UX PORTFOLIO

JOYCE ZHI (支晶晶)

Product design
10 years experience of product design, includes business solutions like ERP, CRM, Marketing platforms, BI and Product Life Cycle tools. Designed products across various platforms include phone, tablet, PC and TV.

Project management
Oversee the project progress based on the goal setting. Task assignment, progress checking, outcome quality review and risk prevention. Collaborate with various teams to improve the project outcomes. Periodic information update and knowledge sharing to increase project buyins.

Mentoring & training
Experience on cross-team UX basic trainings, mentoring junior designers, and sharing design topics based on daily design problems. It excites me when I find it dramatically enhanced my contribution to end products through others.

JOYCE ZHI (支晶晶)

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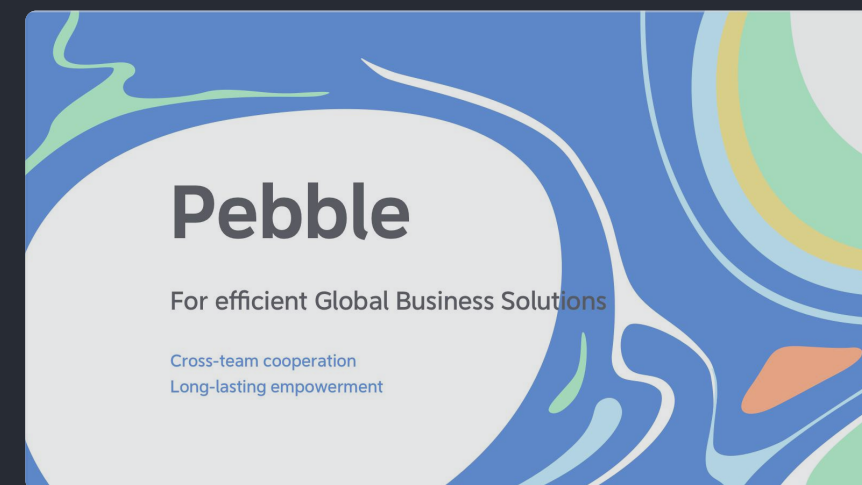
✉ zjjustb@gmail.com   📱 (+852)64868091

2023.05 till now   ● **Design Engineer**

Tianyi Cybersecurity | Beijing

S.E.C Design system
Cybersecurity Saas Platforms

2020.12-2023.05   ● **Principal Designer**

DiDi | Beijing

Pebble design system (design principle, UX evaluation modal and design guidelines.)
Internal CX platform for DiDi global business.

2019.11-2020.12   ● **Product Designer (Associate Manager)**

LiFung | HongKong

Fashion design collaboration tools
Trend engine in fashion industry
Mentoring junior designers.

2016.12-2019.08   ● **Senior UX Designer**

Oracle | Beijing

Marketing automation apps
Customer service apps
ERP and finance solutions
UX basic trainings

Master of Sci. Interactive Technology   **2011.08 - 2014.01**

Multimodal interaction design
GPA: 4.0/5.0

University of Tampere
Tampere, Finland

2015.11-2016.12   ● **Senior Interaction Designer**

Hecom | Beijing

Mobile SME app and CRM app

2014.03-2015.11   ● **Interaction Designer**

Yonyou | Beijing

Analytics and BI Platform
Lead usability testings

Bachelor of Eng. Industrial Design   **2002.08 - 2006.07**

Ergonomics and human-centered design
GPA: 3.2/4.0

Beijing Uni. of Sci. & Tech.
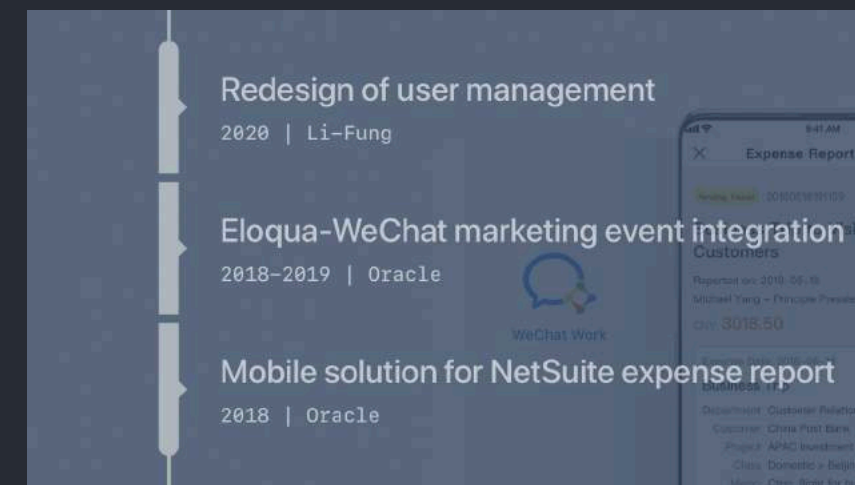Beijing, China

01

Design system

DiDi

2021-2023

02

Product design cases

Oracle, DiDi

2018-2022

03

Design / team sharing

Oracle, Li-Fung, DiDi

2017-2021

01

Design system

Project owner

DiDi

2021-2023

Designers are for solving existing problems, discerning potential problems and propose solutions. We are transforming the valid solutions into methods during the career life.

I am fortunate enough to have this opportunity in DiDi, as the owner of the design system project, designed the structure of the whole design system for business solutions of DiDi International Business Group. And with 2 other colleagues, we provide effective design principles, guidelines, resources and design metrics for R&D to produce efficient global business solutions.
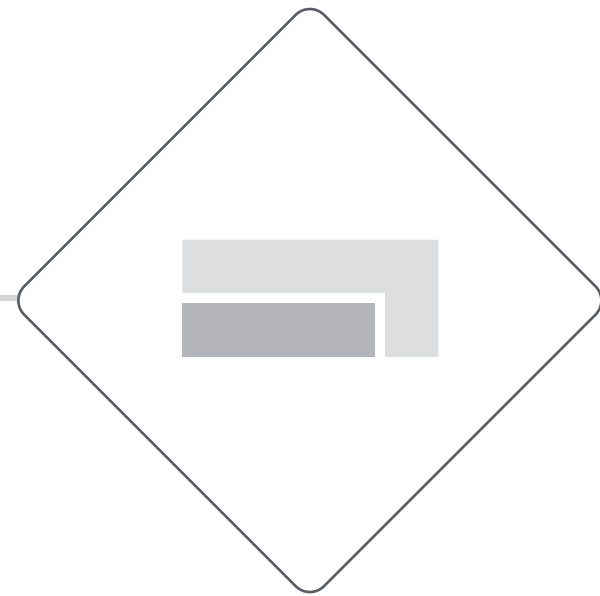
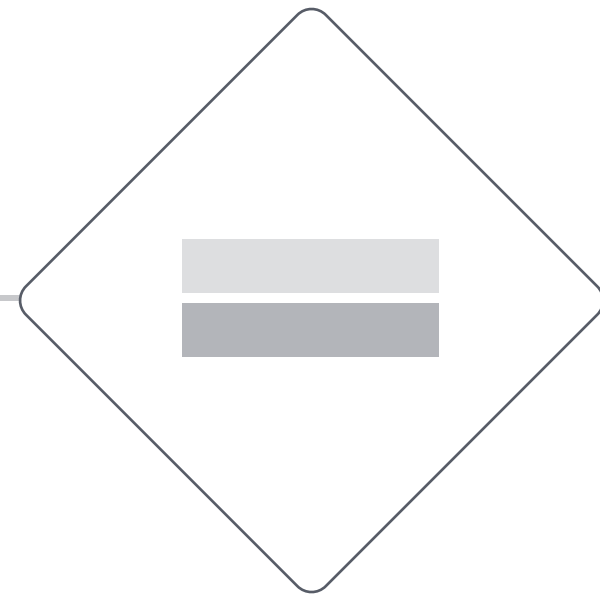# Pebble

For efficient Global Business Solutions

Cross-team cooperation
Long-lasting empowerment

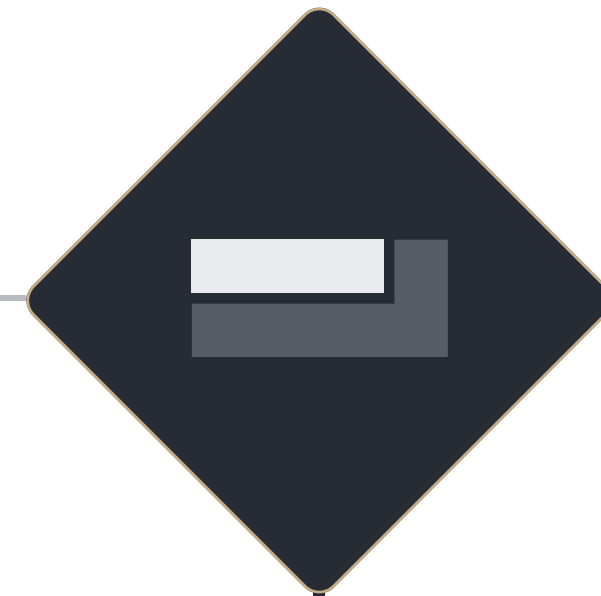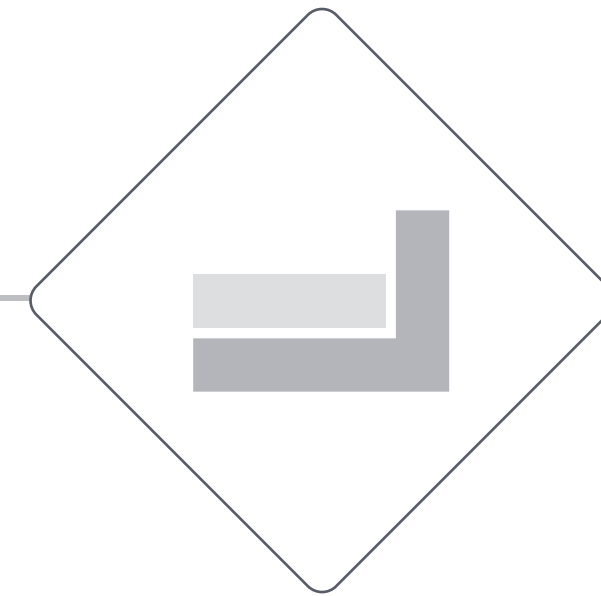1. Supporter   2. Driver   3. Builder   4. Innovator   5. Visionary

BACKGROUND
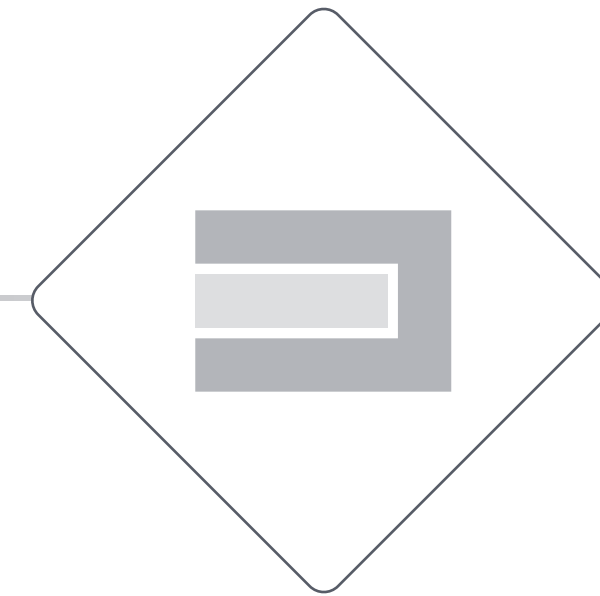
Empower designers

Release from basic interaction/interface dilemma to discover problems and provide design solutions from business side.

Build robust design team

Facilitate fast team expanding by providing unified design guidelines.

Enhance R&D efficiency

Build the common language, reduce monotonous repetitive work.

Design resources

Design kit: Tokens, Styles, Controls&Components

Interaction patterns

Business templates

Sound, Motions, Illustrations...

UX measurement

UX metrics, formulas

Measurement workflow and tools

Methods

Cooperation workflow

Globalization

Accessibility

UX writing guidelines

Foundations

Value

Design principles

STRUCTURE

For efficient global business solutions

1

2

3

4

5

Scenario-based

Design based on users' scenario and their influence, reduce the unnnecessary burden on users and help them to finish the tasks efficiently.

Growth facing

Design should bear business growth in mind. Product should be robust to business variations. Reduce the time cost of the whole business line.

Reliable workflow

Information structure should reflect users' main workflow. Help users to understand and use the product, reduce the product training cost.

Rational structure

The content and logic of the information layout should based on users' operation process and reduce their learning and practicing cost.

Inclusive

Accessible design and inclusive to different policies, laws, cultures. Reduce the political risk and unnecessary penalty.

DESIGN VALUE AND PRINCIPLES

Accessibility

1. Disabilities and accommodations

2. (Operable) interaction design

3. (Perceivable) Visual design

4. (Understandable) Content design

UX writing guidelines

The principles of UX writing in Global B: accurate, concise, consistent, organized.

1. Language (wording and sentences)

2. Voice and tone (promous, tones, writing, punctuation)

3. Text equivalents

Cooperation workflow

1. Product design cross-team cooperation process

2. Product designer's workflow of different design tasks

3. Design system designer's workflow of system updates and team requests

Globalization

Globalization process:

1. Prepraration (the factors/cultural differences designers need to know)

2. The real world implementation for design proposals

3. The global design audit

Localization references

METHODS

Design kit

Use design tokens to create common language between designer and developer

The style sheet enable the user to customize the theme in the defined range while keep the necessary coherence among the products

Interaction patterns

Provide users the general guidelines for simple design decisions.

To create the unified interaction standards among the products. eg. when to use modal vs. full page to create new item.

Business templates

Facilitate users with the ready to use design templates, which saves their time of creating the similar interfaces from scratch.

Help junior designers to understand the business.

