

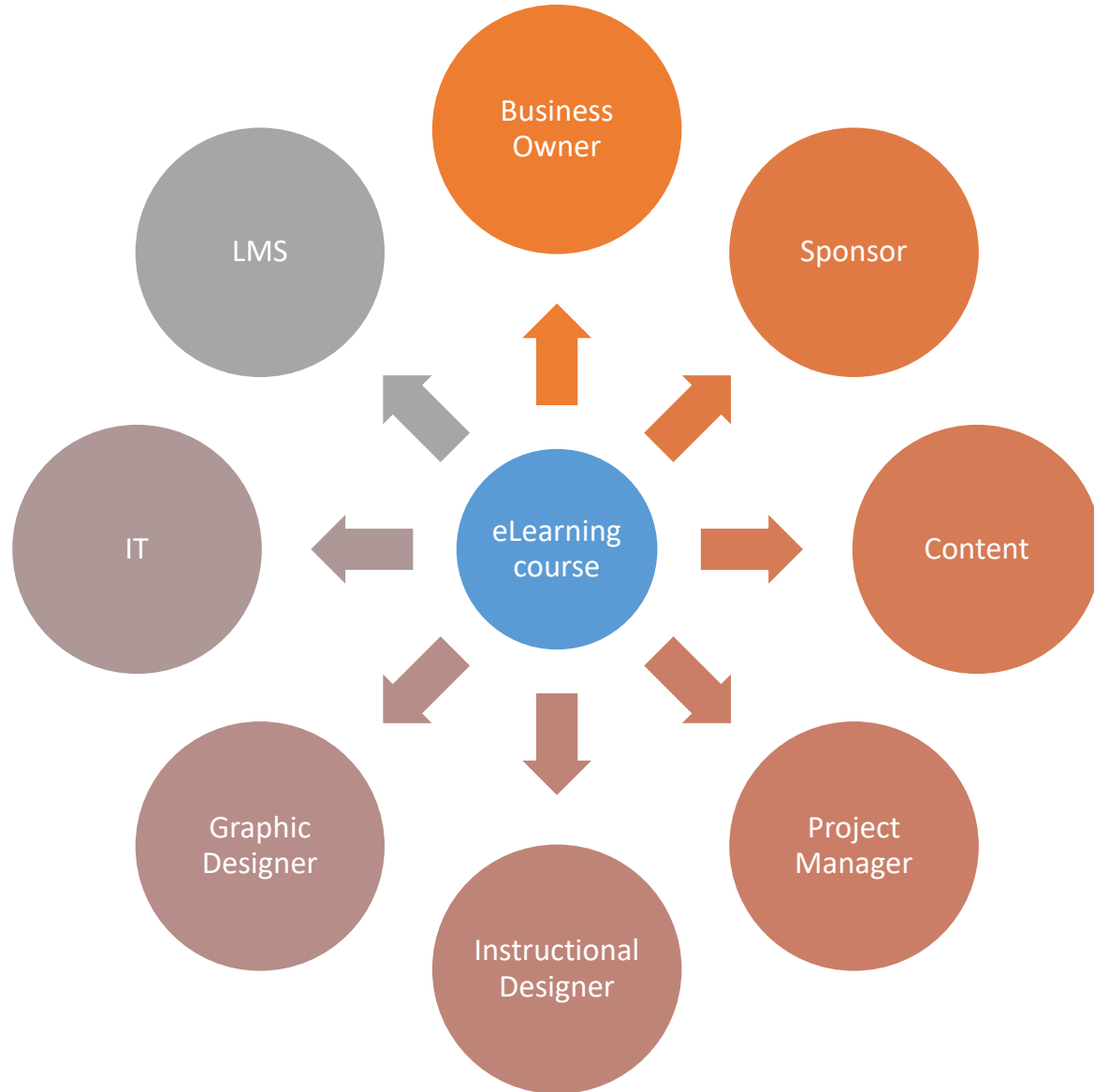
Good eLearning. Done well.



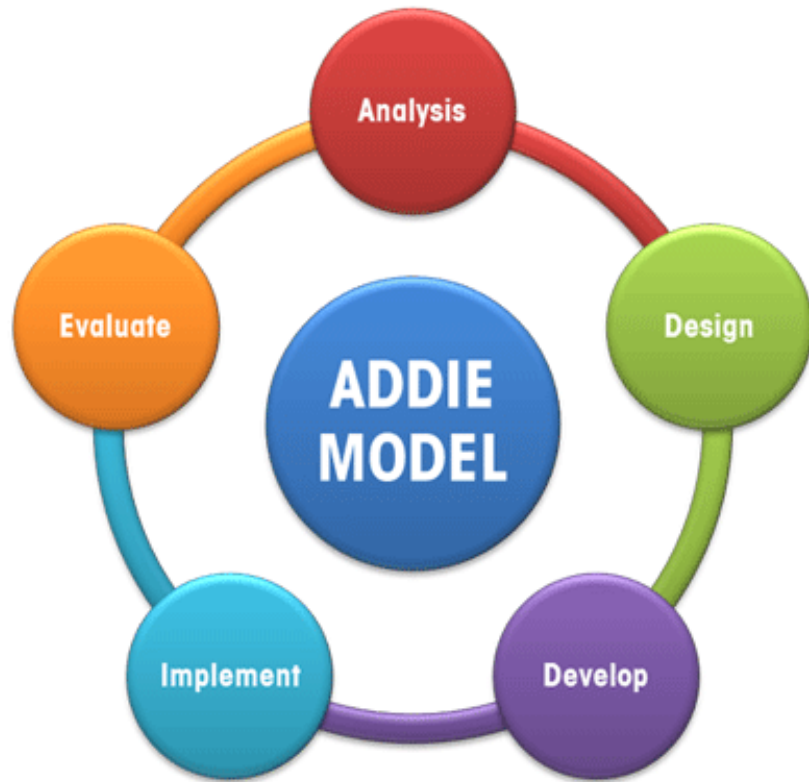
Training Magazine: Online Learning Conference | September 25-27, 2017 | Session C201

UX AND UI: APPLICATIONS FOR INSTRUCTIONAL DESIGN

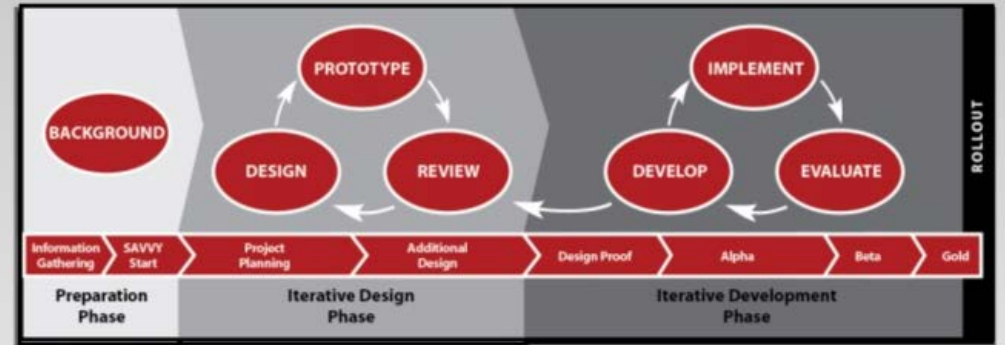
Jean Marrapodi, PhD, CPLP | jmarrapodi@illumina-interactive.com | 401-440-6165



An eLearning Course must meet the demands of many factions



Successive Approximation Model SAM 2



An Agile Model for Developing the Best Learning Experiences

Development typically follows ADDIE or SAM



Gantt Chart										
Project Name										
Project Manager										
Project Information										Go
ID	Project Name	Phase	Budget	Duration	Start	End	00000	00000	0	
1	Software Project: Phase 1		100,000	100						
2	Phase 1 (to date)		50,000	50						
3	Phase 2 (to date)		50,000	50						
4	Variant		(10,000)	(10)						
5	Dependency									Completed: 100%
6	Dependency									
ID	Workable Work/Task Name	Assigned To	Cost	Duration	Start	End	00000	00000	0	
1.1	Software Project: Phase 1.1		100,000	10 days						



We wrangle with competing priorities, schedules and politics.



Who is looking
out for the
user?





They need an
advocate!

This is where we can learn from

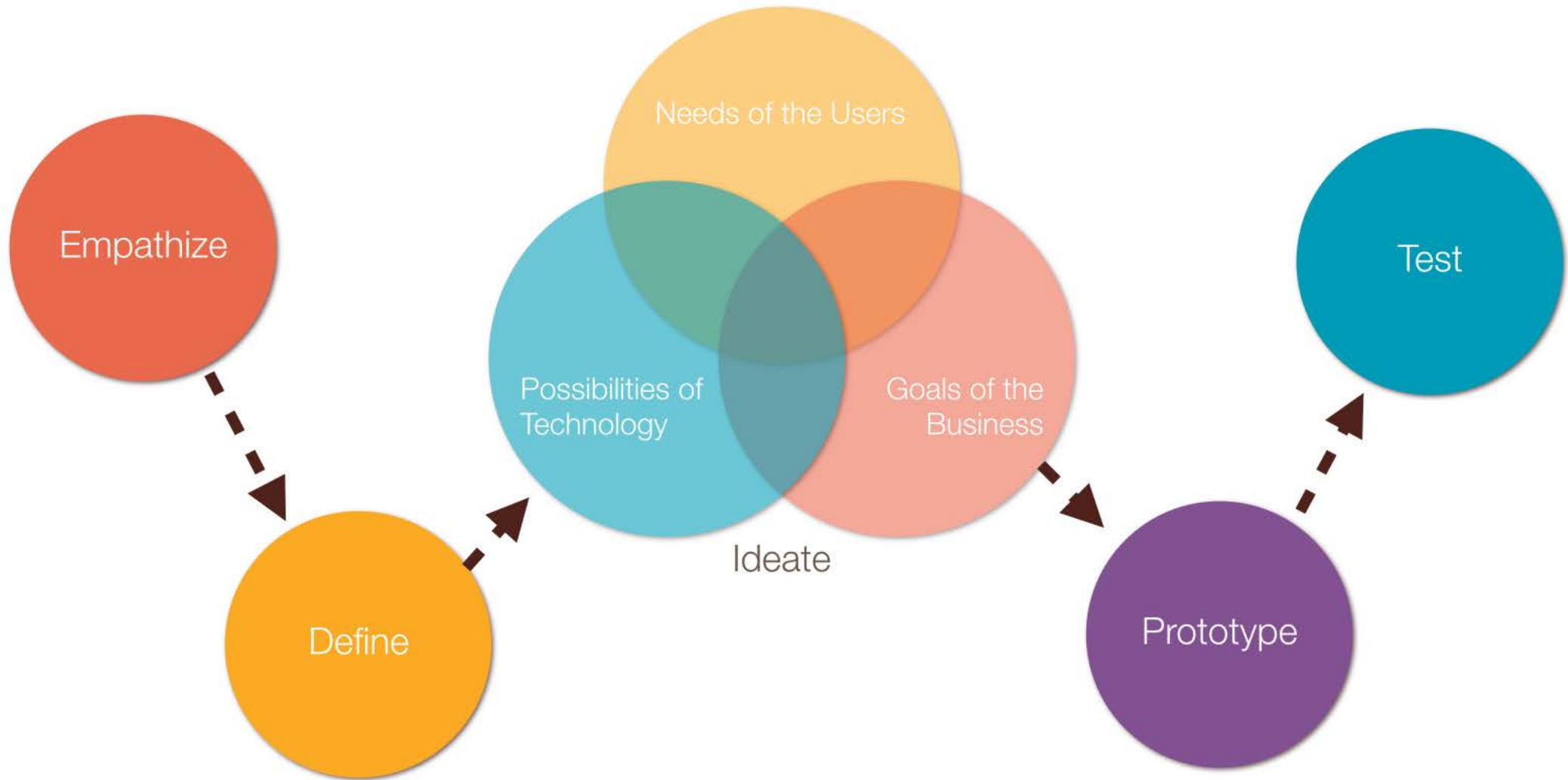
User Experience Designers.



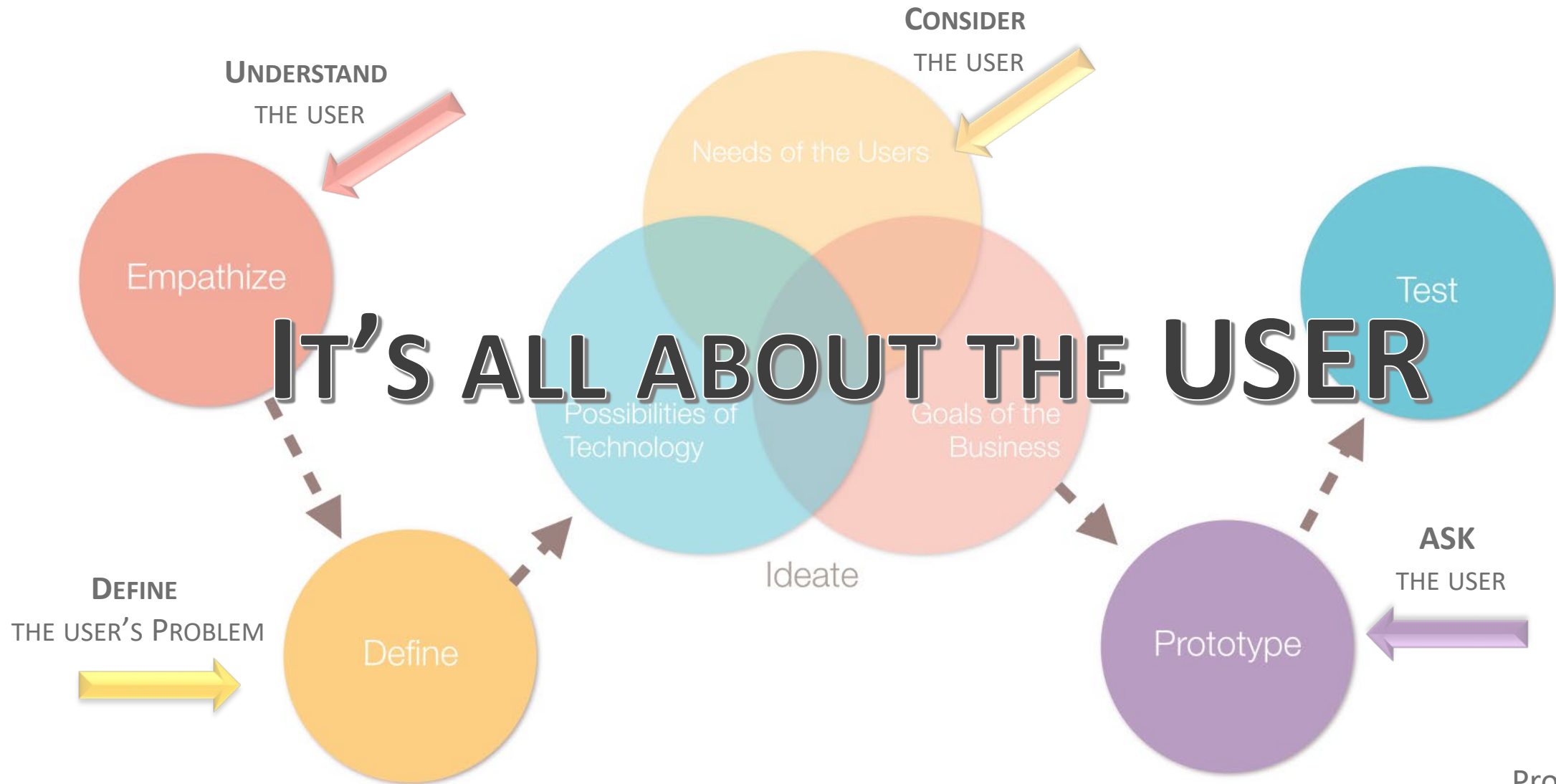
Which bottle provides the better user experience?

