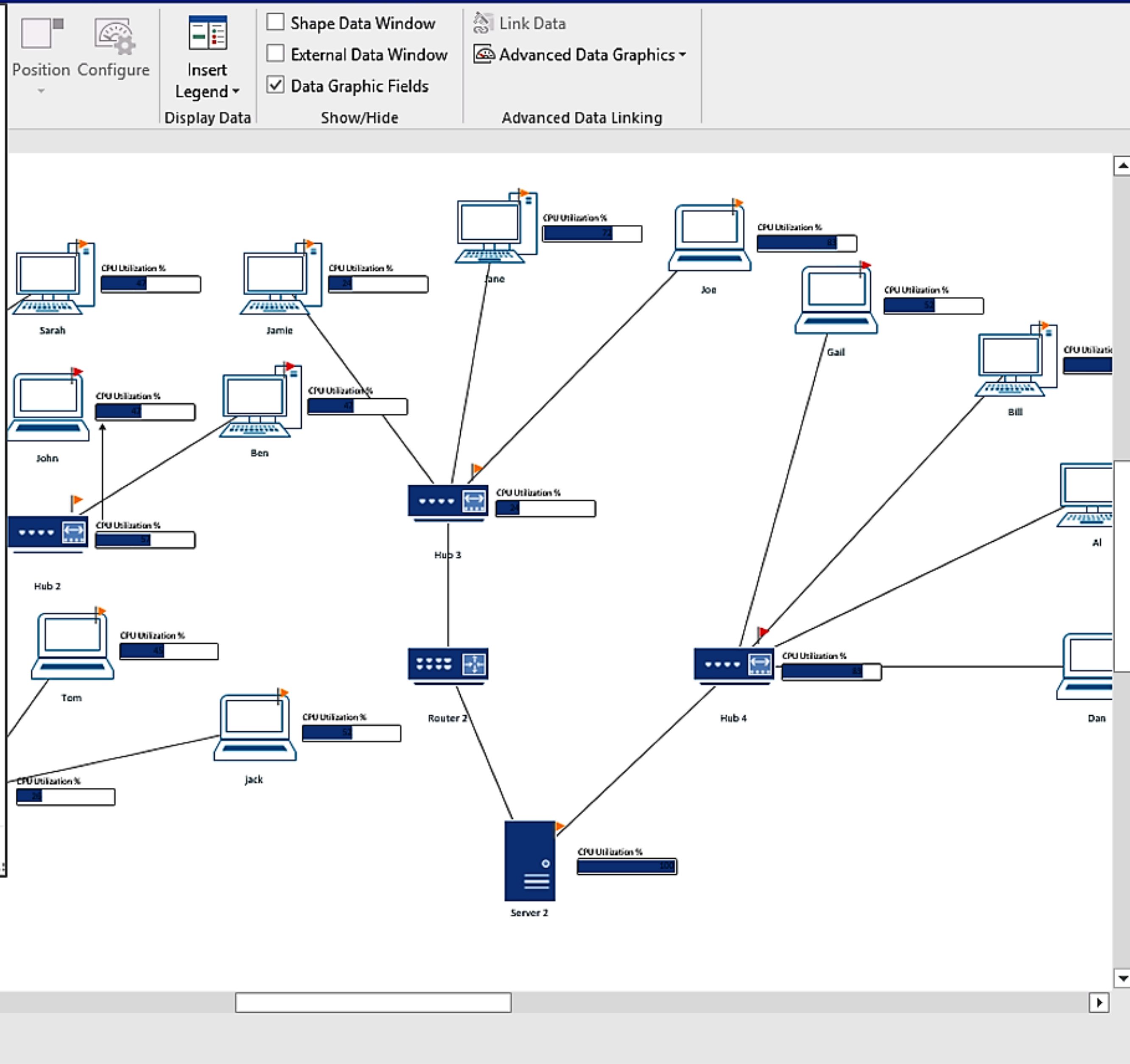
Data Bar

Icons for data bars: horizontal bar, vertical bar, etc.

Color by Value

Color swatches for data visualization.

More Data Graphics

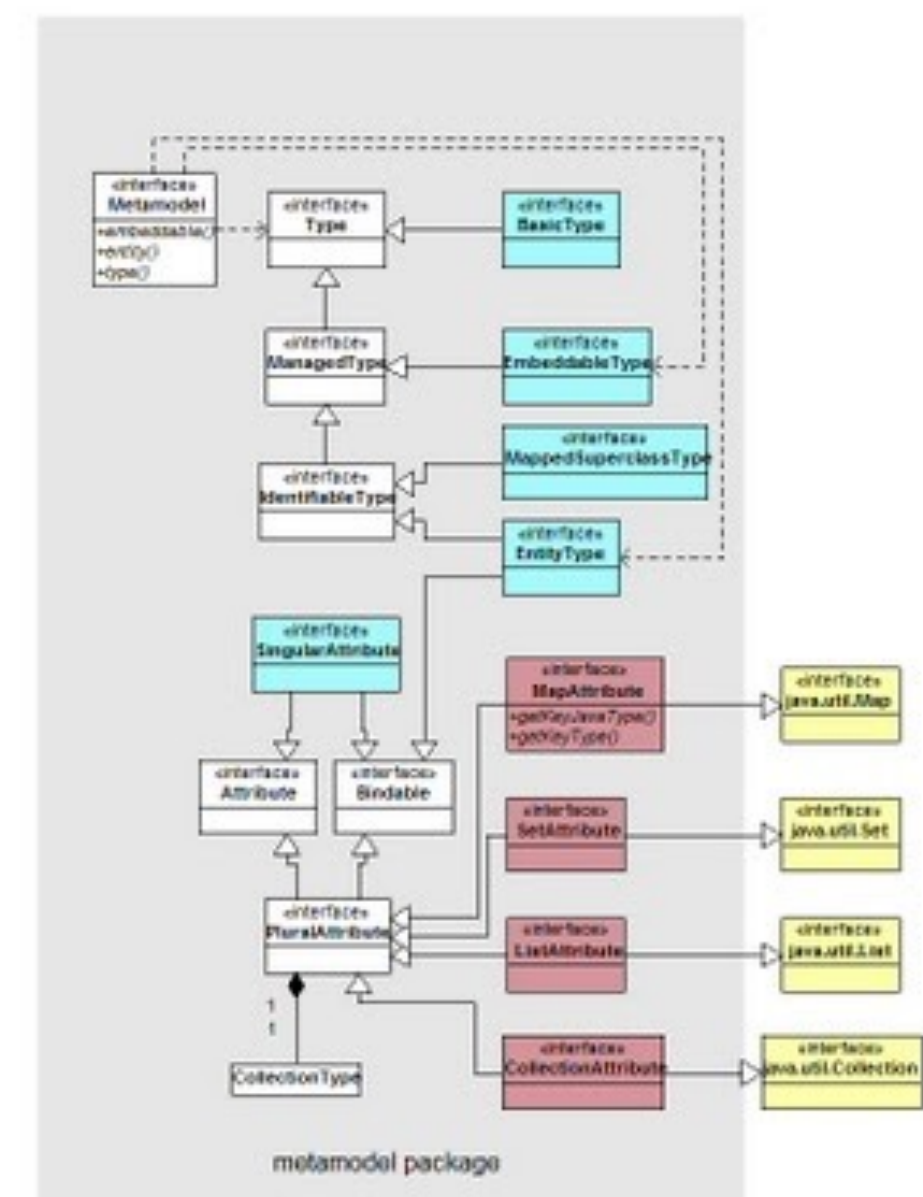
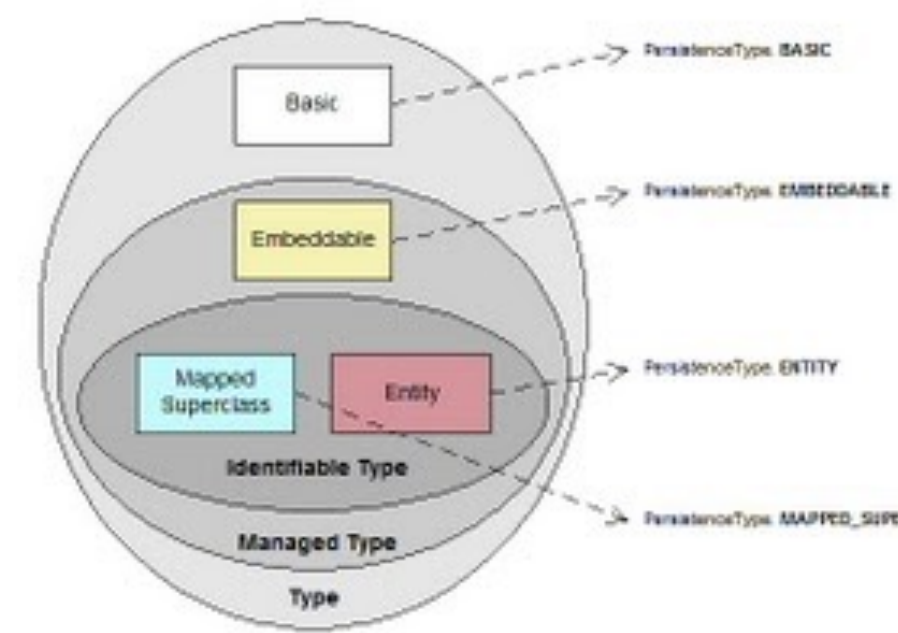
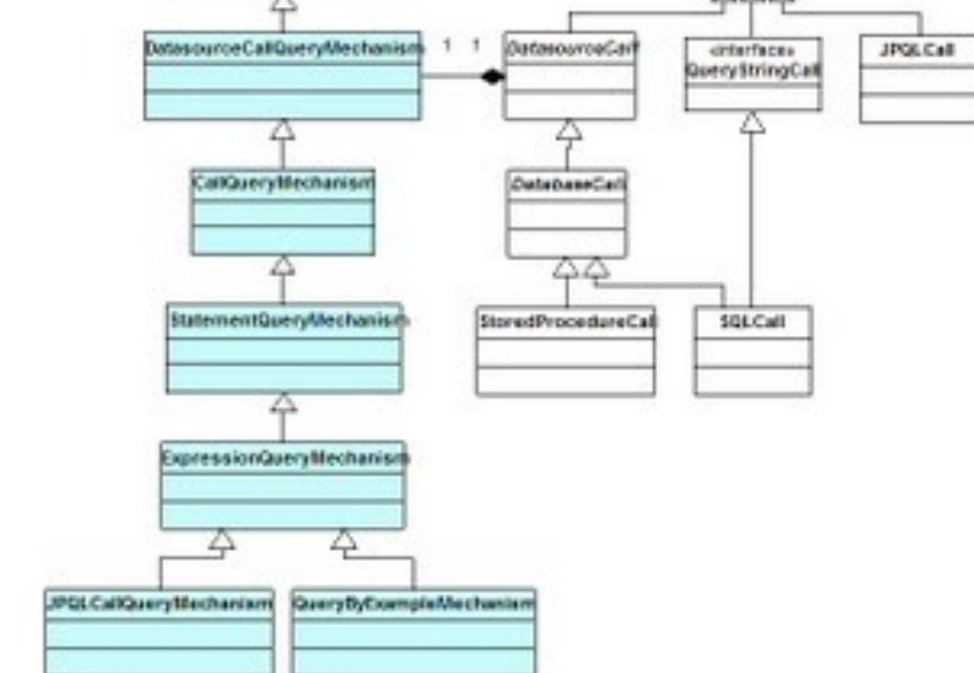
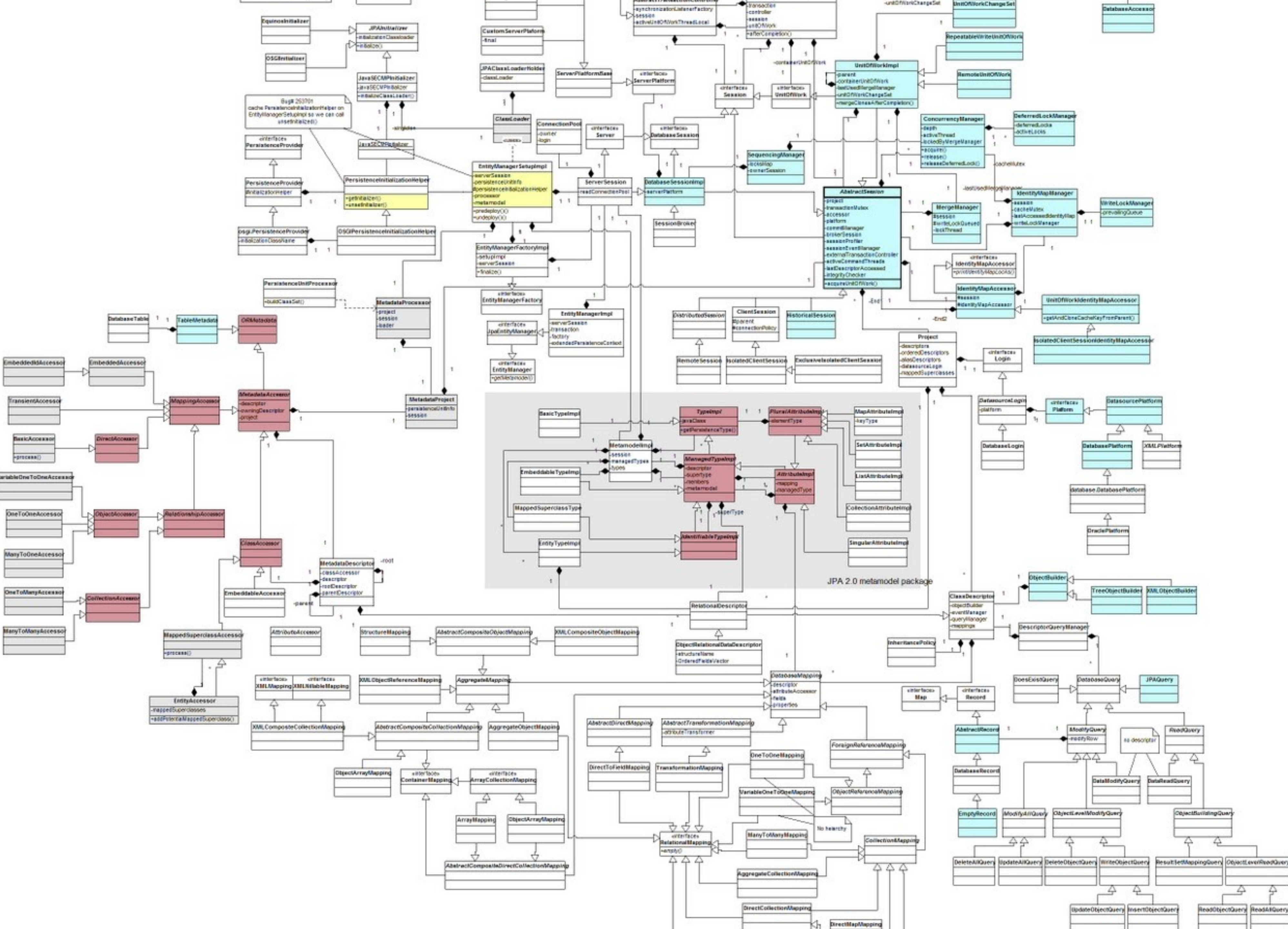