DESIGN RESOURCES
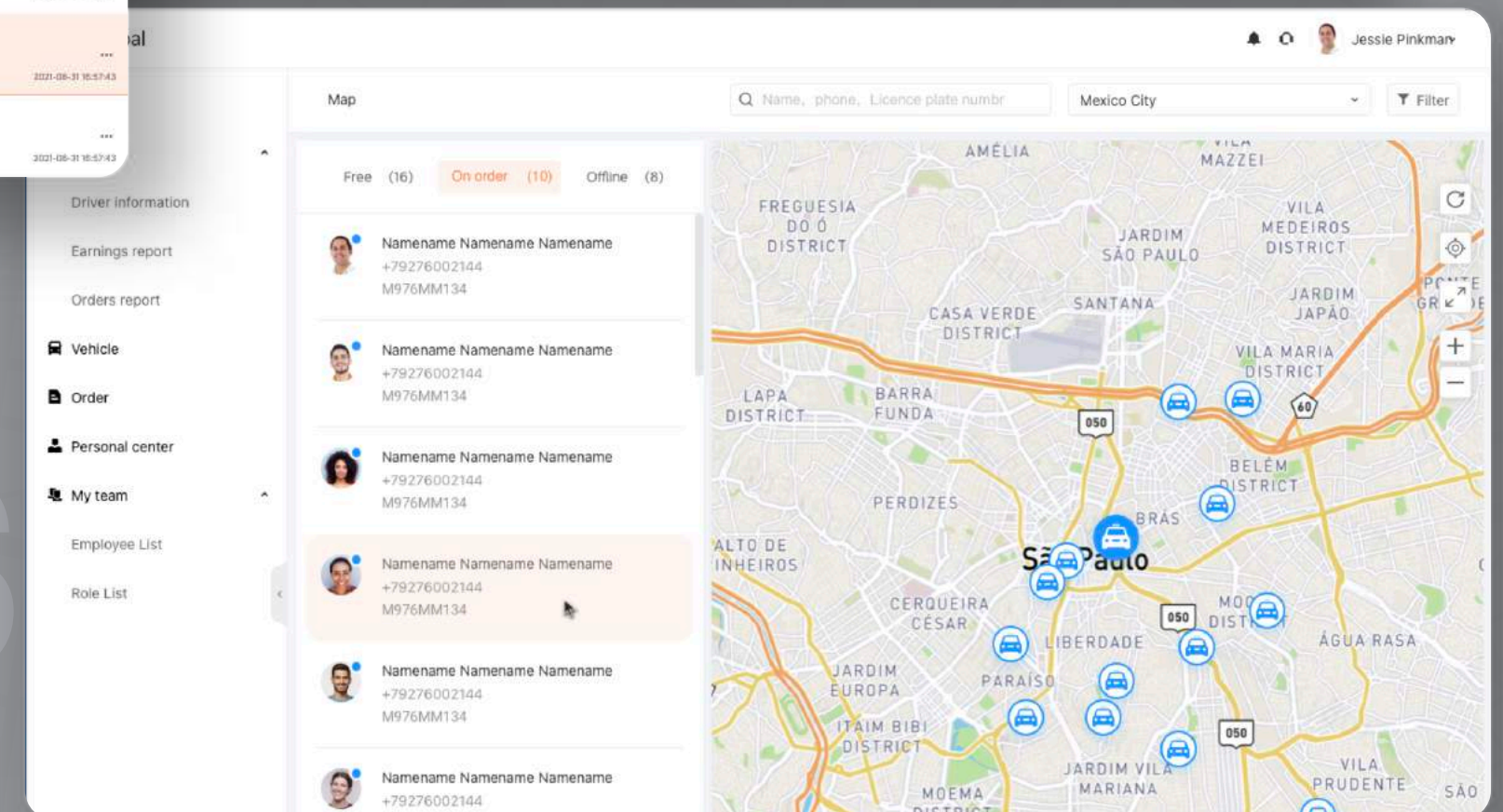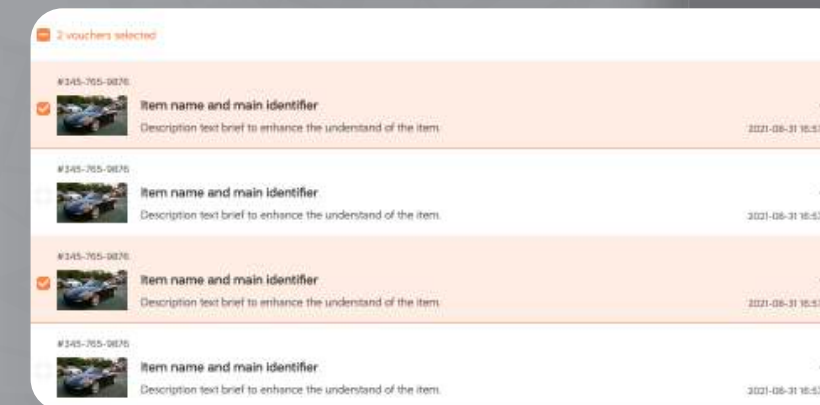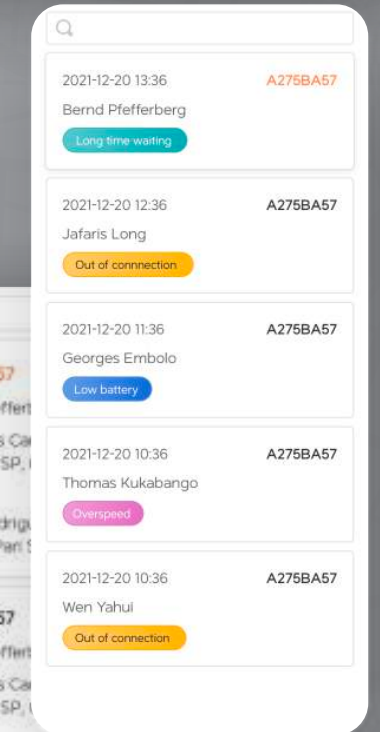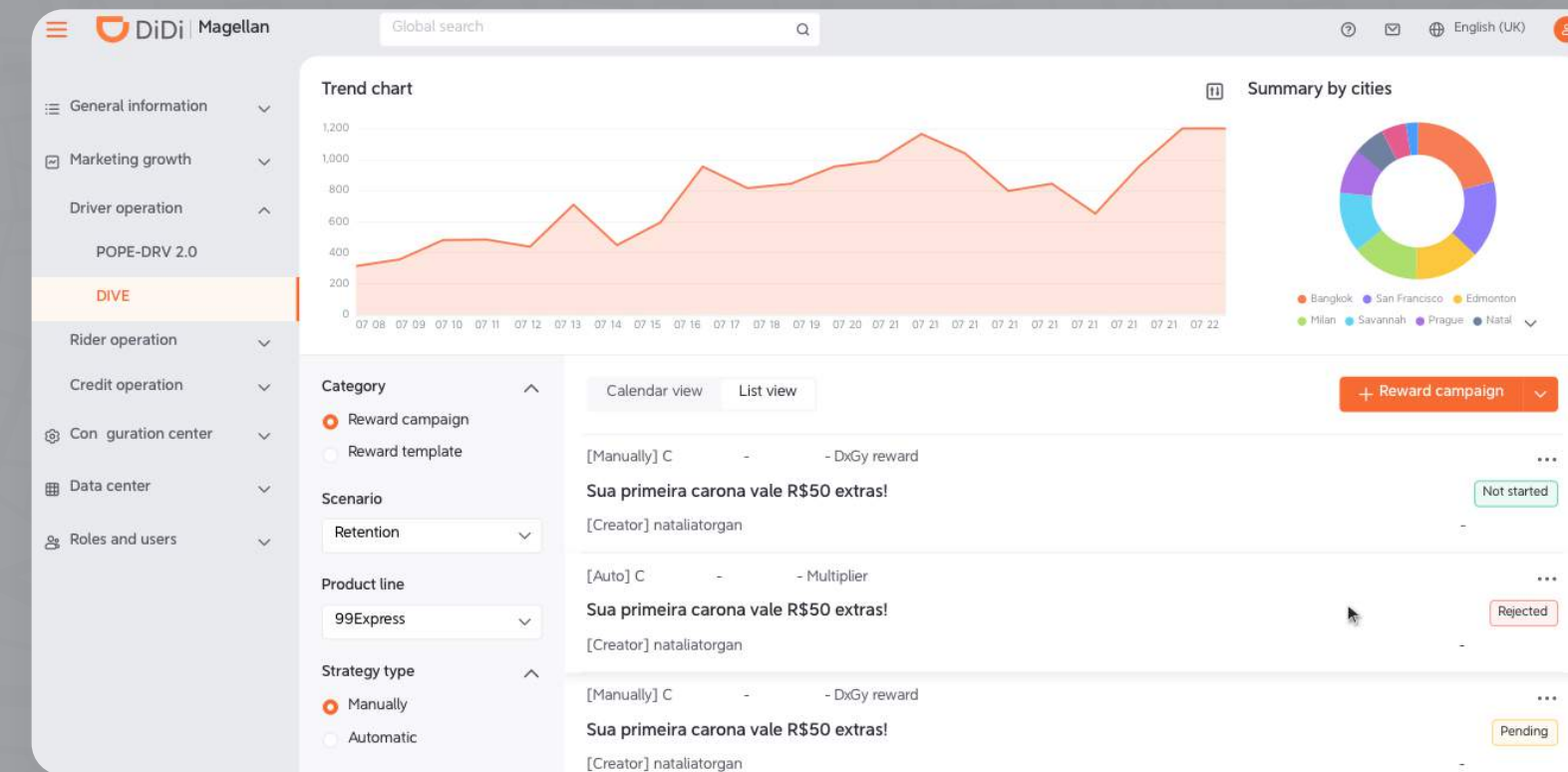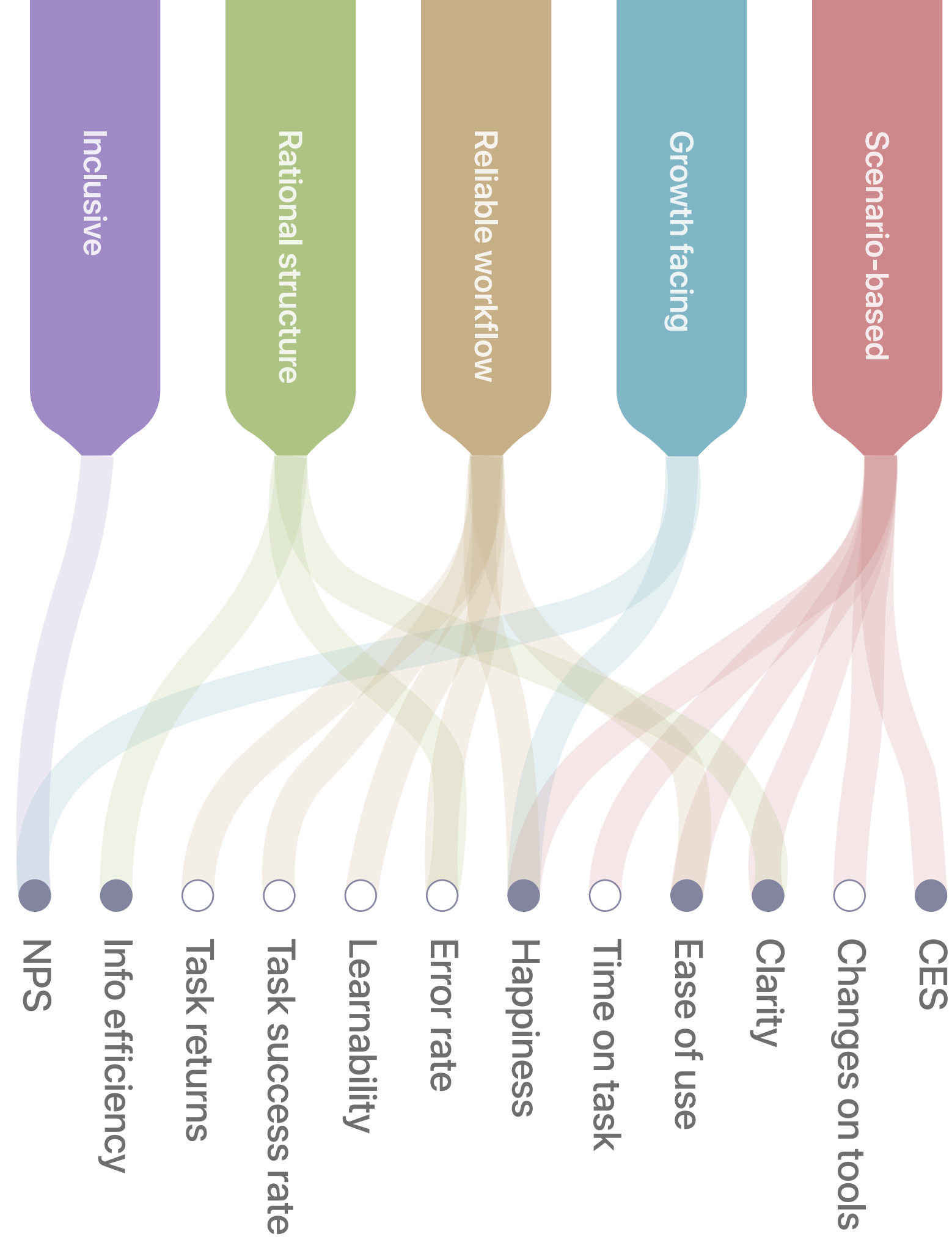
A (Attitudinal Value)=

$$\frac{\text{CES + Clarity + Ease of use + Happiness + Info efficiency + NPS}}{6}$$

B (Behavioral Value)=

$$\frac{\text{Task success rate + Learnability}}{\ln(\text{Changes on tools + Task returns + 1)} + \text{Time on task + Error rate}}$$

GUM (Global-B UX Metrics) = B ± log(|A|+1)

Inclusive

Rational structure

Reliable workflow

Growth facing

Scenario-based

NPS

Info efficiency

Task returns

Task success rate

Learnability

Error rate

Happiness

Time on task

Ease of use

Clarity

Changes on tools

CES

DESIGN MEASUREMENT

NPS

Set the most popular design system, Ant/Ele=3, rate Pebble (1-5) from various perspectives for different roles.

Designers: 3.4

Developers: 3.3

PM:
Easy to use
Request answer
Update rate
Product quality

DV:
Easy to use
Sufficiency
Request answer
Update rate

Designer:
Easy to use
Sufficiency
Business fit
Request answer
Update rate
Product quality

Projects duration

The avg. duration of projects for last 12 months. The goal for 2022 is to reduce the duration for 10% compared to 2021.

The duration for 2021 is 65.78 pd

-10% (59.2 pd)

Coverage

Use of Pebble among the new projects.

50%

PROJECT GOALS

02
Product design

Oracle | DiDi

2018-2023

2014-2015

Analytics and BI Platform

Usability testing

2016

Mobile SME management app

Mobile CRM app

2017-2019

Marketing automation apps

Customer service apps

ERP and finance solutions

UX basic trainings

2020

Fashion design cooperation tool

Vendor sourcing tool

Junior designer mentoring

2021-2023

Internal CX tools

Design system project owner

Cybersecurity platforms

Product design, as a problem solving process, usually starts from understanding the current situation through analytical thinking. This is essential for designing a well-structured workflow for target users, especially of B2B products.

Redesign of DIVE (Driver incentive and value engine) is a start point of marketing platform redesign.

Redesign of DIVE

2022 | DiDi

Mobile solution for NetSuite expense report

2018 | Oracle

Eloqua-WeChat integration

2018–2019 | Oracle

Product

What

As a part of marketing platform, DIVE aims creating rewards for drivers acording to different conditions and rules.

Redesign

Why

DIVE was produced when designers were not included. With functions added day by day, it becomes the obstacle of marketing efficiency.

Team and roles

How

1 PM: product goal defination

1 UX: workflow and interface

4 Devs: implementation
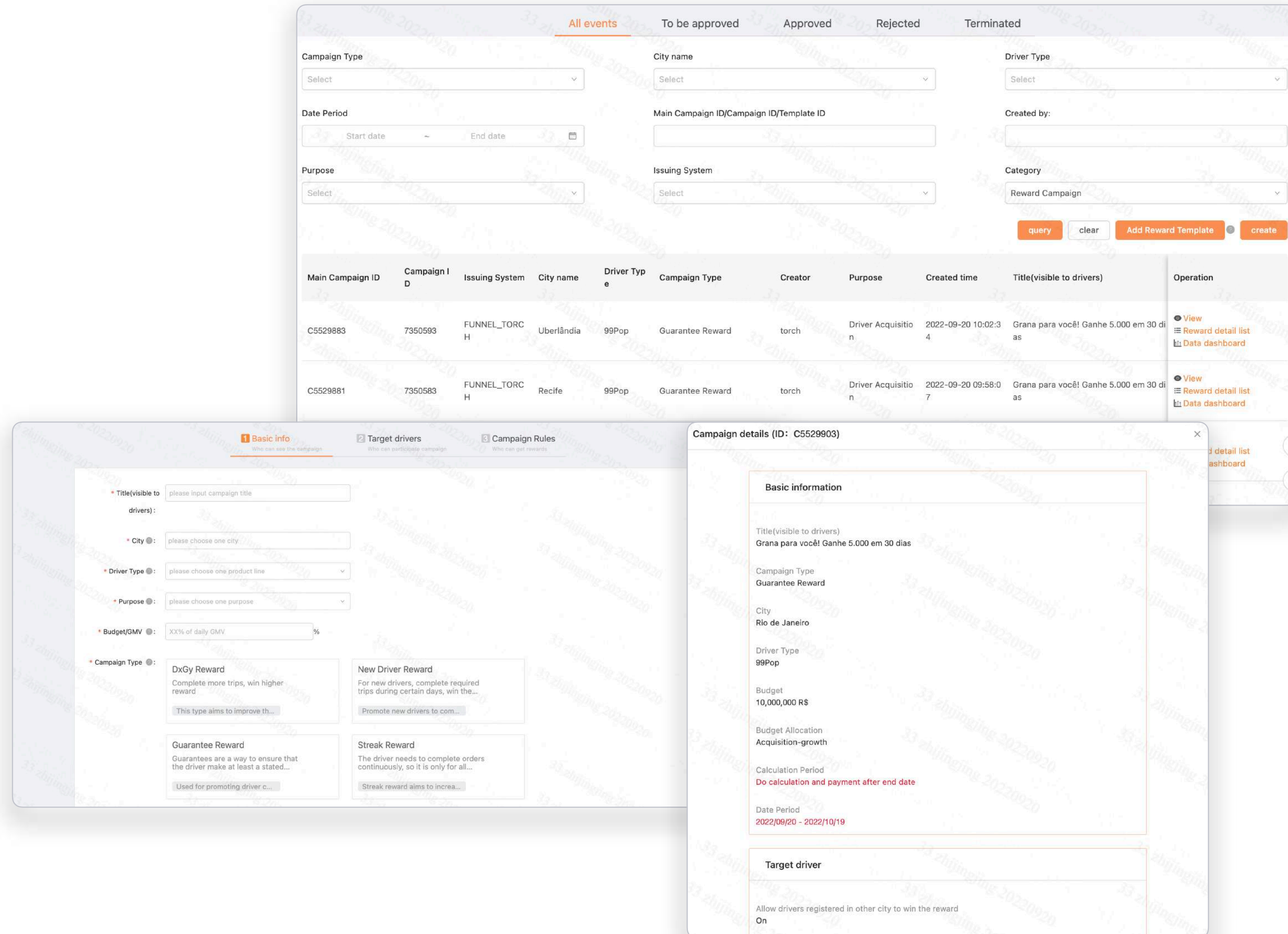
MAIN USER TASKS

Events management

View the events for different product lines

View the events of different types

Insights:

Marketers are usually with the primary mental modal of separating the events into past, present and future events, mainly in timeslot.

There is a lot of useless info on the table, which frustrates the user.

Events creation

Event dates/time

Event target drivers

Event rules

Insights:

The steps are not clearly reflect the task process.

The logic of the steps is not in accordance with the mental modal of the users when they are creating the events.

It is not efficient in copying the rules and conditions which many of the marketers want to do when creating a new event.

Track the events

View the event detail in different status

Insights:

The structure of the detail page is meaningless and with little index of information priorities.

The data of the event is in different place other than the detail page, which increases the effort of information corelation.

PRODUCT GOALS

DESIGN ACTIONS

Unstrtuctured information presentation

Plain data clustering instead of communication

Little consideration of efficiency

No function of re-use

No auto-fill

No personalized landing page

Lack of error prevention

Without effective rule self-review

No duplication checking when creating new event

1 **User-friendly layout of information**

Design the views according to user mental modals by iterating and design review with the users.

2 **Improve the efficiency by various ways**

eg. remember the last filter conditions, auto-fill the related info in forms, provide duplicate functions in different scales.