UX (User Experience) vs. UI (User Interface)

the ux design process



the ux design process



Is This Our Learner's Experience?



LX Design Pyramid

The learner experience pyramid demonstrates a hierarchy of learner experiences.

Learner experience design is led by the learner needs.

Learner experience design is led by organisational systems and processes.

Focus on experiences

Transformational

Meaningful

Convenient

Usable

Reliable

Functional

This is all we generally consider in elearning
Focus on tasks

Critical pivot point



LX Pyramid created by RMIT University and Academic Tribe is licensed under a Creative Commons Attribution - ShareAlike 4.0

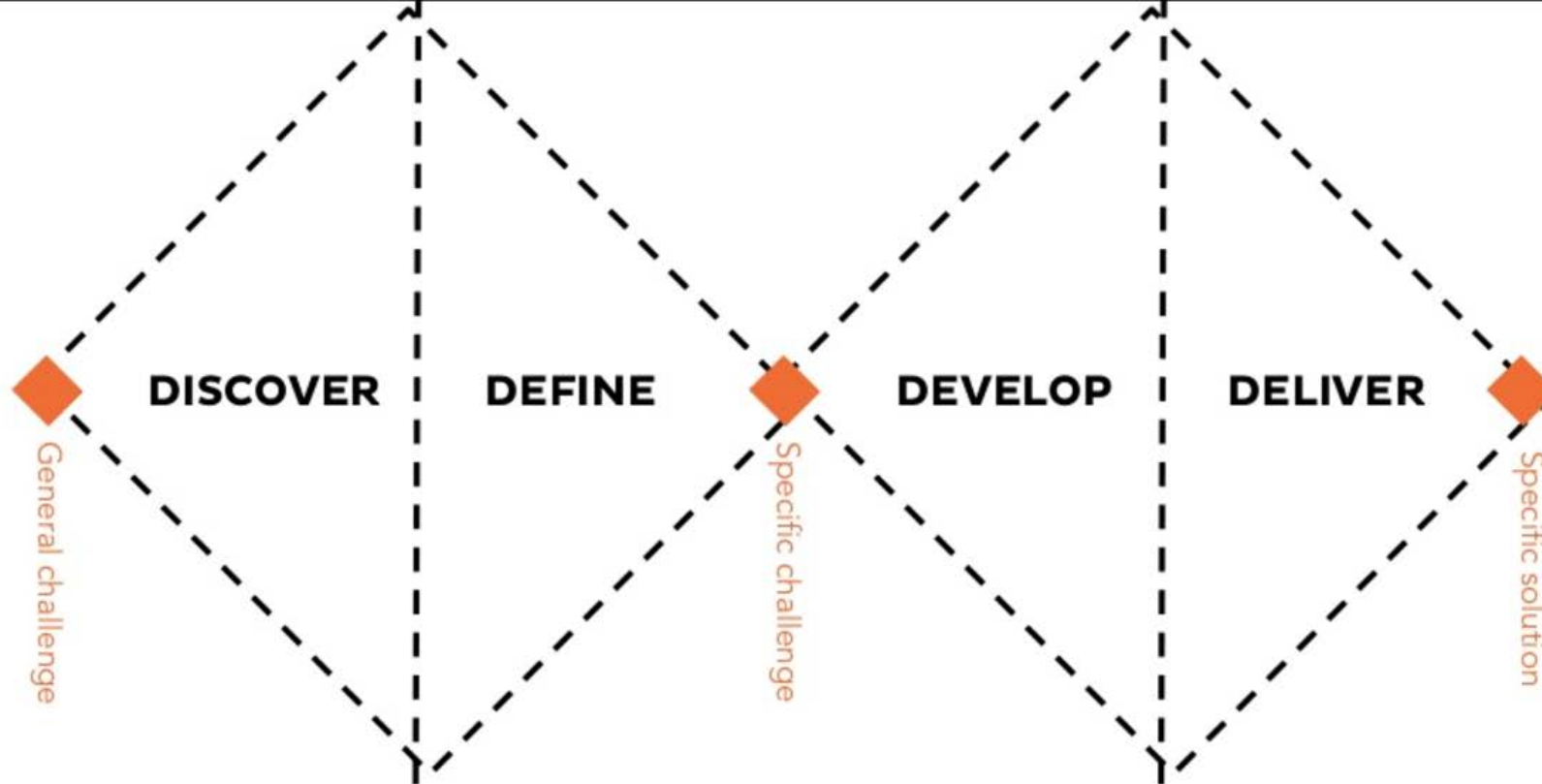
Based on CX Pyramid by Aberdeen Research after Mark Scibelli and Stephen Anderson.

UX – User
experience

UI – User
interface

LX – Learning
experience

Terminology



Learner & stakeholder driven design research

Gain insights and define challenges

Develop possible learning solutions through iteration

Improve and optimize final learner experience

RESEARCH

Technology research
Competitor analysis
Service design blueprint

CHALLENGE DEFINITION IDEA GENERATION

Workshops
Affinity diagramming
Scenario mapping
How might we...?
Problem statements

Sketching
Storyboarding
Scenario mapping

TESTING

Usability testing
A/B testing
User observations & interviews

USER EMPATHY

Learner & stakeholder interviews
Learner observation
Learning analytics
Persona

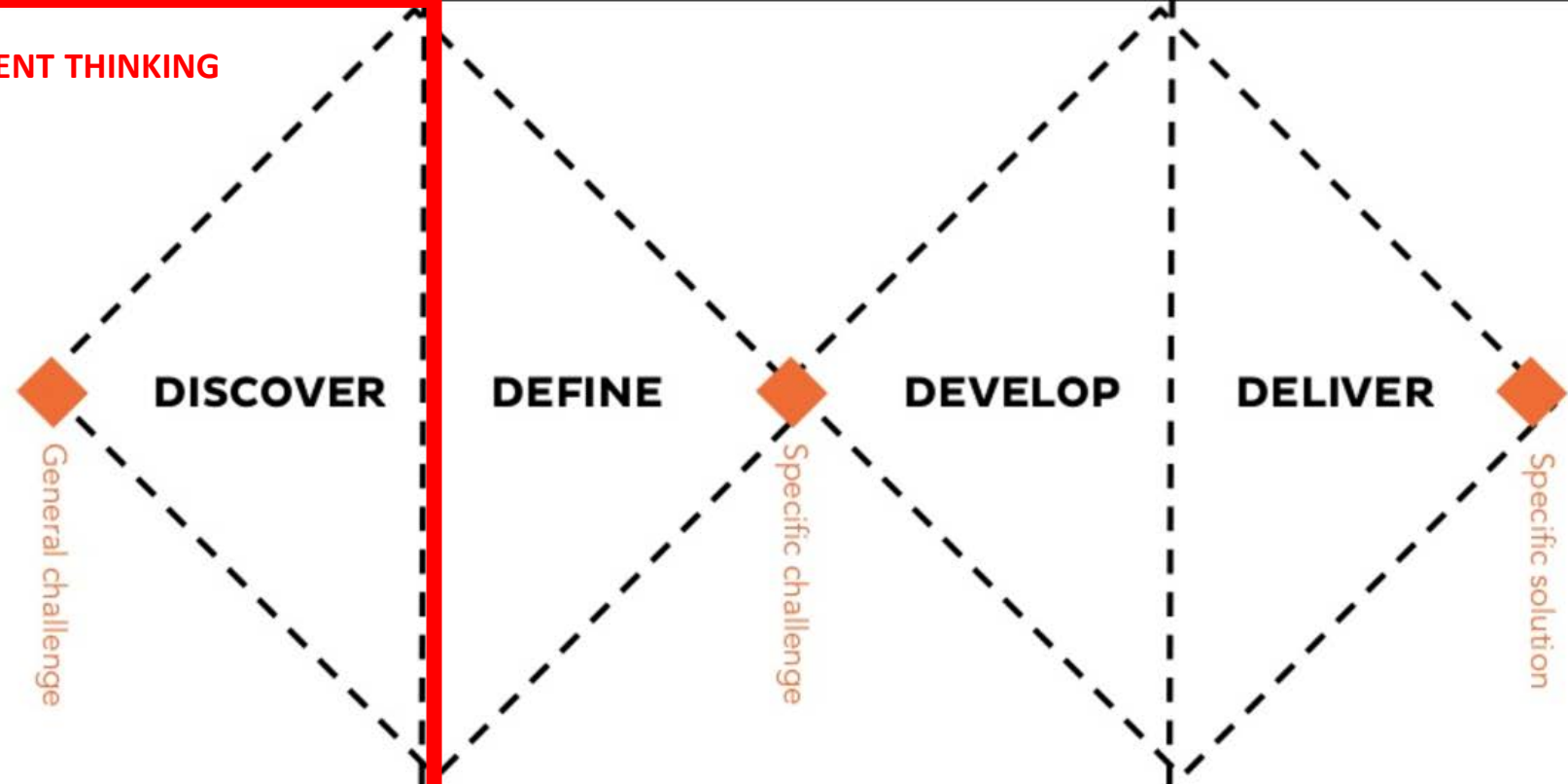
PROTOTYPING

Paper prototyping
Journey mapping
User testing
Service design blueprint
Information architecture

IMPLEMENT

Feedback loops
A/B testing
Learning analytics

DIVERGENT THINKING



Learner & stakeholder driven design research

Gain insights and define challenges

Develop possible learning solutions through iteration

Improve and optimize final learner experience

RESEARCH
Technology research
Competitor analysis
Service design blueprint

CHALLENGE DEFINITION
Workshops
Affinity diagramming
Scenario mapping
How might we...?
Problem statements

IDEA GENERATION
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Storyboarding
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Usability testing
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Paper prototyping
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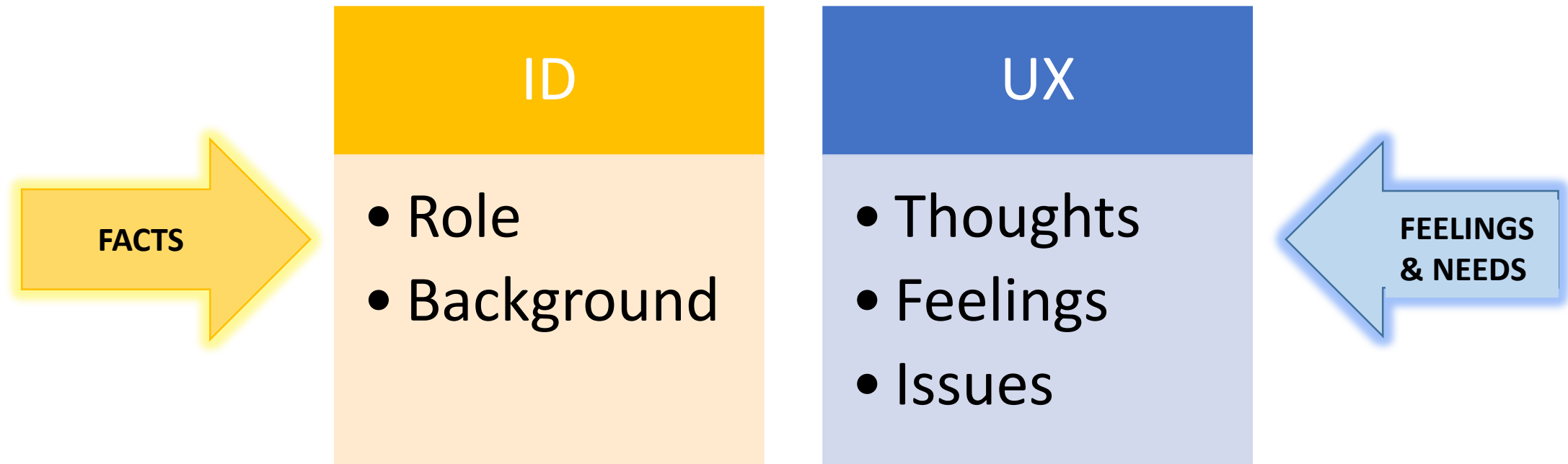
We must go beyond

Audience Analysis.

Which like evaluation, often is omitted. <sigh>

Step 1

Ask **WHO** is our Learner?