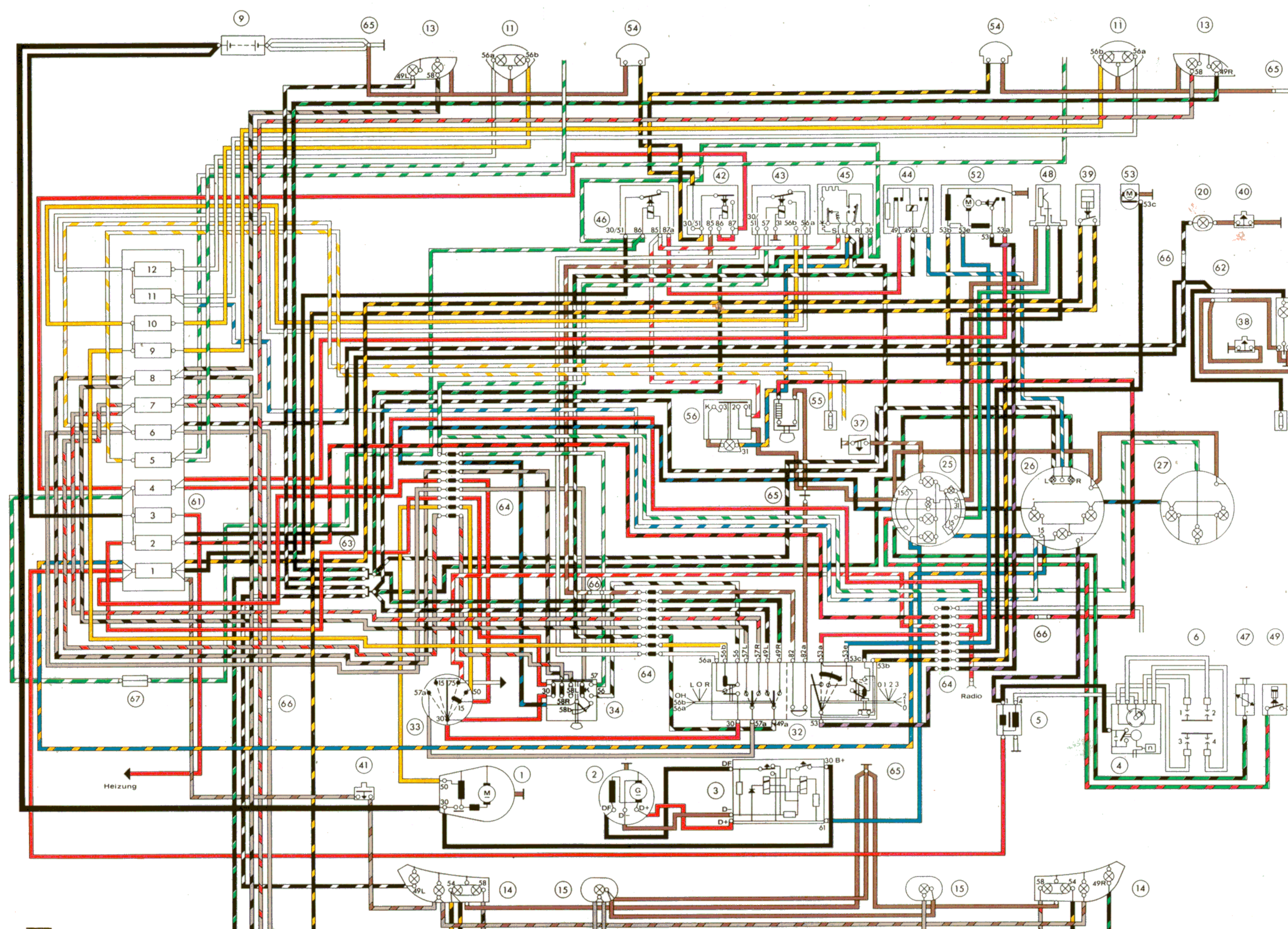
Data Graphic Fields

Choose column fields to apply data graphics.

Sheet1\$B2:I26

- ☐ Name
- ☐ OS Installed
- ☐ IP Address
- ☒ State
- ☐ Status
- ☒ CPU Utilization %
- ☐ Disk IO (kbps)
- ☐ Domain





- ① starter
- ② generator
- ③ regulator
- ④ distributor
- ⑤ ignition coil
- ⑥ spark plugs
- ⑨ battery
- ⑪ headlight
- ⑬ parking and turn signal light
- ⑭ tail, stop, turn signal and back-up light
- ⑮ license plate light
- ⑰ interior light
- ⑲ luggage compartment light
- ⑳ large combination instrument
- ㉑ transistORIZED tachometer
- ㉒ speedometer
- ㉔ combined switch for turn signal, low beam, headlight signal, wiper, washer and horn button
- ㉕ ignition switch
- ㉖ main light switch
- ㉗ hand brake indicator light switch
- ㉘ door contact switch
- ㉙ stop light switch
- ㉚ luggage compartment light switch
- ㉛ back-up light switch
- ㉜ horn relay
- ㉝ by-pass relay for high beam signal
- ㉞ turn signal flasher
- ㉟ warning signal flasher
- ㊱ warning signal relay
- ㊲ oil temperature sending unit
- ㊳ fuel tank sending unit
- ㊴ oil pressure sending unit
- ㊵ wiper motor
- ㊶ washer pump
- ㊷ horn
- ㊸ cigarette lighter
- ㊹ warning signal switch
- ㊺ fuse box
- ㊻ two-pole plug connector
- ㊼ cable distribution block
- ㊽ eight-way disconnect
- ㊾ ground
- ㊿ single-pole plug connector
- ⓫ warning signal fuse with holder

Fuses

- 1 stop, turn signal and back-up light
- 2 interior light, cigarette lighter
- 3 supplementary heater (option)
- 4 wiper and washer
- 5 fog lamps (option)
- 6 license plate and luggage compartment
- 7 parking light, right
- 8 parking light, left
- 9 low beam, right

“Can we have
two weeks
to see what’s possible?”

2

ASKING BETTER QUESTIONS



INTERVIEWS

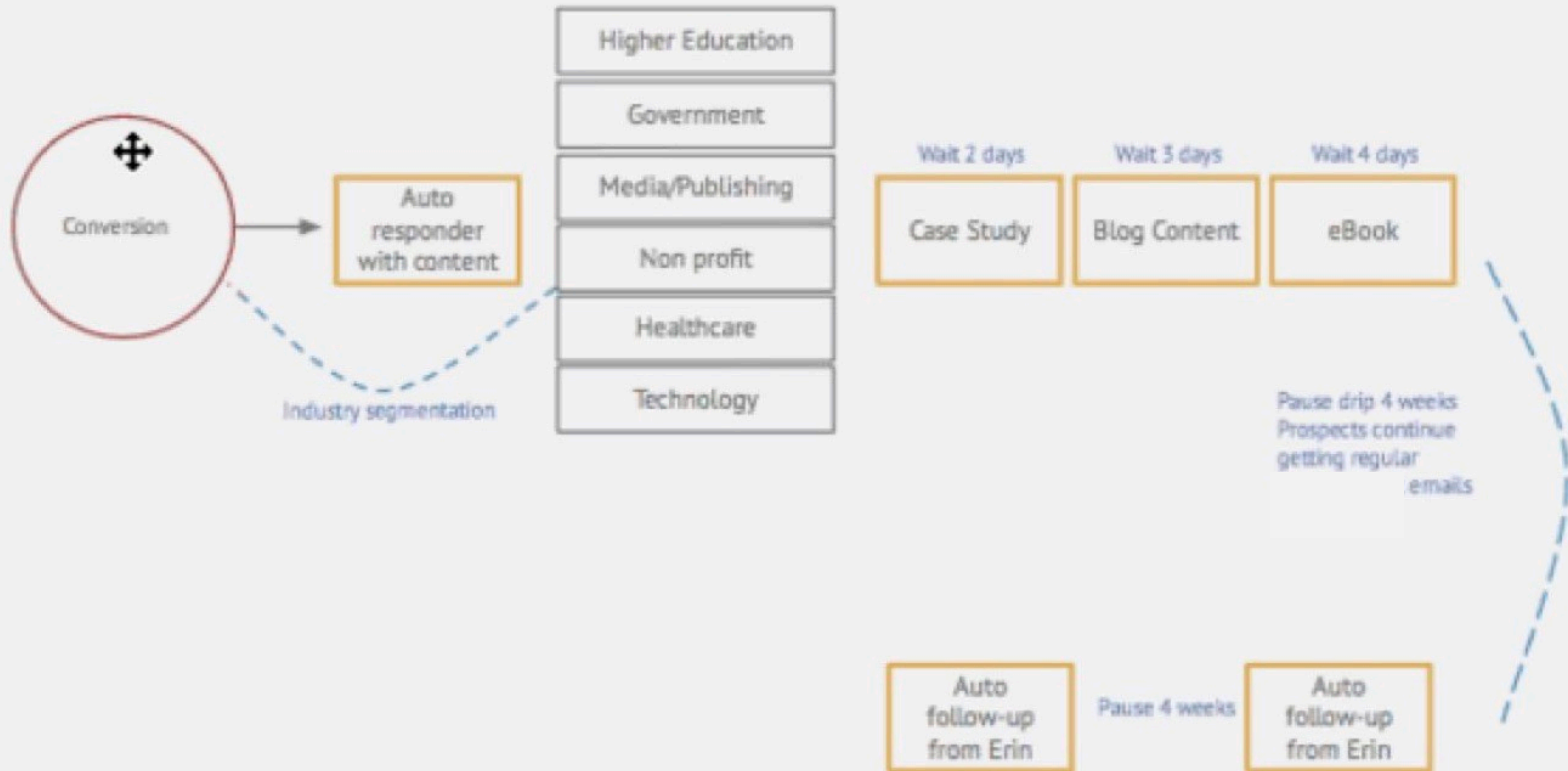
On-site & Remote

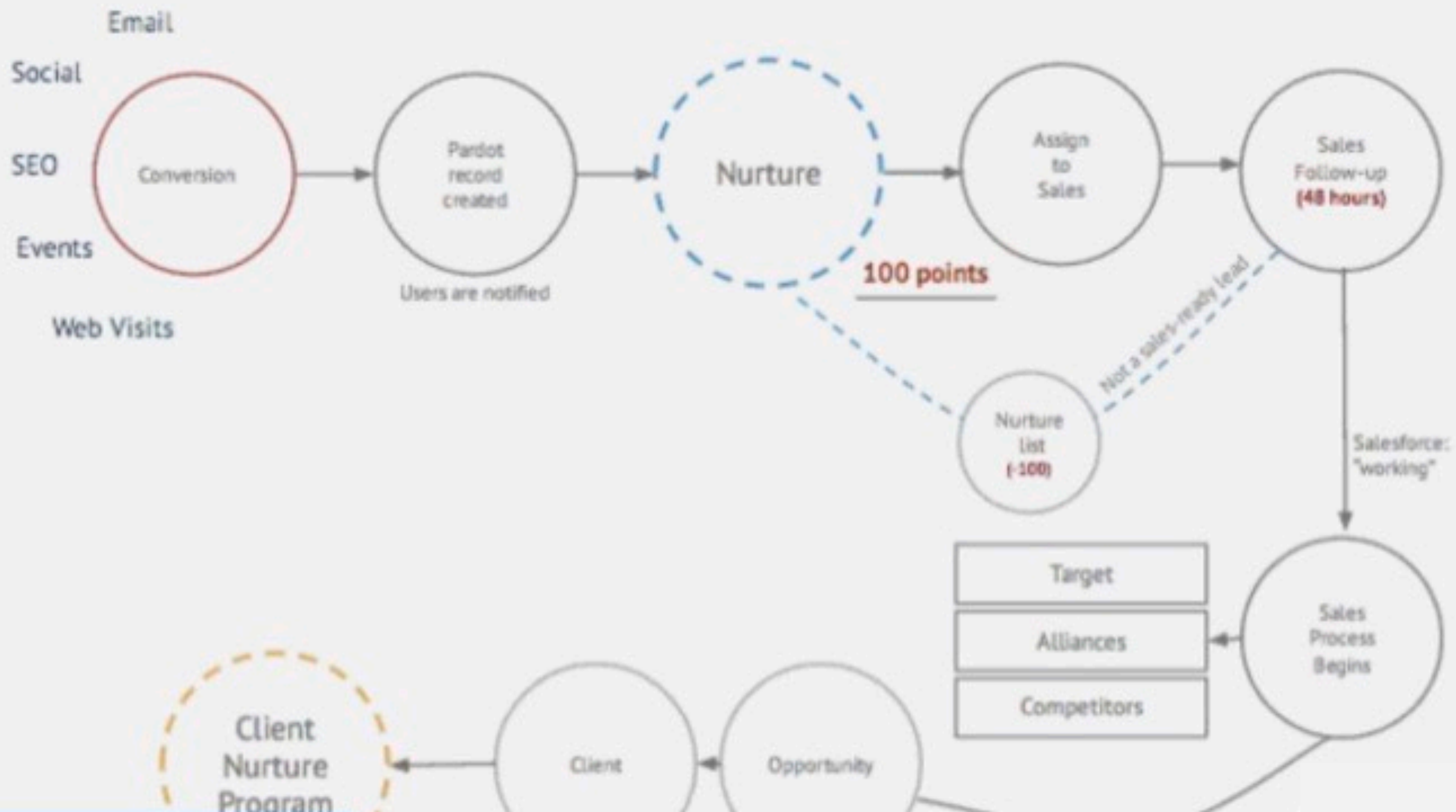
REFRAMING & DISCOVERY

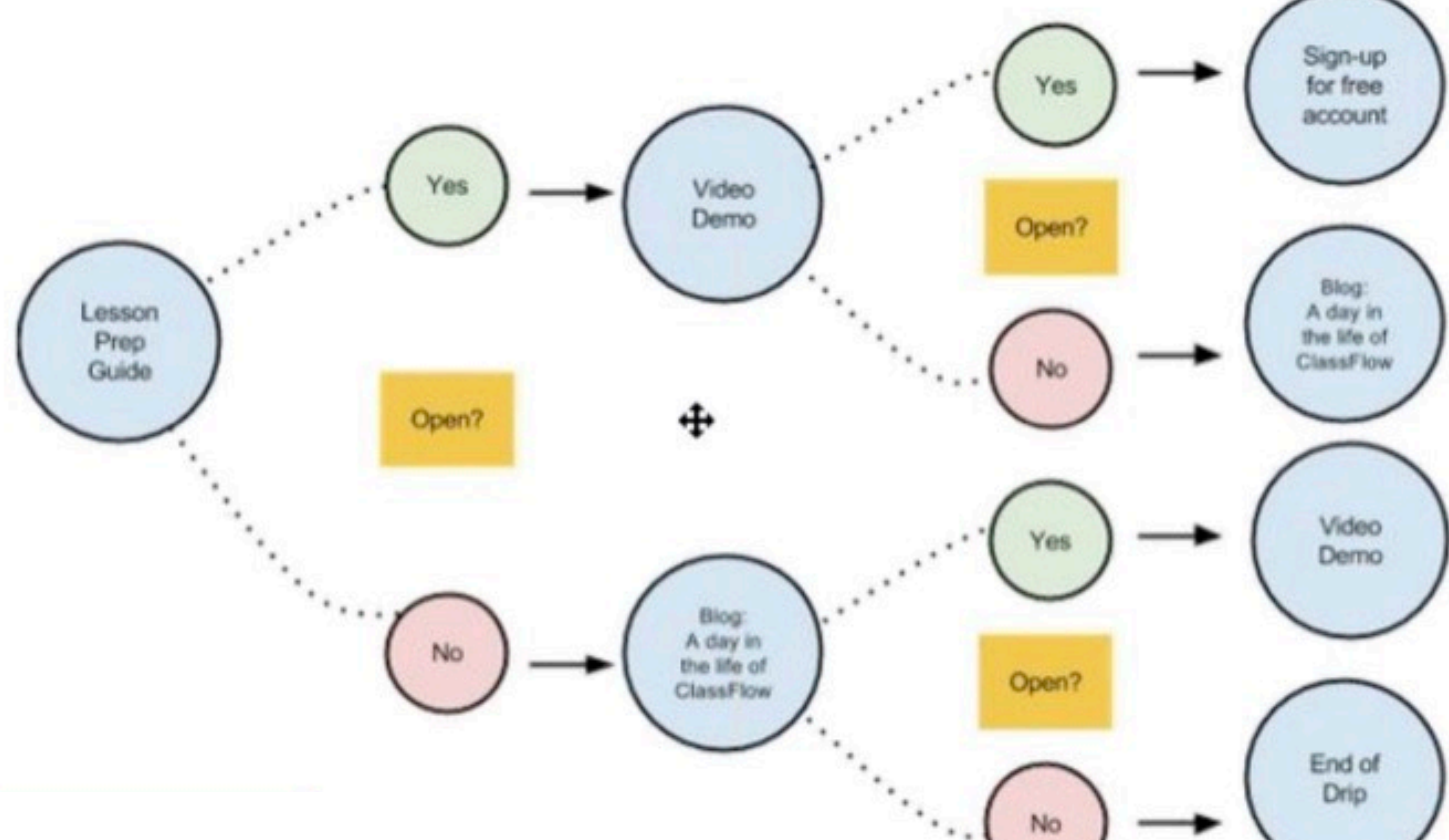
What's the **process** for taking a marketing campaign from conception to reality?