3 **Provide various ways of help**

eg. templates, calculation, more visible group dividing, preview on the way etc.
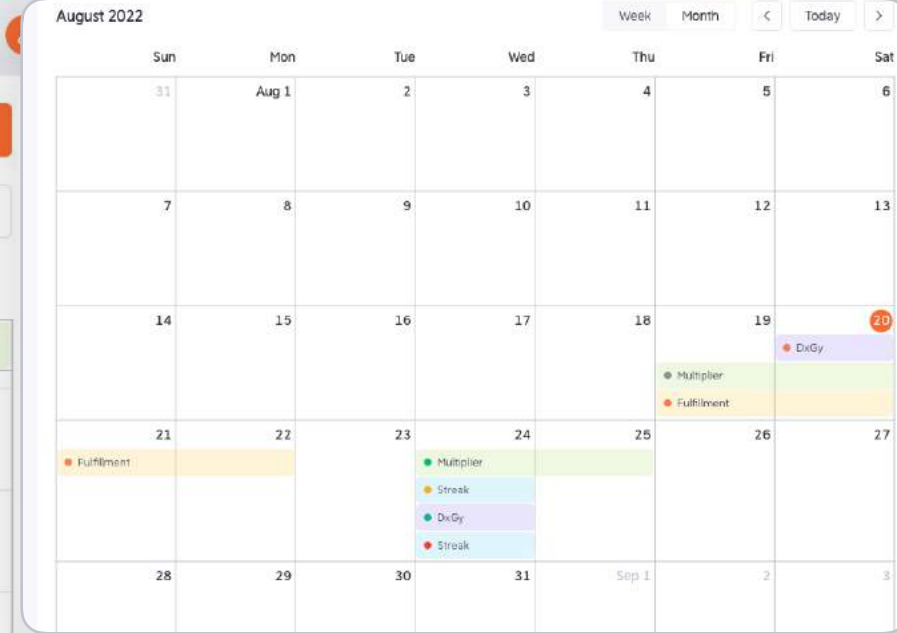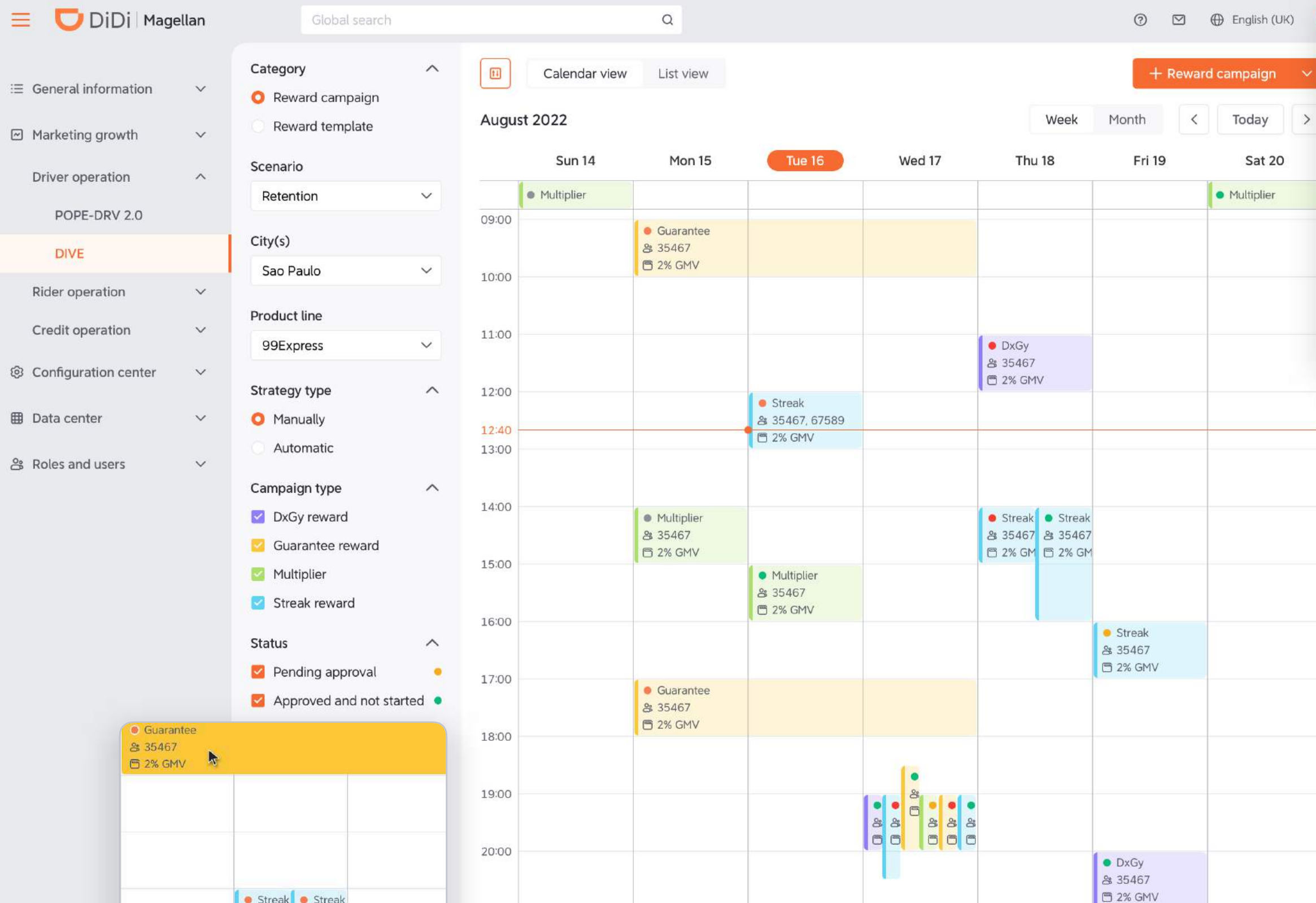
Events list — List view

Only show the related information to the users

Highlight the name of the events and the status

The information in the single-select filters is not repeatedly shown in the list
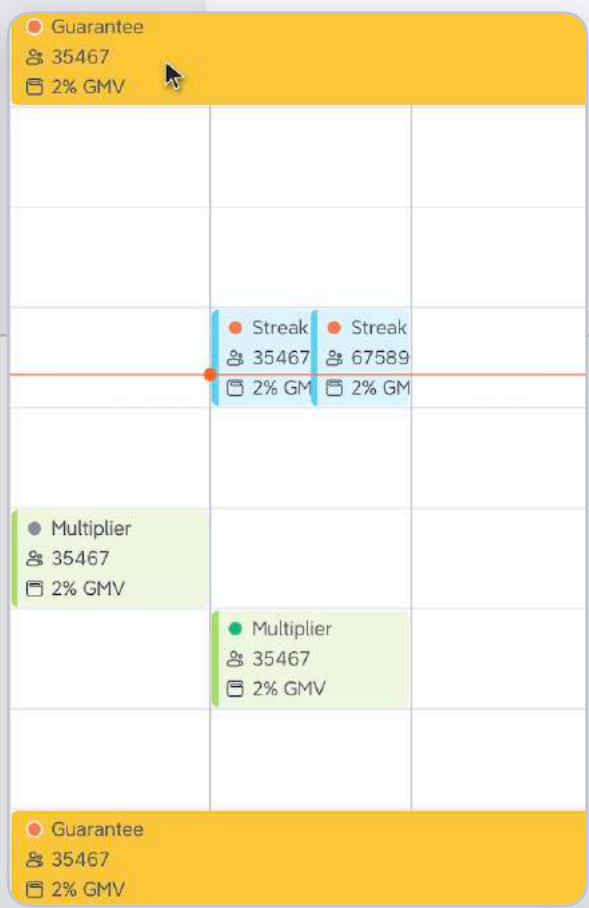
Events list — Calendar view

Provide the view of cross time-slots events

Change the traditional calendar event creation method

Monthly view is also different in layout (stable hight) to show all the events directly
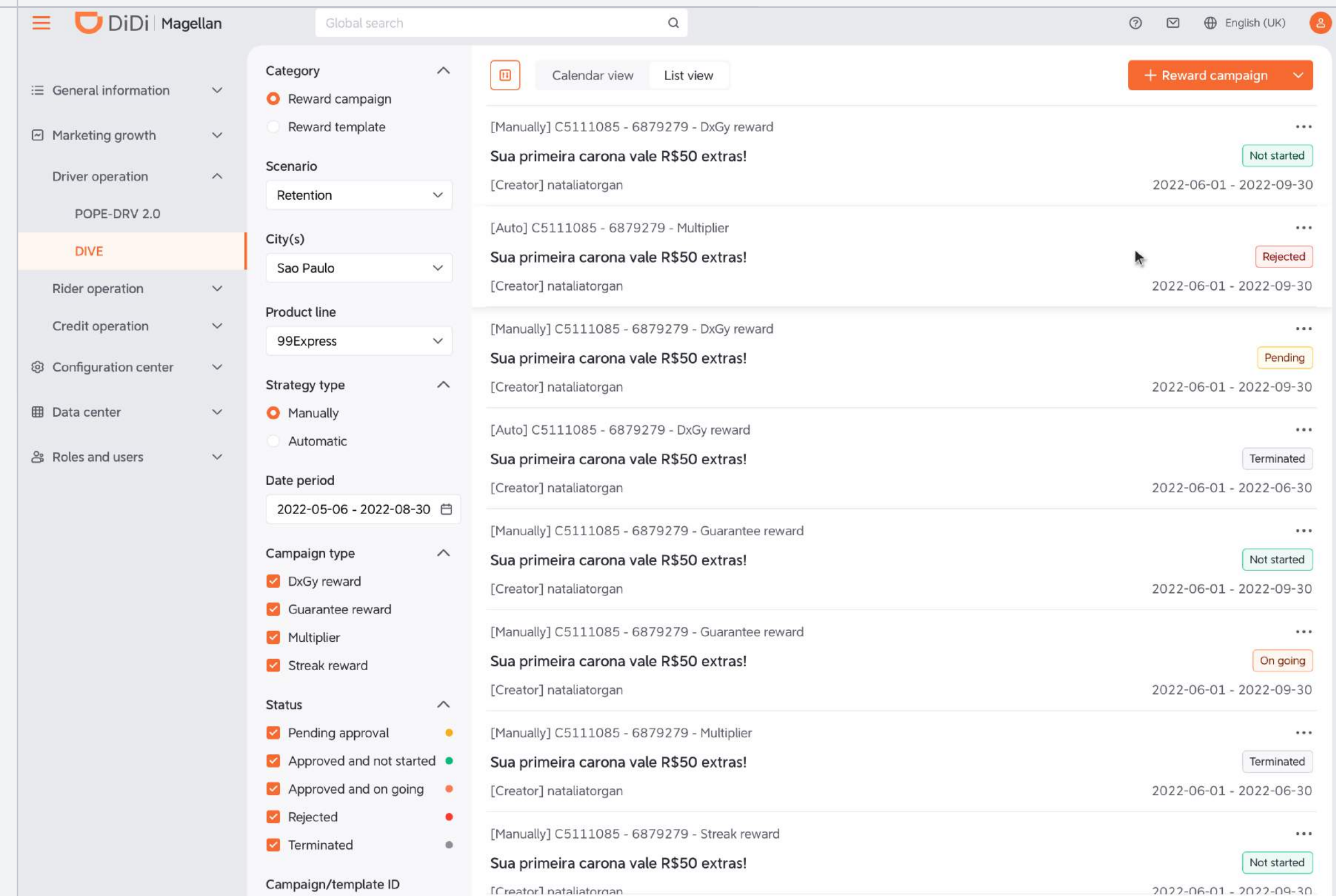
EVENTS MANAGEMENT

Conditions

With configured info of previous steps visible to users

Conditions are linked to specific target drivers

Conditions can be copy paste

Rules

Using colored slides to indicate the groups

Use structured form for globalization

Provide calculator for rule validation
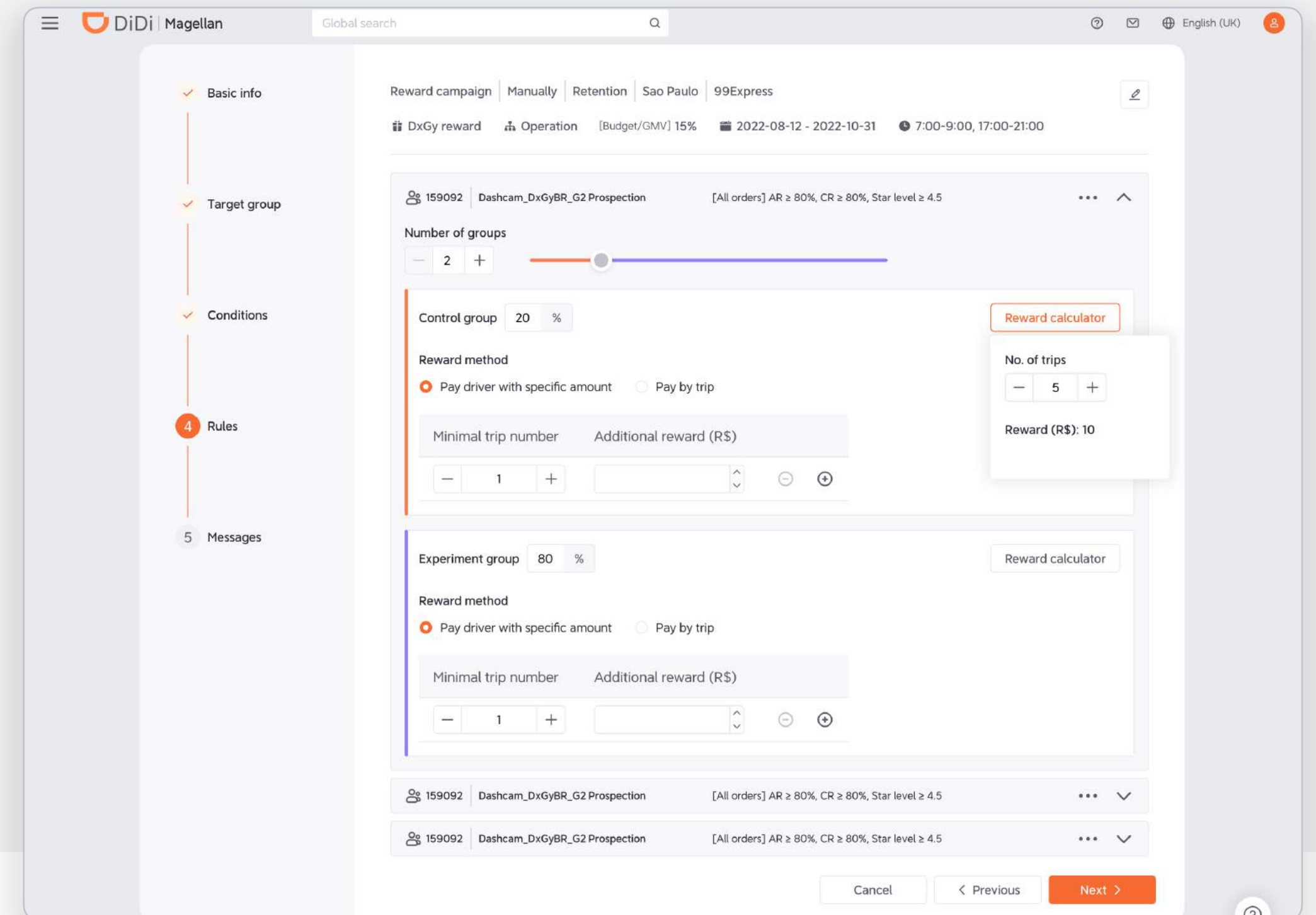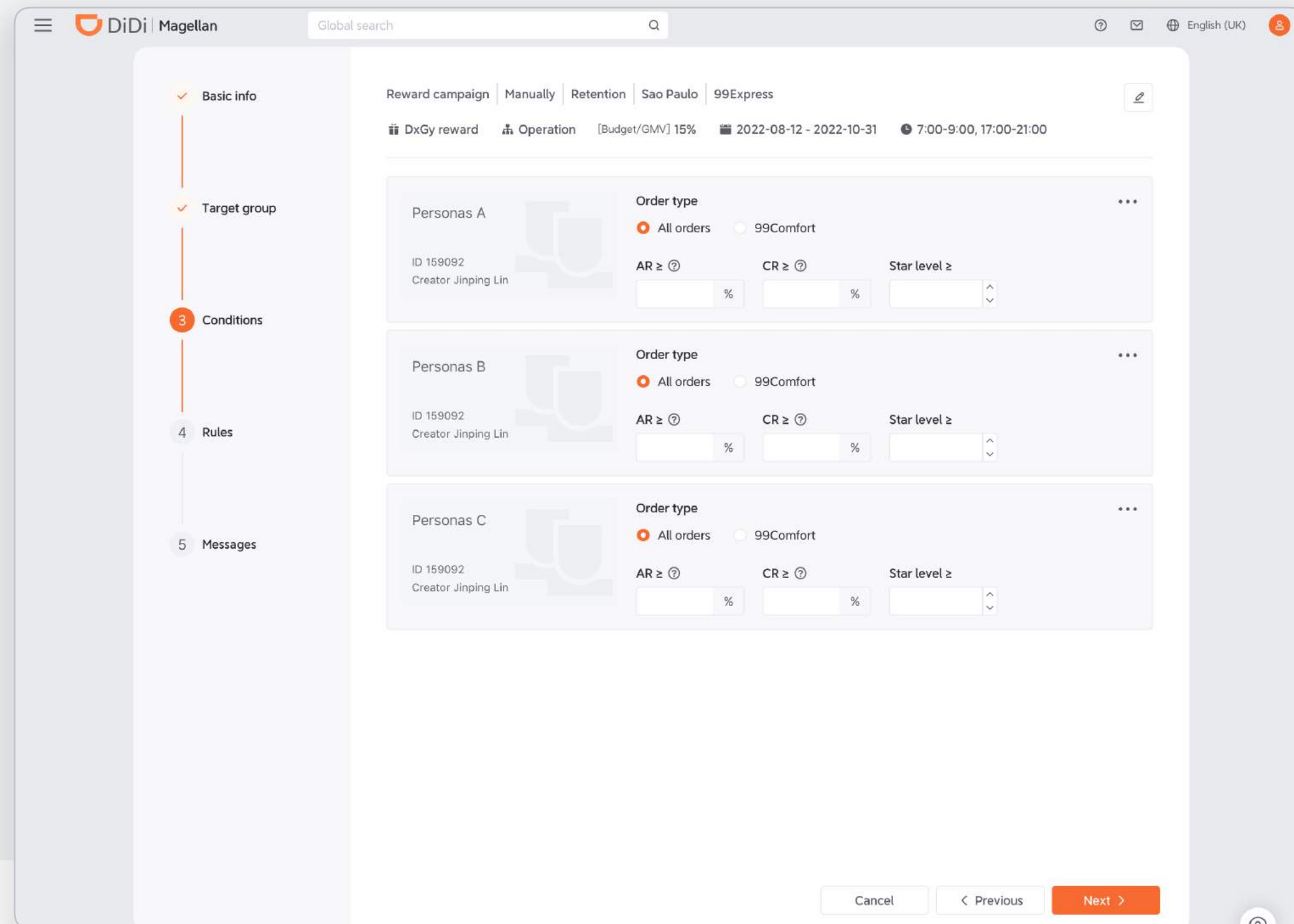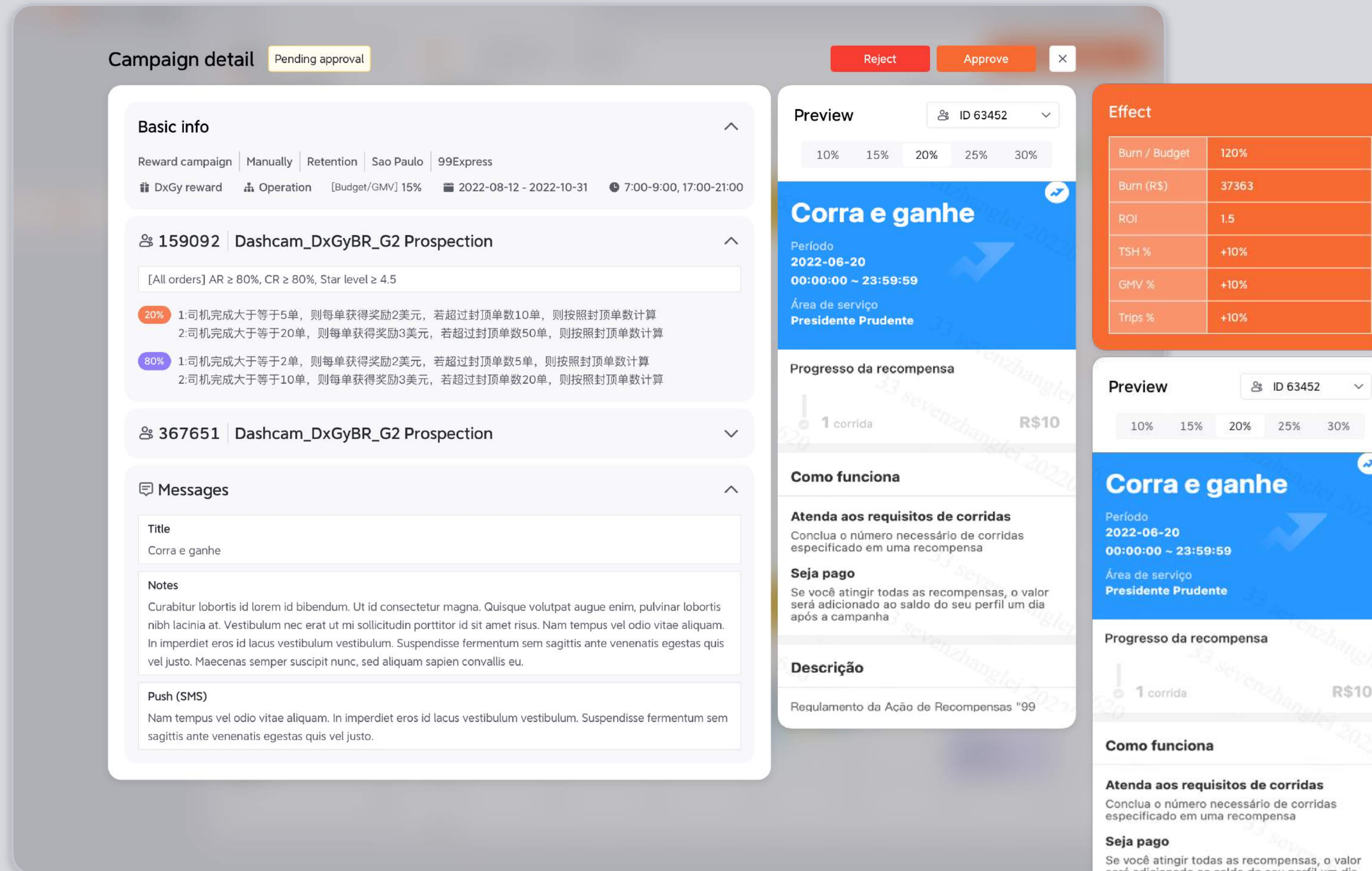
EVENTS CREATION