Create User Personas

Clark Andrews

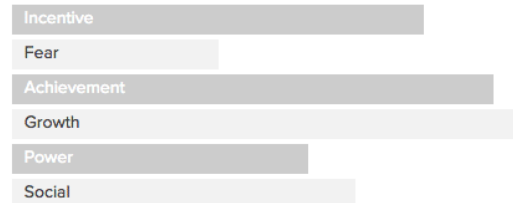
AGE 26
OCCUPATION Software Developer
STATUS Single
LOCATION San Jose, CA
TIER Experiment Hacker
ARCHETYPE The Computer Nerd

Friendly Clever Go-Getter



"I feel like there's a smarter way for me to transition into a healthier lifestyle."

Motivations



Goals

- To cut down on unhealthy eating and drinking habits
- To measure multiple aspects of life more scientifically
- To set goals and see and make positive impacts on his life

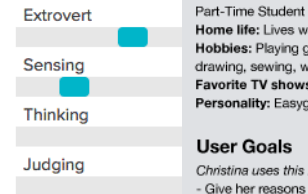
Frustrations

- Unfamiliar with wearable technology
- Saturated tracking market
- Manual tracking is too time consuming

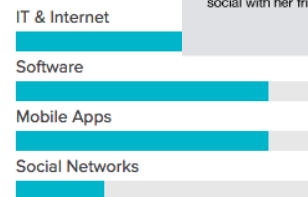
Bio

Aaron is a systems software developer, a "data junkie" and for the past couple years, has been very interested in tracking aspects of his health and performance. Aaron wants to track his mood, happiness, sleep quality and how his eating and exercise habits affects his well being. Although he only drinks occasionally with friends on the weekend, he would like to cut down on alcohol intake.

Personality



Technology



Brands



PERSONAS AT A GLANCE

Christina
Moletti
Freelance Graphic Designer



"Living life is a creative process too"

- Has enough money but not much more
- Works hard during the day but on her own hours
- Walking is her main way to travel, day or night

Personal Information

Age: 25
Location: Pittsburgh, PA
Education: BA Graphic Design NC State University, Part-Time Student
Profession: Freelance Graphic Designer
Home life: Lives with a roommate (Eva 25),
Hobbies: Playing guitar and xylophone, reading, drawing, sewing, watching movies, sleeping
Favorite TV shows: Doesn't watch much TV
Personality: Easygoing, outgoing, try new things

User Goals

- Christina uses this information system to...
- Give her reasons to go out walking at night
 - To be active and aware of her surroundings at night
 - To find the safest places to go at night
 - Make walking and being out at night more social with her friends

Maria
Nantes
Newspaper Editor



"I want to stay healthy both mentally and physically always"

- Health Conscious
- Use basic technology for day to day activities
- Enjoy Social groups

Personal Information

Age: 31
Location: Ann Arbor, MI
Education: Master's in English from U of Michigan
Profession: Newspaper Editor
Home life: Married, no children
Hobbies: Walking, making friends, Yoga
Favorite TV shows: Desperate Housewives
Personality: Outgoing, Passionate, Social, Cheerful, Sophisticated

User Goals

- Maria uses this information system to...
- Connect and coordinate with friends
 - Find safe walking routes at night
 - Get a sense of safety by getting more info
 - Find out about social events taking place at night, which might be of potential interest
 - Wants to get emotional and mental relaxation by walking

James
Goetsener
Senior Engineer



"I know what I'm doing, I'm willing to try everything new."

- is willing to spend money on that
- Likes to chat with others online
- Knows that health is very important & work out

Personal Information

Age: 37
Location: San Francisco, CA
Profession: Cellphone Interface Developing
Education: Master's
Home life: Single
Hobbies: Surfing online to look for new electronic products, working out at gym
Favorite TV shows: Friends, Heros
Personality: knowledgeable in popular stuffs, talkative, keeping things on schedule

User Goals

- James uses this information system to...
- Stay ahead of latest trends on mobile devices
 - Take more time to walk as the substitute for exercise
 - Meet new friends through this application
 - Feel free to walk at night
 - Discuss the new interaction
 - Try to figure out a method for socializing and also provide a feeling of security

From LinkedIn Media Group

Background:

- Grew up in town
- Honors Student in High School
- Served as President of the Philanthropy Group in High School

Sample Sally

Challenges:

- Not able to give as much since she is a college student
- Difficult to find time to volunteer

Demographics:

- Millennial
- 22 years old
- College student
- Attends local university

Hobbies & Interests:

- Supports children's charities
- Tech savvy
- Loves nature, yoga, health food

Common Objections:

- Not feeling valued for her time spent volunteering
- Not receiving information in a timely manner

Goals:

- Education Major
- Wants to eventually work internationally and teach children abroad

Biggest Fears:

- Will get stuck with no development opportunities
- Won't be able to find a job in her field

From Single Grain

Free creation software <https://xtensio.com/user-persona/>

Use focus groups and interviews to identify patterns

Build Personas

“
”

FUTURE DREAM

PORTRAIT

BIO

DAILY ROUTINE

SOCIAL CONNECTIONS

COMMUNICATION

PERSONALITY

Introvert Extrovert

Individual Social

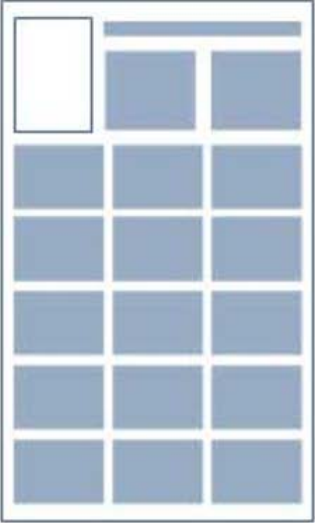
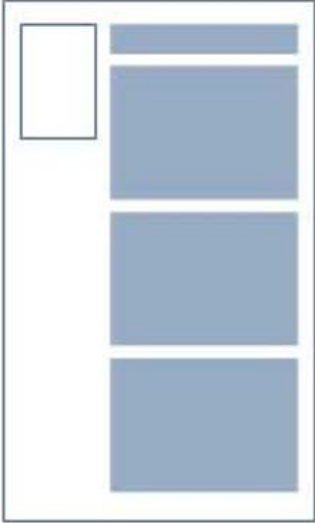
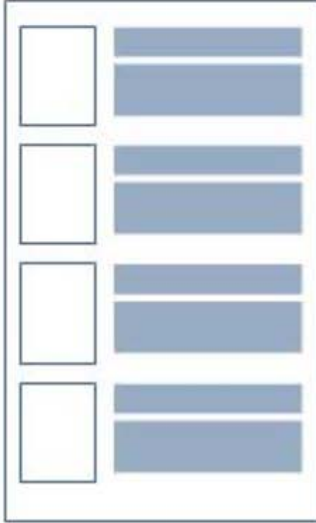
Responsible Risk Taker

Traditional Modern

Calm Loud

Realistic Dreamer

User Persona Examples

The Narrative	The Table	The Quick-and-Dirty
		
<p>Best for stakeholders who are not so concerned about the technical details of user needs.</p>	<p>Best for designers who need an easy way to compare designs to user needs.</p>	<p>Best in situations where personas lack sufficient research.</p>



Terry Teller, 19

GENERATE NAME

Idealist



Goals

Terry has sales goals to meet at the bank. Terry wants to get to college some day, but for now, she enjoys spending time with her boyfriend and friends she graduated Dorchester High with.

Quote

“ Things are so old fashioned around here. I wish people would get with it more. ”

Background

Barely graduated high school last June. Lives at home with her dad, who divorced mom when Terry was 8.

Motivations

Latest gadgets
Recognition
Get out on time

Frustrations

Meeting her numbers
"Inept customers"
Slow producers

Brands and influences



URBANOOG

+ ADD IMAGE

Technology

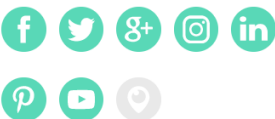
Devices own and used



Browsers



Social



Demographic

Female 19 years

New York

Single

Teller

20,000

Loves spending money.

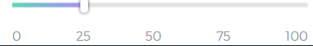
+ ADD FIELD

Skills

Customer service



Sales



Accuracy



Computer skills



+ ADD SKILL



Betty Banker, 56

GENERATE NAME

Guardian



Goals

Betty has sales goals to meet at the bank. She also is centered on her family, which includes her grandchildren.

Quote

“ The best part about my job is running into a customer in the supermarket and having them say hi first. Serving them is the most important part of my job. ”

Background

Seasoned professional. Worked her way up through the ranks when she started as a teller after high school.

Motivations

Recognition
Family
Community service

Frustrations

Meeting her numbers
System changes
Competing demands

Demographic

Female 56 years

New York

Married

Senior Universal Banker

50,000

Loves her job

+ ADD FIELD

Skills

Customer service



Sales



Efficient with paperwork



Follow up



+ ADD SKILL

Brands and influences



+ ADD IMAGE

Technology

Devices own and used



Browsers



Social



We know WHO they are.

Now we look at what they do.

UX – User
experience

UI – User
interface

LX – Learning
experience

CX –
Customer
experience

Terminology

Great Product



GE Healthcare



The new **GE Optima MR360** is well suited for a wide range of MR scanning needs – with the ease of operation to help make a clinician's staff more productive. For streamlining routine scans, the Optima MR360 incorporates an express exam approach to MR.

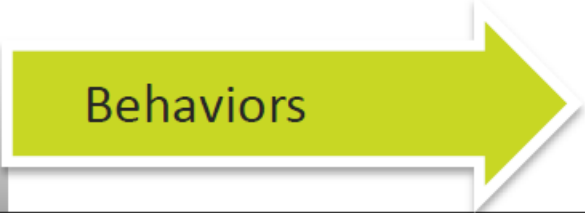
It includes many intuitive and automated functions that help increase patient comfort, operator confidence, image consistency, and professional satisfaction of MR staff.

Case study in <http://designingcx.com/cx-journey-mapping-toolkit/>

Sofia

Age 6½







GOES TO
INITIAL
DOCTOR

...

RIDES TO
HOSPIT'L

...

CHECKS
IN

WALKS
TO MRI
ROOM

SEES MRI
MACHINE

CRIES &
RESISTS

...

SEES
DOCTOR
ENTER

GETS
DRUGGED

GOES
THROUGH
MRI



GOES TO
INITIAL
DOCTOR

...

RIDES TO
HOSPIT'L

...

CHECKS
IN

WALKS
TO MRI
ROOM

SEES MRI
MACHINE

CRIES &
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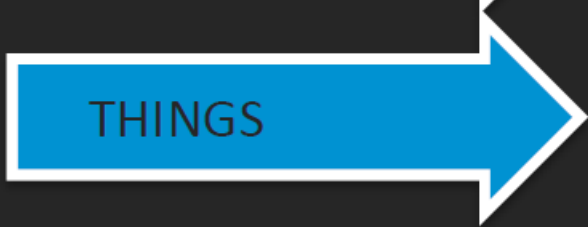
...

SEES
DOCTOR
ENTER

GETS
DRUGGED

GOES
THROUGH
MRI

ON STAGE
EXPERIENCE





GOES TO INITIAL DOCTOR

...

RIDES TO HOSPIT'L

...

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

CRIES & RESISTS

...

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI

DOCTOR

MOM

CHECKIN NURSE

IMAGING TECH

MOM

NURSE

DOCTOR ANESTH.