KEY INSIGHT

Visual languages were being created to explore and communicate campaigns.







IN OTHER WORDS:
WE COULD
SEE THEIR
MENTAL MODEL

“The secret to designing an intuitive user experience is making sure that the conceptual model of your product matches, as much as possible, the mental models of your users.”

– Susan Weinschenk

CAN A *TRUSTED*
VISUAL LANGUAGE
FACILITATE
EXPERIMENTATION?



**CUSTOMER
SUCCESS**
+
CLEAR ROI
+
**EMPOWERED
USERS**
=
**WINNING
PRODUCT**

WHY **EXPERIMENTATION?**

- It's a key skill for marketing (read: customer) **success**
- Customized marketing programs are correlated with higher product **ROI**
- It indicates comfortability with the toolset

3

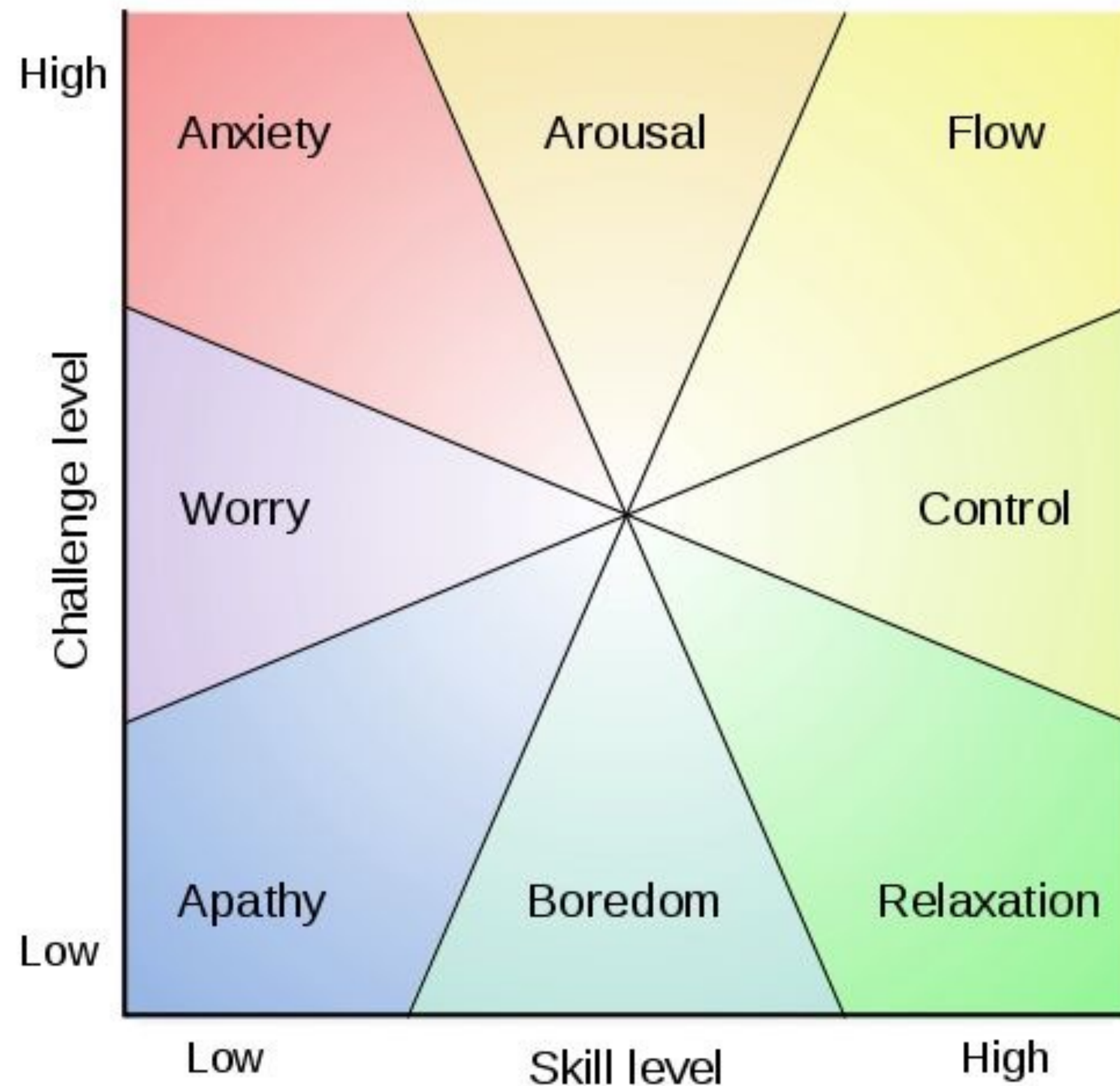
DESIGN PRINCIPLES + PRODUCT FOCUS

HYPOTHESIS:
EXPERIMENTATION
INDICATES
FLOW STATE

“Enjoyment appears at the boundary between boredom and anxiety, when the challenges are just balanced with the person's capacity to act.”

– Mihaly Csikszentmihalyi

ELEMENTS OF FLOW



- 1 There are clear goals every step of the way.
- 2 There is immediate feedback to your actions.
- 3 There is a balance between challenges and skills.
- 4 Action and awareness are merged.
- 5 Distractions are excluded from consciousness.
- 6 There is no worry of failure.
- 7 Self-consciousness disappears.
- 8 The sense of time becomes distorted.
- 9 The activity becomes 'autotelic' – meaning it is an end in itself.

DESIGN **PRINCIPLES** + **ELEMENTS** OF FLOW

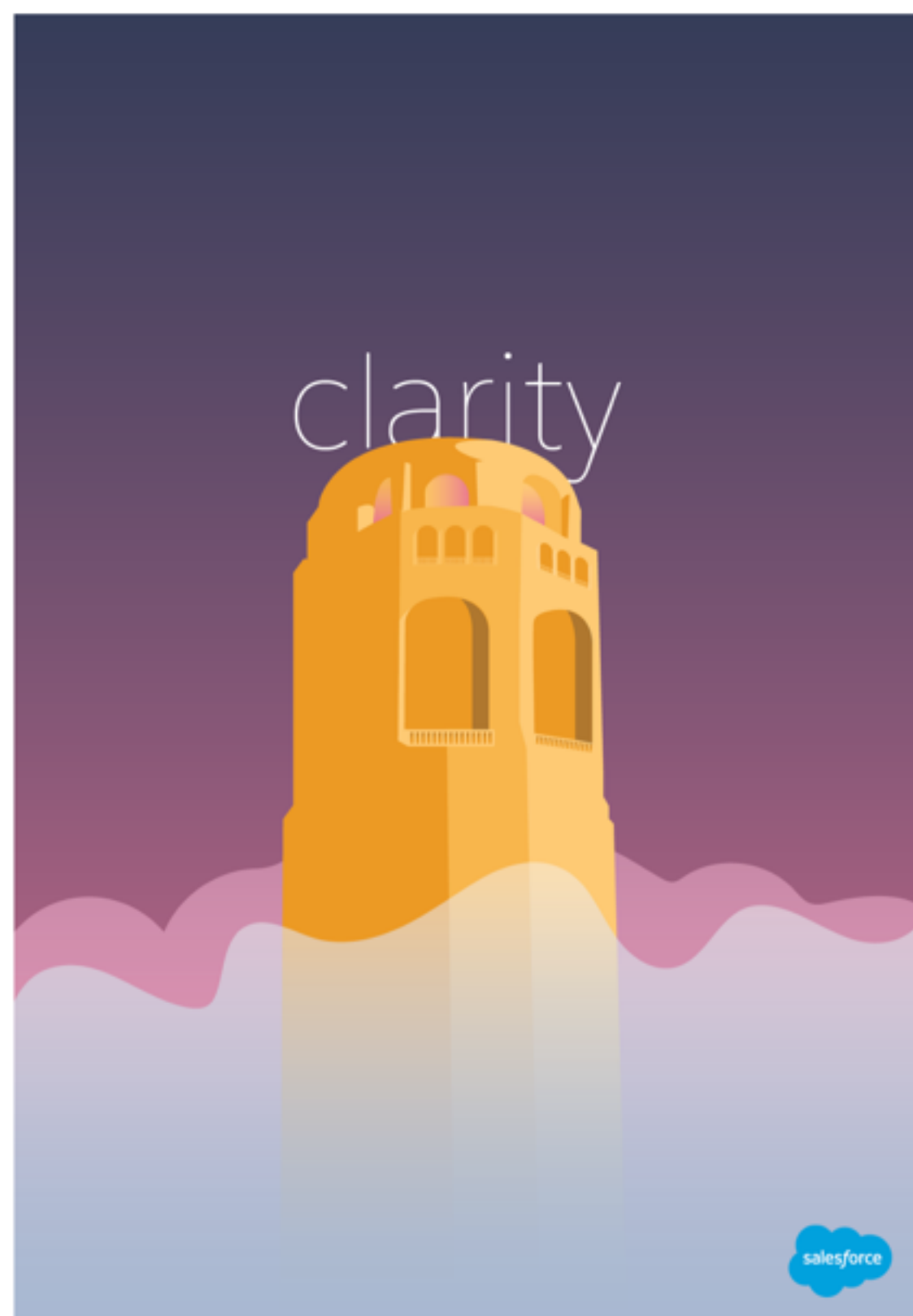
CLARITY

EFFICIENCY

SECURITY

BEAUTY

- 1 There are clear goals every step of the way.
- 2 There is immediate feedback to your actions.
- 3 There is a balance between challenges and skills.
- 4 Action and awareness are merged.
- 5 Distractions are excluded from consciousness.
- 6 There is no worry of failure.
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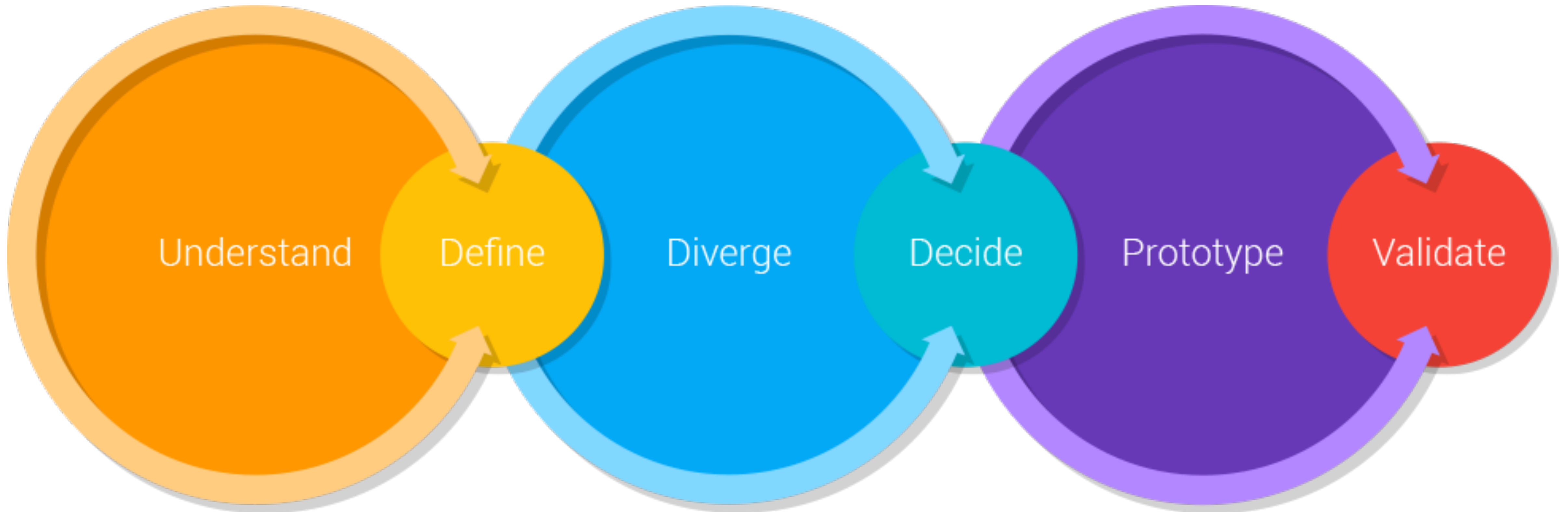


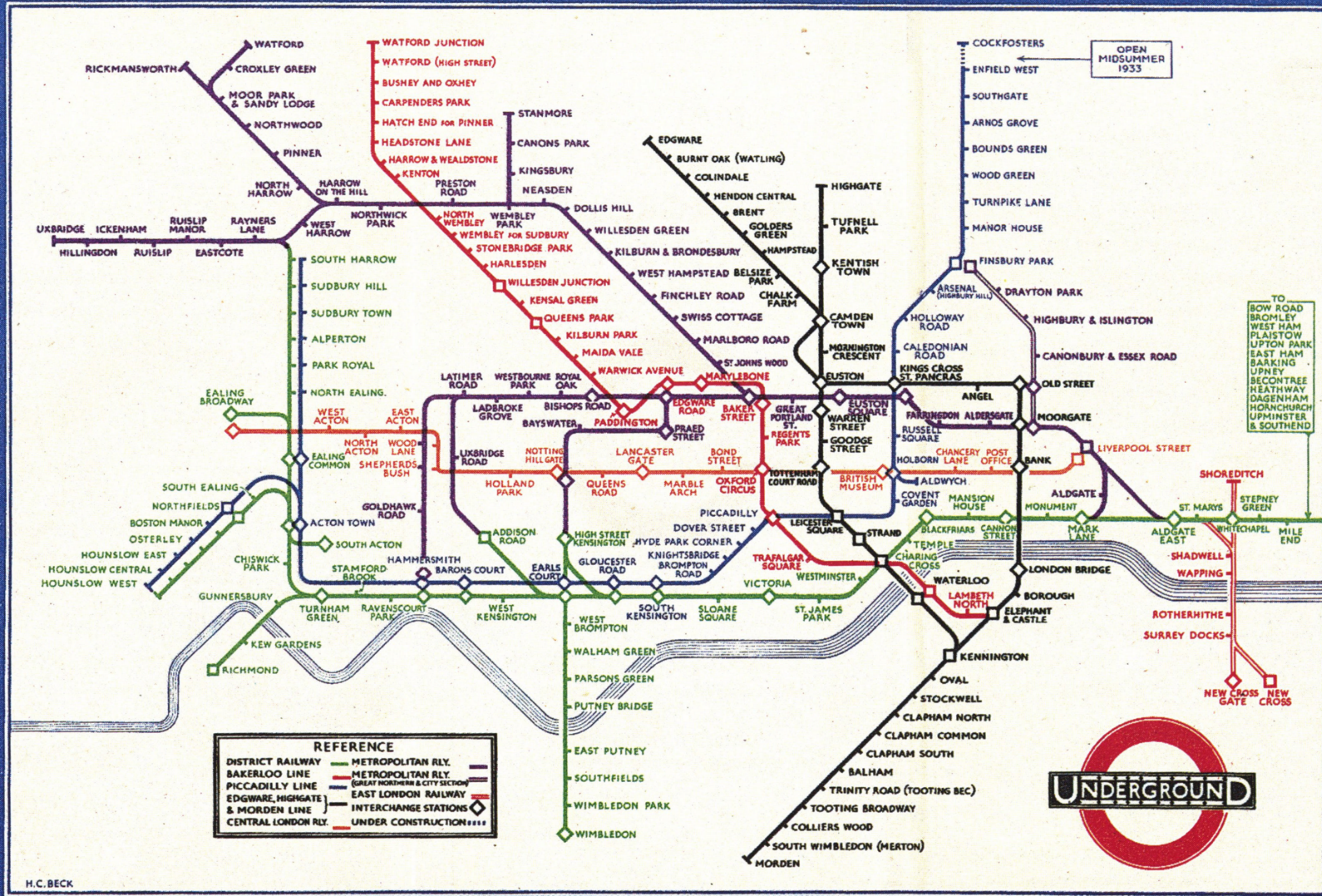
CAN A *TRUSTED*
VISUAL LANGUAGE
FACILITATE
EXPERIMENTATION?