Event Detail

Show of the app event page to increase the sense of direct perception.

The event information is structured according to the creation process.

The target groups are highlighted.

The detail page will provide different actions in accordance with different status.

The data table will be provided if the event is finished.

Campaign detail Pending approval

Reject   Approve   ✕

Basic info

Reward campaign | Manually | Retention | Sao Paulo | 99Express

🎁 DxGy reward | ⚖ Operation | [Budget/GMV] 15% | 📅 2022-08-12 - 2022-10-31 | 🕐 7:00-9:00, 17:00-21:00

👥 159092 | Dashcam_DxGyBR_G2 Prospection

[All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5

20% 1:司机完成大于等于5单，则每单获得奖励2美元，若超过封顶单数10单，则按照封顶单数计算
2:司机完成大于等于20单，则每单获得奖励3美元，若超过封顶单数50单，则按照封顶单数计算

80% 1:司机完成大于等于2单，则每单获得奖励2美元，若超过封顶单数5单，则按照封顶单数计算
2:司机完成大于等于10单，则每单获得奖励3美元，若超过封顶单数20单，则按照封顶单数计算

👥 367651 | Dashcam_DxGyBR_G2 Prospection

💬 Messages

Title
Corra e ganhe

Notes
Curabitur lobortis id lorem id bibendum. Ut id consectetur magna. Quisque volutpat augue enim, pulvinar lobortis nibh lacinia at. Vestibulum nec erat ut mi sollicitudin porttitor id sit amet risus. Nam tempus vel odio vitae aliquam. In imperdiet eros id lacus vestibulum vestibulum. Suspendisse fermentum sem sagittis ante venenatis egestas quis vel justo. Maecenas semper suscipit nunc, sed aliquam sapien convallis eu.

Push (SMS)
Nam tempus vel odio vitae aliquam. In imperdiet eros id lacus vestibulum vestibulum. Suspendisse fermentum sem sagittis ante venenatis egestas quis vel justo.

Preview   👥 ID 63452

10% 15% **20%** 25% 30%

Corra e ganhe

Período
2022-06-20
00:00:00 ~ 23:59:59

Área de serviço
Presidente Prudente

Progresso da recompensa

1 corrida   R$10

Como funciona

Atenda aos requisitos de corridas
Conclua o número necessário de corridas especificado em uma recompensa

Seja pago
Se você atingir todas as recompensas, o valor será adicionado ao saldo do seu perfil um dia após a campanha

Descrição

Regulamento da Ação de Recompensas "99

Effect

Burn / Budget	120%
Burn (R$)	37363
ROI	1.5
TSH %	+10%
GMV %	+10%
Trips %	+10%

Preview   👥 ID 63452

10% 15% **20%** 25% 30%

Corra e ganhe

Período
2022-06-20
00:00:00 ~ 23:59:59

Área de serviço
Presidente Prudente

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1 corrida   R$10

Como funciona

Atenda aos requisitos de corridas
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Seja pago
Se você atingir todas as recompensas, o valor será adicionado ao saldo do seu perfil um dia

Component—select city/city group

Components for this specific feature

Other creation pages: message configuration

City(s)

City(s)
Sao Paulo

Cities | City groups
Sao Paulo
Rio de Janeiro
Brasilia
Salvador
Fortaleza
Belo Horizonte
Manaus
Curitiba
Recife

Cities | City groups
Group name 1 (8)
Fortaleza, Manaus, Recife, Belem,...
South Region (11)
Porto Alegre, Curitiba, Maringa, Apucar...
North Region (8)
Manaus, Belem, Porto Velho, Ananin...
Central-West Region (7)
Brasilia, Goiania, Campo Grande, Cuiab...
Southeast Region (11)
Sao Paulo, Rio de Janeiro, Belo Horizo...
Northeast Region (9)
Recife, Fortaleza, Salvador, Natal, Sao L...
+ City group

创建城市群

Group name
Group name two
Selected cities
Click to select cities from the list below

Aguas Lindas de Goias | Aneindeua | Anapolis | Aparecida de Goiania
Aracaju
Belem | Blumenau | Boa Vista | Brasilia
Caceres | Campo Grande | Canoas | Caxias do Sul | Curitiba
Dourados | Duque de Caxias

Cancel | Save

创建城市群—选择城市后

Group name
Group name two
Selected cities
Aguas Lindas de Goias ✕ | Corumba ✕ | Belem ✕

City ID or name

Ananindeua | Anapolis | Aparecida de Goiania | Aracaju
Blumenau | Boa Vista | Brasilia
Caceres | Campo Grande | Canoas | Caxias do Sul | Curitiba
Dourados | Duque de Caxias

Cancel | Save

编辑城市群—增加删除按钮

Delete | Cancel | Save

Component—rule setting for target groups

应用限制：
当群组的数量有限（一般不超过7个）时，可以用滑平的方式直观表示各群组的占比

群组的标志色按照数据黑色的色系顺序使用

159092 Dashcam_GuaranteeBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5

Number of groups − 2 +

Control group 20 %   Reward calculator

Minimal trips	Minimal active time	Guarantee per driver (R$)	Minimal reward (R$)
− 5 +	20 hours	50	
− 10 +	30 hours	80	

Experiment group 80 %   Reward calculator

Minimal trips	Minimal active time	Guarantee per driver (R$)	Minimal reward (R$)
− 5 +	20 hours	50	
− 10 +	30 hours	80	

Number of groups − 2 +
Number of groups − 3 +
Number of groups − 4 +
Number of groups − 5 +
Number of groups − 6 +
Number of groups − 7 +

Component—Global help

Help center
Landing guide
Help documents
Campaign self-review tool

Scan QR code to join the D-Chat feedback group

DiDi | Magellan   Global search   English (UK)

Basic info
Target group
Conditions
Rules
5 Messages

Reward campaign | Manually | Retention | Sao Paulo | 99Express
DxGy reward | Operation | [Budget/GMV] 15% | 2022-08-12 - 2022-10-31 | 7:00-9:00, 17:00-21:00

159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5

20% 1:司机完成大于等于5单，则每单获得奖励2美元，若超过封顶单数10单，则按照封顶单数计算
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2:司机完成大于等于10单，则每单获得奖励3美元，若超过封顶单数20单，则按照封顶单数计算

159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5
159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5

Campaign title (visible to drivers)   Fill presets to the placeholders
Notes   Fill presets to the placeholders
Pushes   Fill presets to the placeholders

Method
SMS

SLZ | R$70 EXTRA - das 06h às 10h

(1/2) Aliquam eget odio sed ligula iaculis consequat at eget orci. Mauris molestie sit amet metus mattis varius. Donec sit amet ligula eget nisi sodales egesta-

(2/2) -s. Aliquam interdum dolor aliquet dolor sollicitudin fermentum. Donec congue lorem a molestie bibendum.

+ Placeholder | Use template | Save as template

Cancel | Previous | Save

DiDi | Magellan   Global search   English (UK)

Basic info
Target group
Conditions
Rules
5 Messages

Reward campaign | Manually | Retention | Sao Paulo | 99Express
DxGy reward | Operation | [Budget/GMV] 15% | 2022-08-12 - 2022-10-31 | 7:00-9:00, 17:00-21:00

159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5
159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5
159092 Dashcam_DxGyBR_G2 Prospection   [All orders] AR ≥ 80%, CR ≥ 80%, Star level ≥ 4.5

Campaign title (visible to drivers)   Fill presets to the placeholders
SLZ | R$70 EXTRA - das 06h às 10h
+ Placeholder | Use template | Save as template

Notes   Fill presets to the placeholders
SLZ | R$70 EXTRA - das 06h às 10h
+ Placeholder | Use template | Save as template

Cancel | Previous | Save

Pros

A project that I insisted to use the new design kit of my project and it approves effective and welcome.

It also encourages me to increase the business specific patterns in our new design kit.

The user involvement during the design process is effective and make the users feel being respected.

high benefit

Proceed   Investigate

low effort   high effort

Consider   Kill

low benefit
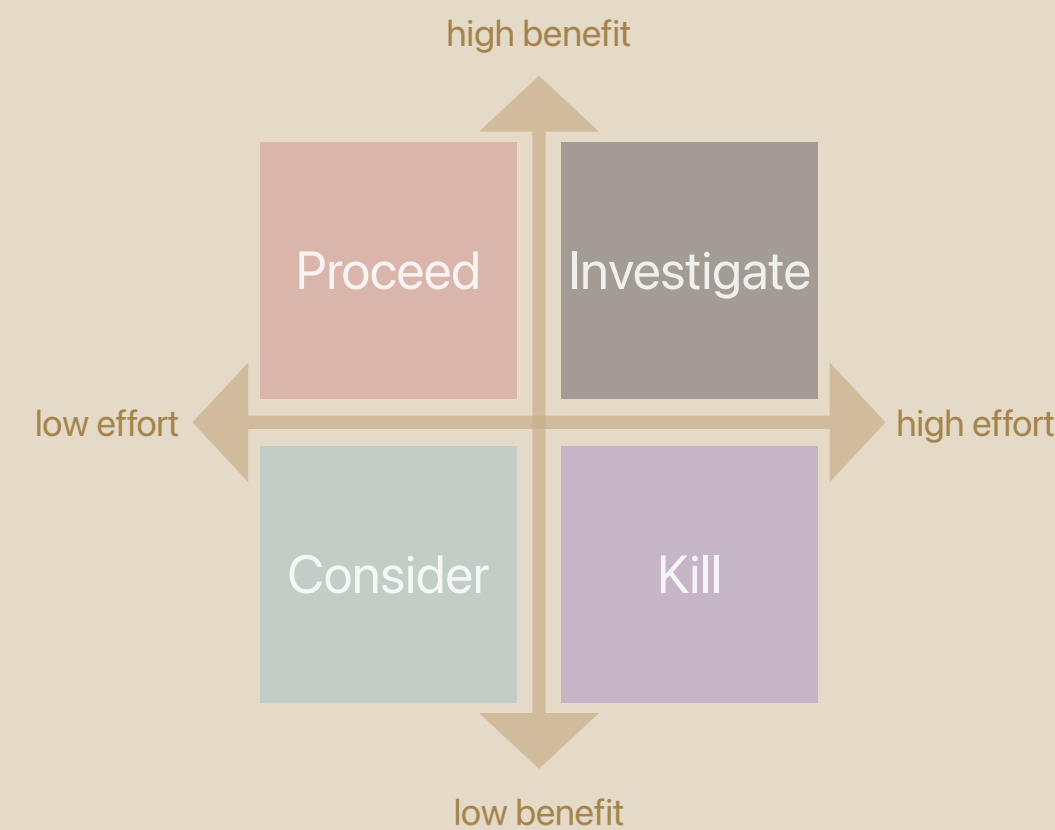
"It really a good start from the product side, the product looks like a real tool now" — PM manager

"I like the interface with the new design kit" — Developer

"It makes me believe the product is valuable and efficient" — Internal user

"The whole platform is too complicated and we can never say we're done" — PM

Cons

The time during is squised by the project, and some of the patterns can not be considered more thoroughly from the design system perspective.

We have too few background knowledge on the whole operation system (even the PM), there is risk to re-design from functional perspective when other operation system started to be modified.

PROJECT DEBRIEF

In China, there are many mobile apps for business customers, people in China are more inclined to finish job on mobiles than their partners in western world.

Based on fast mobile e-commerce development, and paperless trend, e-invoice started to use in 2013. After that, there are various business solutions developed with the fast growing e-invoices. WeChat, the social media platform of 1 billion-user in China, has implemented the first blockchain ecoystem for invoices. Some of the most important companies start using e-invoice only.

To accommodate WeChat e-invoices and WeChat payments (in the plan), we decided to develop the WeChat@Work mini app "expense report" for Chinese users finally.

Redesign of DIVE

2022 | DiDi

Mobile solution for NetSuite expense report

2018 | Oracle

Eloqua-WeChat integration

2018–2019 | Oracle

Where is it from?

NetSuite is an "all in one" ERP web application which is bought by Oracle.

I started work with this product from the end of year 2017. As NetSuite has a design team of internationalisation, I worked as the localisation designer for China, Japan, India, Australia and east Europe.

As I was discussing about the plan of UX jobs for NetSuite with PMs and NetSuite internationalisation design lead, most of us voted to mobile applications in China.

To get started, the most urgent and ready to be applied feature is expense report. That's where the project proposed as the first time.

WHY MOBILE EXPENSE REPORT

Expense cannot report immediately whenever it happens

Approver is not always at PC
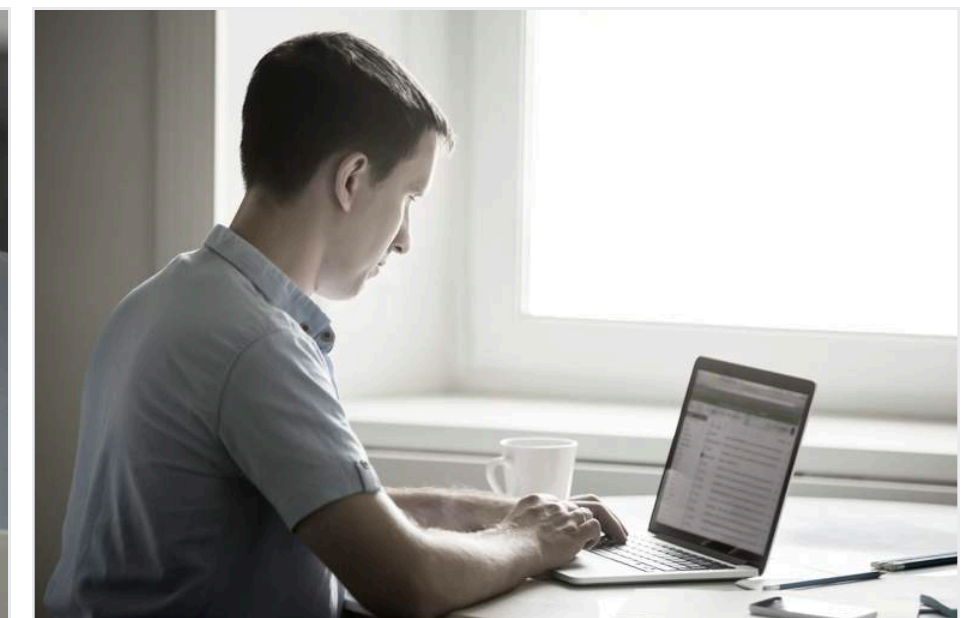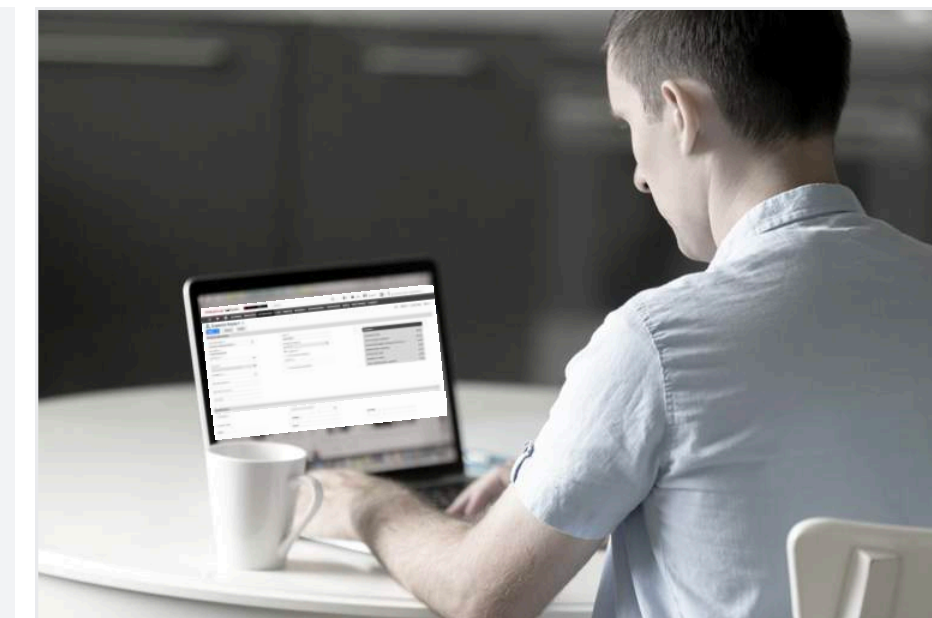

E-invoice sometimes complicates the current expense report process in NetSuite

E-invoice —> Email —> Download to PC —> Upload to NetSuite System to report the expense

PROJECT SITUATION

My job

UX lead partnered with 1 part-time PM, 5-6 developers and 1 QA.

