

1 The problem to solve

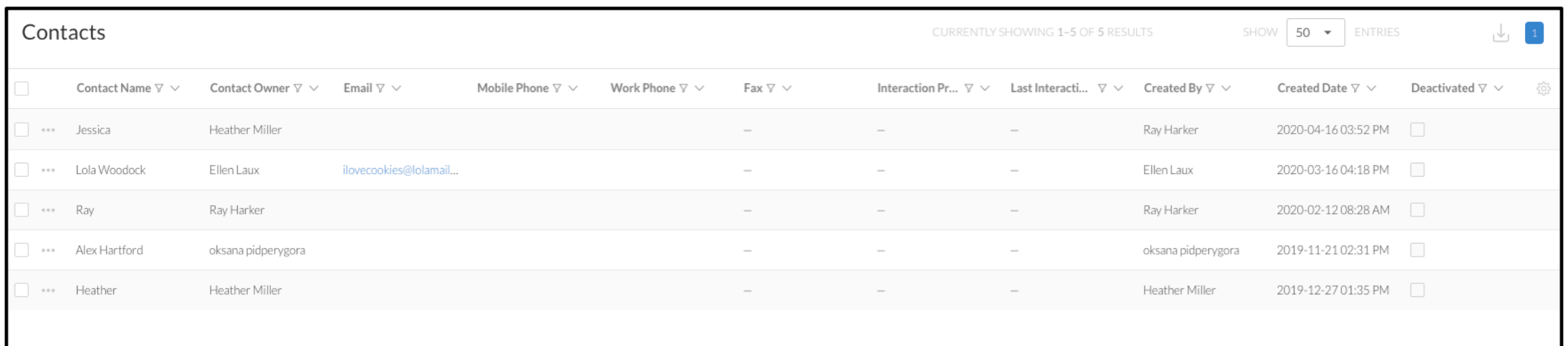
Today within typical applications there are several ways of looking at data or records. One of the most common ways are table or grid views. For example when looking at a list of contacts, the data is simply presented in a table like view, where the user can sort, filter and perform an array of different functions

Table views have come a long way from the excel days and are used in various industries, from banking, CRM's, mortgage companies or anywhere that a list of documents or data is needed.

The challenge with table views and typical core functionality are as follows

- Wanting to display as much information as possible across the columns
- Simple and creative sorting, filtering and searching
- Being able to accommodate long string data, text wrapping, in-line editing, drop downs
- Applying color where necessary
- Highlighting important data from the rest
- Previewing or expanding within the table so I avoid leaving the page
- Saving filters or views, once I create them so I can come back to the same data
- Limiting records to be show (lazy scrolling)
- Downloading or exporting
- With CRM for example, other records might be linked or associated
- Solving for jumping to other pages or opening other tools (clicking email or phone)
- Bulk editing, creating, deleting
- Making the experience fun, yet lite