CLARITY

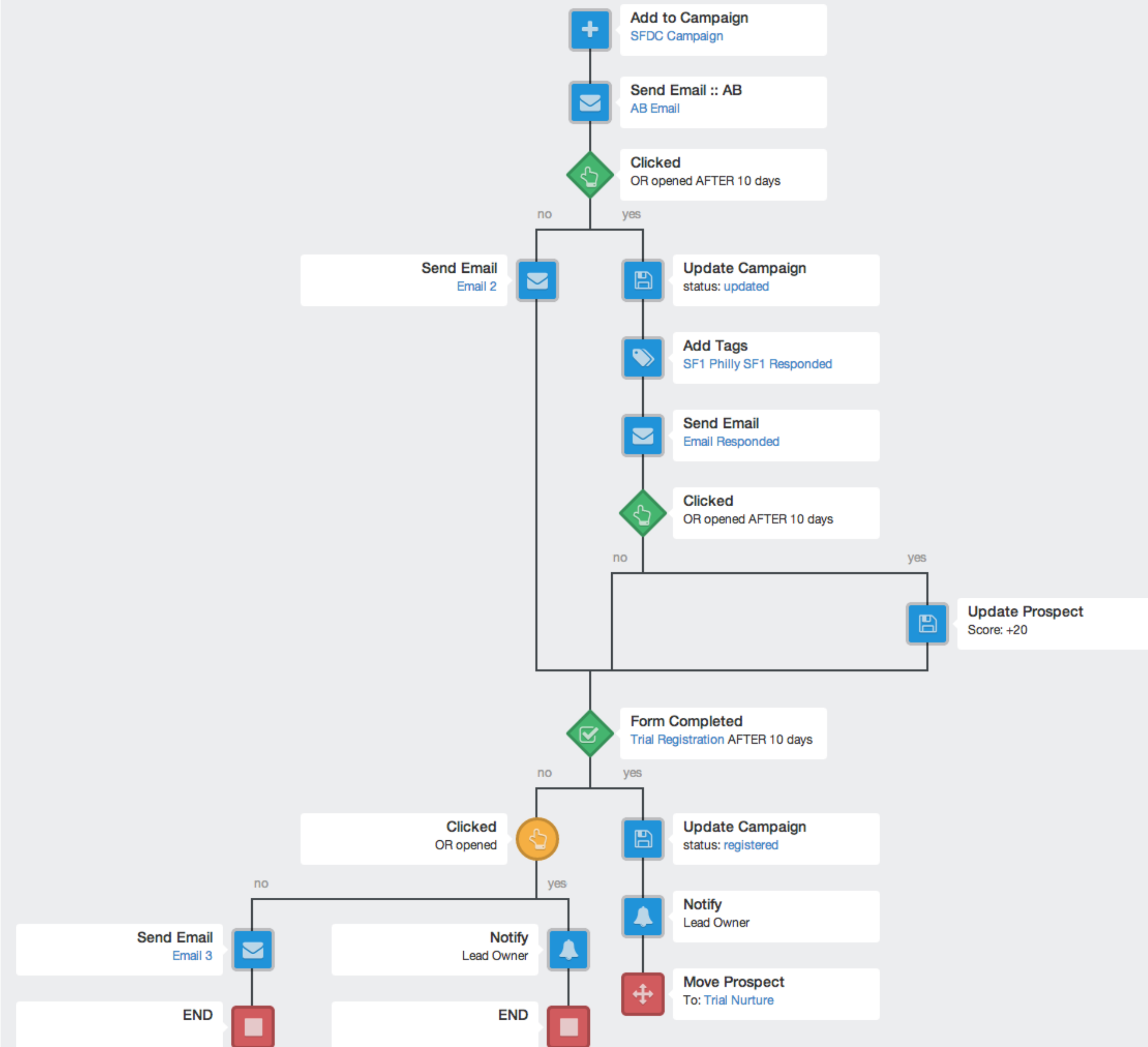
CREATE **FLOW**
THROUGH
VISUAL LANGUAGE

DESIGN **SPRINTS**





REFERENCE	
DISTRICT RAILWAY	METROPOLITAN RLY.
BAKERLOO LINE	METROPOLITAN RLY.
PICCADILLY LINE	(GREAT NORTHERN & CITY SECTION)
EDGWARE, HIGHGATE & MORDEN LINE	EAST LONDON RAILWAY
	INTERCHANGE STATIONS
CENTRAL LONDON RLY.	UNDER CONSTRUCTION

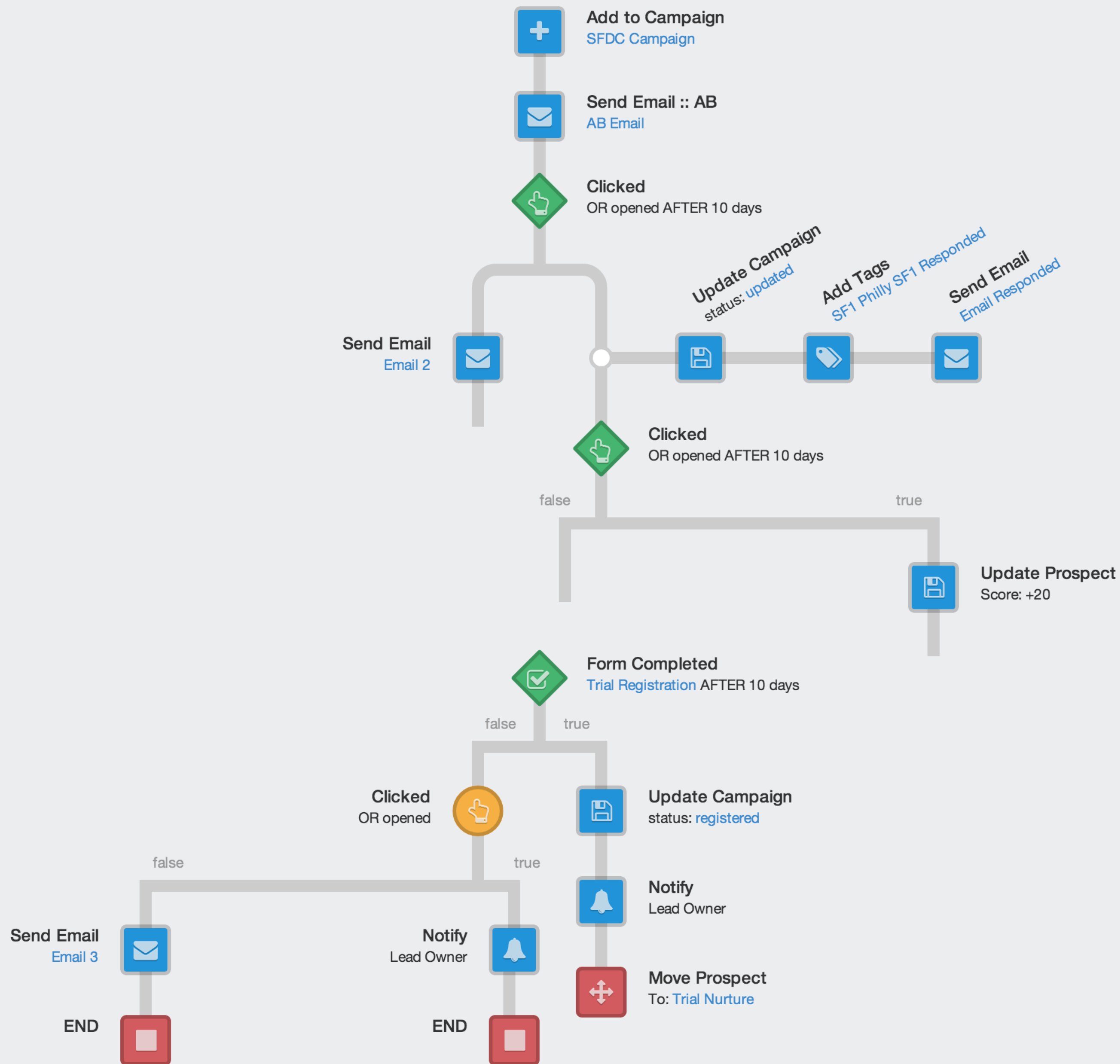


Sample Pardot Nurture

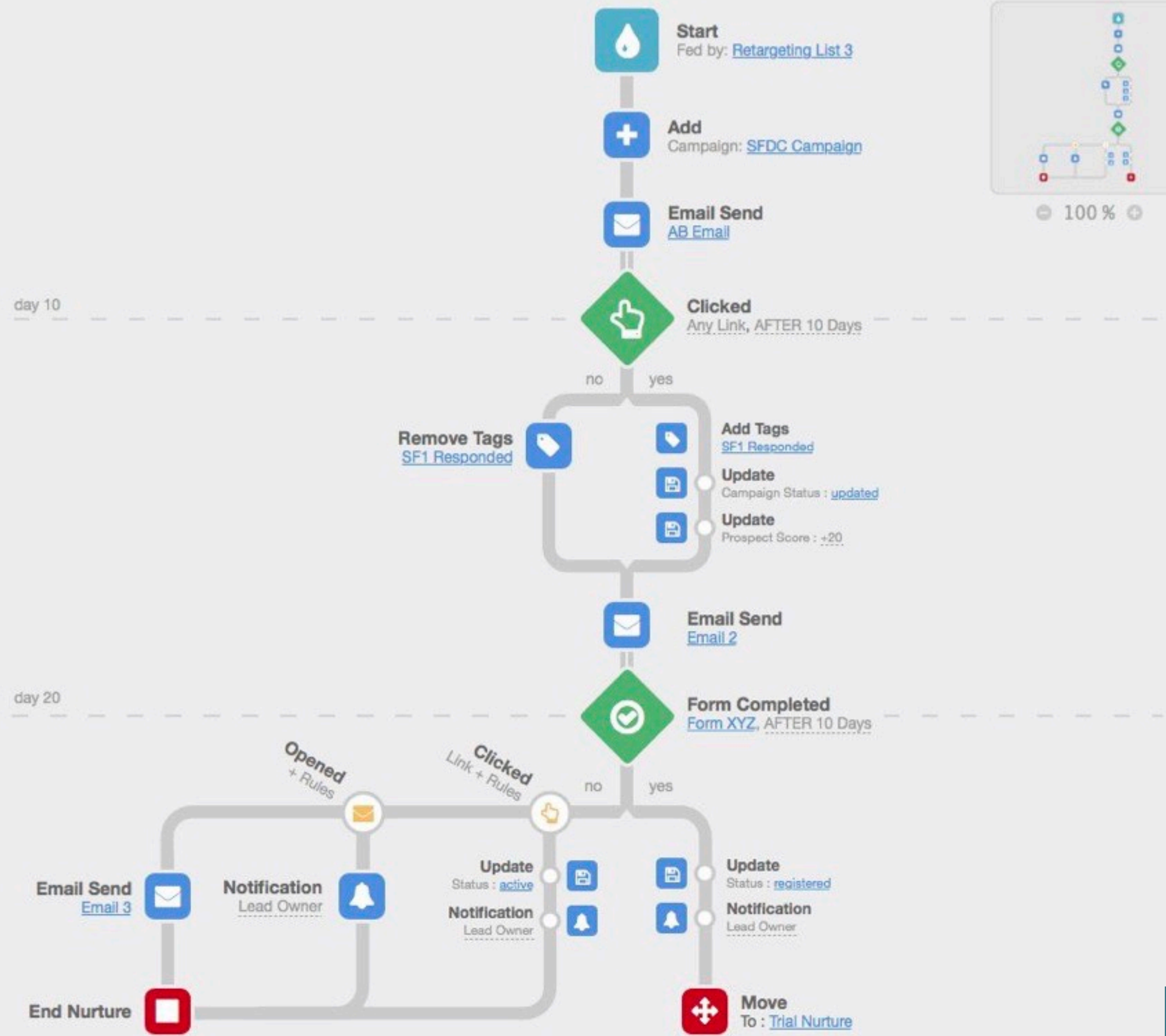
List: [Pardot Nurture List](#)