Summarize the main functions from both the NetSuite and user requirement.

Discuss the main user tasks and the possible mobile specific features needed to make the task flows smoother.

Learn about the constrains of the platform and UI framework, adjust my designs when necessary.

Design review with NetSuite UX team.

Basic design guidelines

One hand operation   User control   Flexibility   Less user input   Efficiency

Constrains

1   The design should follow both WeChat@work design patterns and NetSuite UI guidelines.

2   We are developing H5 pages inside the browser of WeChat @work, which has some technical contrains to UI development.

3   As PM and devs in the team do not have much experience of building mobile apps, it takes time to transfer their mental modal from the web application to mobile application and the different interaction patterns by repeated design discussions and review meetings.

4   NetSuite has very completed functions on expense report. It's impossible and unnecessary to move all of them into a mini app.

One hand operation

Put the action buttons at the bottom to facilitate one hand operation on the screen (tabs could be switched by swiping)

User control

Expand the list item for more action options instead of popups would provide user the context of control.
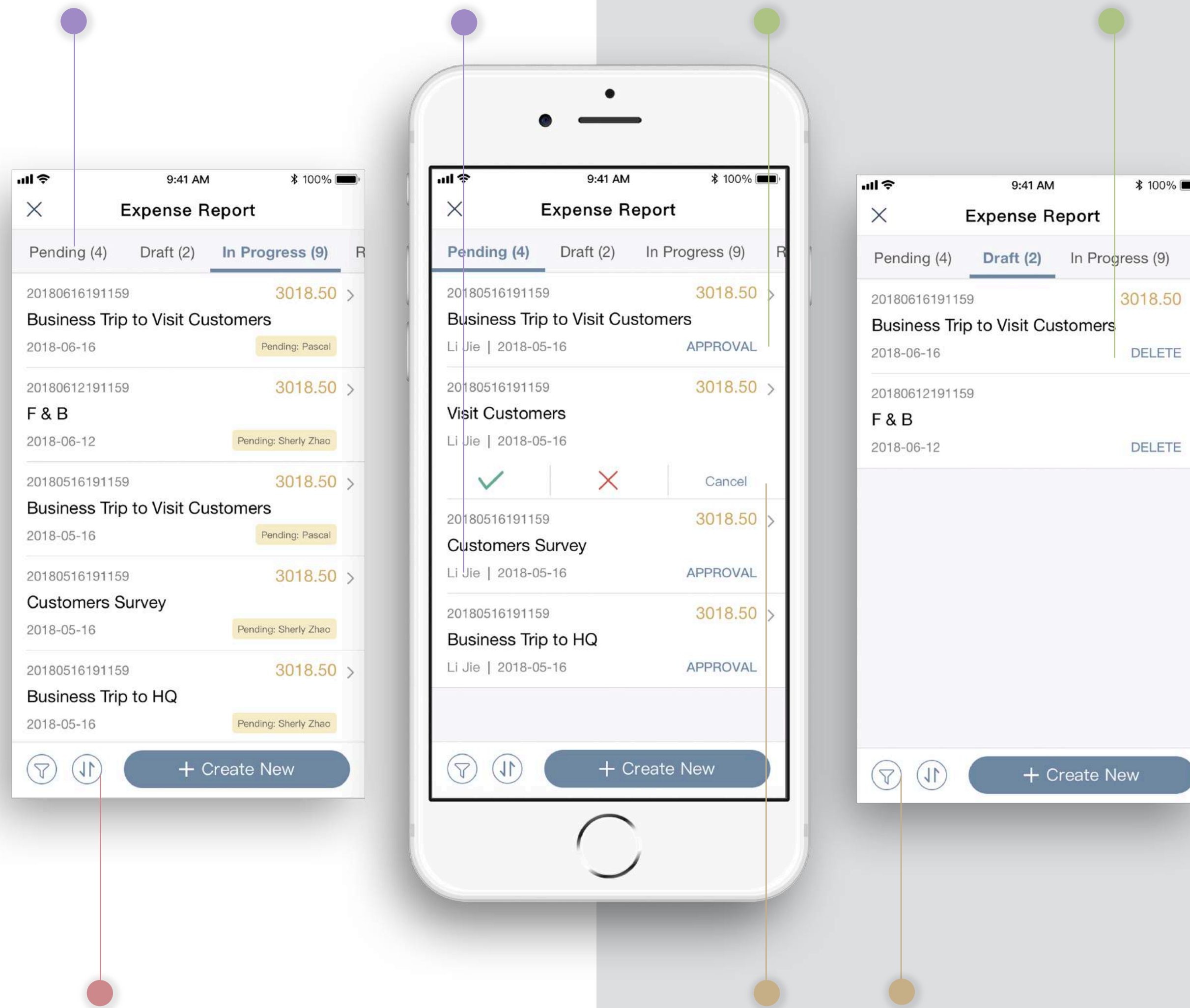
Provide filter and sorting for the lists to give users more control on their list viewing.
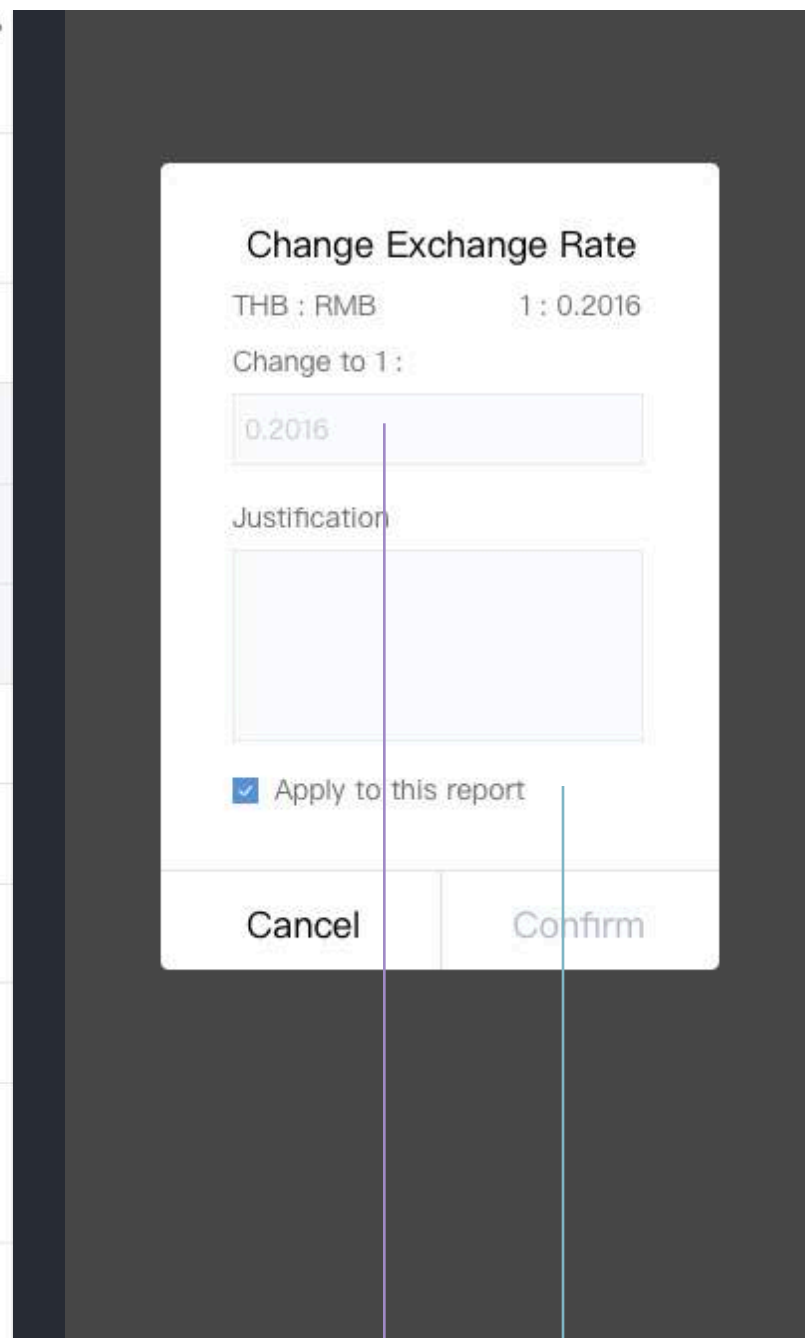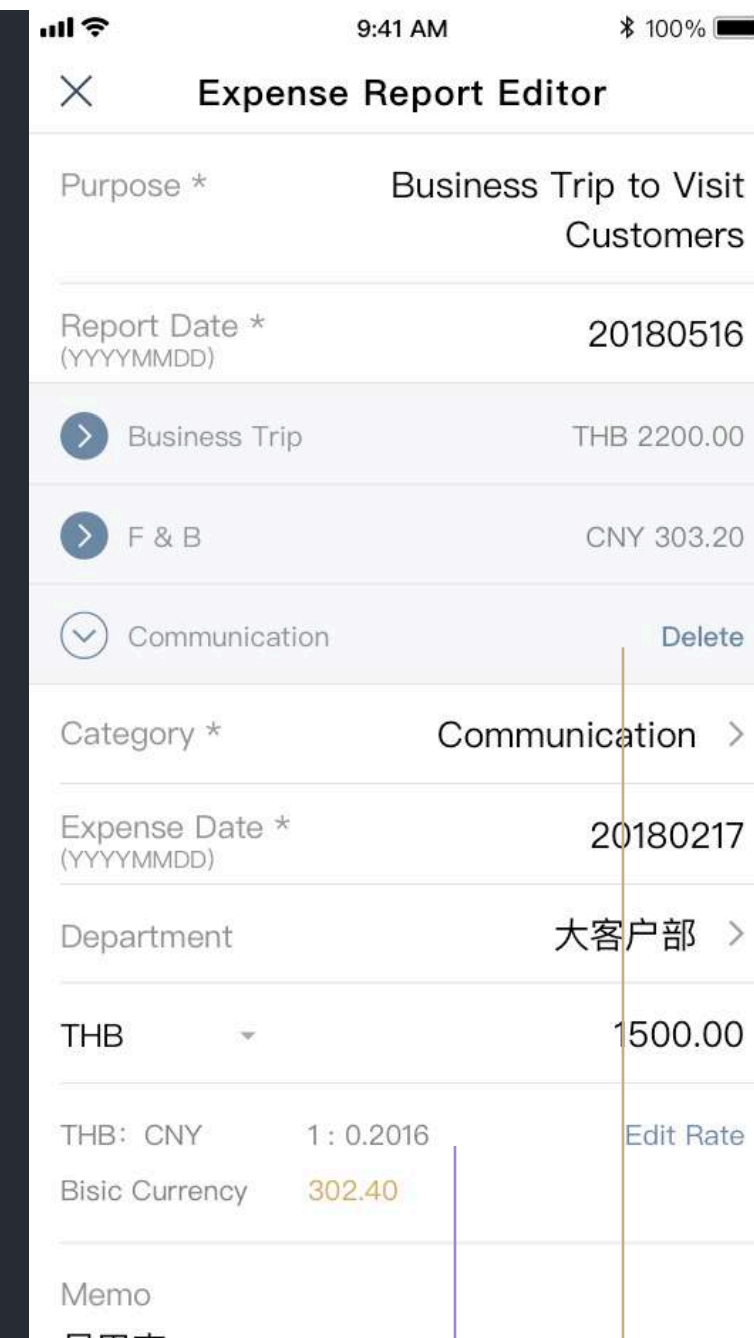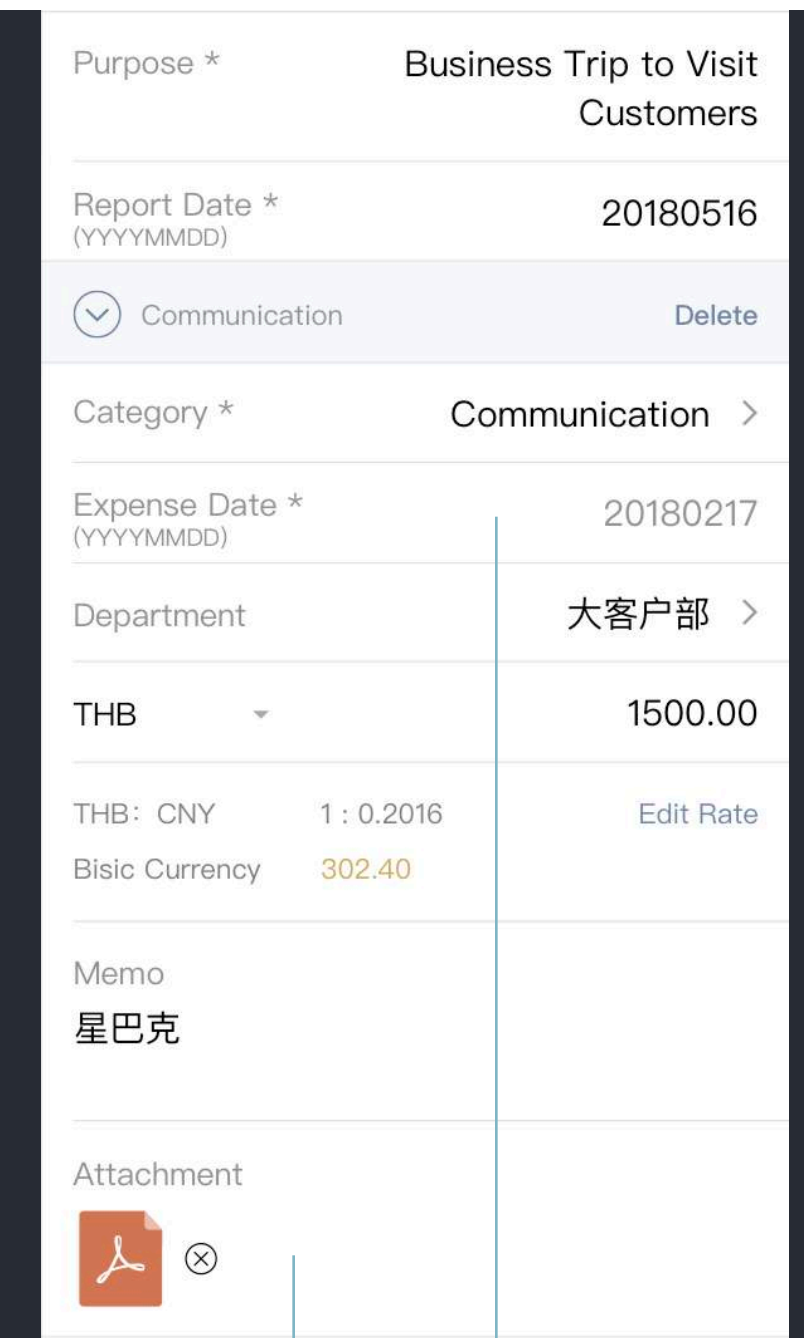
Flexibility

Provide quick actions at the card to save user the time of opening the report to act.

Efficiency

Using tabs to segment the reports into status, saves users' time on filtering

Only the pending (my approval) reports has the reporter's name

Screen 1 (In Progress tab)

9:41 AM   100%

Expense Report

Pending (4)   Draft (2)   In Progress (9)   R

20180616191159   3018.50
Business Trip to Visit Customers
2018-06-16   Pending: Pascal

20180612191159   3018.50
F & B
2018-06-12   Pending: Sherly Zhao

20180516191159   3018.50
Business Trip to Visit Customers
2018-05-16   Pending: Pascal

20180516191159   3018.50
Customers Survey
2018-05-16   Pending: Sherly Zhao

20180516191159   3018.50
Business Trip to HQ
2018-05-16   Pending: Sherly Zhao

+ Create New

Screen 2 (Pending tab)

9:41 AM   100%

Expense Report

Pending (4)   Draft (2)   In Progress (9)   R

20180516191159   3018.50
Business Trip to Visit Customers
Li Jie | 2018-05-16   APPROVAL

20180516191159   3018.50
Visit Customers
Li Jie | 2018-05-16

✓   ✗   Cancel

20180516191159   3018.50
Customers Survey
Li Jie | 2018-05-16   APPROVAL

20180516191159   3018.50
Business Trip to HQ
Li Jie | 2018-05-16   APPROVAL

+ Create New

Screen 3 (Draft tab)

9:41 AM   100%

Expense Report

Pending (4)   Draft (2)   In Progress (9)   R

20180616191159   3018.50
Business Trip to Visit Customers
2018-06-16   DELETE

20180612191159
F & B
2018-06-12   DELETE

+ Create New

LIST PAGE

User control

User could only delete the line when it's opening, for error prevention considering.