Below is an example of a typical, older style, table view

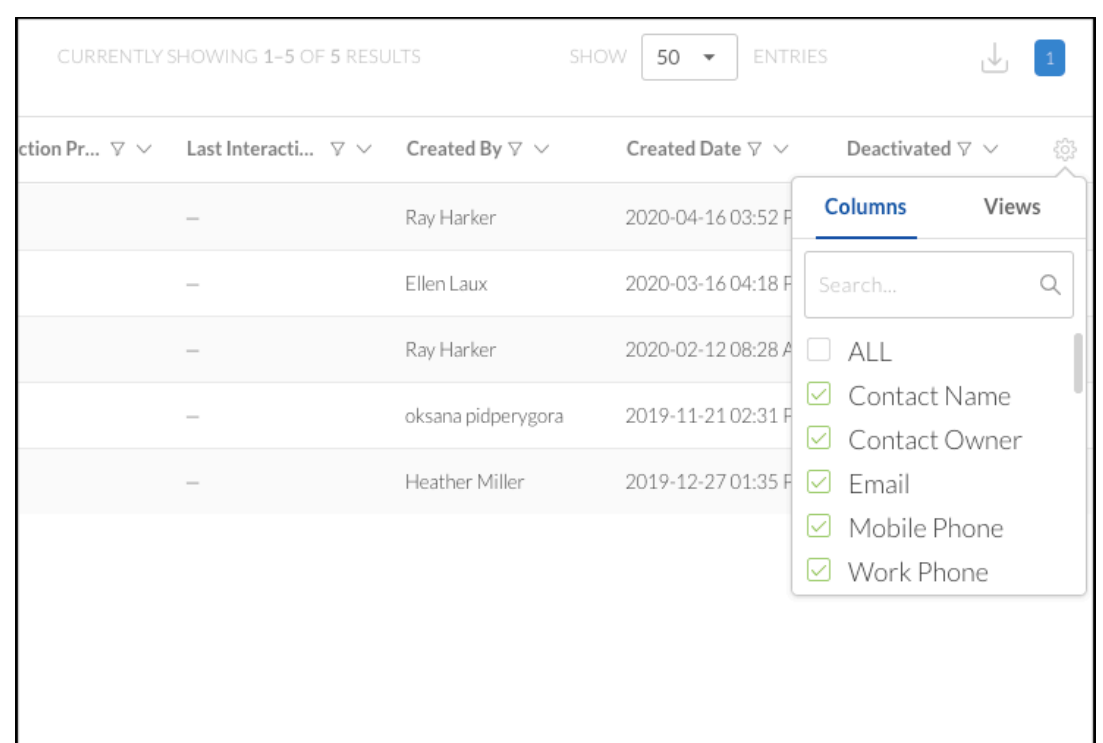


<input type="checkbox"/>	Contact Name ▾	Contact Owner ▾	Email ▾	Mobile Phone ▾	Work Phone ▾	Fax ▾	Interaction Pr... ▾	Last Interacti... ▾	Created By ▾	Created Date ▾	Deactivated ▾
<input type="checkbox"/>	*** Jessica	Heather Miller							Ray Harker	2020-04-16 03:52 PM	<input type="checkbox"/>
<input type="checkbox"/>	*** Lola Woodock	Ellen Laux	ilovecookies@lolamail...						Ellen Laux	2020-03-16 04:18 PM	<input type="checkbox"/>
<input type="checkbox"/>	*** Ray	Ray Harker							Ray Harker	2020-02-12 08:28 AM	<input type="checkbox"/>
<input type="checkbox"/>	*** Alex Hartford	oksana pidpergyora							oksana pidpergyora	2019-11-21 02:31 PM	<input type="checkbox"/>
<input type="checkbox"/>	*** Heather	Heather Miller							Heather Miller	2019-12-27 01:35 PM	<input type="checkbox"/>

The primary objective is to create an uplifting experience that takes the typical mundane contact table (directory) and makes it modern, fresh and fun, where a user would really want to use the function for all its capabilities and not export it into something else, like excel. Please show your approach to thinking about the problems to be solved (below) and the capabilities that need to be included (ideation, flow, wireframes). As well as the approach, the end deliverable will be a simple hifi design that shows your imagination, unconstrained from any technical limitations.

Use Cases to accomplish (as much as you can, given the time)

- Creating a contact experience
- Editing a contact experience (could be in-line editing)
- Previewing contact information within the table
- Create a filter and saving it
- Selecting columns to be displayed and conditions of the filter criteria
- Bulk change/update operation
- Download or exporting experience
- Flagging, tagging or highlighting something
- Click to dial or click to email
- Include the experience once they click the phone number (Dialer)
- Searching experience
- Sharing a contact with a teammate
- Possibility in table commenting, @mentioning and sharing



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Contact fields can be but not limited to

First Name, Last Name, Home Phone, Mobile Phone, Work Email, Home Email, Address, Last Interaction, Account Name, Account

2 Study

Methodology: my first step for a design work is to study the problem to make sure I understand it correctly and to define the main priorities, the pain points if the product already exists or the main goal if the product is new.

I value team collaboration so I will involve all the people needed for the effort in order to build the best user experience and to delight the users. I'm even involving engineers at the early stage as the understanding of tech stacks is also essential.

Let's first try to understand the problem with some comments in red.

Today within typical applications there are several ways of looking at data or records. One of the most common ways are table or grid views. For example when looking at a list of contacts, the data is simply presented in a table like view, where the user can sort, filter and perform an array of different functions

Table views have come a long way from the excel days and are used in various industries, from banking, CRM's, mortgage companies or anywhere that a list of documents or data is needed.