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

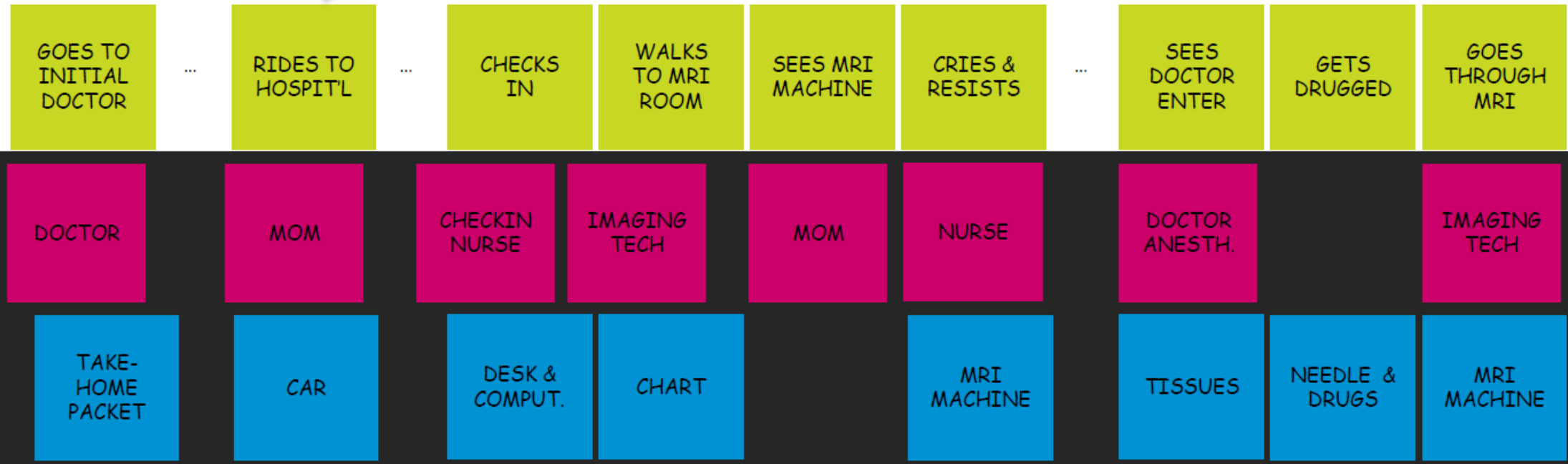
NEEDLE & DRUGS

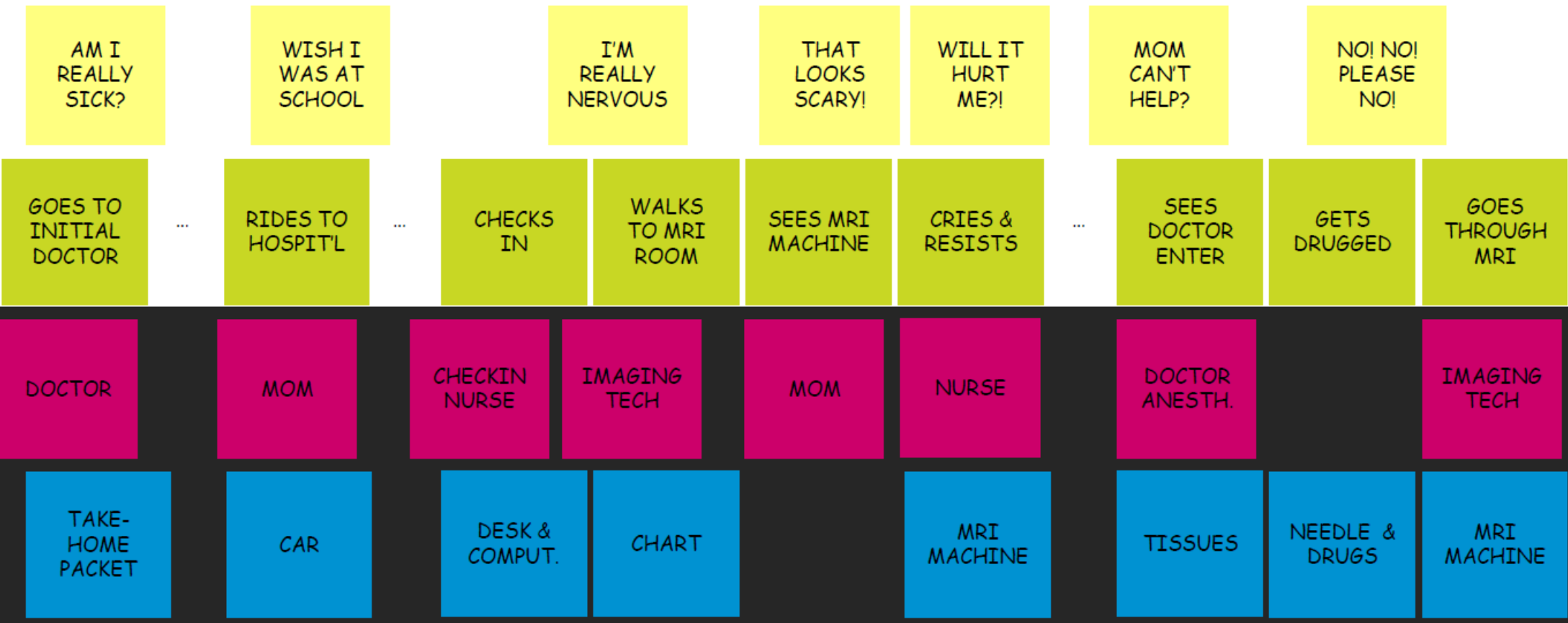
MRI MACHINE



SOFIA

ATTITUDES







SOFIA

AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!

WILL IT HURT ME?!

MOM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

...

RIDES TO HOSPIT'L

...

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WALKS TO MRI ROOM

SEES MRI MACHINE

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CHART

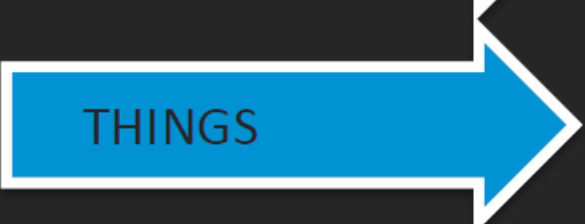
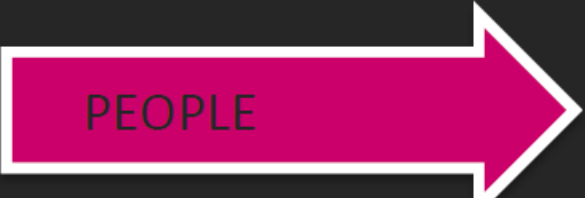
MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE

BACK STAGE SUPPORT





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NEEDLE & DRUGS

MRI MACHINE

TECH. WRITER

HOSPIT'L BLDG MGR

SYSTEM ADMIN.

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

RESERV. SYSTEM

PATIENT RECORD SYSTEM

STAFF PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



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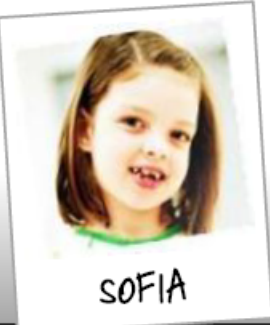
PATIENT RECORD SYSTEM

STAFF PAGING SYSTEM

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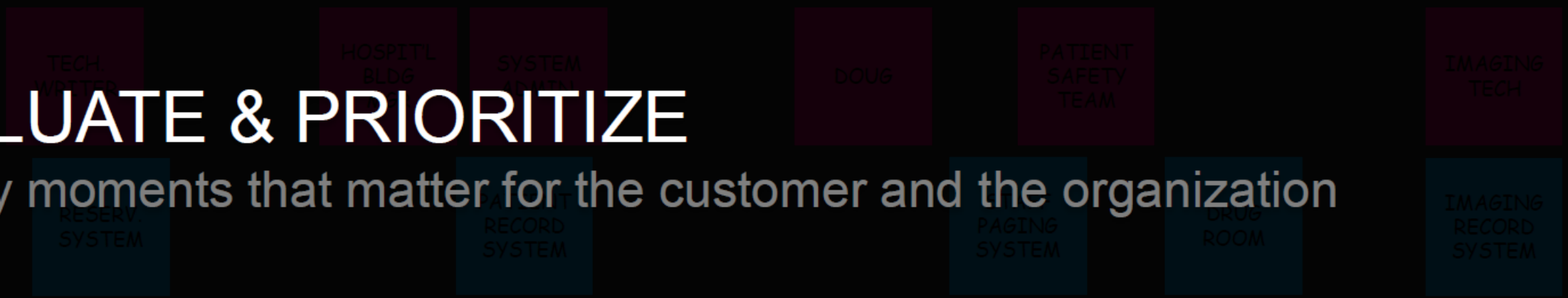
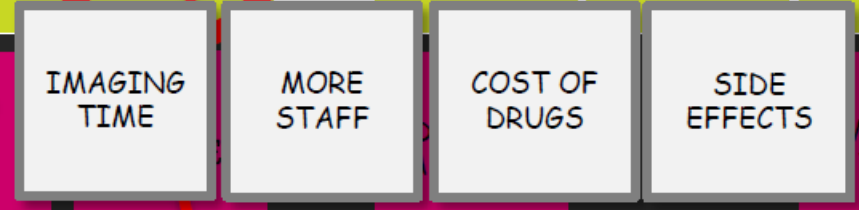
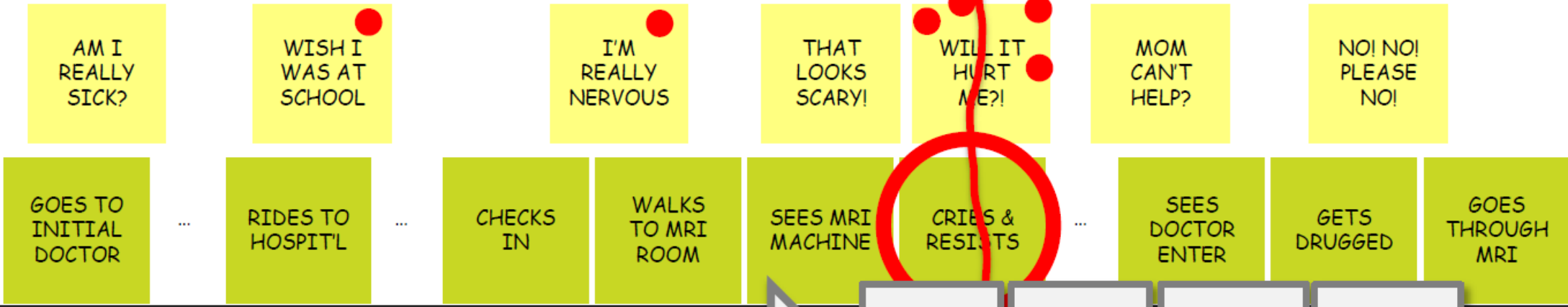
PATIENT RECORD SYSTEM

STAFF PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM





EVALUATE & PRIORITIZE

Identify moments that matter for the customer and the organization



NEEDS



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MRI MACHINE

TECH

HOSPIT'L BLDG

SYSTEM

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

EXPLORE CUSTOMER NEEDS

Gain deeper understanding of functional and emotional needs

RESERV SYSTEM

RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



NEEDS

HAVE SCAN
FEEL SAFE



AM I REALLY SICK?

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TECH WAITED

HOSPIT'L BLDG

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DOUG

PATIENT SAFETY TEAM

IMAGING TECH

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Gain deeper understanding of functional and emotional needs

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RECORD SYSTEM

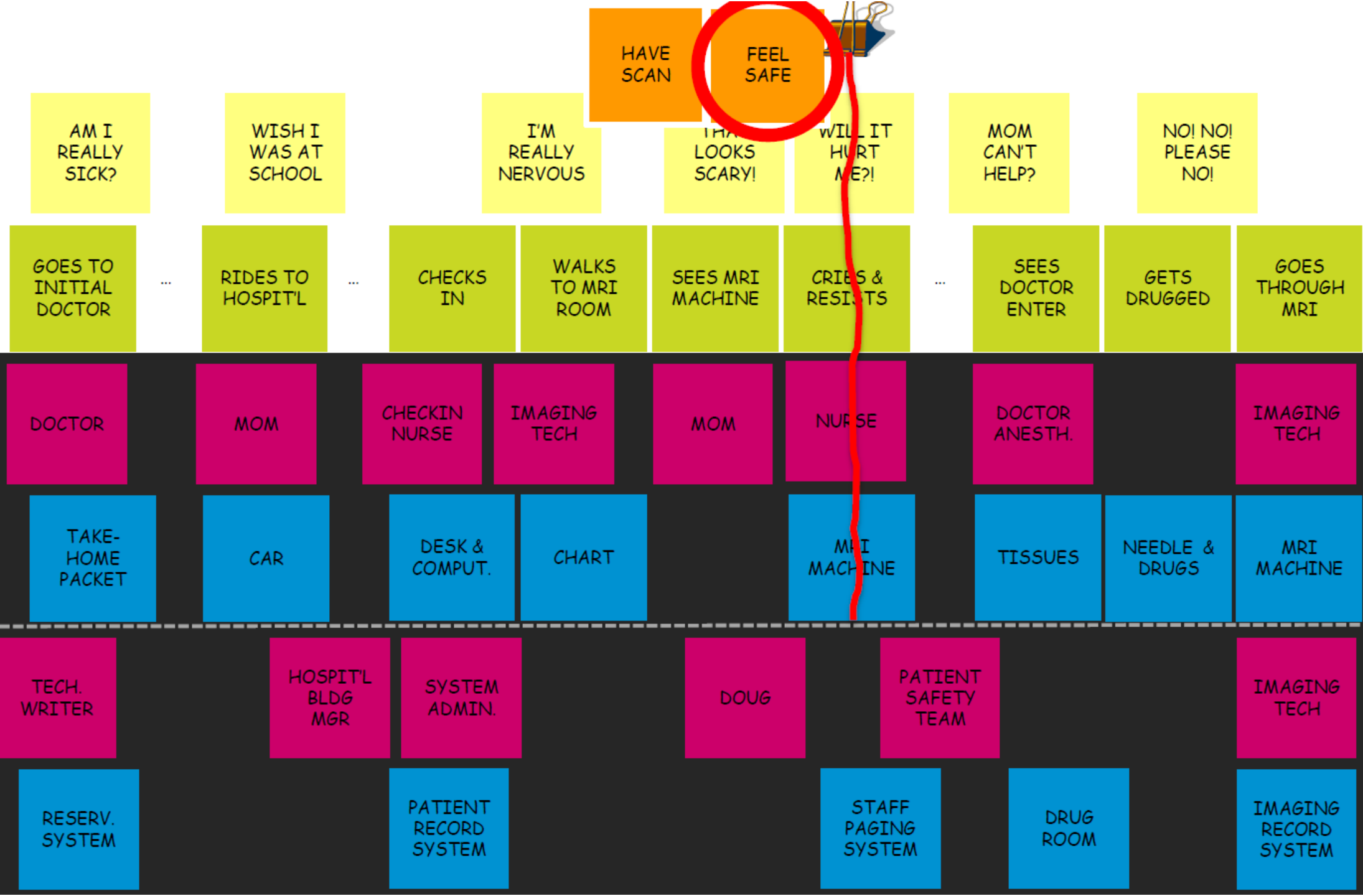
PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



SOFIA





Roles & Processes

POSITION PATIENT

TAKE IMAGE

DEVELOP IMAGE



AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

HAVE SCAN

FEEL SAFE

WILL IT HURT ME?!

MOM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

RIDES TO HOSPIT'L

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

CRIES & RESISTS

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI

DOCTOR

MOM

CHECKIN NURSE

IMAGING TECH

MOM

NURSE

DOCTOR ANESTH.

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE



POSITION PATIENT

TAKE IMAGE

DEVELOP IMAGE

?

EVALUATE & FRAME

Examine existing capabilities to determine issues / opportunities

TECH ADMIN

HOSPIT'L BLDG

SYSTEM ADMIN

DOUG

SUPPORT TEAM

RESERV SYSTEM

RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



EVALUATE & FRAME

Re-examine issue / opportunity based on deep customer understanding



AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!

WILL IT HURT ME?!

MOM CAN'T HELP?

NO! NO! PLEASE NO!

FEEL SAFE

GOES TO INITIAL DOCTOR

RIDES TO HOSPIT'L

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

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NEEDLE & DRUGS

MRI MACHINE

TECH

HOSPIT'L BLDG

SYSTEM

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

DESIGN NEW EXPERIENCES

Innovate to influence attitudes and change behaviors

RESERV. SYSTEM

RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!