Pause

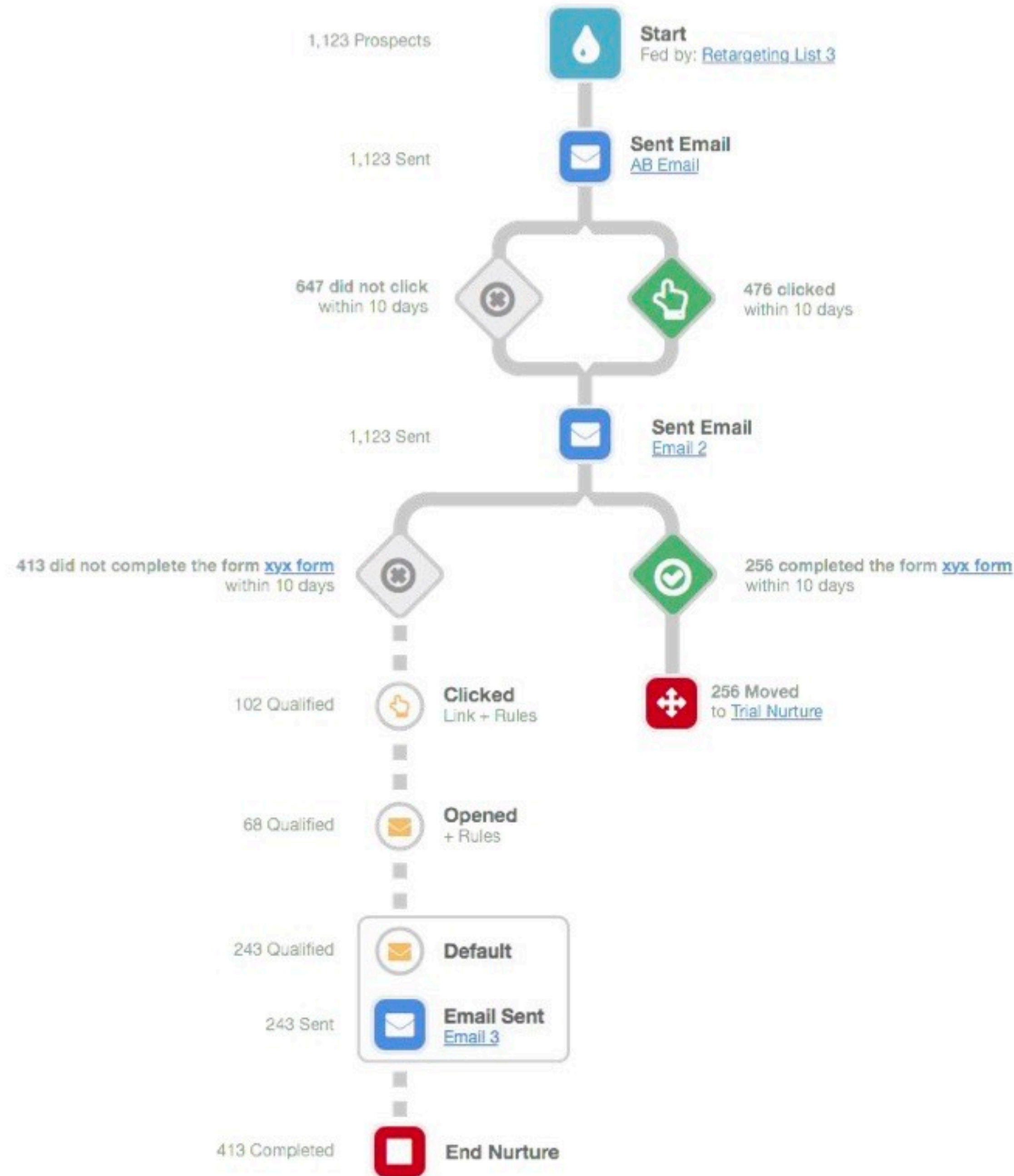
Test



An Amazing New Nurture Campaign



Overall Reporting

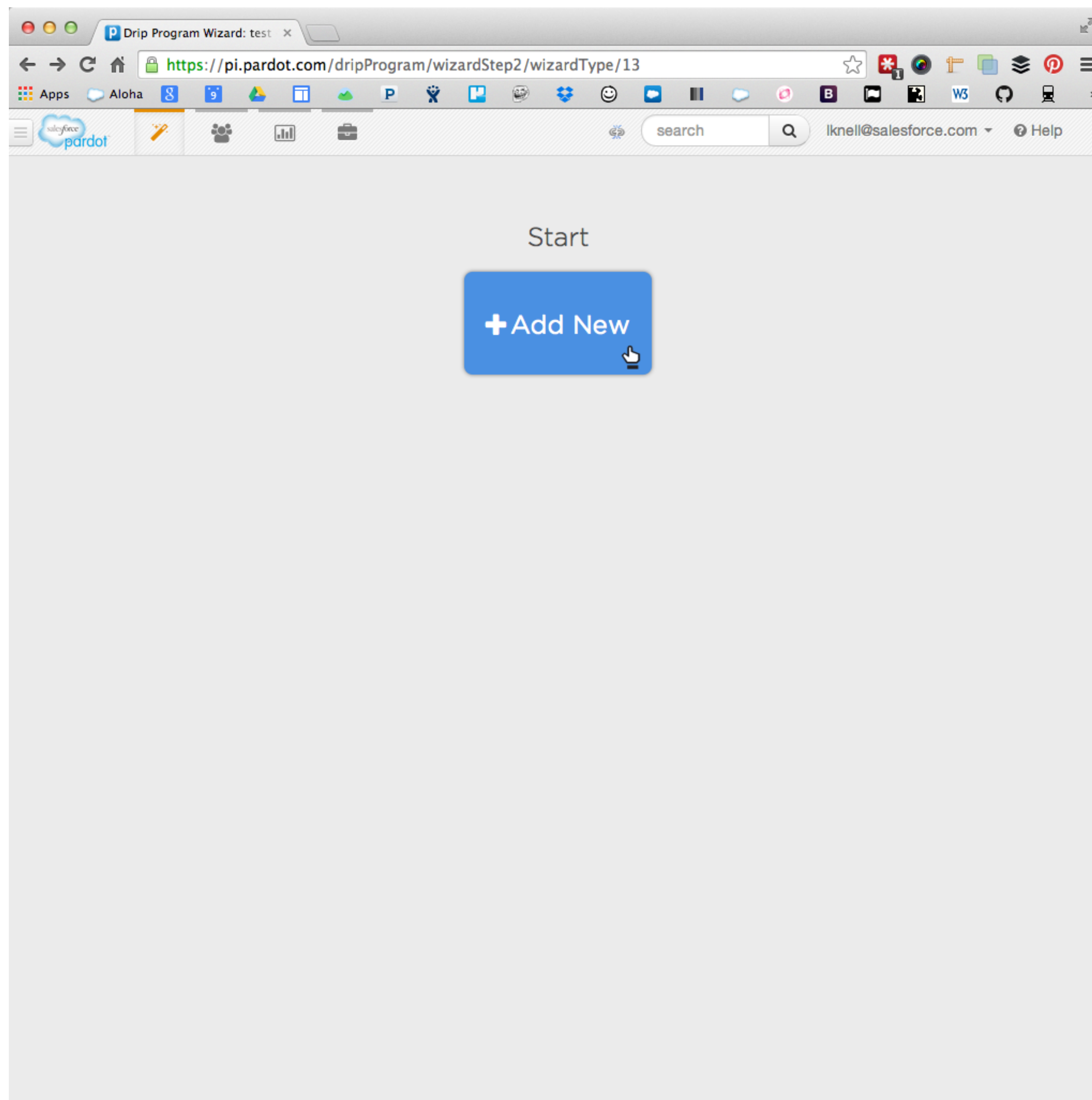


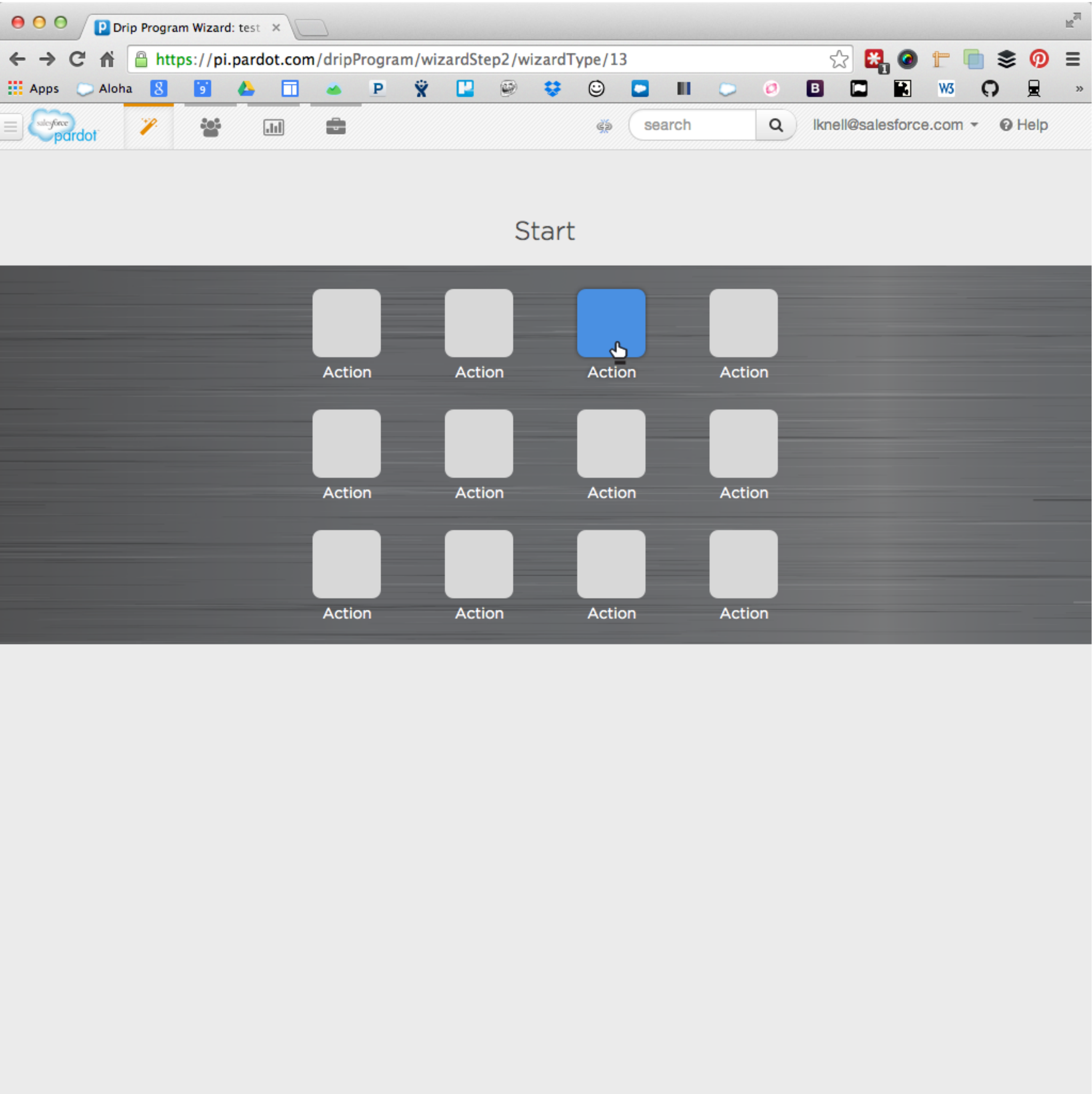
Individual Audit Report

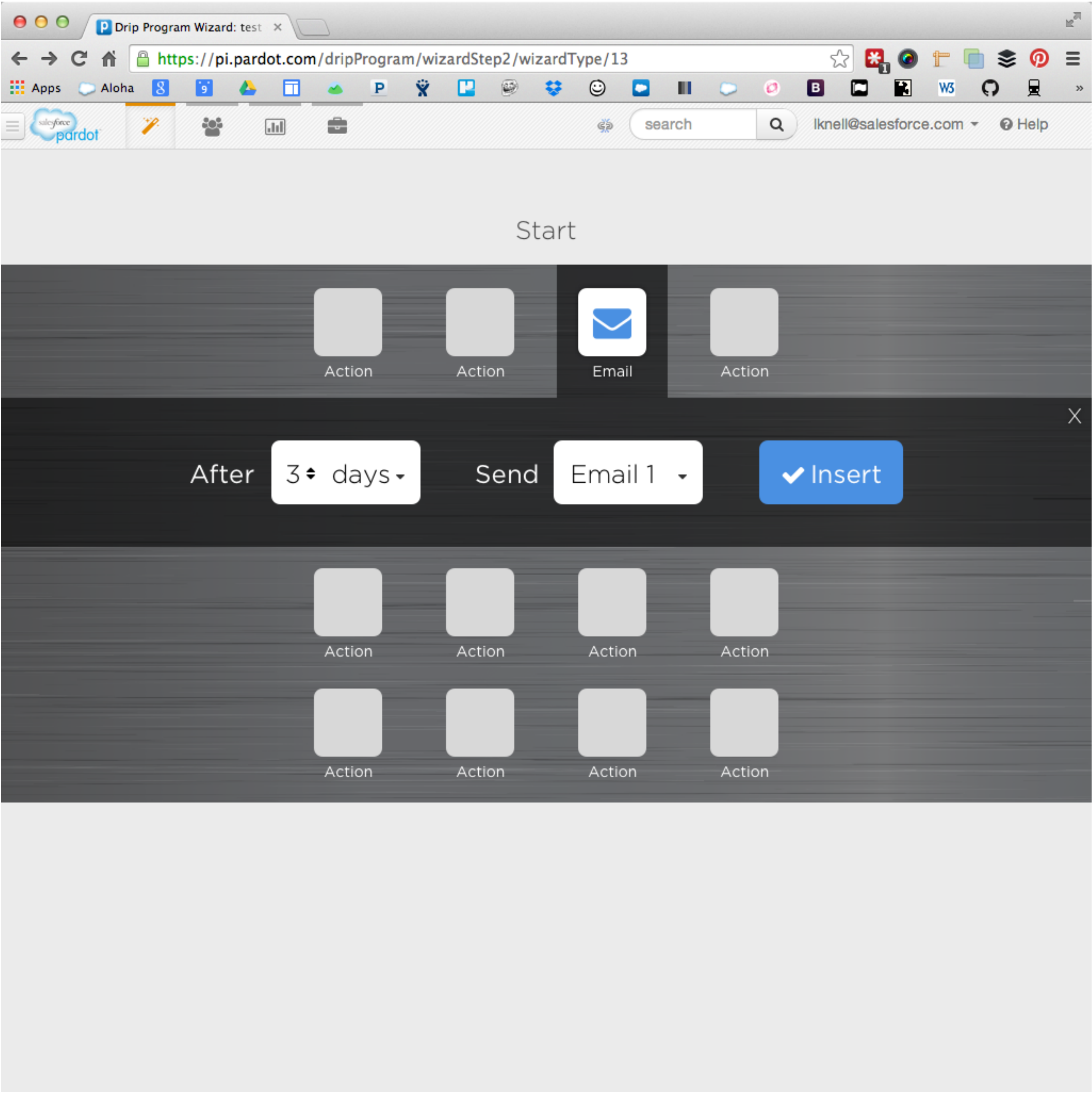


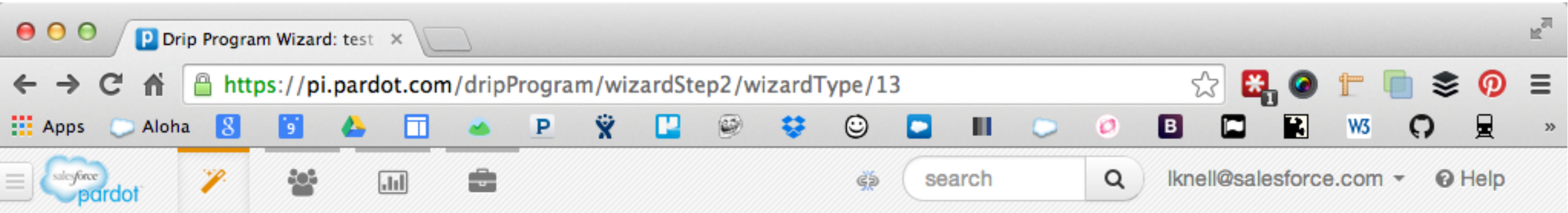
EFFICIENCY

KEEP VISUAL **FOCUS**











After 5 days,
Send This Email
To This List



Prospect tagged
This Tag?



After 5 days,
Clicked This Link?

A white rectangular input field with a blue border and a blue handle on top. It contains the number '5' and a small 'x' icon on the right side.