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- Applying color where necessary

Highlighting important data from the rest Important

Previewing or expanding within the table so I avoid leaving the page Expanding view is good UI/UX

Saving filters or views, once I create them so I can come back to the same data

Limiting records to be show (lazy scrolling) Trend

Downloading or exporting

With CRM for example, other records might be linked or associated

Solving for jumping to other pages or opening other tools (clicking email or phone)

Bulk editing, creating, deleting

Making the experience fun, yet lite I vote for it :-)

True but most table lists were created because of technical limitations of computers at the origin. A lack of focus on relevant or more visual data contributed to create bad user experiences. It's why there are still challenges :-)

Below is an example of a typical, older style, table view

Contact Name	Contact Owner	Email	Mobile Phone	Work Phone	Fax
...
*** Jessica	Heather Miller				-
*** Lola Woodcock	Ellen Laux	ilovecookies@lolamail...			-
*** Ray	Ray Harker				-
*** Alex Hartford	oksana pidperygora				-
*** Heather	Heather Miller				-

Fax	Interaction Pr...	Last Interacti...	Created By	Created Date	Deactivated
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Possibility in table commenting, @mentioning and sharing

It's the list of features, brainstorming session needed to see if we forgot some features and to identify priorities

Another brainstorming session is needed to determine how we can integrate Nextiva features and services into this experience

Very good point, the user experience should always keep the user on the current application

Contact fields can be but not limited to

Conclusion: it's a CRM data management request with a focus on the user experience to keep the user using the solution.

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great icons but accessibility issue

We should be able to change the order of columns with a simple drag and drop

3 Research

The next step is to research what are the best ways to handle data and contacts in a table for CRM applications. I'm spending time to see what are the best practices but also what are the trends in design. I do not believe that a designer can do what he want as they are always technical issues. It's why it's important to involve engineers as early as possible to make sure that ideas can be implemented. One of the part of the research is to look at competitors.