FEEL SAFE

WILL IT HURT ME?!

MOM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

...

RIDES TO HOSPIT'L

...

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

CRIES & RESISTS

...

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI

DOCTOR

MOM

CHECKIN NURSE

IMAGING TECH

MOM

NURSE

DOCTOR ANESTH.

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE

IDEA: LET'S GO CAMPING

TECH

HOSPIT'L BLDG

SYSTEM

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

DESIGN NEW EXPERIENCES

Innovate to influence attitudes and change behaviors

RESERV. SYSTEM

RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



Great Experience

Step 2

Map the Journey

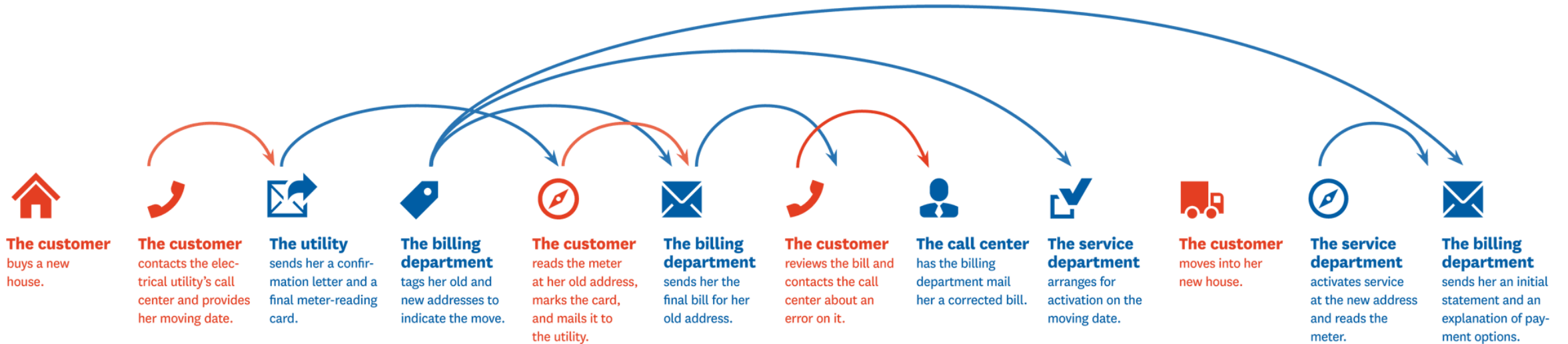
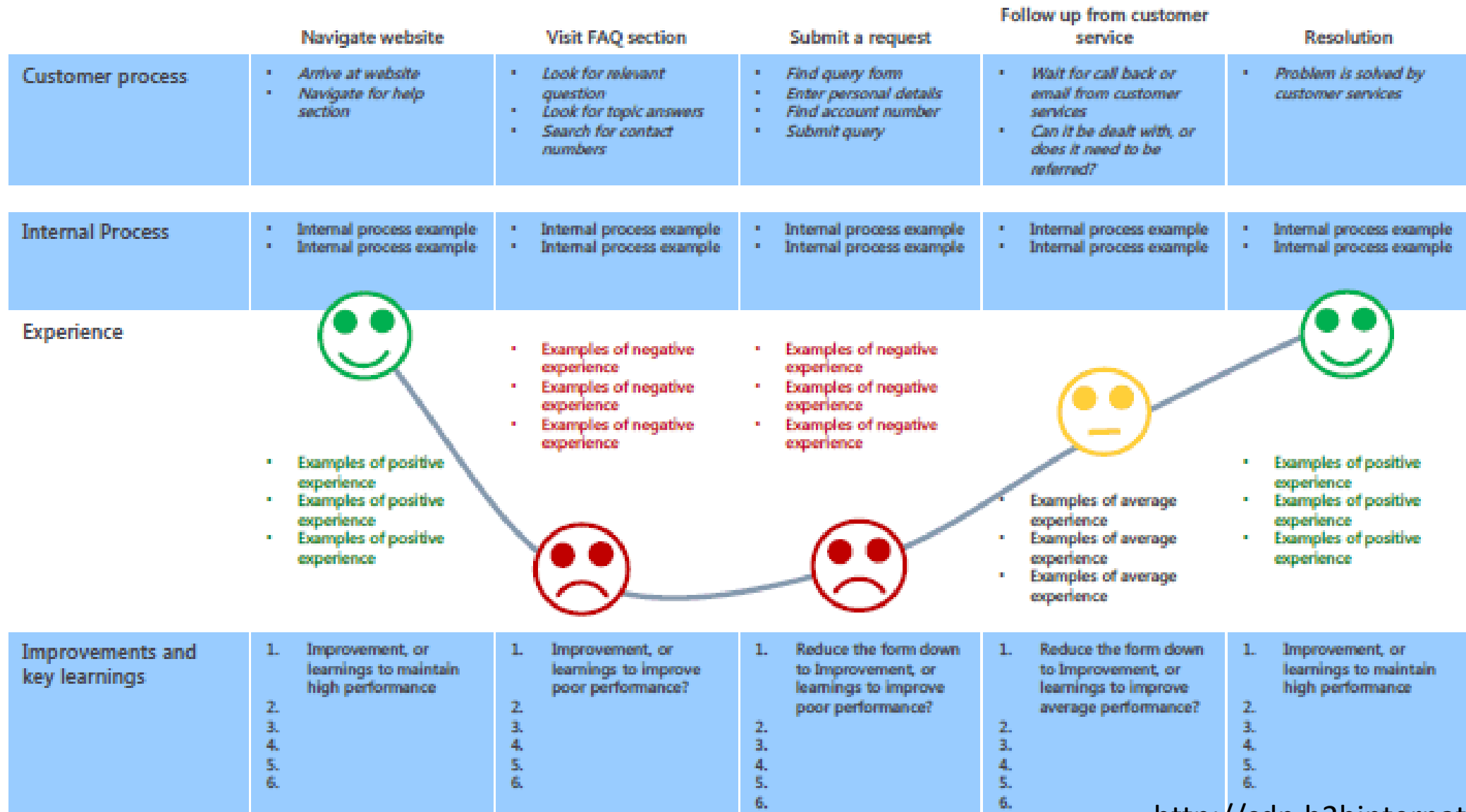
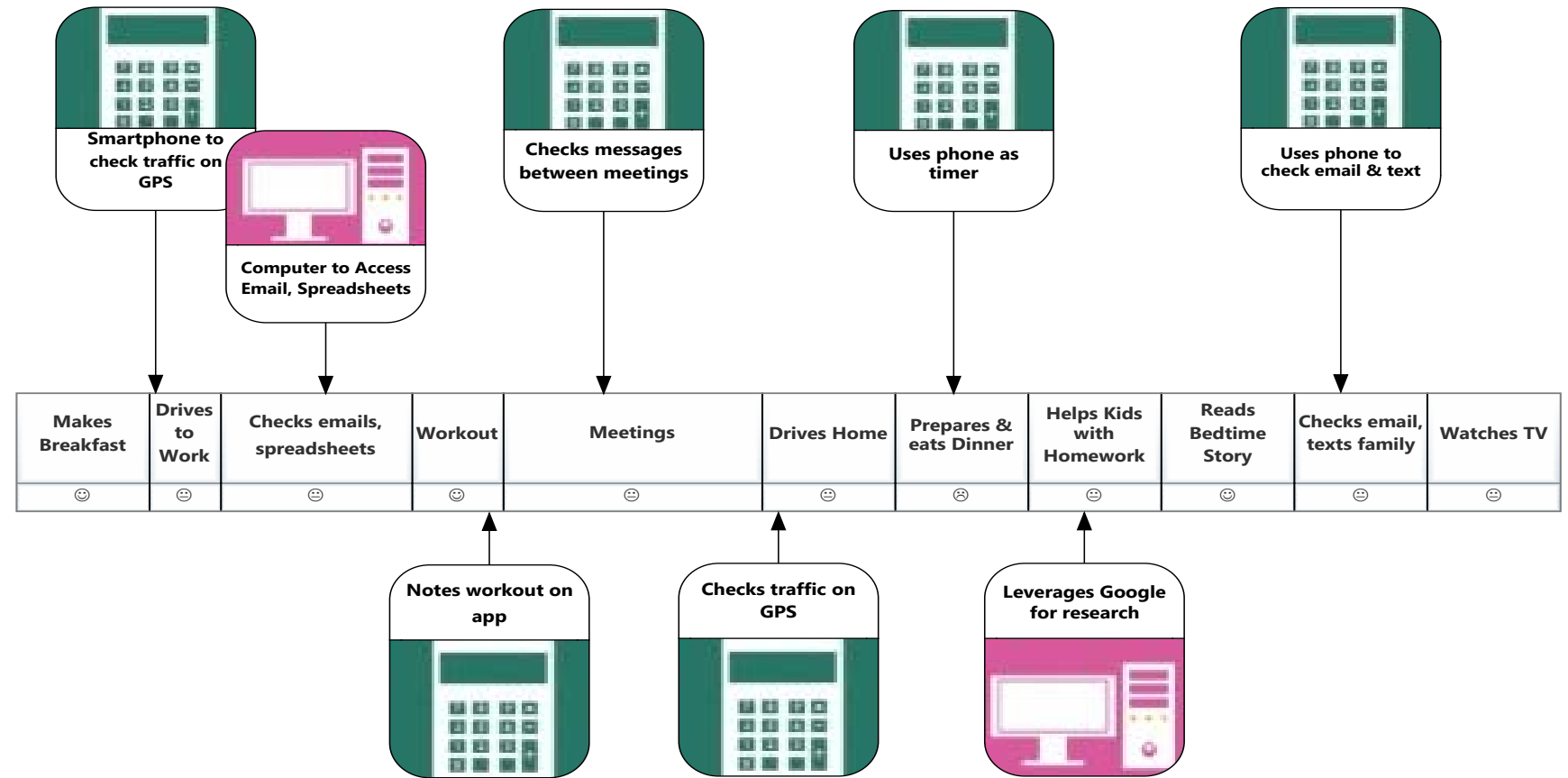
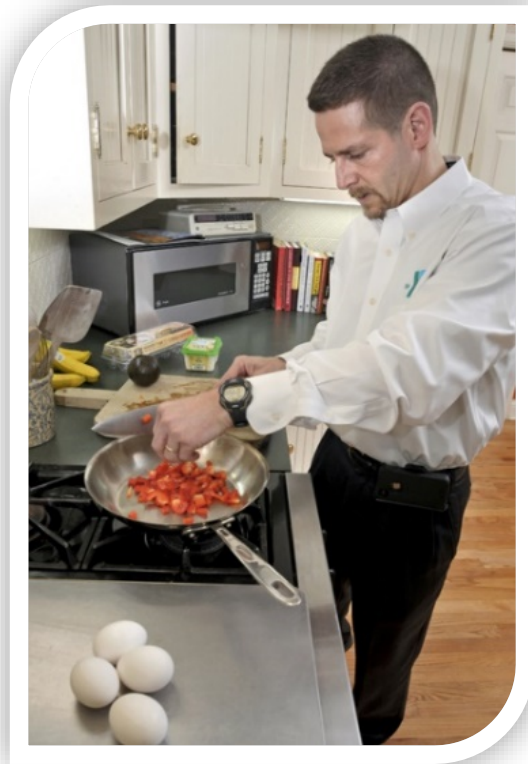


Image from <https://hbr.org/2013/09/the-truth-about-customer-experience>

Journey Map – Look for Pain Points



Brent's Day



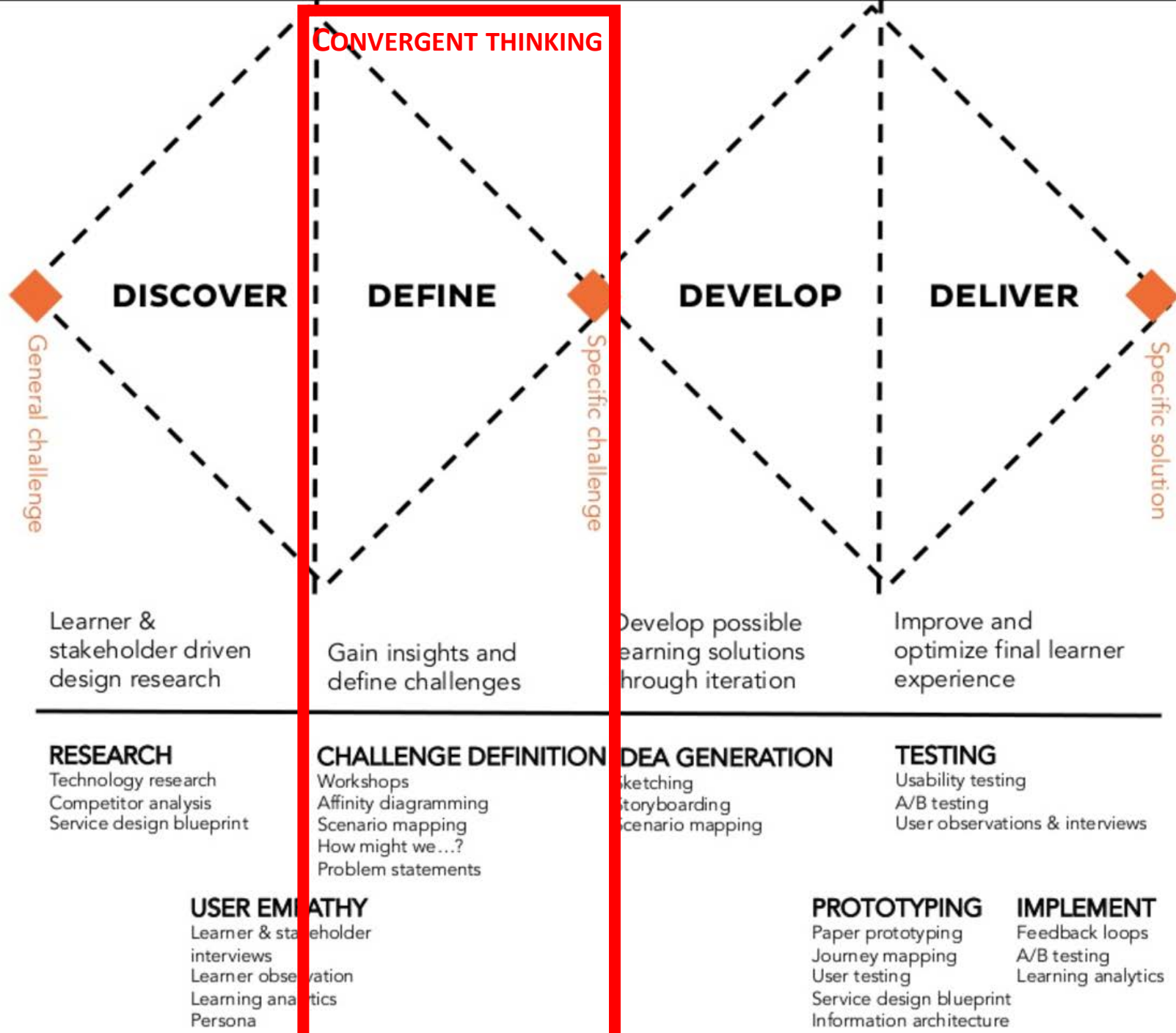
Pain Points: Commute traffic in AM & PM, meal prep, desire to relax after work but need to prepare meals, healthy meals take more time to create

Opportunity: Fathers need a way to simplify and shorten meal preparation because they would rather spend time with their kids than cooking

Step 3

We know WHO they are and WHAT they do.