Less user input

Imported E-invoice would automatically fill in the necessary fields for the expense line. (expense date cannot be changed as it's from invoice)

And also, the invoice will automatically attached in line as a pdf file.

When changing the exchange rate, it allows user to apply the rate to the whole report to reduce user's repeated input for multiple lines.

Efficiency

We provide the calculated base currency based on the exchange rate for user. And the total amount of the expense report is in base currency for convenient of calculation.

The current rate is displayed as placeholder as reference when the user is changing the exchange rate

EDITING
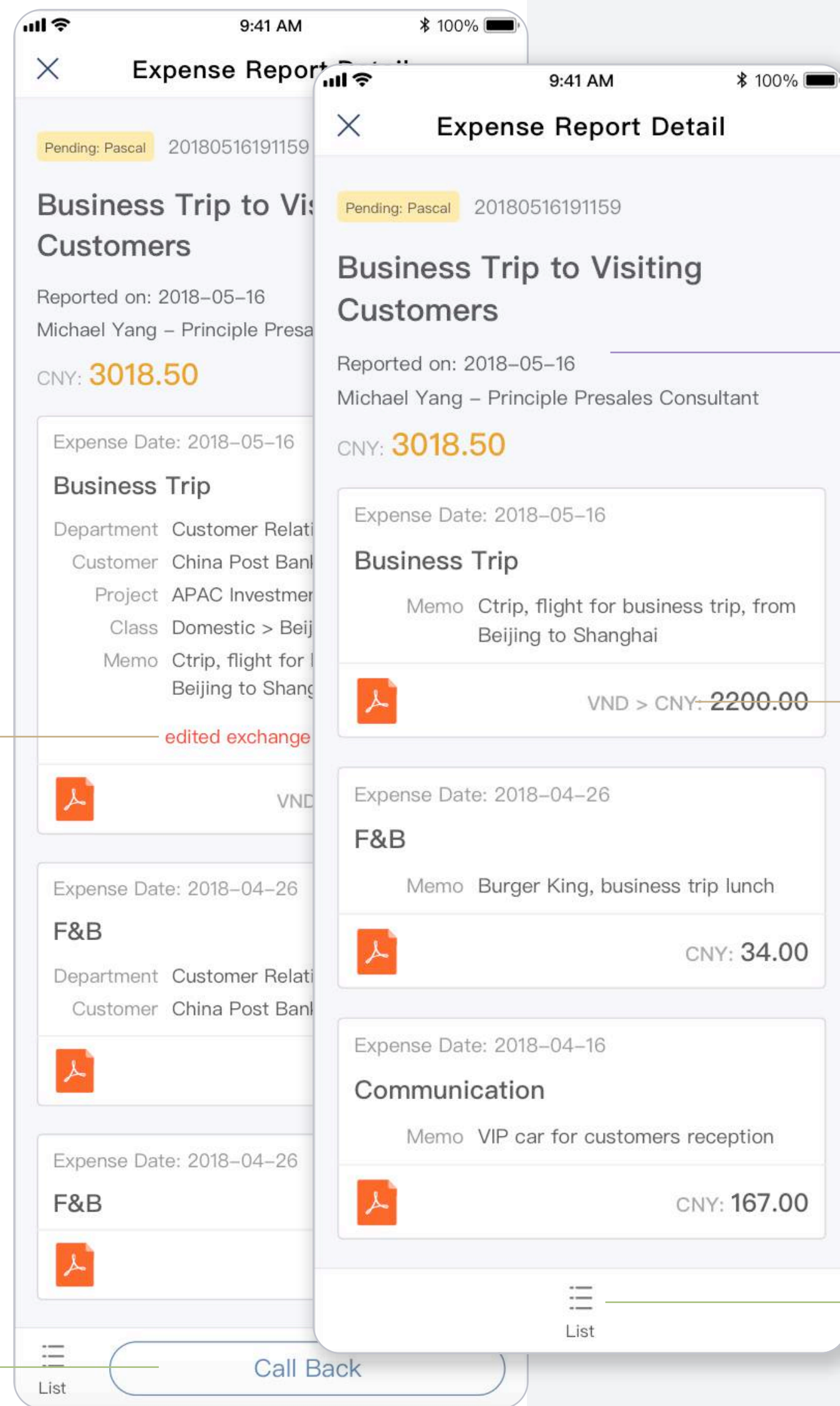
User control

User could see the exchange rate edited if he/she did. The exchange currency provided if the original invoice is in foreign currency.

Flexibility

Before anyone has approved this report, the reporter could call back the report. The withdrawed report would be in draft status. But the report cannot be called back if at least one person has already approved this report.
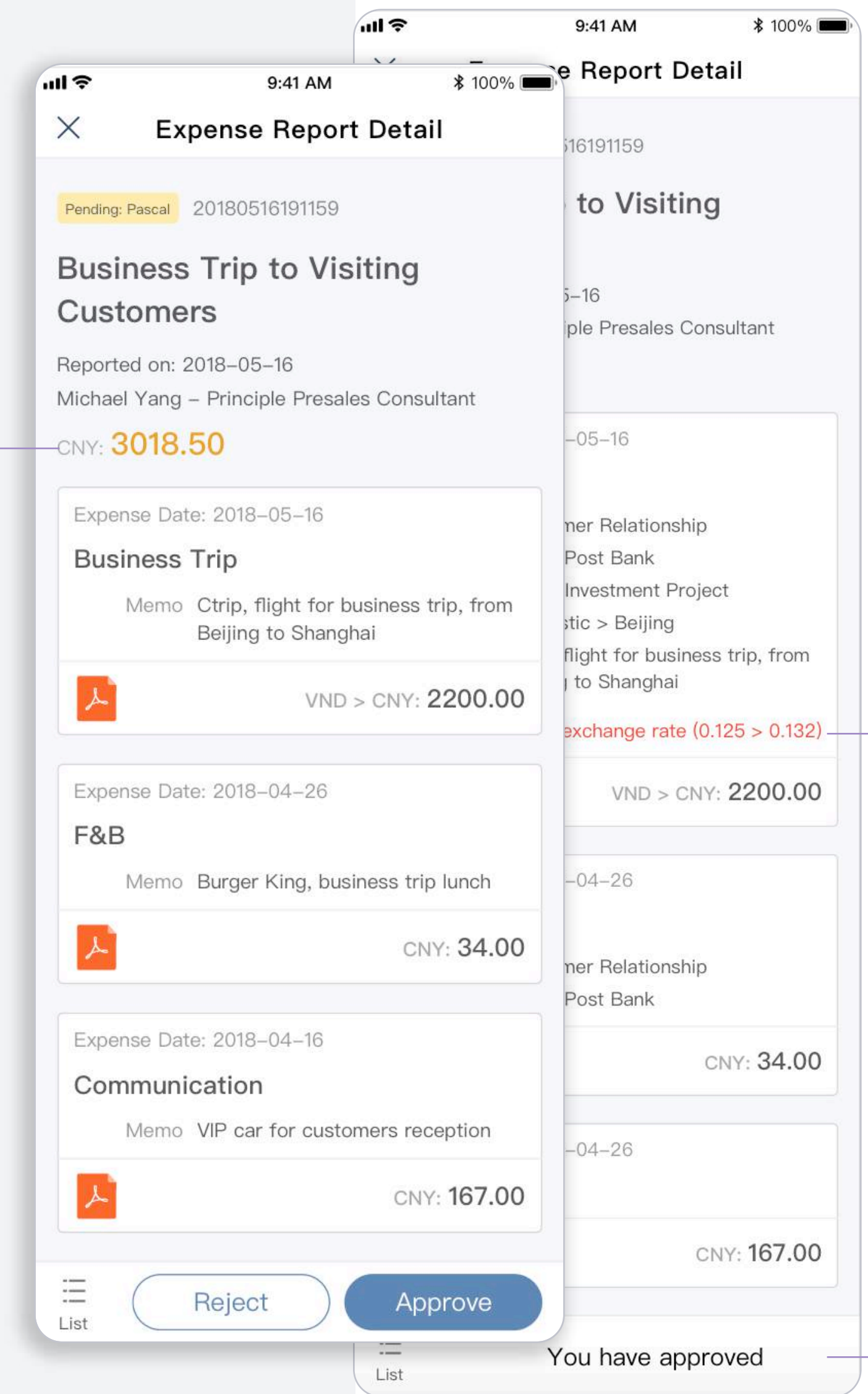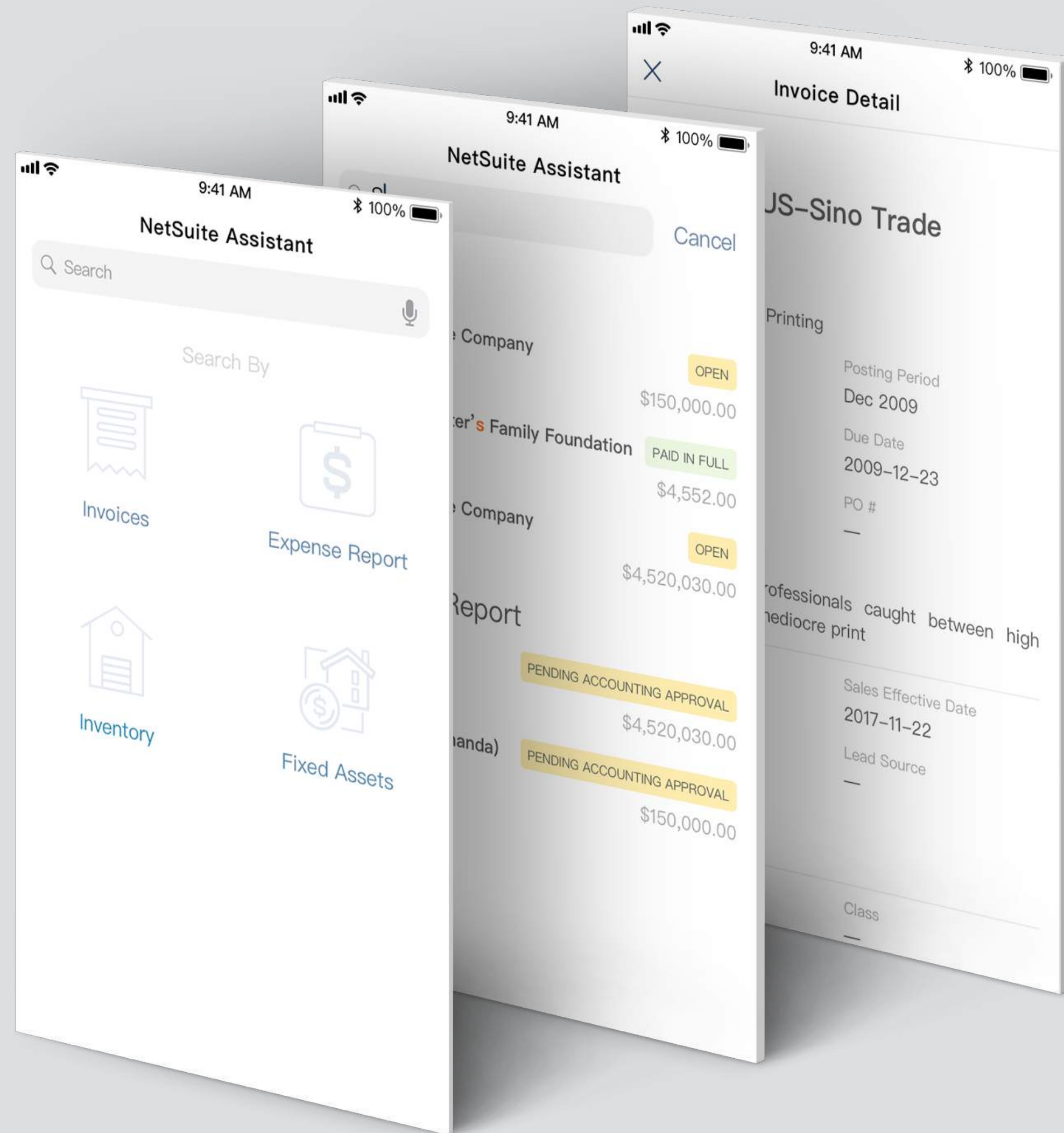
Efficiency

Most important summary info is displayed at the top of the page.

The total amount is in base currency. But we still provide currency (CNY) for reliability.

If the reporter has edited the exchange rate, the edited exchange rate and the original one will be displayed and compared to facilitate approver's decision making.

If user has already approved this report, there will be a message instead of the action buttons

Screen 1 (Expense Report Detail)

Pending: Pascal 20180516191159

Business Trip to Visiting Customers

Reported on: 2018-05-16
Michael Yang – Principle Presales Consultant

CNY: **3018.50**

Expense Date: 2018-05-16
Business Trip
Department Customer Relati...
Customer China Post Bank
Project APAC Investment...
Class Domestic > Beijing
Memo Ctrip, flight for l...
Beijing to Shangi...

edited exchange...

VND...

Expense Date: 2018-04-26
F&B
Department Customer Relati...
Customer China Post Bank

Expense Date: 2018-04-26
F&B

List   Call Back

Screen 2 (Expense Report Detail)

Pending: Pascal 20180516191159

Business Trip to Visiting Customers

Reported on: 2018-05-16
Michael Yang – Principle Presales Consultant

CNY: **3018.50**

Expense Date: 2018-05-16
Business Trip
Memo Ctrip, flight for business trip, from Beijing to Shanghai

VND > CNY: ~~2200.00~~

Expense Date: 2018-04-26
F&B
Memo Burger King, business trip lunch

CNY: **34.00**

Expense Date: 2018-04-16
Communication
Memo VIP car for customers reception

CNY: **167.00**

List

Screen 3 (Expense Report Detail)

Pending: Pascal 20180516191159

Business Trip to Visiting Customers

Reported on: 2018-05-16
Michael Yang – Principle Presales Consultant

CNY: **3018.50**

Expense Date: 2018-05-16
Business Trip
Memo Ctrip, flight for business trip, from Beijing to Shanghai

VND > CNY: **2200.00**

Expense Date: 2018-04-26
F&B
Memo Burger King, business trip lunch

CNY: **34.00**

Expense Date: 2018-04-16
Communication
Memo VIP car for customers reception

CNY: **167.00**

List   Reject   Approve

exchange rate (0.125 > 0.132)

VND > CNY: **2200.00**

CNY: **34.00**

CNY: **167.00**

You have approved

Achievement of this Project

The MVP verson of expense report was demoed on OOW (Oracle Open World). The entire audience was attracted by this new feature and people were all impressed how deeply Oracle did on localization of its cloud applications.

Our exchange rate solution is very rare in similar products in China, while it solves a very common problem in expense report process.

What Impressed Me?

Close communication with developers is necessary and efficient when designing for a new platform. Developers should also learn about the new UI framework before hand.

Simplicity comes from the deeply digging on use cases. We should consider all the possible workflows before providing a design solution.

Although there are many similar products in the market, our product is unique because of our unique platform (integrated WeChat @Work with NetSuite system) and technical environment (potential users are already the NetSuite users). Design should bear these context in mind.

Application localization could not deeply touch the target user unless you understand more about their habit, preference, and their complicated usage environment.

Eloqua is an important marketing automation product in Oracle marketing cloud. To help marketers around the world recognize and reach their (potential) ideal customers, Eloqua integrates with social platforms. In China, we integrate WeChat, the local most popular social media platform, to empower global and regional businesses directly engage WeChat users to build their brand presence in the Chinese market and connect with potential buyers, at scale.

Redesign of DIVE

2022 | DiDi

Mobile solution for NetSuite expense report

2018 | Oracle

Eloqua-WeChat integration

2018–2019 | Oracle
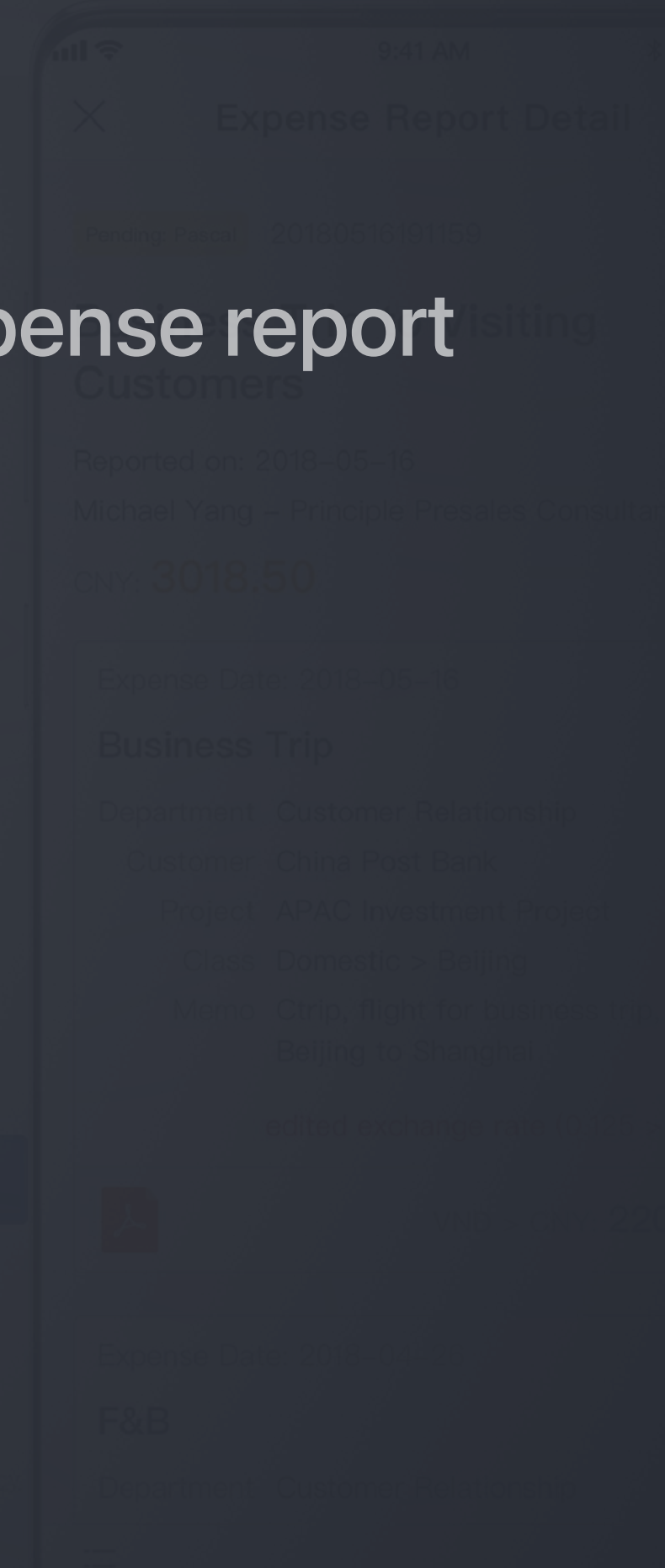
Eloqua usage

For marketers to:

manage the contacts of different chanels

manage the marketing content (articles, medias etc.)