Most used CRM applications



dated but cheap



Clean UI/UX



now called freshworks, AI focus



trend mostly big companies



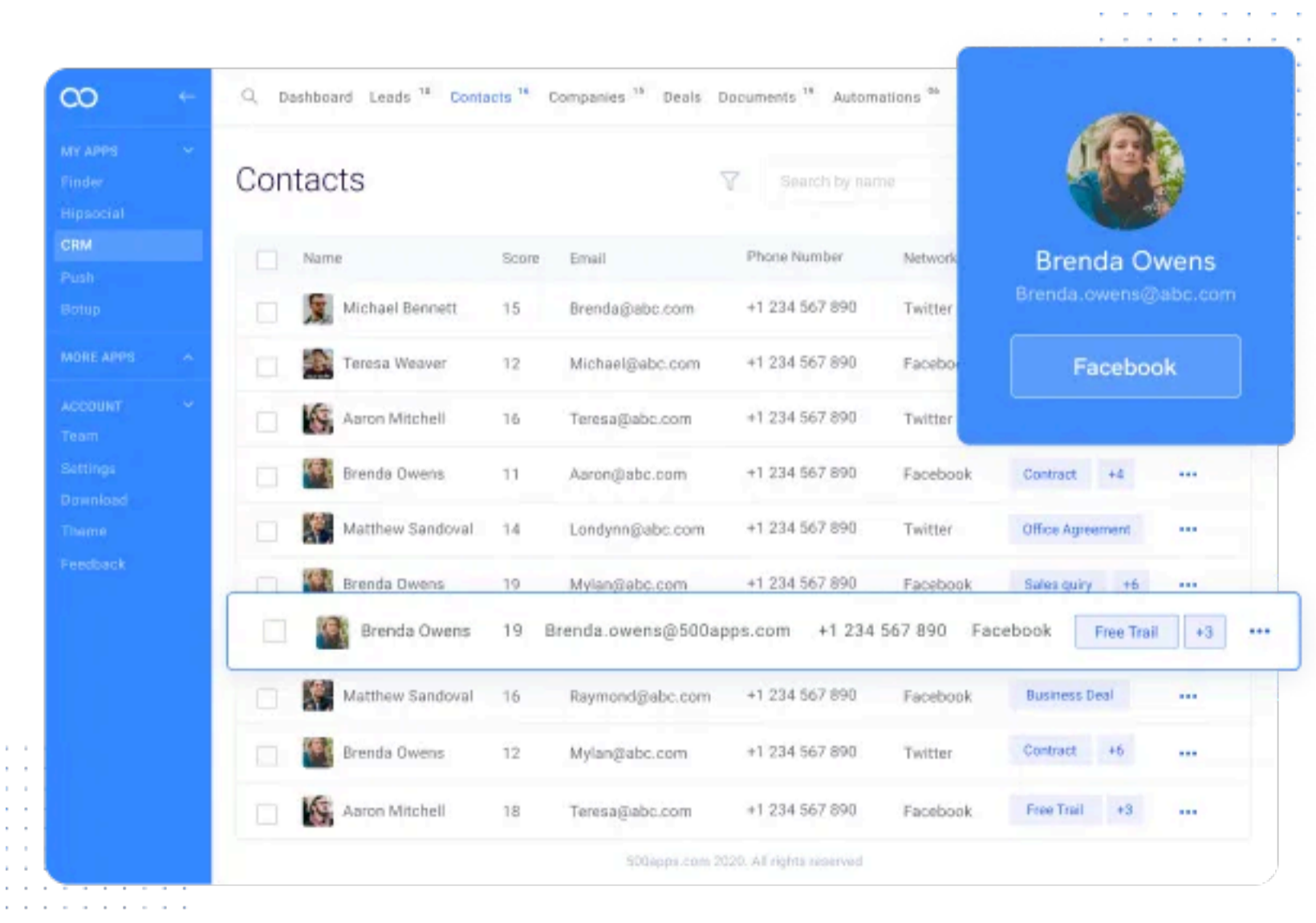
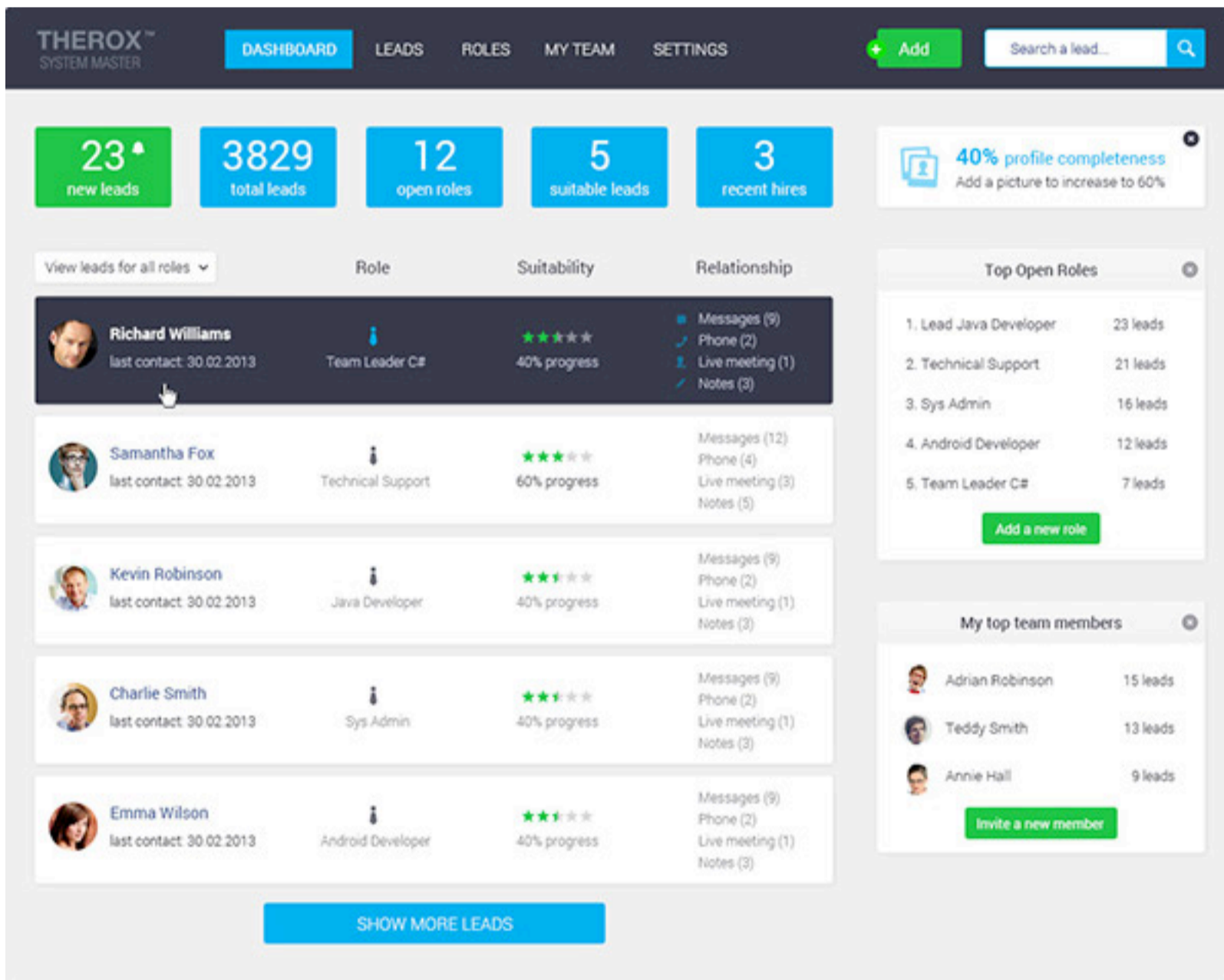
Lot of products