Now we SYNTHESIZE.



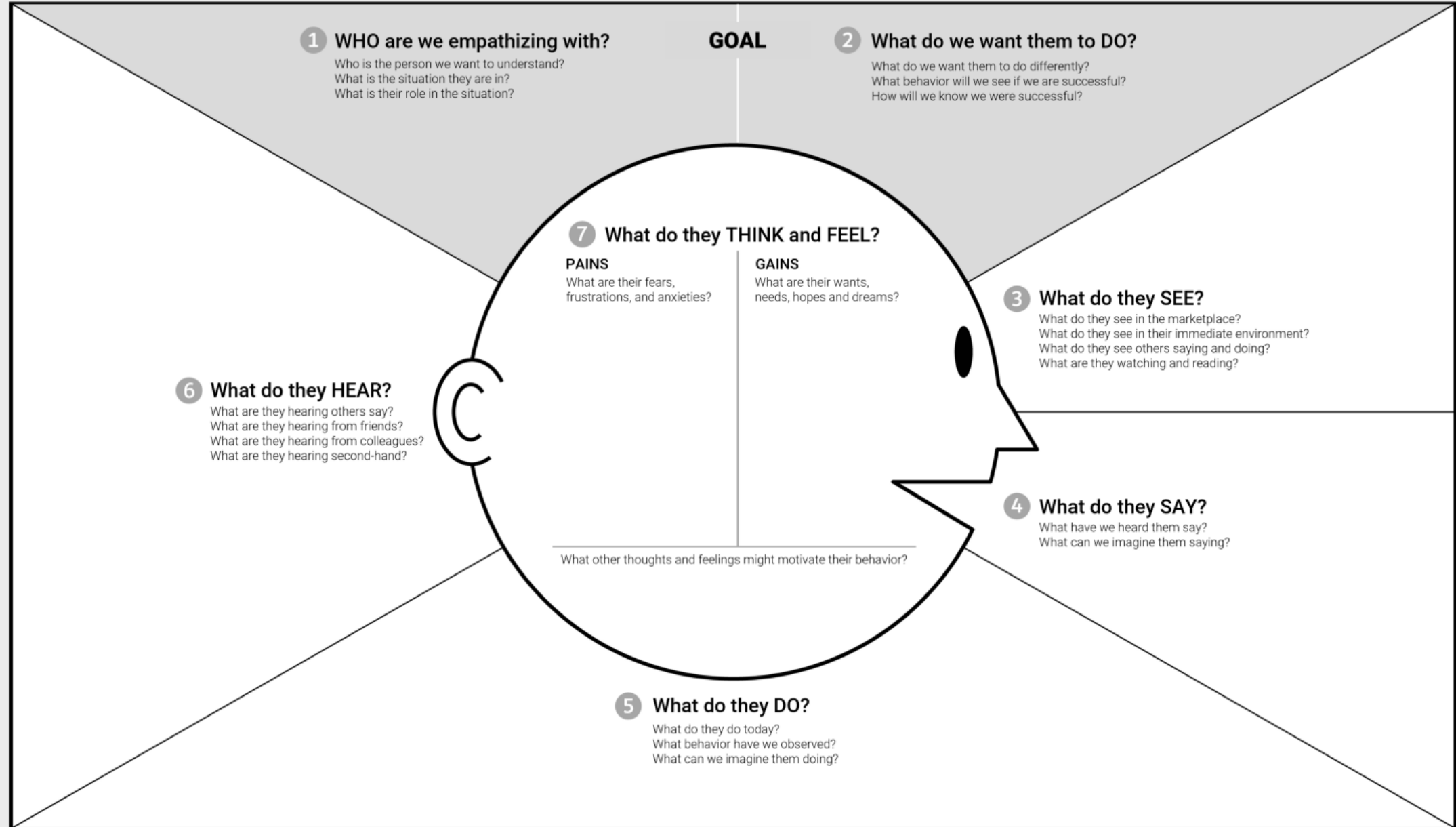
Empathy Map Canvas

Designed for:

Designed by:

Date:

Version:




 LEARNING OUTCOMES

Grid area for Learning Outcomes

LEARNING OBJECTIVES

Behavior	Insight
Skill	Knowledge

 STRATEGY


Grid area for Strategy

 ENVIRONMENT

Physical	Virtual
Social	Cultural

 LOCATION

Grid area for Location

 PEOPLE

Grid area for People

 CHARACTERISTICS

Grid area for Characteristics

 CONSTRAINTS


Grid area for Constraints

 RESOURCES

Grid area for Resources

 ACTIVITIES

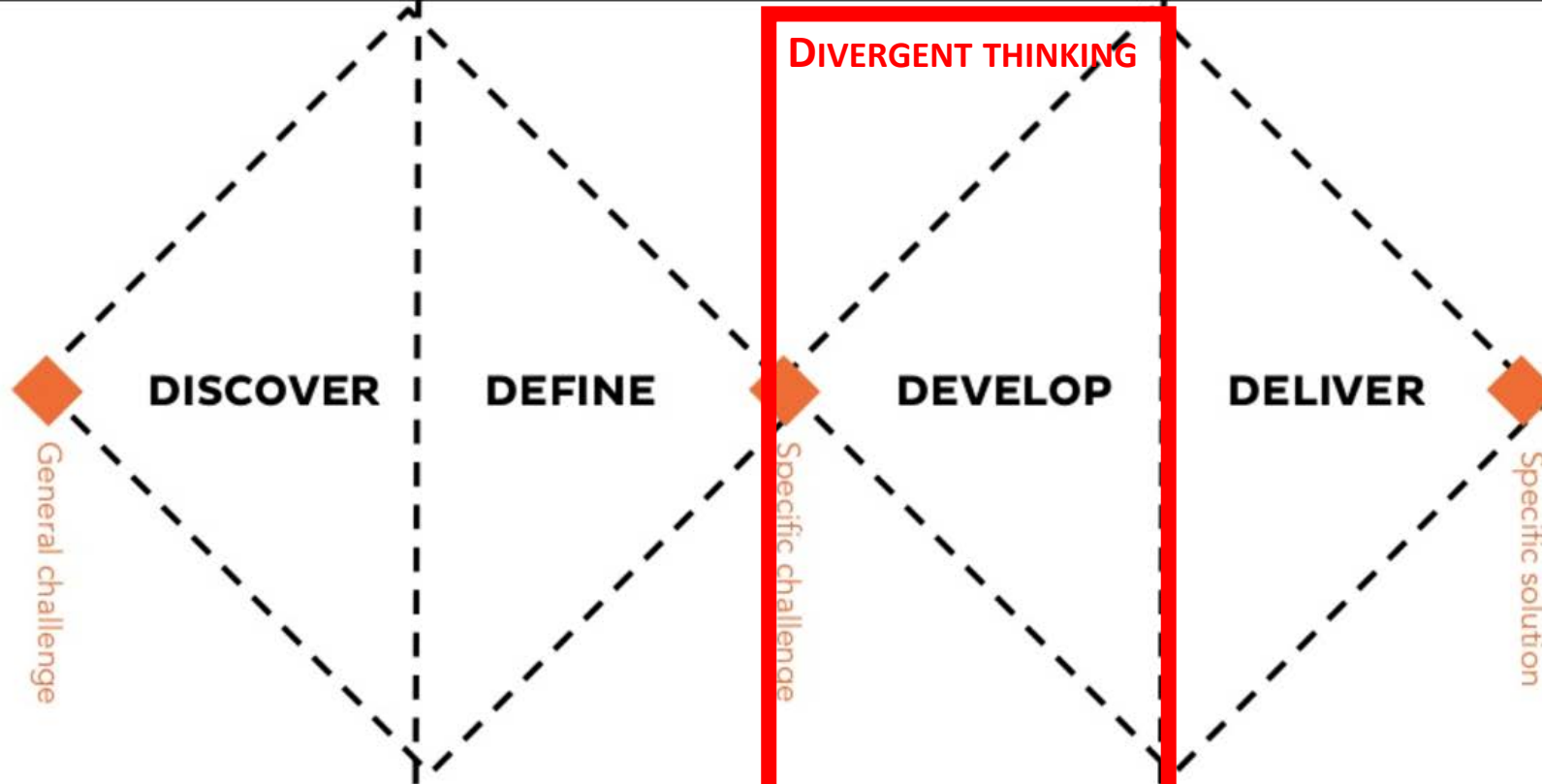
Grid area for Activities

 PROCESS

Grid area for Process

<p>LEARNING OUTCOMES</p> <p>In the end, learners will know the functionality of CrunchTime software and be able to effectively manage inventory and payroll functions for the store.</p>	<p>LEARNING OBJECTIVES</p> <p>Behavior</p> <ul style="list-style-type: none"> Leverage CrunchTime for inventory & scheduling & reporting <p>Skill</p> <ul style="list-style-type: none"> Complete <ul style="list-style-type: none"> Ordering Inventory Payroll Reporting <p>Insight</p> <ul style="list-style-type: none"> Software simplifies & makes operations more efficient <p>Knowledge</p> <ul style="list-style-type: none"> NetChef & Teamworx functionality 	<p>STRATEGY</p> <p>Training must be compact and interruptible Chunk into discrete units Provide just-in-time aids</p> <p>TRAINING PLAN</p> <p>SEE IT</p> <ul style="list-style-type: none"> Overview key functionality of inventory, ordering, payroll in YouTube-like videos Provide how-to microlearning guides and supporting job aids to guide through the steps. 	<p>ENVIRONMENT</p> <p>Physical</p> <ul style="list-style-type: none"> Busy store Training on back office computer <p>Social</p> <ul style="list-style-type: none"> Friendly Customers are the priority. <p>Virtual</p> <ul style="list-style-type: none"> Difficult for dedicated training Many distractions <p>Cultural</p> <ul style="list-style-type: none"> Store are often family operations 	<p>LOCATION</p> <ul style="list-style-type: none"> All US based Training will occur on site in each franchisee store
<p>PEOPLE</p> <p>Franchisees</p> <p>Store managers</p> <ul style="list-style-type: none"> Diverse group Education & age varies Some English Language Learners Experienced & new hire <p>Line staff (for scheduling tool)</p> <ul style="list-style-type: none"> Most part time Many high school/college 	<p>CHARACTERISTICS</p> <ul style="list-style-type: none"> Busy managers. Problem solvers Most promoted from the line Ability to multi-task 	<p>TRY IT</p> <ul style="list-style-type: none"> (For new hires) optional for others) Complete practice in a training database <p>USE IT</p> <ul style="list-style-type: none"> Leverage resources for transfer of system use to store operations 	<p>CONSTRAINTS</p> <ul style="list-style-type: none"> Training must fit around work schedule. Unlikely to have dedicated training session time Franchisee computer age and quality varies 70% of users never adopted past system: Perception of "this is too complex and no value" Hyper-Busy SMEs System still being built 	<p>RESOURCES</p> <ul style="list-style-type: none"> Training managers help with operations training and will support the rollout Availability of a training database Cornerstone LMS

<p>ACTIVITIES</p> <p>New Hire (Optional for others): View high level overview of inventory & schedule process</p> <p>Managers: View high level overview of:</p> <ul style="list-style-type: none"> NetChef - Inventory NetChef - Ordering and Reconciling Teamworx - Scheduling <p>View micromodules - Show me/Try It for individual activities Practice exercises in training database or implement in live system</p> <p>Line Staff: View micromodule on scheduling</p>	<p>PROCESS</p> <p>INVENTORY/ORDERING</p> <ul style="list-style-type: none"> Take inventory->Order what is needed->Receive Order->Reconcile Invoice Handle waste/bad product Plan for specials <p>SCHEDULING</p> <ul style="list-style-type: none"> Staff enter availability Review forecast->Plan schedule->Enter staff Weekly timecard approval
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Learner & stakeholder driven design research

Gain insights and define challenges

Develop possible learning solutions through iteration

Improve and optimize final learner experience

RESEARCH

Technology research
Competitor analysis
Service design blueprint

CHALLENGE DEFINITION **IDEA GENERATION**

Workshops
Affinity diagramming
Scenario mapping
How might we...?
Problem statements

Sketching
Storyboarding
Scenario mapping

TESTING

Usability testing
A/B testing
User observations & interviews

USER EMPATHY

Learner & stakeholder interviews
Learner observation
Learning analytics
Persona

PROTOTYPING

Paper prototyping
Journey mapping
User testing
Service design blueprint
Information architecture