design the marketing automation process on the canvas

track and analyze the marketing event ROI

Contact management:
The contact rating, information update, channel account configuration

Target

Trigger   Trigger   Trigger

Actions   Trigger   Actions

Menu service:
The user actions/ conditions which trigger system reactions

Actions   Trigger

Actions

Action service:
From which channel to send which message (content service) to the user or update info.
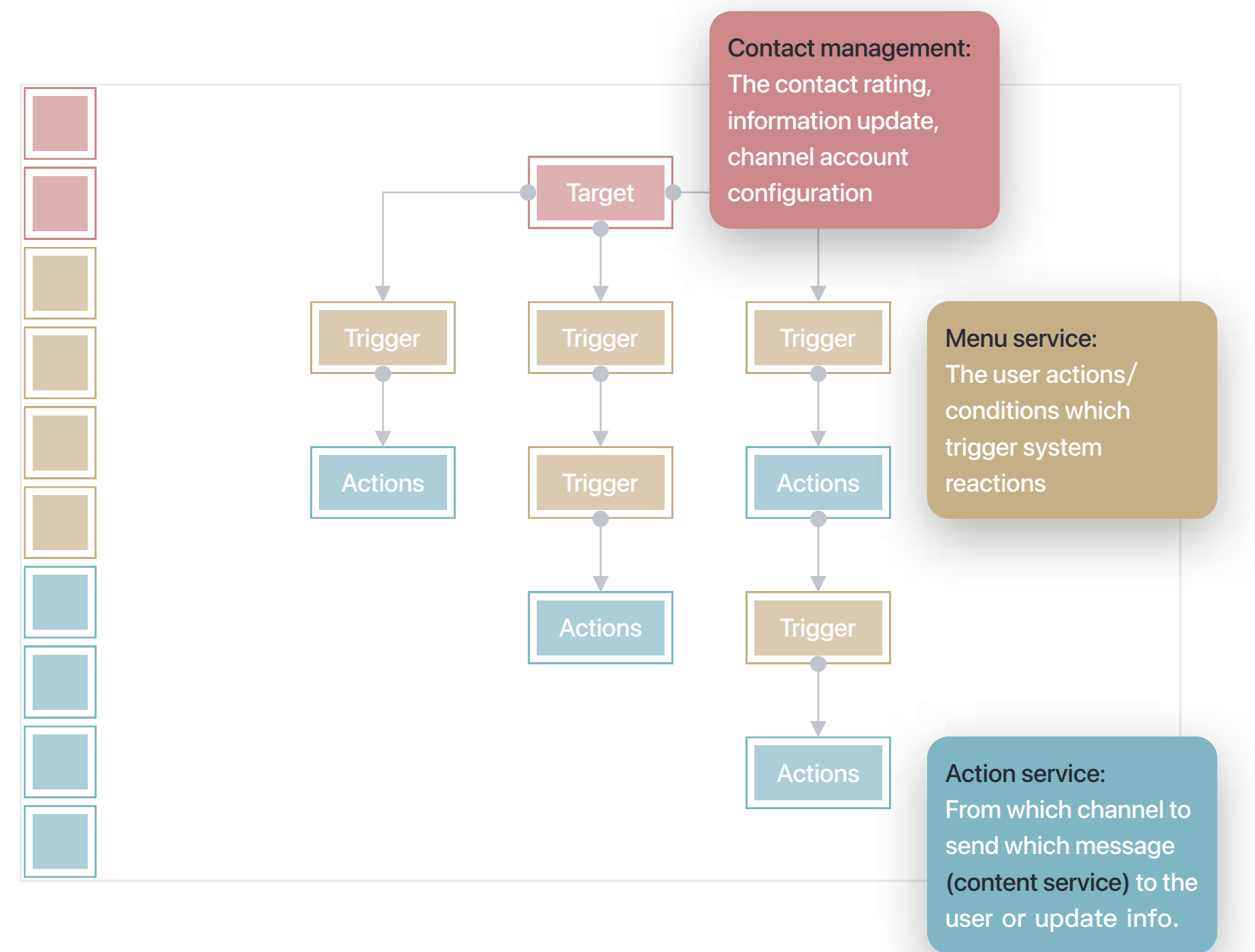
Eloqua-WeChat integration

1 Connet the WeChat accounts into the Eloqua platform

The configurations in the WeChat account management platform can be integrated, the followers of that account will be loaded into the contacts list

2 The welcome messages the account followers receive when they first subscribe to that account

The menu setting of the account interface, how the account reacts when user tapping on different menus of that official account

Autoreply messages: what will user receive if some conditions fulfilled

3 Contact information synchronize and message send configuration

The dynamic content configuration when the specific WeChat followers are receiving or acting on some specific messages. eg. fields mapping, QR code configuration, landing page configuration

INTRODUCTION

DESIGN WORKSHOPS

The workshops were aimed at getting insight into the WeChat marketing functions and how they can integrate with marketing cloud apps.
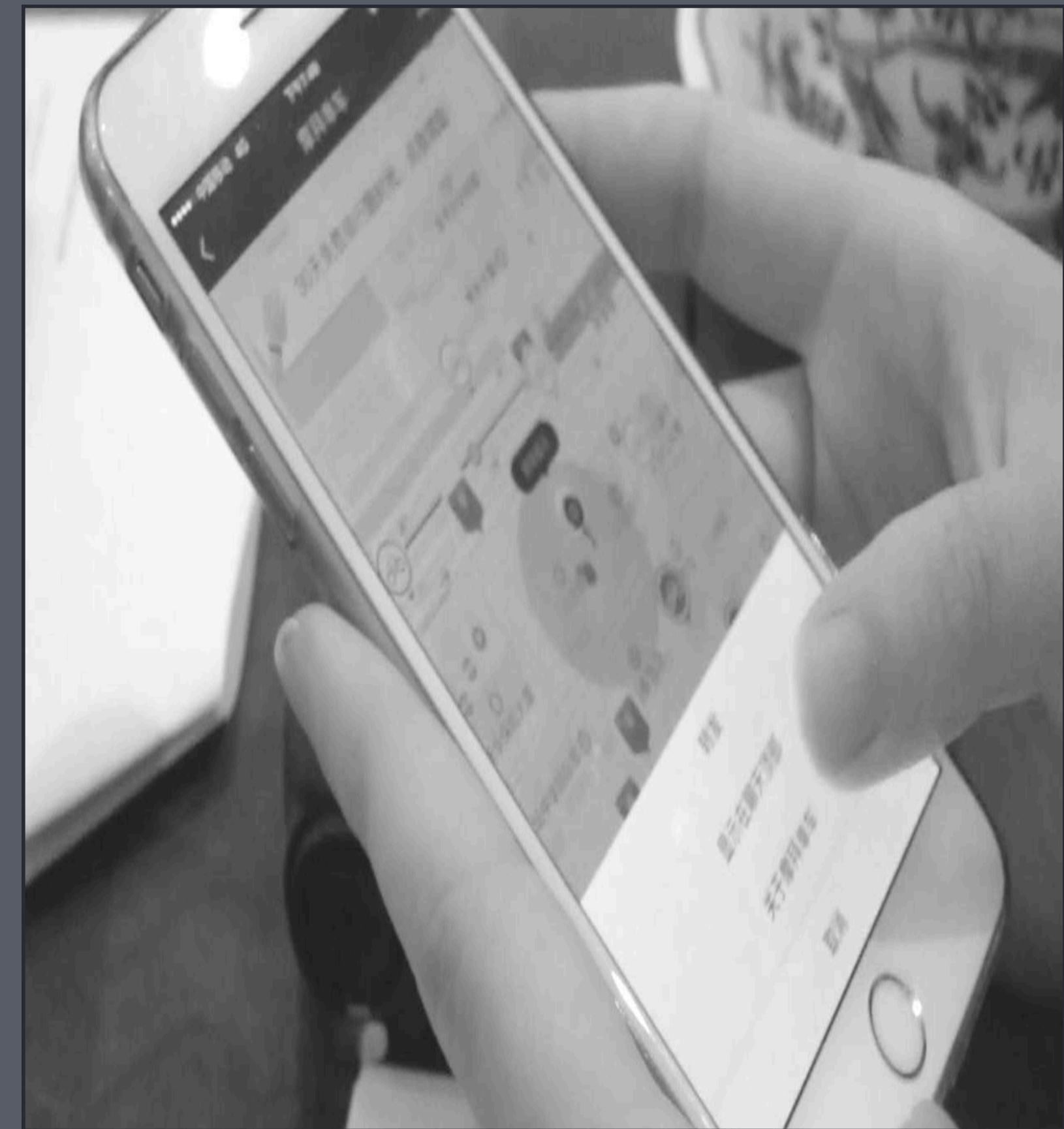
DESIGN PRINCIPLES

Discoverable

As an integrator, some of the task flows are crossing two products, we should make best use of both products but through a visible workflow from the interface. Users need to know what they can do and how they can get the work done immediately from the UI.

Flexible

When visiting our customers, we got to know that although our product was target at the B2B marketing users, there are many customers are using as B2C marketing automation actually. We should make it flexible to various scenarios in addition to our main workflows.

Consistent

As the integrator users are both using Eloqua and WeChat official account management platforms, our product should inherit as much as possible interaction patterns from both products according to the feature relationships to these two products.

Discoverable and flexible information architecture

The main menu

Besides the functions related to the account integration, which is finished in the app platform of Eloqua. All other configurations are finished in this Eloqua-WeChat integrator.

The configuration functions are categorized according to their objects.

WeChat setting: setting relating to what contacts will see and will the simple interactions at the official account.

Message gallery: different kind of messages created from both the WeChat account management platform and the integrator.

Event management: the settings of different kind of WeChat events, which is unique from the Eloqua general events.

Integrator reports: the data presentation and analysis of different marketing material and actibities in the integrator.

Categorizing by the objects bears the benefit of flexibility. For example, it is flexible for WeChat capability expansion,such as more kinds of messages.
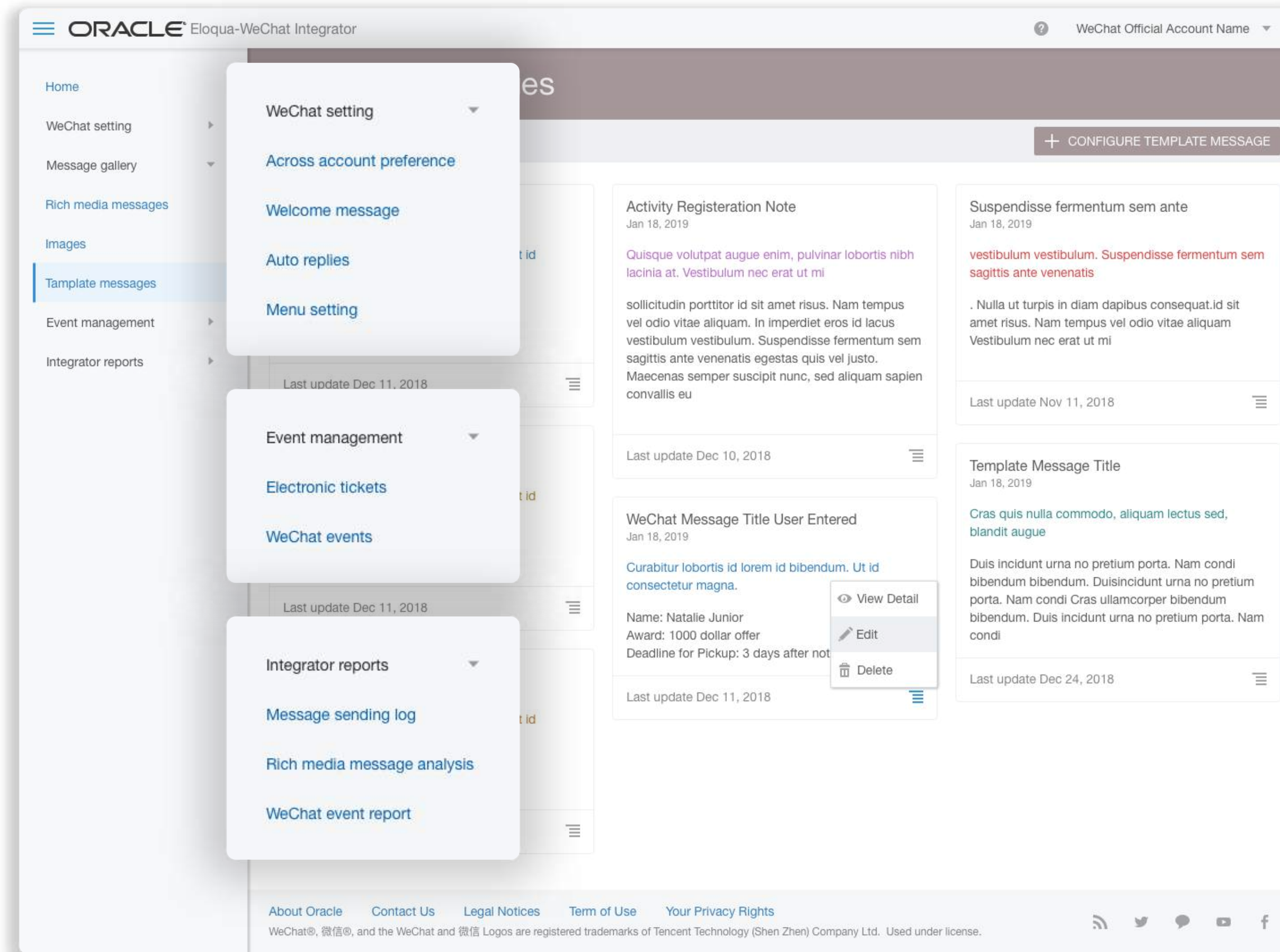
Discoverable workflow logic

The form design of message sending configuration

Besides the integrator, I also designed the configurations of the nodes relating to WeChat in the canvas.

One of the most used configuration is sending WeChat messages. As to the limits of WeChat capacity, different types of messages can send as different types through different methods.

Although the tradition top to down form has the natural logic as the fields in the upper side would decide the ones followed, but their relationship is not obvious to the users. I decided to put these fields horizontally as they are fixed fields, only providing different options in different relationships. The relationship is more transparent to the users.
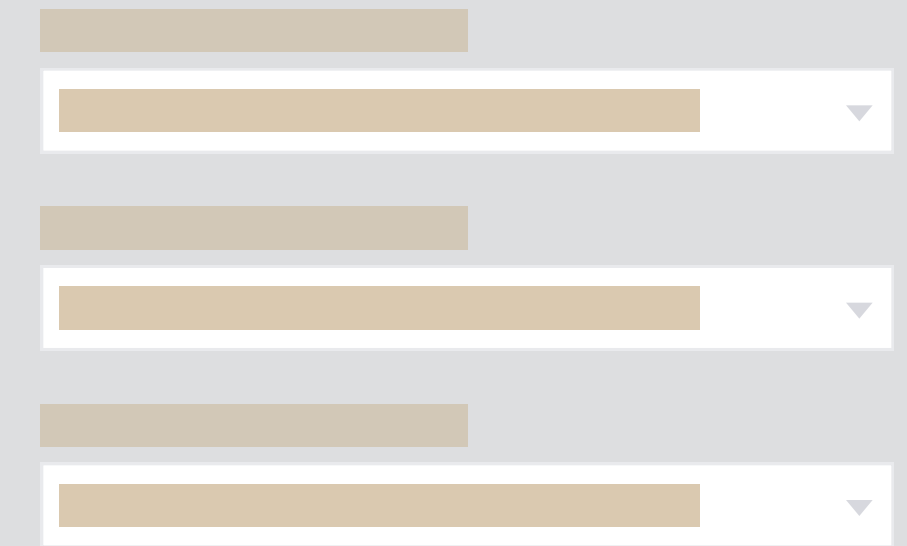
The relatinships between the three fields is not obvious in the traditional form layout.

Flexbible function

The multi-session event configuration

The event configuration was proposed as the setting for single event. But as I walk through the user journey, I found that some of the events have different "sub-" events, and sometimes as the conference sessions. This inspired me to provide event-session relationship inside the event configuration.

Discoverable status

The form design of event configuration

As the form is long, sometimes user need to check if they have finished all the fields or not. To save this physical effort, I provide the indication of fields filling of different groups of fields. From this indication, it is quite obvious of the status and save the physical effort of user review.

Take advantage of both platforms:

WeChat offline event management

New Electronic Ticket — Cancel · Save · Submit

Event Configuration — Cancel · Save

Marketer

- Create WeChat electronic ticket
- Create an event
- Prepare registration form and landing page
- Send landing page as the link in message
- Send registrants with the electroic ticket(s)

Invitee

- Click the landing page link
- Fill the form and submit

Receptor

- Download ticket verification mini program
- Scan the event QR code to be authorized for verification

- Click to save the ticket and use it check-in
- Get scan result and show to receptor
- Scan the participant's ticket

- View the report of the event

Prerequisite:
Add the mini program in the integrator

Consistent layout design

The form design of ticket and event configuration

Both of the forms are separating the main parts by background. The tickets setting page uses the background for content not showing on ticket; the event configuration page uses the background for the event setting (to differentiate from session setting)

The ticket configuration form is consistent with WeChat management to facilitate user's familarity.

Oracle

Oracle is a Leader, based on Oracle Eloqua's robust feature set, extensive third-party integration option and connections to other components of the Oracle Marketing Cloud. Eloqua serves many verticals, w stronger concentrations in business and consumer services, high-tech and IT, manufacturing, financia services, and media. Oracle is based in Redwood Shores, California, U.S.