Startup

On this research, I see that there are still a lot of opportunities in this field to innovate and create great user experiences. Most tools have dated UI/UX or creating too much noise on user screens.

Trend in CRM apps



More visual list with pictures of users and dashboard oriented look and feel. Focus on essential data, vibrant colors, simplicity and consistency in UI elements

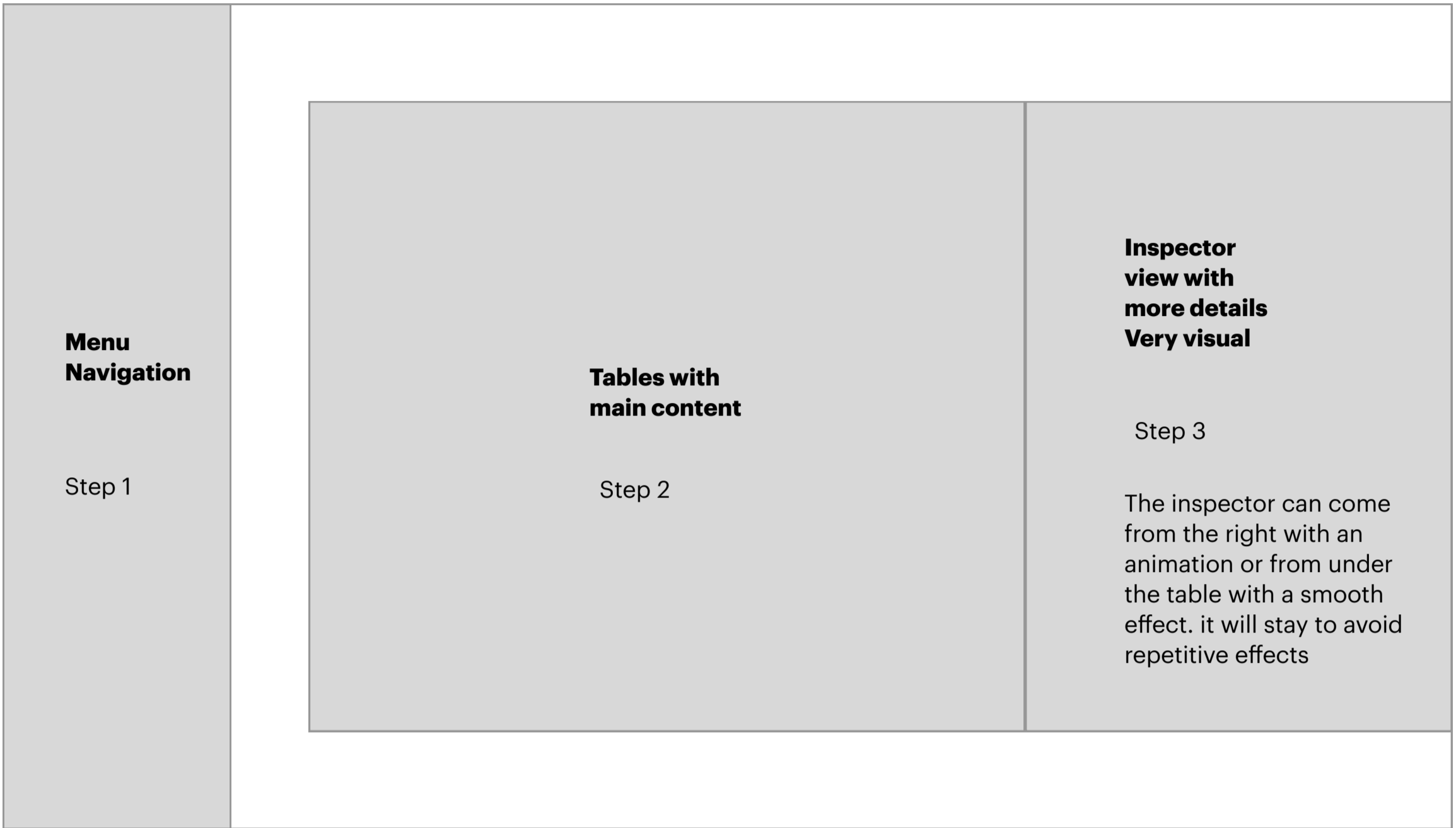
Tags can be a good addition to the list of contacts. I also believe that vertical menus for options are very efficient

One of the research part is about to study the persona of users. I will work with the research team on this topic as I do not have a lot of experiences in this field.