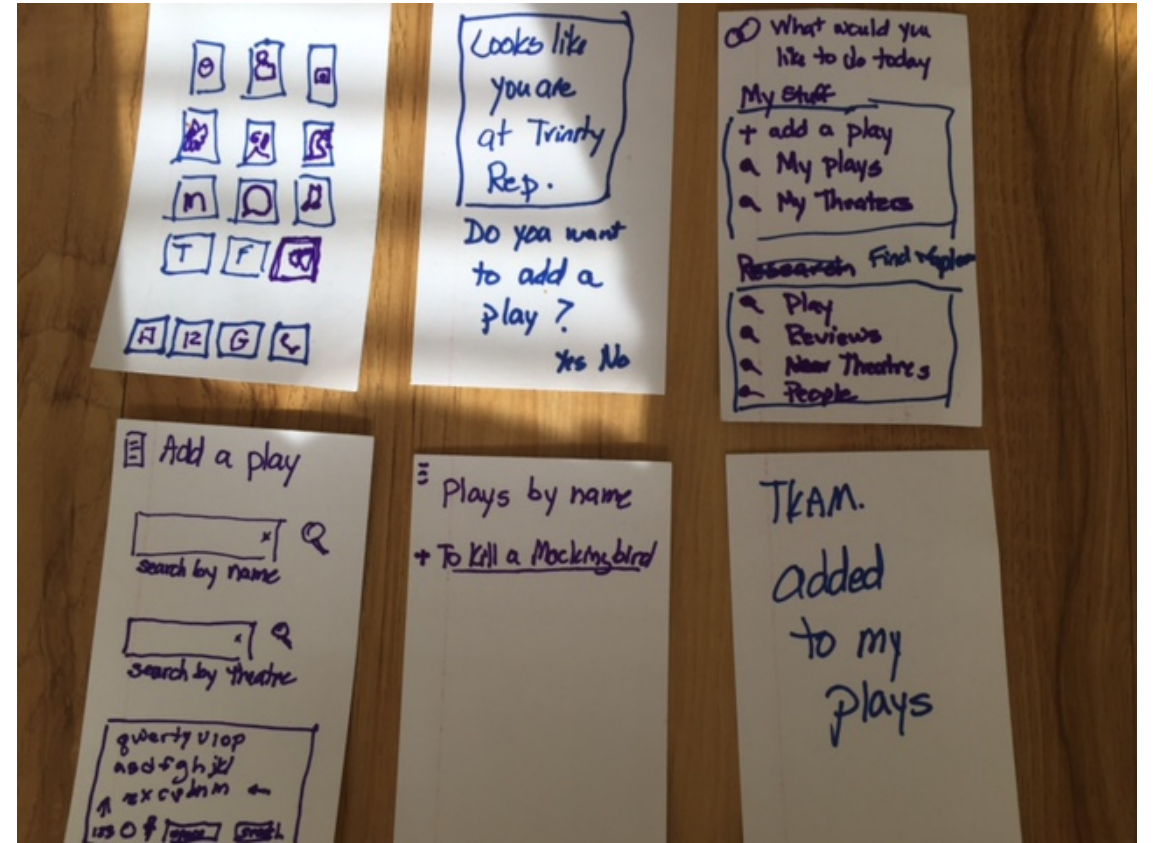
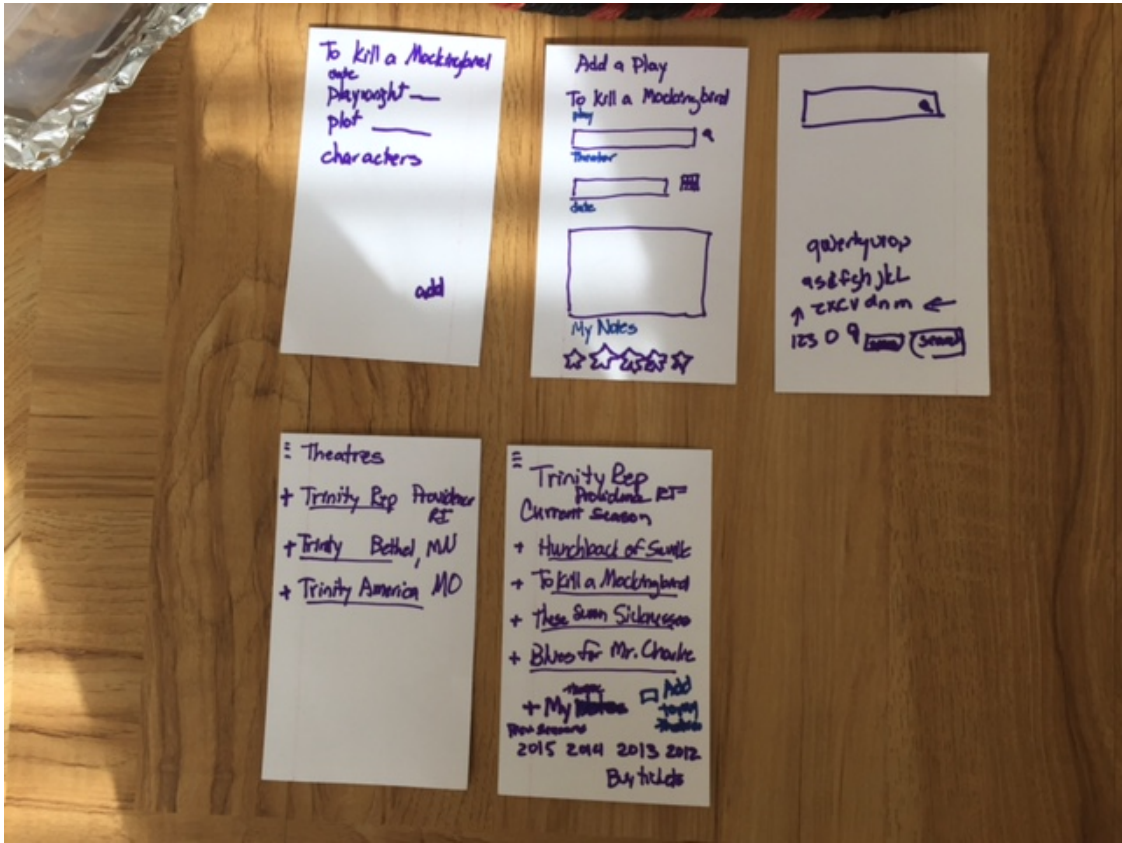
IMPLEMENT