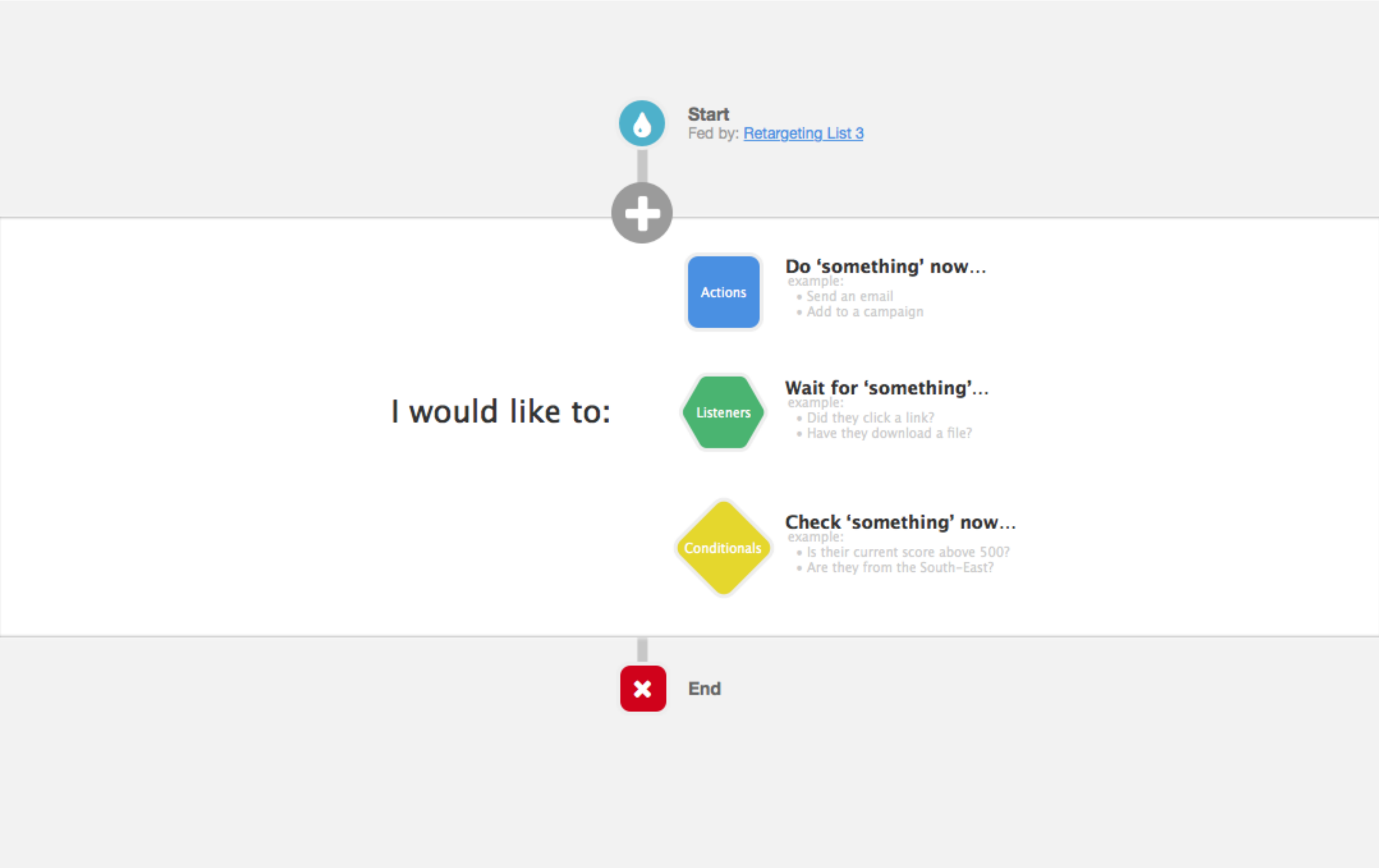
After 5 days,
Send This Email

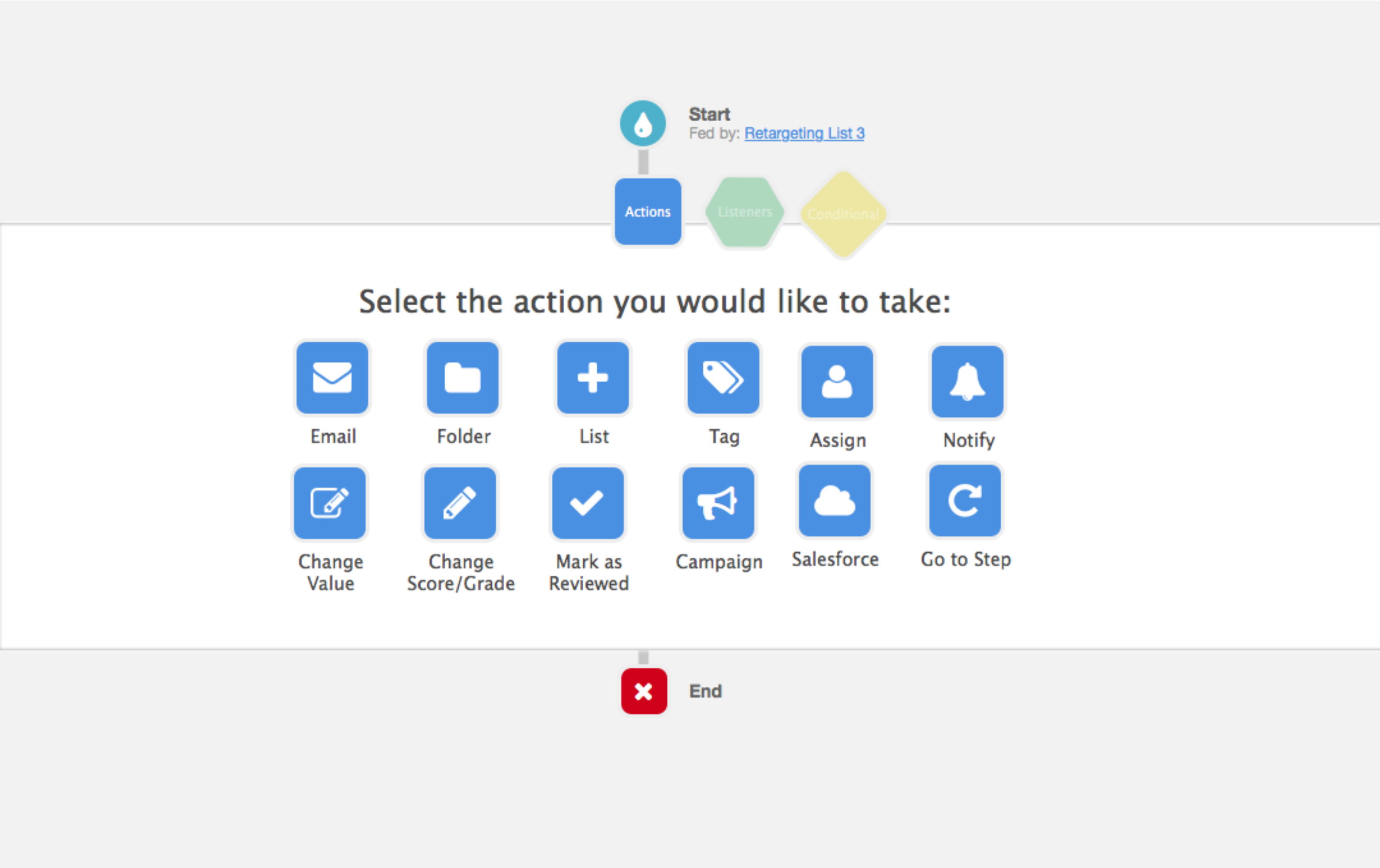
A white dropdown menu with a blue border. It contains the following options: 'minutes', 'hours', '✓ days' (highlighted with a blue background), and 'weeks'.

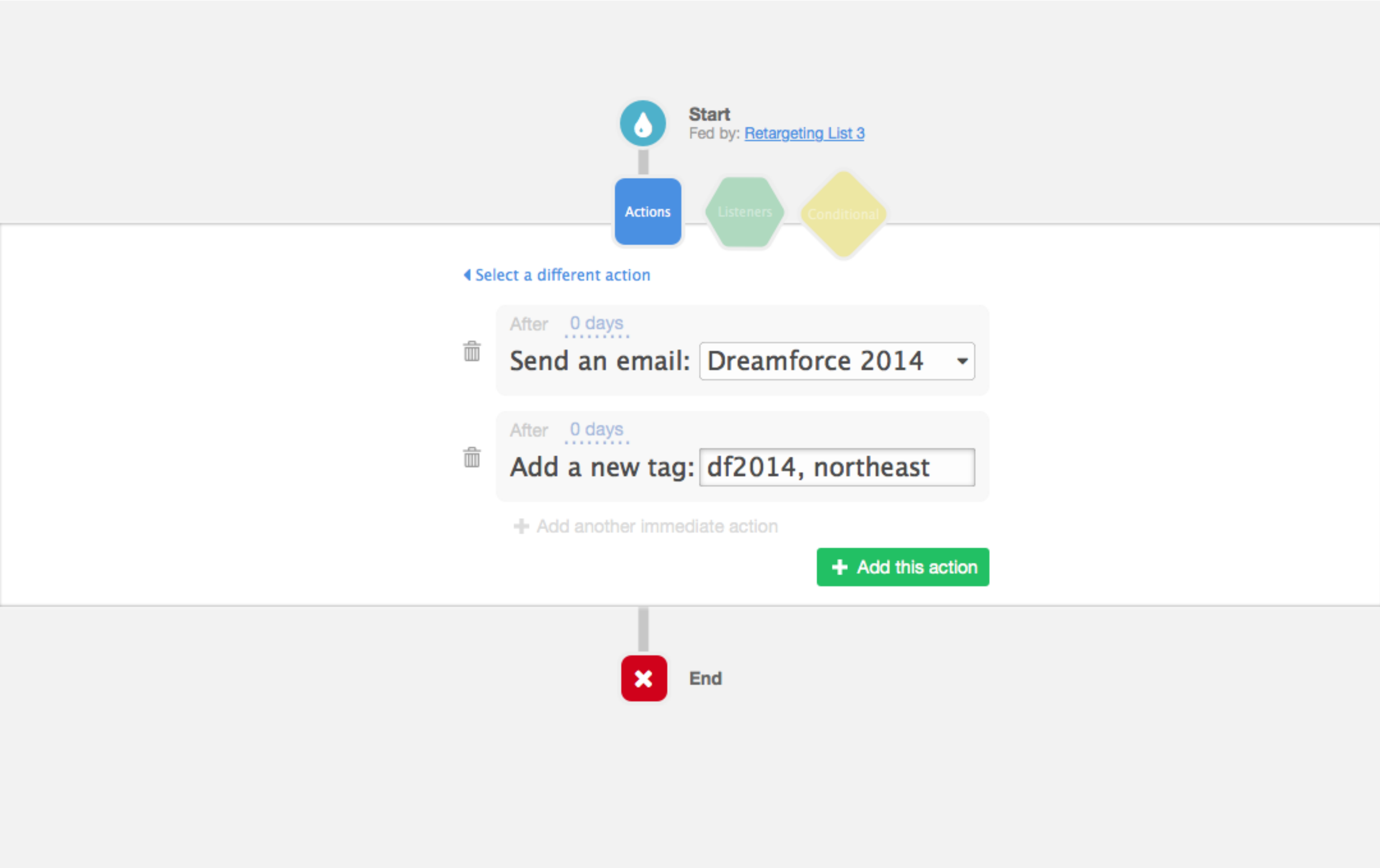
After 5 days,
Send This Email
To This List

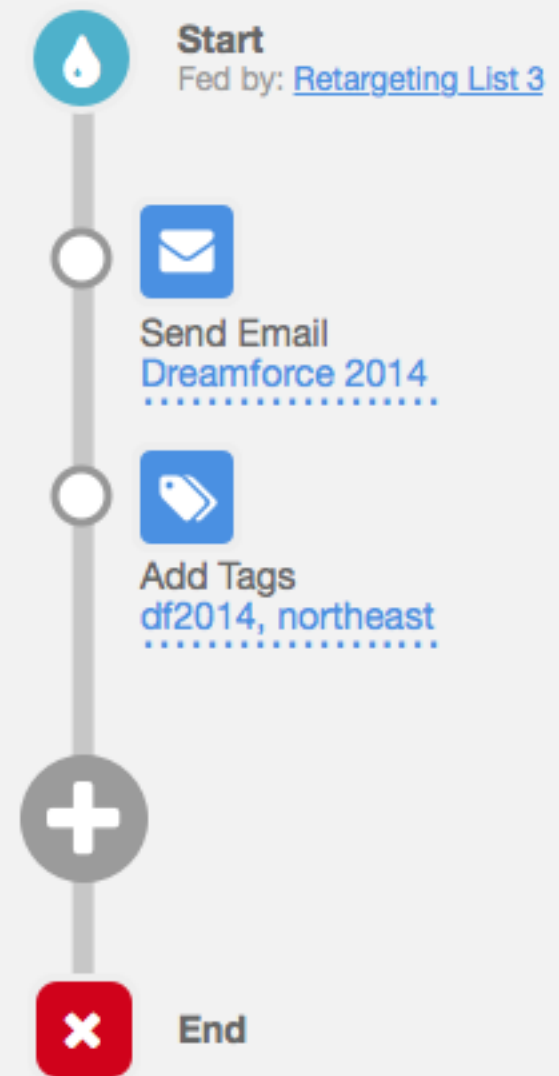
A white dropdown menu with a blue border. It contains the following options: 'This Email' (highlighted with a blue background), 'That Email', 'Other Email', 'JIMMYs', 'TEST', and 'EMAIL'.

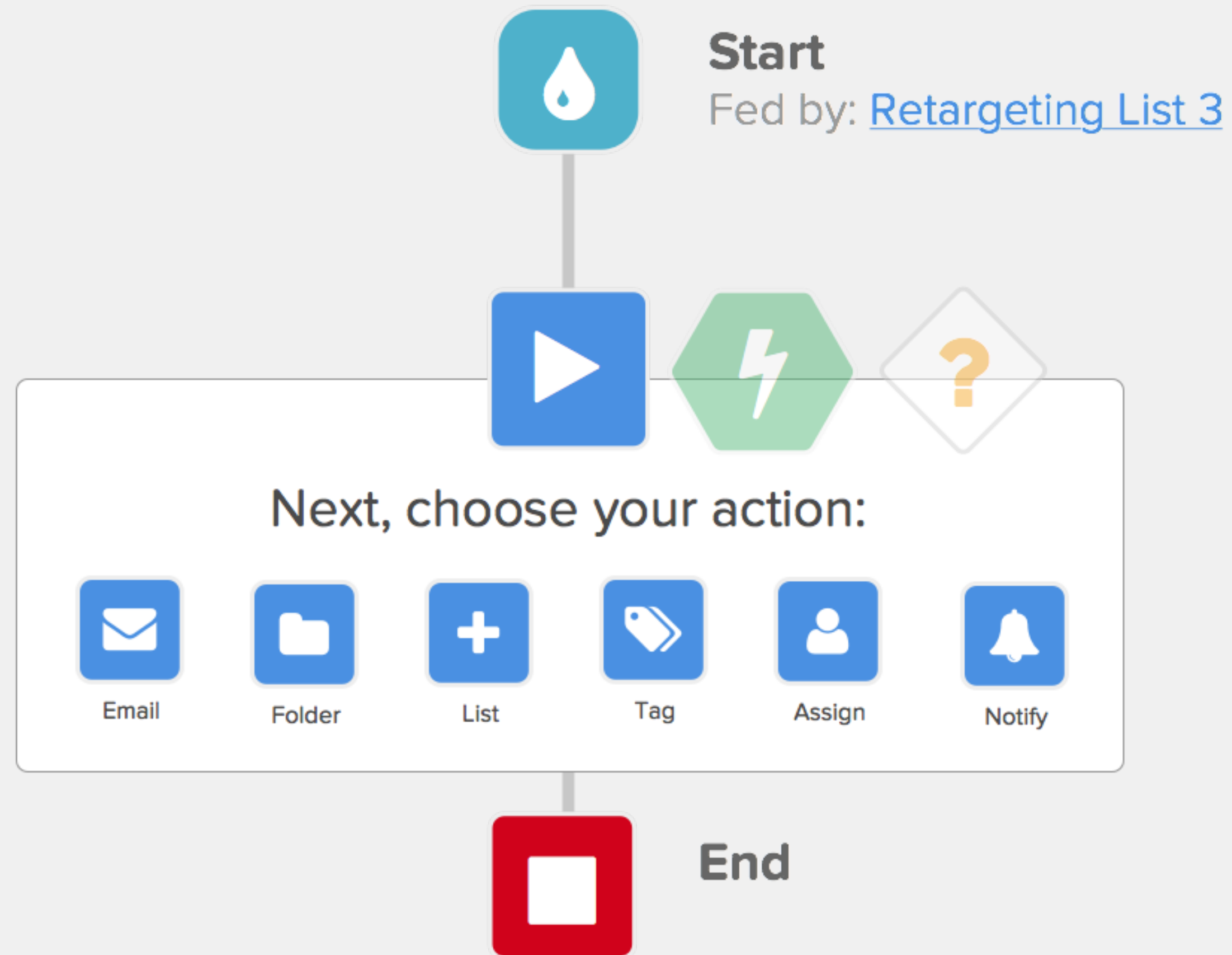














Choose an interaction type

Action

Trigger

Condition



Something like...

- Send an email
- Notify the owner
- Add to a campaign

Something like...

- Lorem ipsum
- Dolor sit amet
- Lorem lorem

Something like...