STRENGTHS

Functionality depth and user interface: Eloqua has an excellent user interface and deep functionalit areas such as workflow triggers, email creation and lead importing — including an integration with WeChat for creating leads directly from the popular messaging platform. Eloqua is able to scale its solution for very large lead databases and companies with complex needs. Reference customers ga Eloqua above-average scores for lead management vision and product roadmap as well as overall product features and functionality.

Integration and ecosystem partners: Eloqua has a broad ecosystem of partners in addition to the

Quarterly Team Award Winners

Employee profiles	Award for
Lian Liu, Na Liu, Jason Yu, Boya Cui, Weifang Chen, June Gao, Natalie Hong Liu, Dawei Yin, Claire Mao, Lipeng Han, Meng Wang, Huanhuan Lu, Yuguo Li, Lennard Low, Joyce Zhi **LOB:** APG **Nominated by:** Sherly Zhao **Site:** Beijing	- The Eloqua-Wechat project team took initiative and built this integrator from scratch. The team went through all new product release process and released it as an Oracle standard product. The process including security, legal and corporate architect and HQ App. - After release, the team follows Agile process and do a monthly release. So far there are 6 customers go live and around another 20 customers installed and are in testing stage. - The team did an outstanding job to develop new release and in the mean time support customers on using the integrator . With the great support from the team and the capability provied by the integrator , our customer TE aquired over 10,000 Wechat followers in one marketing compaign .They were so happy with our product and introduced our product to another customer. - In FY18 Q1, the Eloqua-Wechat integrator helps Oracle to win the biggest Eloqua deal globally (1.32 M ARR for three years) . Eloqua WeChat Integrator has been specifically mentioned in Gartner Magic Quadrant for CRM Lead Management in Q1 to helps Eloqua achieve leading position in CX cloud globally .Functionality depth and user interface: Eloqua has an excellent user interface and deep functionality in areas such as workflow triggers, email creation and lead importing — including an integration with WeChat for creating leads directly from the popular messaging platform. - I think this is probably the first time something that we did directly got mentioned in a Gartner report. Although just a brief mention, it is touted as a strength by Gartner.

Best Satisfied

High customer appraisal on the interaction design.

Contributes to Oracle (marketing cloud) as the leader in Gartner magic quadrant.

Devs advocate the design more when they have more empathy with the users.

Potential opportunities

As a powerful marketing cloud, there is bright future of its integrators with social media in China. From designer part, the potentials include but not limited to:

Improving the learnability of different marketing activities through guided workflow;

Customized contact fields for different industries, like agriculture and construction industries have different requirements for the fields;

Supporting creative content generation using our integrator as the content is the center of marketing.

03

Design sharing

Oracle | Li-Fung | DiDi
2017-2021

2017-2019

UX basic training

Design mentor in cross company personal mentoring program

2020

Interaction design mentoring and training for junior designers

2021

Global B UX metric sharing

Design decision making

BACKGROUND

Team

Lack experience of working with UXers (most of them don't know what is UX and how to work with UXer)

Lack the workflow with UXers involved

Don't have the connection with designers in HQ

Myself as the only UXer

Too many projects to support

I need to do repeative work to different project teams on the basic UX annotations

Lack backups

UX basic trainings

2017-2019 | Oracle

Design sharing

2021 | DiDi

UX understanding

To tell the different roles across different projects what is UX, and what kind of UX team structures inside Oracle, how can they work with UXers.

Also I shared details about the process of typical scrum teams with UX designers involved.
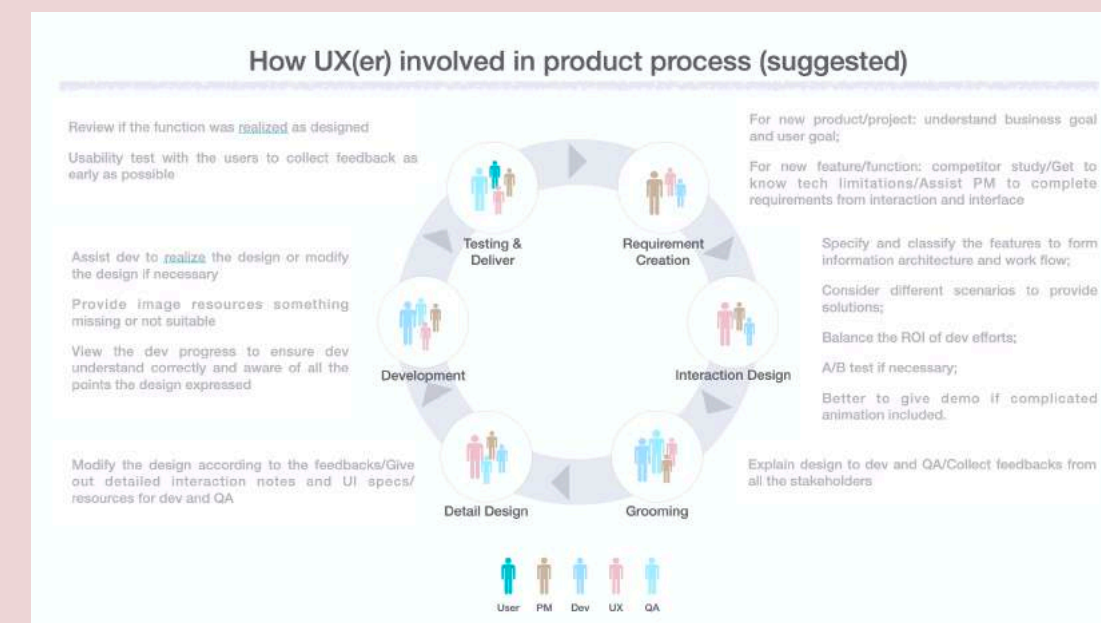
Mobile applications

There are more and more mobile apps for business solutions are requested to us. While we as a whole team has few experience on the mobile interaction.
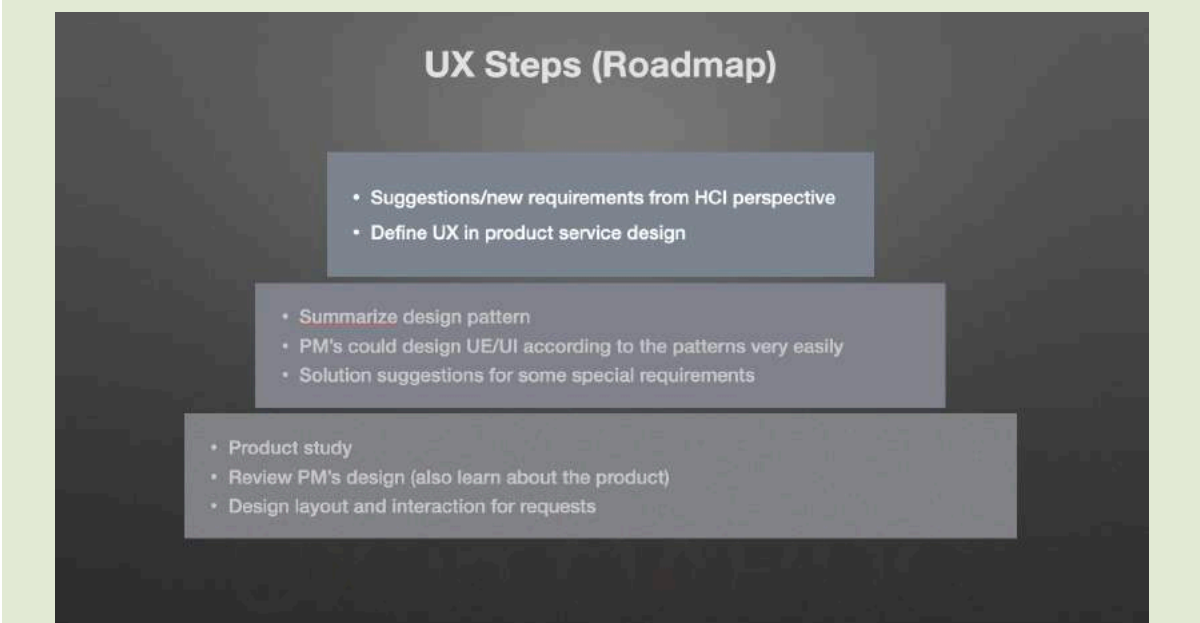
I start sharing the basic dev knowledges and design patterns of mobile apps with the team. They became more prepared for my design proposals and start switching to the mobile "mind modal" since their first mobile project.
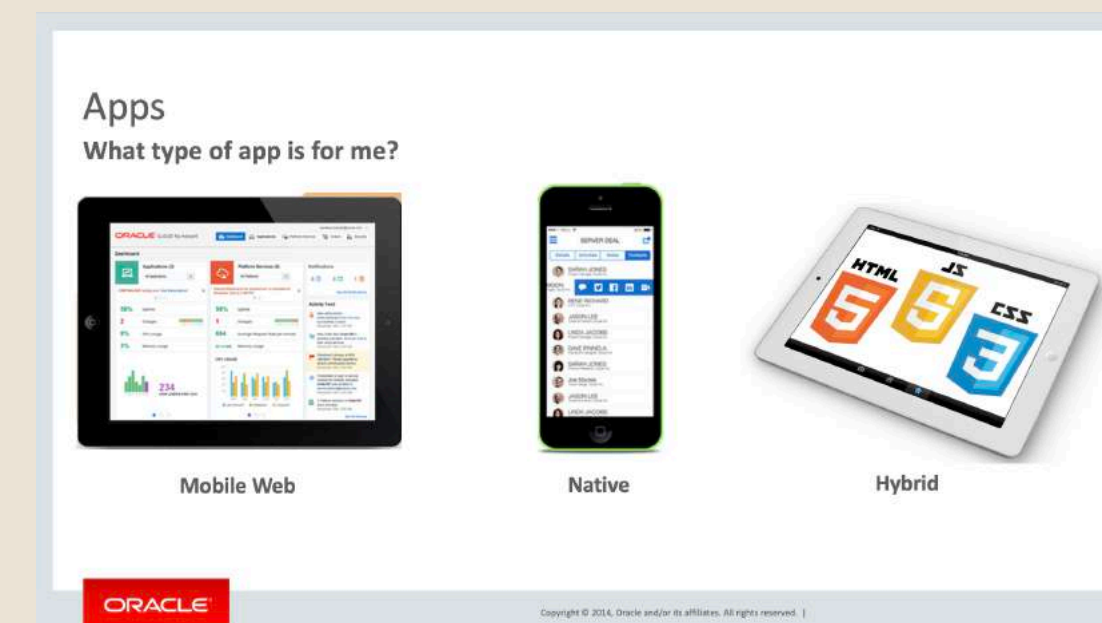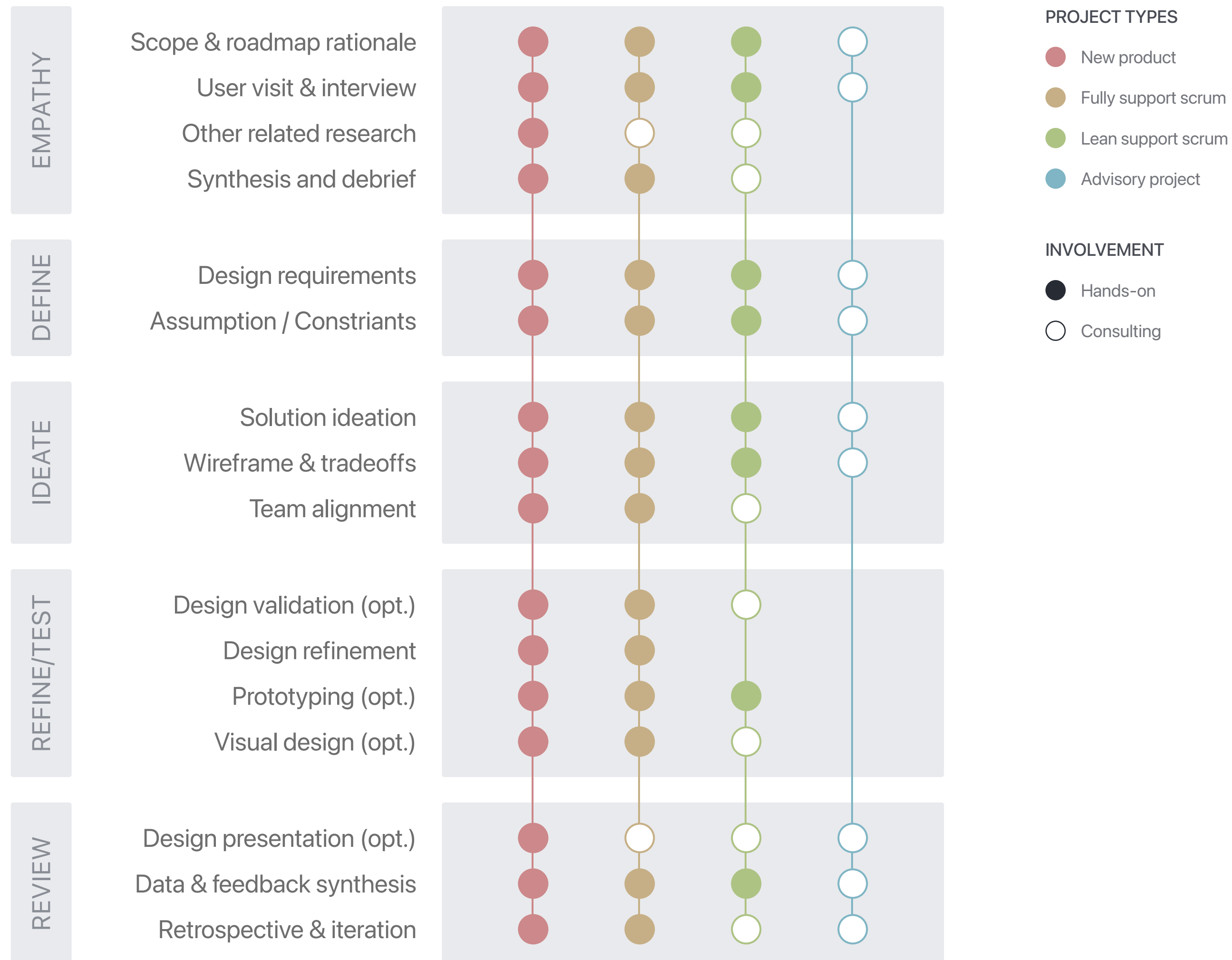

UX roadmap sharing

Share my vision of the UXer role inside this very special R&D environment, to get feedback from my colleagues and discuss on how can they help me to realize this vision.

Sharing this kind of information is helpful for me as the only UXer and the PMs and other roles who are interested in UX were start involving more on UX improvements.

UX BASICS

PROJECT TYPES

- New product
- Fully support scrum
- Lean support scrum
- Advisory project

INVOLVEMENT

- ● Hands-on
- ○ Consulting

EMPATHY

- Scope & roadmap rationale
- User visit & interview
- Other related research
- Synthesis and debrief

DEFINE

- Design requirements
- Assumption / Constriants

IDEATE

- Solution ideation
- Wireframe & tradeoffs
- Team alignment

REFINE/TEST

- Design validation (opt.)
- Design refinement
- Prototyping (opt.)
- Visual design (opt.)

REVIEW

- Design presentation (opt.)
- Data & feedback synthesis
- Retrospective & iteration

Multiple projects support

When the teams are getting more and more involved with UX cooperation, and some of the PMs and developers are more knowledgeable about UX basics, I can have less engaged in some of the projects which were in lower priority in user experience design.

IDEAL COOPERATION REACHED

BACKGROUND

DiDi Global UX is a team with the culture of sharing. We have a lot of opportunities to share what we did in projects and what we learned from the projects and other experiences.

The purposes of sharing include learning from each other and getting feedbacks from peers with different perspectives, to prevent unnecessary mistakes and improve ourselves.

I shared the team with one project summary and one personal design method in 2021.

UX basic trainings

2017—2019 | Oracle

Design sharing

2021 | DiDi

UX design metrics

A part of Global B design system. It is shared in the end of May, 2021, before then I was responsible this part of the design system.

Background

We don't have effective metrics for B2B products to measure the quality and value of design.

Although there are many eveluation metric in the market, they are not fit into our specific business scenario and design goals.

Feedbacks and follow up

Some of my colleagues are confused about the formula part, but more of them like to learn more and discuss on it. The metrics were then shared with product team and applied on the products.

Background

There are many discussion of design patterns among the designers on what kind of patterns should be selected and applied on our design system.

Many of the designers in the team don't know why we need design principles and how can we take advantage of it.

Feedbacks and follow ups

There is a clear co-understanding on what design principle is and how can we use it.

The discussions on the design patterns are more easier to get agreement based on the design decision making frame work.

Designers are starting to realize the cost and value of different kind of design problems.

Design decision making
设计决策

Joyce Zhi
Global UX, Didi Global

设计决策

决策	选择现有模式的设计决策	无参考模式的设计决策
取舍与决策	简单问题	难解问题
直觉偏差	设计原则及应用	假设检验及应用范围
Cynefin框架	复杂问题	极端问题
	解构损益，平衡目标	弗洛姆领导者参与模型
		(Vroom–Yetton–Jago model)

设计原则

具体的

这些设计原则分别可以对应到哪类产品?

与产品特征功能和内容密切相关

为探索者设计
给用户带来惊喜
值得信任
突出品牌
能盈利
提供最好的
按相关性组织页面
满足对速度的需求
充分满足用户
提供无缝的体验

直观易学: 用户不需要别人的进一步解释就能理解解怎么才用
沉浸体验: 使用无缝和隐藏的框架, 用户在交互之前不会注意到它, 并且可以控制它, 而不是被迫接受
色彩丰富: 突出个性
视觉响应: 用户可以在物理空间中体验交互
为探索者设计: 就像小孩的玩具, 吸引用户来尝试、挖掘和学习, 使用越多, 收获越多

专注沉浸的工作体验
清晰的界面增强用户的自信
快速、省力以及有目的的交互
通过渐进发现的设计为不同用户赋能
一致性和标准化, 创新须具有增值目的
促进更有效和友好的人机互动

设计师的日常

Minimalist vs. Visible   Novice vs. Expert   Easy to use vs. Easy to build

THANKS

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