Feedback loops
A/B testing
Learning analytics

Create a Prototype

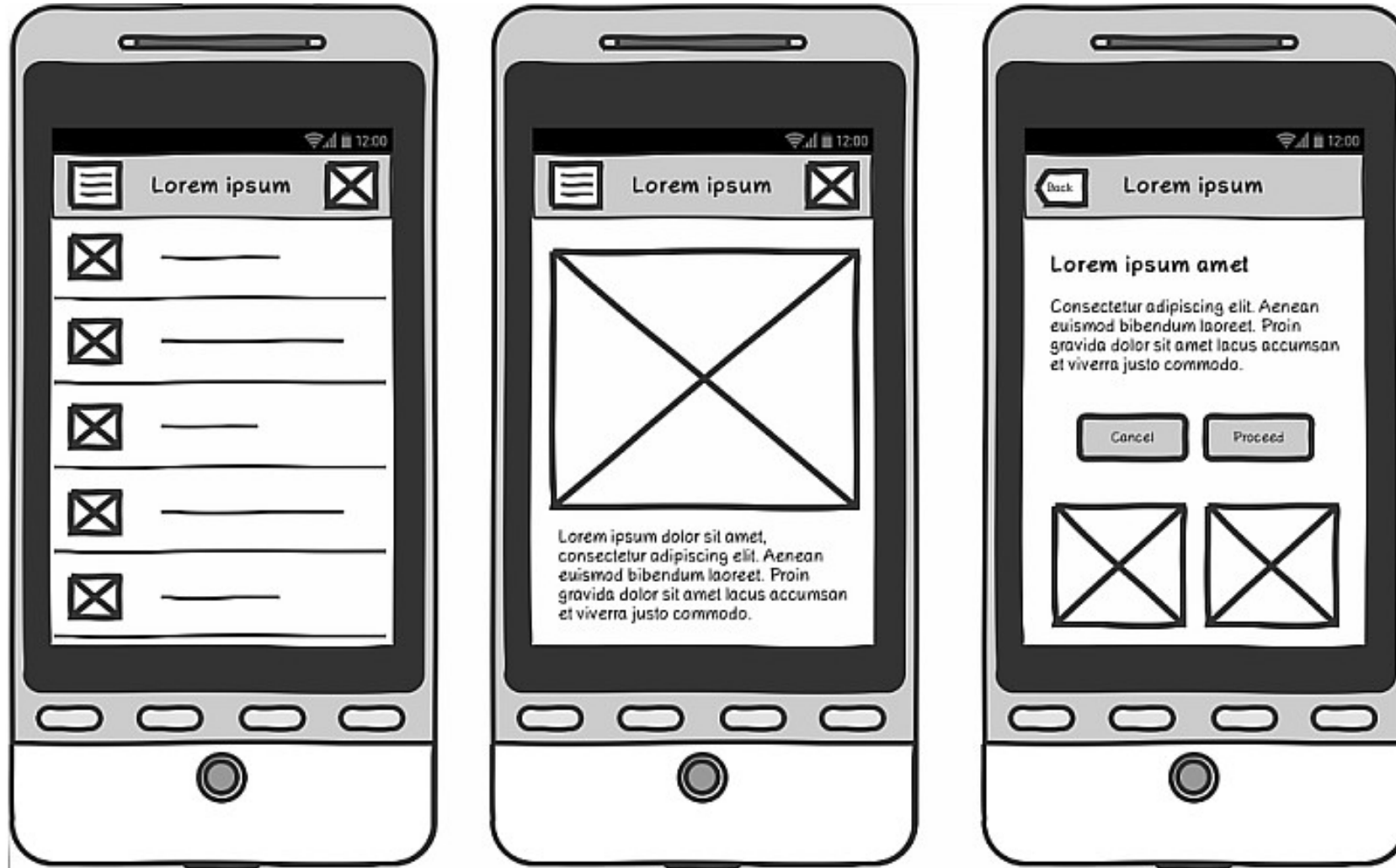


Use PowerPoint

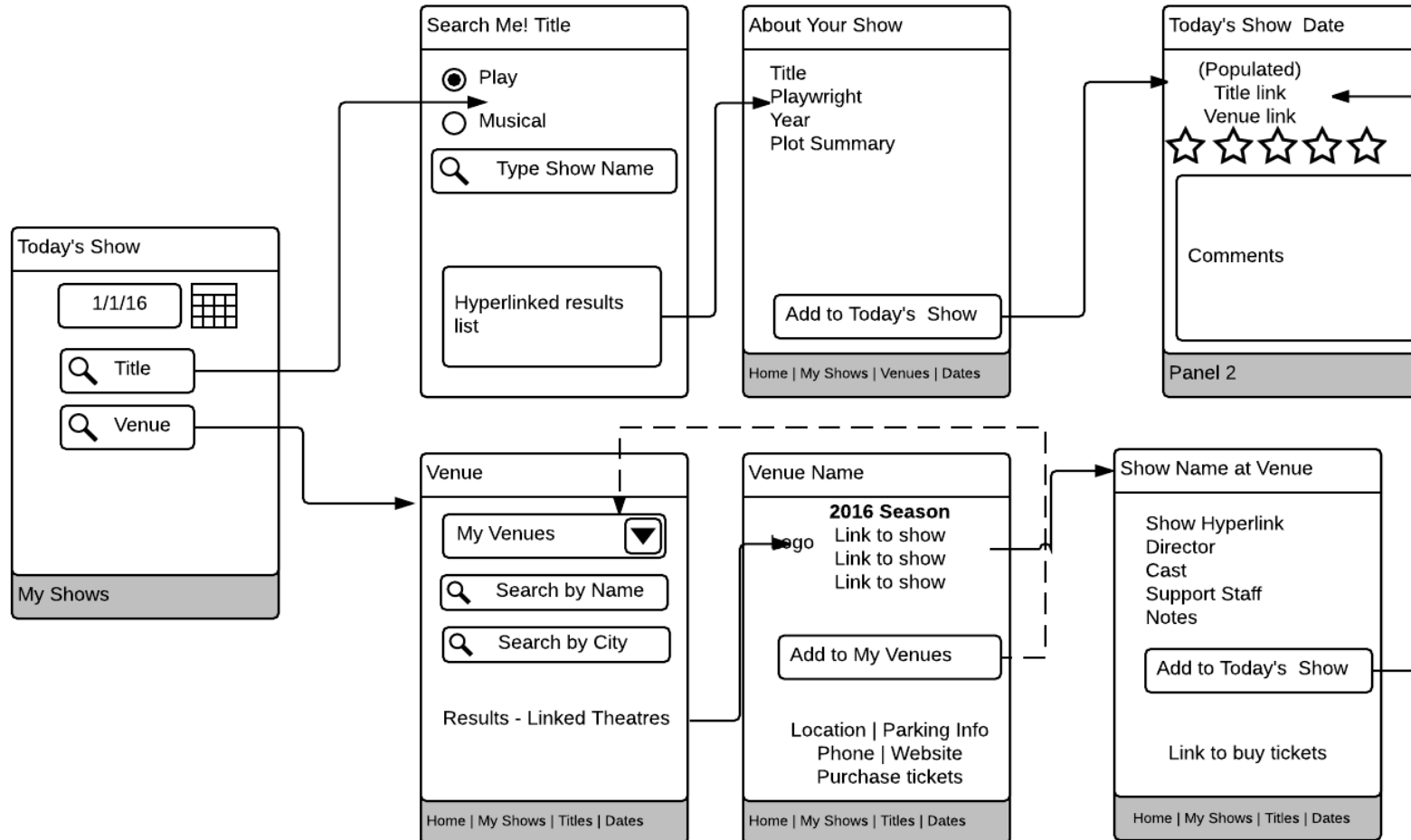


Sketched Mockups/Index Cards

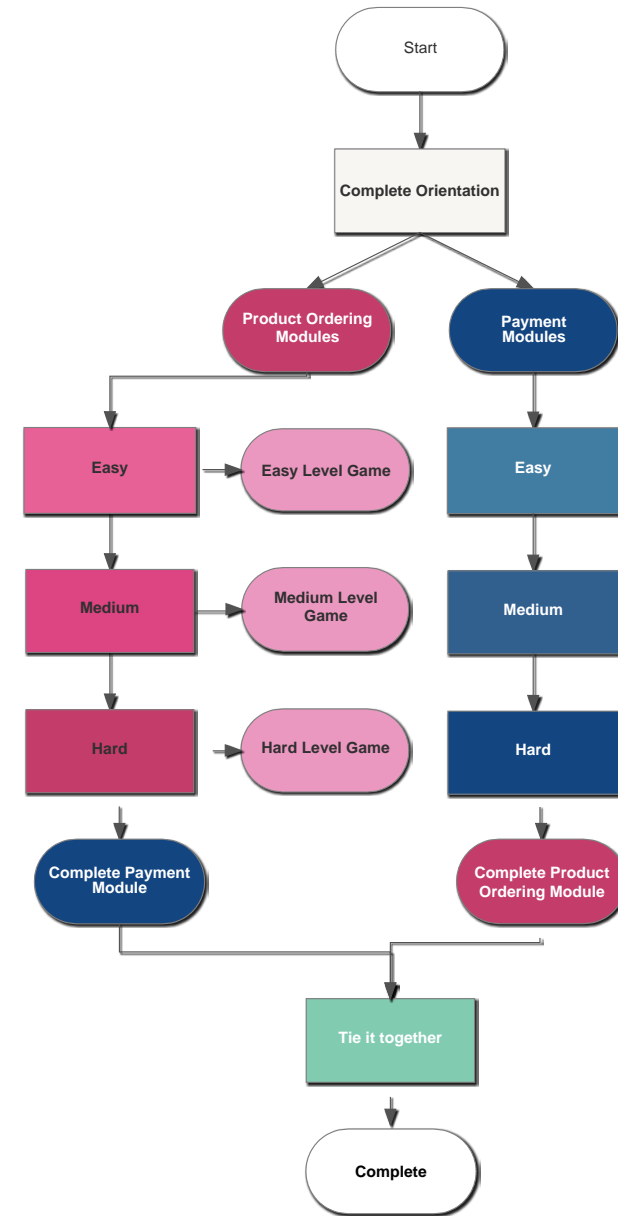
Prototype



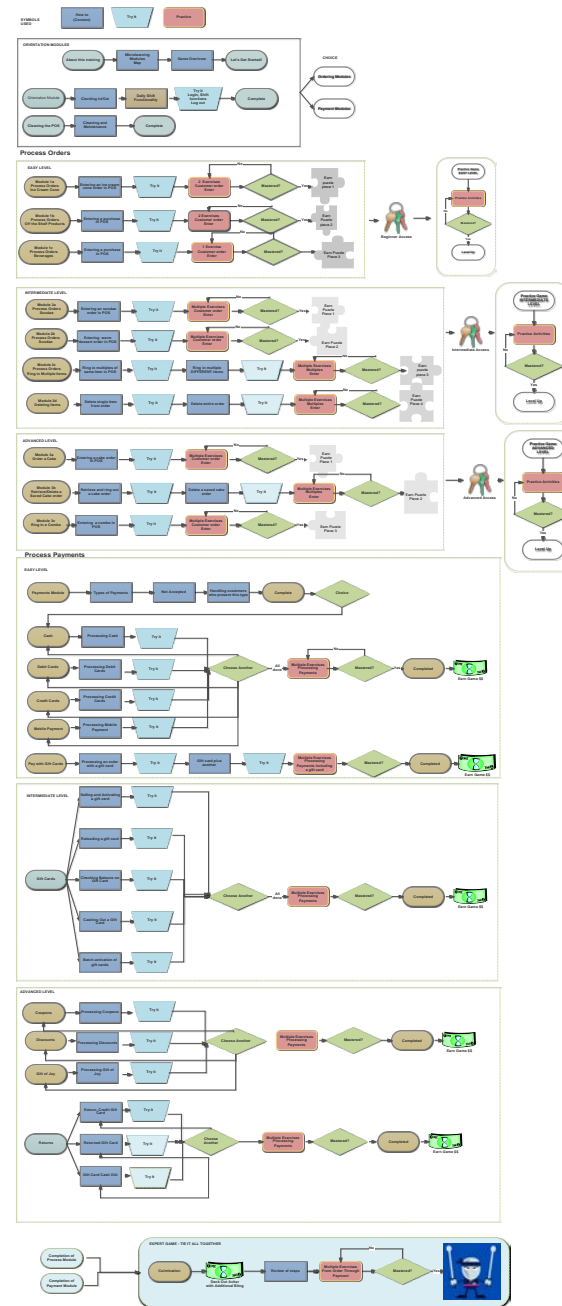
Prototype - Wireframe



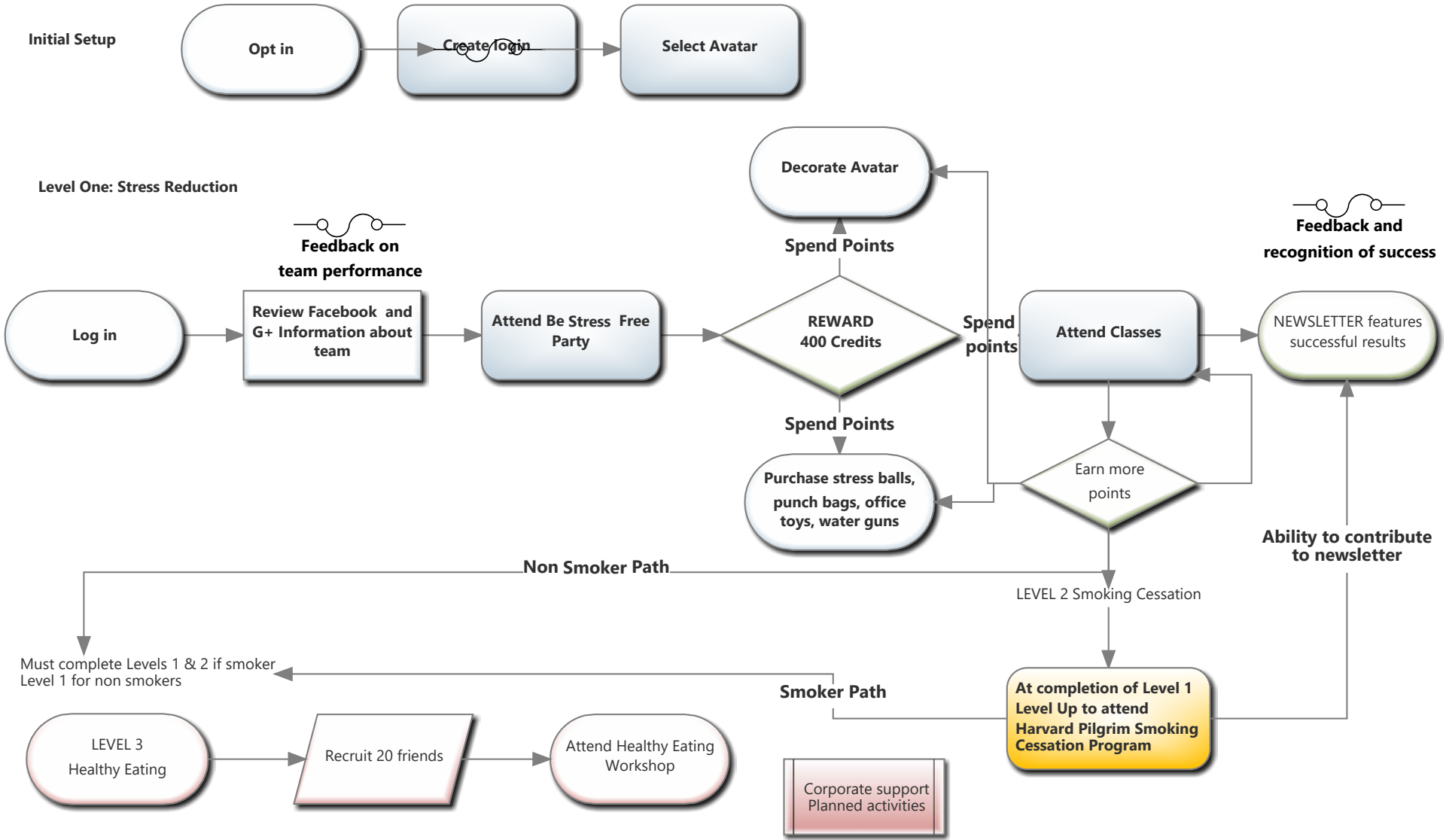
Document Screen Flow Big Picture



Document Screen Flow Detailed



Consider the User's Journey through Your Learning



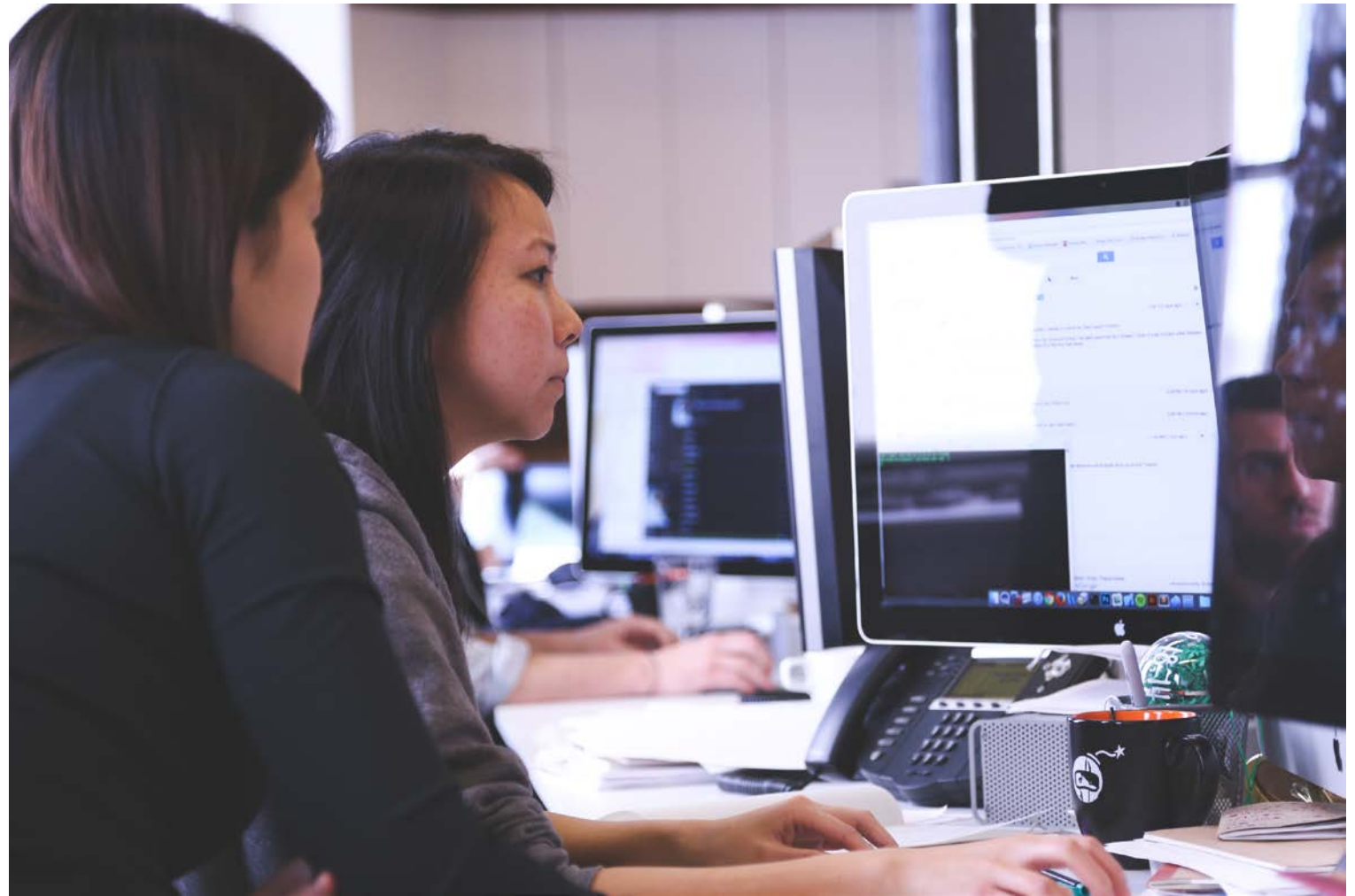
User Testing

Must be actual users

- Use Think-alouds
- Watch movements
 - Eyes
 - Mouse
- Look for confusion



Let's Try One






If you get the glassy eyed management stare, use [UserTesting.com](https://www.usertesting.com) for paid testers.





User Experience Design: Complete UX Fundamentals...

Adam Treister, Entrepreneur,
Architect, and Designer. Now...

100% Complete 

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The Coursera logo, featuring the word "coursera" in a blue, lowercase, sans-serif font with a stylized "c" that has a circular element.

INTERACTION DESIGN SPECIALIZATION

- Human Centered Design: An Introduction
- Design Principles: An Introduction
- Social Computing
- Input and Interaction
- User Experience: Research and Prototyping
- Information Design
- Designing, Running and Analyzing Experiments
- Interaction Design: Capstone Project

What can we learn from UX?

- Leverage Personas
- Create Journey Maps
- Prototype simply
- Involve users in testing

Remember the user!



Good eLearning. Done well.

Jean Marrapodi, PhD, CPLP | jmarrapodi@illumina-interactive.com | 401-440-6165



Thanks for coming.

Remember to fill in your evaluation.