- Lorem ipsum
- Dolor sit amet
- Lorem lorem

First, choose an interaction type:



Actions
Examples: email, notify, and assign

Triggers
Examples: click, open, and download

Conditions
Examples: location, list, and score/grade

First, choose an interaction type:



Actions
Examples: email, notify, and assign

Triggers
Examples: click, open, and download

Conditions
Examples: location, list, and score/grade

Action

Trigger

Condition

Action

Email

Action

Action

Action

Action

After 3 days

Send Email 1

+ Add new rule

Cancel

✓

Insert an email

After 3 days

Send Email 1

Cancel

✓

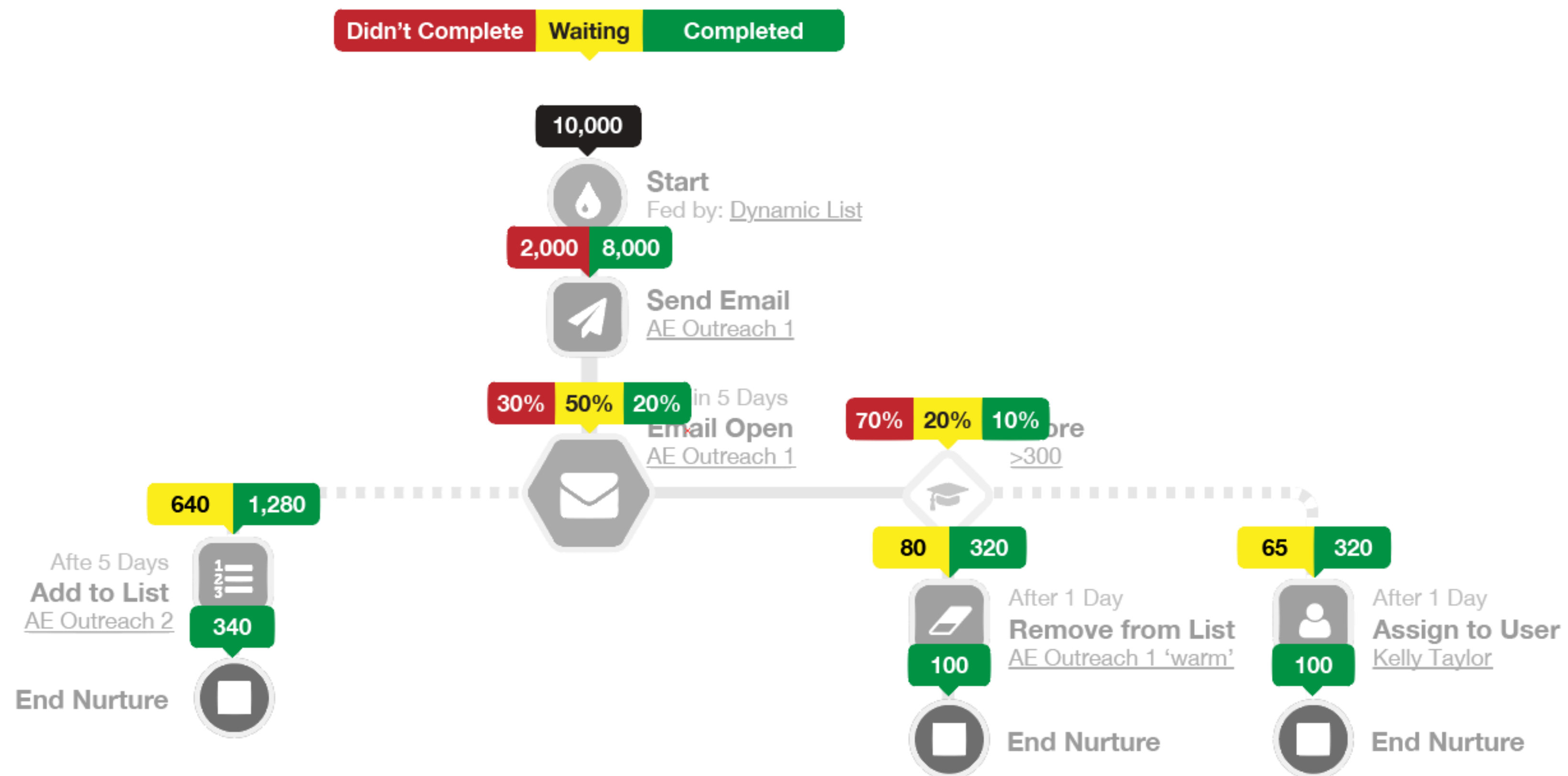
After 3 days

Send Email 1

+ Add new rule

Cancel

✓

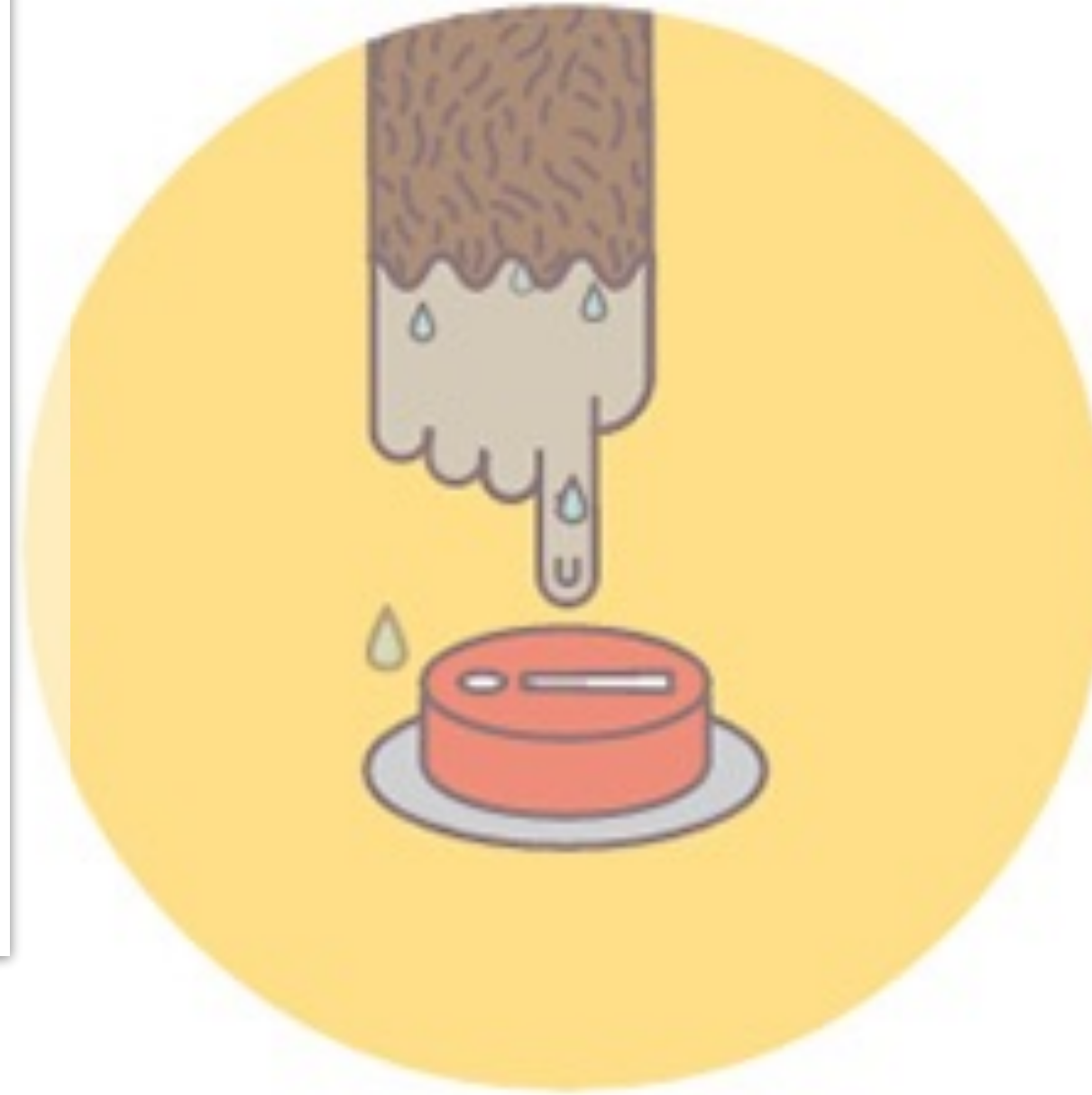


SECURITY

MINIMIZE
UNCERTAINTY

PRETTY SCARY

Prepare for launch



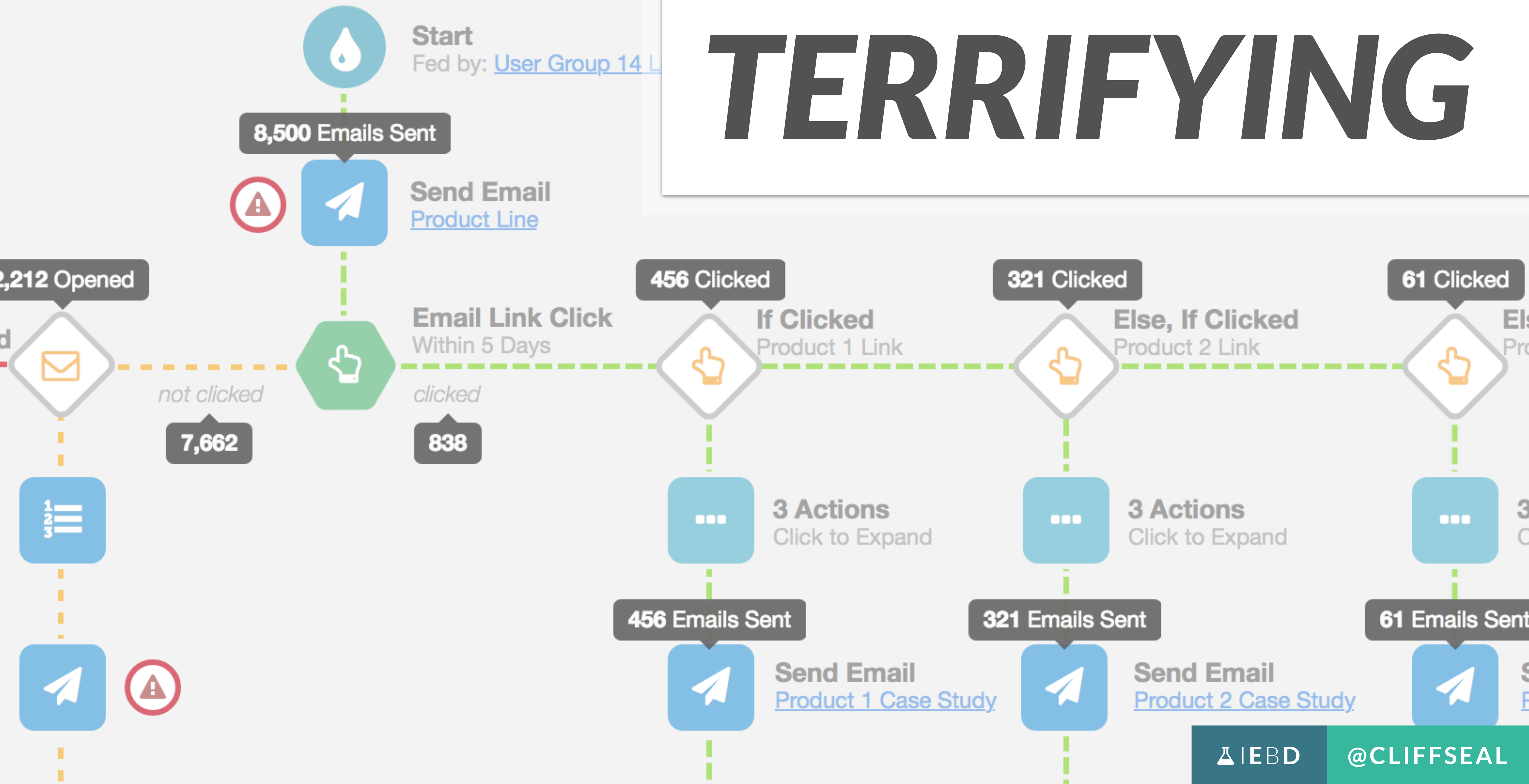
You're about to send a campaign to:
Gamification Weekly

Send Now

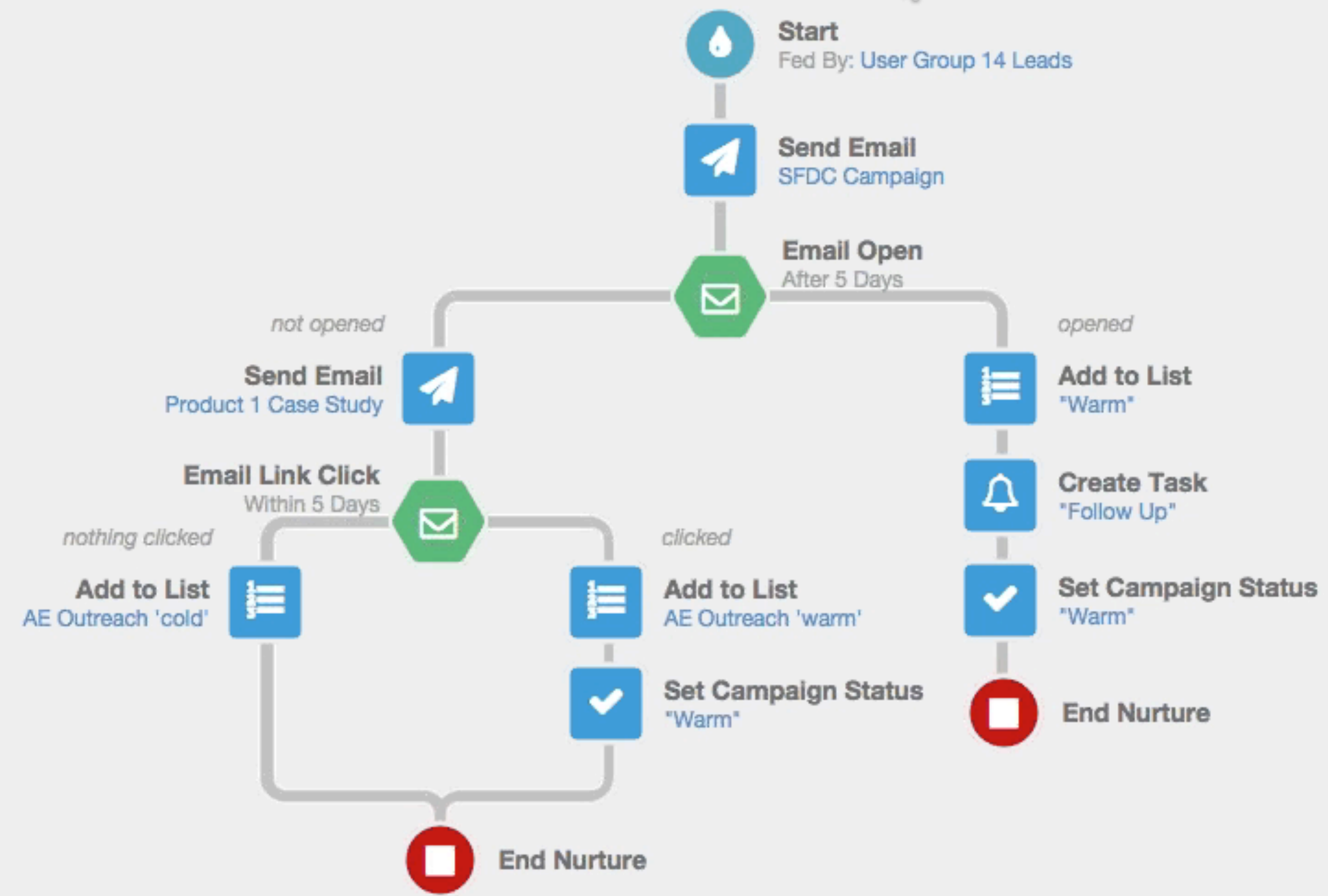
Cancel

This is your moment of glory.

TERRIFYING



Start Test



PRODUCT COMPROMISE

GET NERDY
ABOUT **SCALE**

```
ne fields/tables with the old name and change them
_name => $new_field_name) {
ld_name exists
ld_data_'.. $field_name)) {
a data table then just continue.

ld_data_'.. $field_name;
'field_revision_'.. $field_name;
o_field($field_name);
ld_info['storage']['details'];

field has unique configuration. Must follow.
s['sql']['FIELD_LOAD_CURRENT'] as $field) {
ames.
y => $value) {

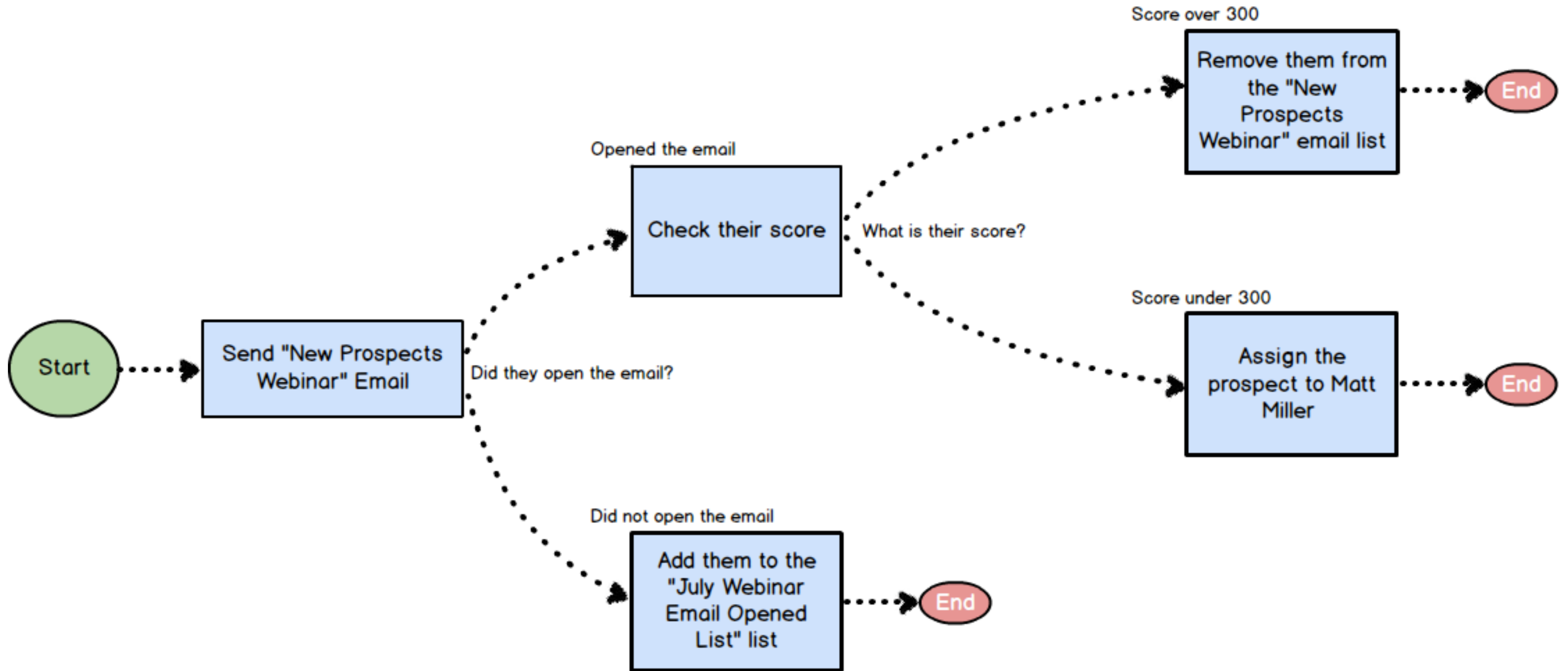
table columns and preserve existing spec. Let
re of any configuration changes.
['columns'][$key];
ta_table_name, $value, $new_field_name.."_".. $key, $spec);
vision_table_name, $value, $new_field_name.."_".. $key, $spec);
```

THINKING **AHEAD**

- **Platform:** API-powered, JSON-backed data meant future scalability
- **Onboarding:** early “template” concepts reinforced the need for the platform
- **Prioritization:** built partnerships with Product + Engineering teams

PRODUCT COMPROMISE

OPTIMIZE EARLY FOR **KEY USE CASES**





4

CLEAR CONCEPT VALIDATION



VALIDATION

On-site & Remote

CLEAR **OBJECTIVES**

- **Clarity:** Is the interface actionable and clear?
- **Efficiency:** Can users complete common tasks with minimal frustration?
- **Security:** Do users feel sure of what they're doing? Did they do what they meant to do?

Data

Total cards: 53 cards

Add prospect to list
Add prospect to salesforce.com campaign
Adjust prospect score
Allow deleted CRM lead or contact to recreate from Pardot
Apply tags
Assign prospect to queue
Assign prospect to user
Assign prospect to user in group
Assign prospect via salesforce.com active assignment rule
Change profile criteria
Change prospect custom field value
Change prospect default field value
Change prospect profile
Clear prospect field value
Create salesforce.com task
Do not sync with CRM
Increment prospect field value
Mark as reviewed
Notify assigned user
Notify user

Remove prospect from list
Remove tags
Send prospect email
Set prospect's source campaign
Prospect CRM campaign
Prospect CRM campaign status
Prospect Google Analytics parameter
Prospect account custom object
Prospect account field
Prospect assigned queue
Prospect assigned user
Prospect assignment status
Prospect campaign

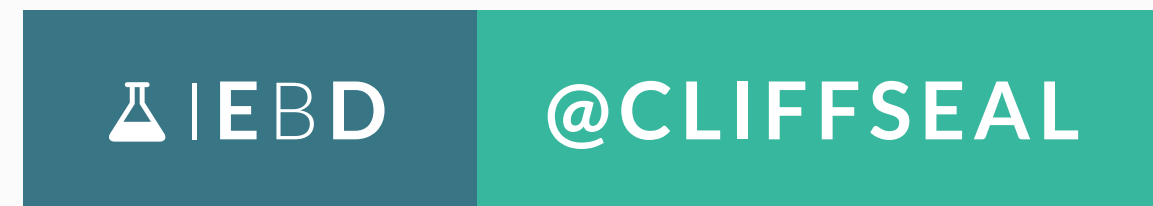
Prospect grade
Prospect landing page
Prospect list
Prospect opportunity
Prospect opportunity default field
Prospect opportunity status
Prospect profile
Prospect query
Prospect score
Prospect tag
Prospect time
Prospect webinar
Visitor hostname

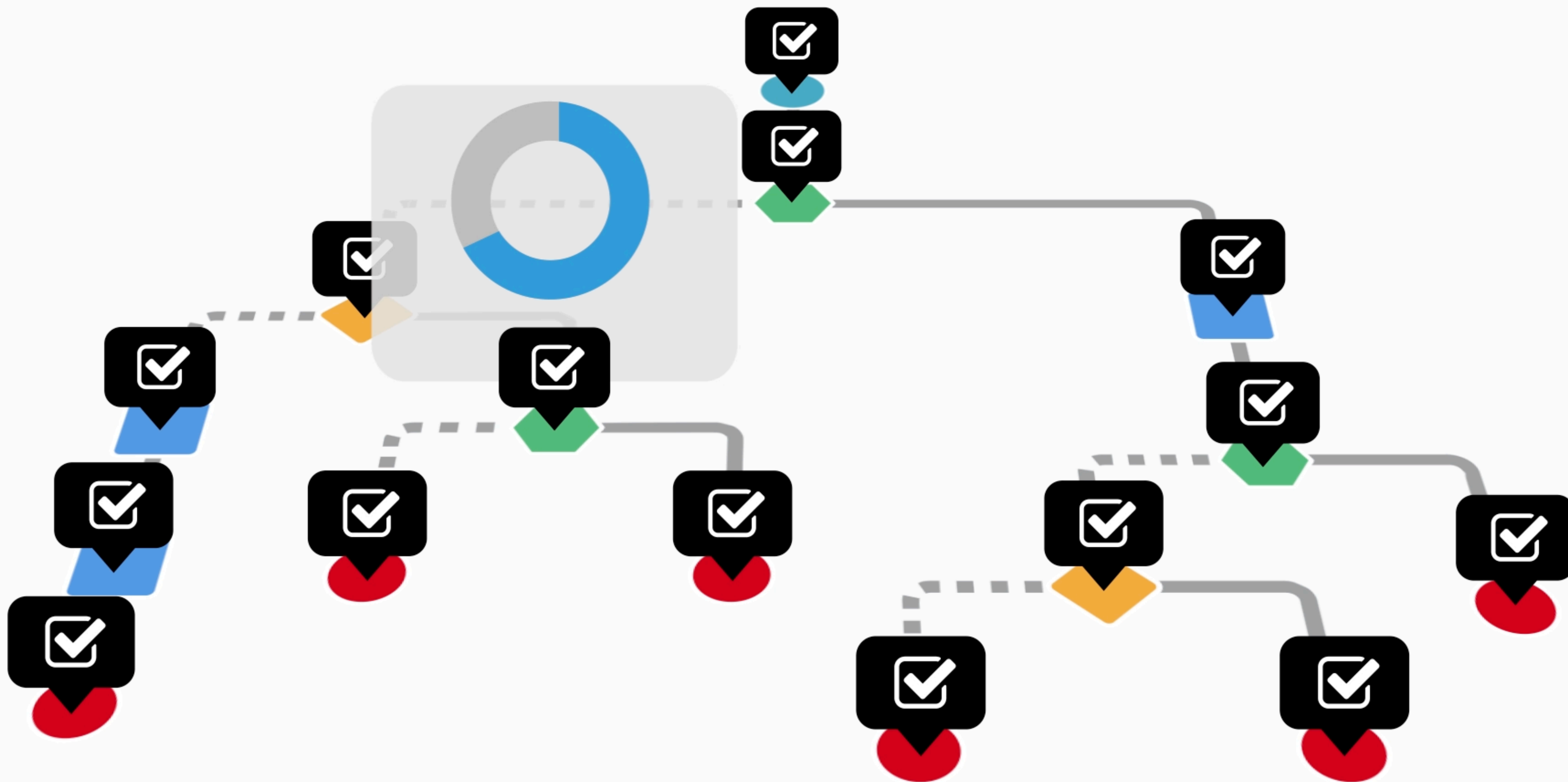
	Goals	Signals	Metrics
Happiness	Customers should perceive building nurture programs as easy and satisfying.	Happiness ratings on a quarterly survey.	System Usability Scale to judge ease; NPS to gauge satisfaction.
Engagement	Customers should enjoy building nurture programs and continue to build multiple programs.	Increase in visits to Nurture Studio per quarter.	Total number of sessions that include a visit to Nurture Studio will increase [Google Analytics].
Adoption	As customers experience successful nurture programs, Pardot usage will increase.	Total users interacting with nurture programs will increase.	Total number of unique visitors to Nurture Studio will increase [Google Analytics].
Retention	Customers should continue to use nurture programs as an integral part of their marketing campaigns.	Total returning users will increase.	Daily active users and monthly active users of Nurture Studio will increase [Google Analytics].
Task Success	Customers should be able to successful build nurture programs and ensure what they built works the way they intended it to.	More published/running nurture programs.	Total running programs/# started during a specific time frame = success rate

Respondent	T1	T2	T3	T4	T5	T6	T7	T8	T9	T10	T11	T12	T13	T14
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
	Terminology & Templates							Testing			Reporting		Beta	

T5: Understands My Programs		
T6: Understands Community Programs		
T7: More feedback on templates		THUMBS UP
T8: Set the email campaign		MEH
T9: Did you notice scrolling?		FAIL
T10: Do you need language to clarify what testing screen does?		
T11: Understands testing screen		
T12: Finds screen useful		
T13: Comfortable with nurture success		
T14: More feedback on testing		
T15: Is the yellow bubble information you'd like to see here?		
T16: Bottom bar - dates		
T17: Export button		
T18: Want to do a beta?		

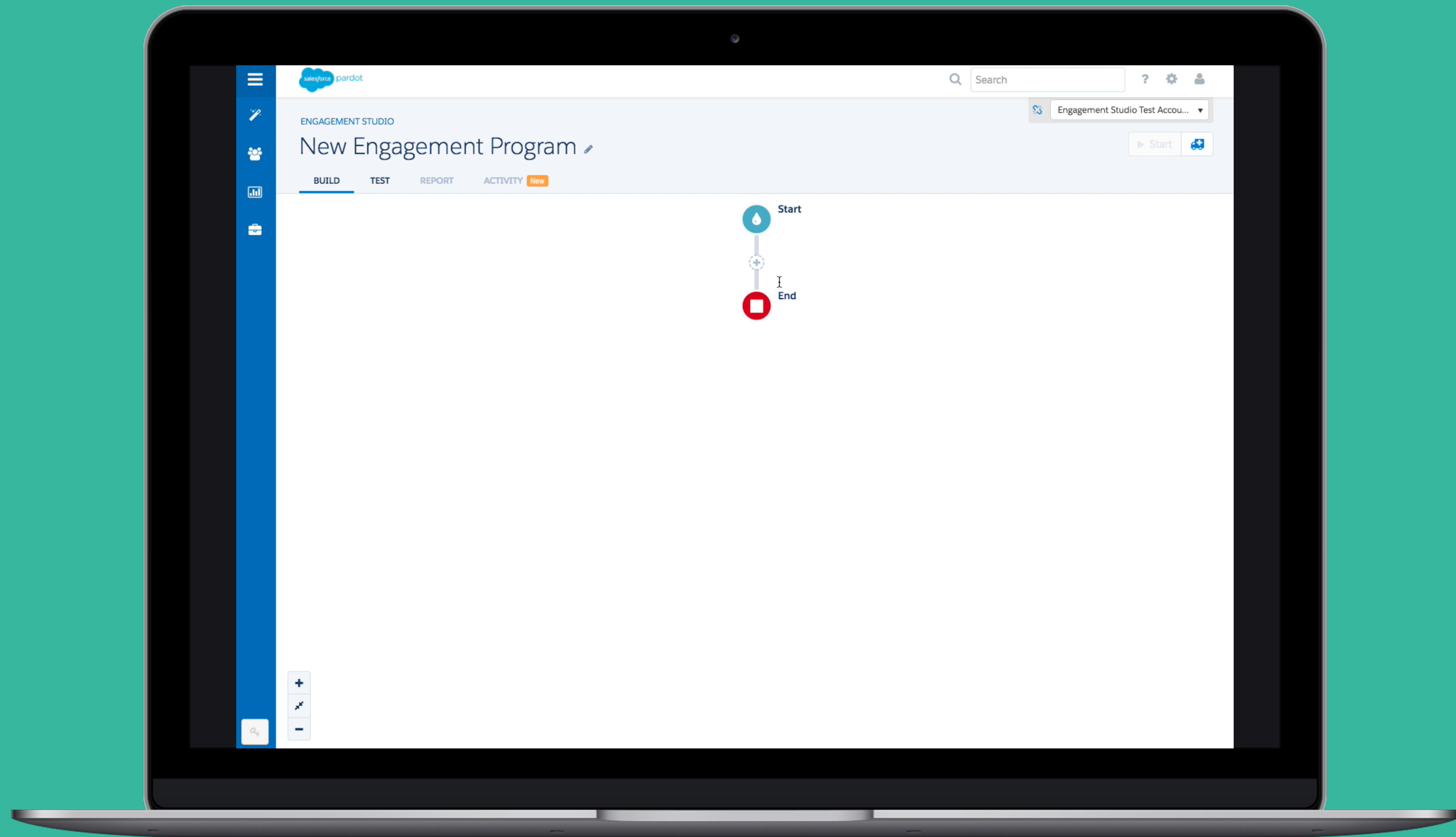
“Customers created their own terminology and phrases for the progress indicator on the testing screen: ‘orange goo,’ ‘yellow brick road’ and ‘choose my own adventure.’”





BEAUTY

ATTEND TO THE DETAILS





INVITING

EXPERIMENTATION

BY DESIGN