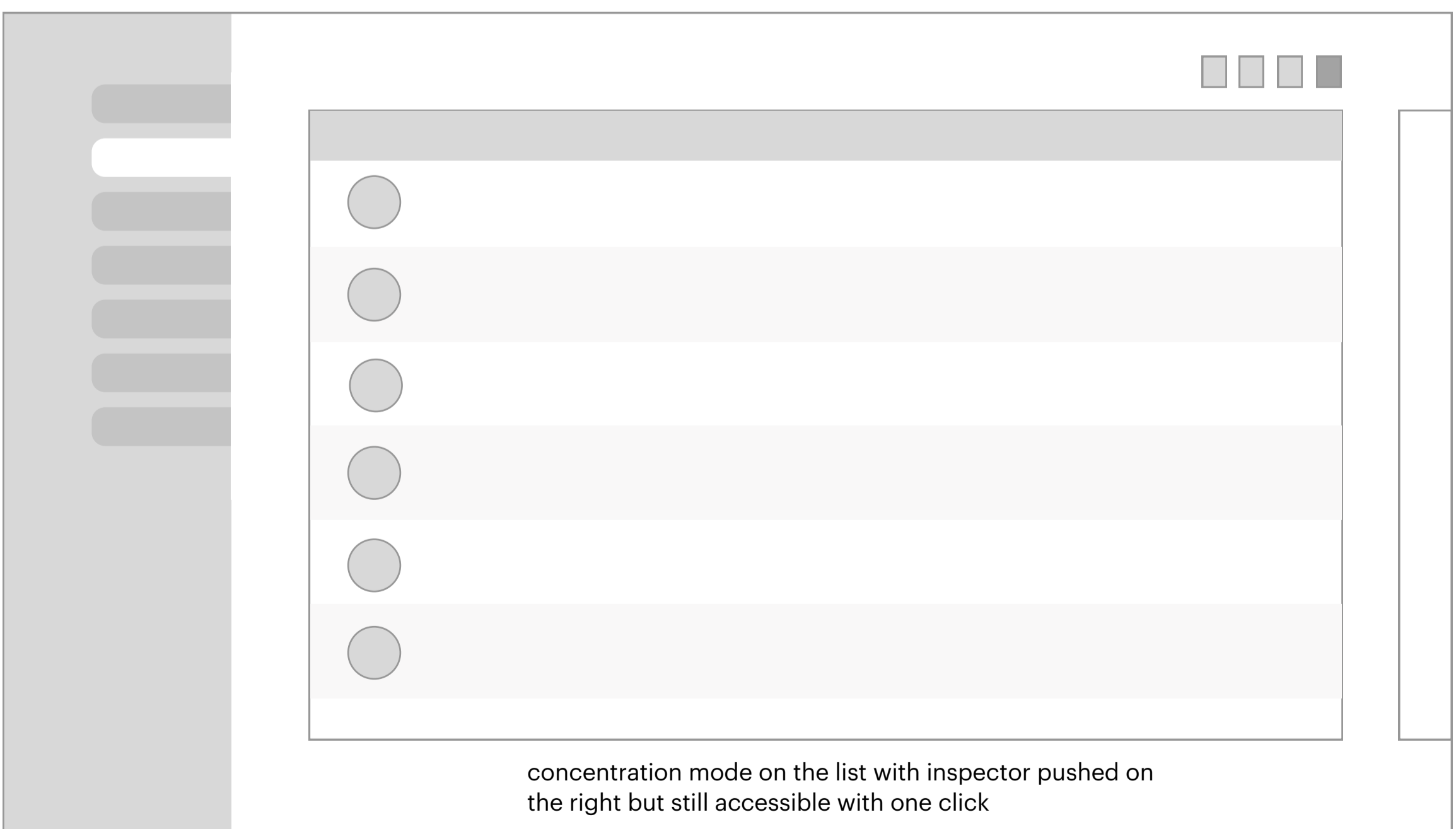
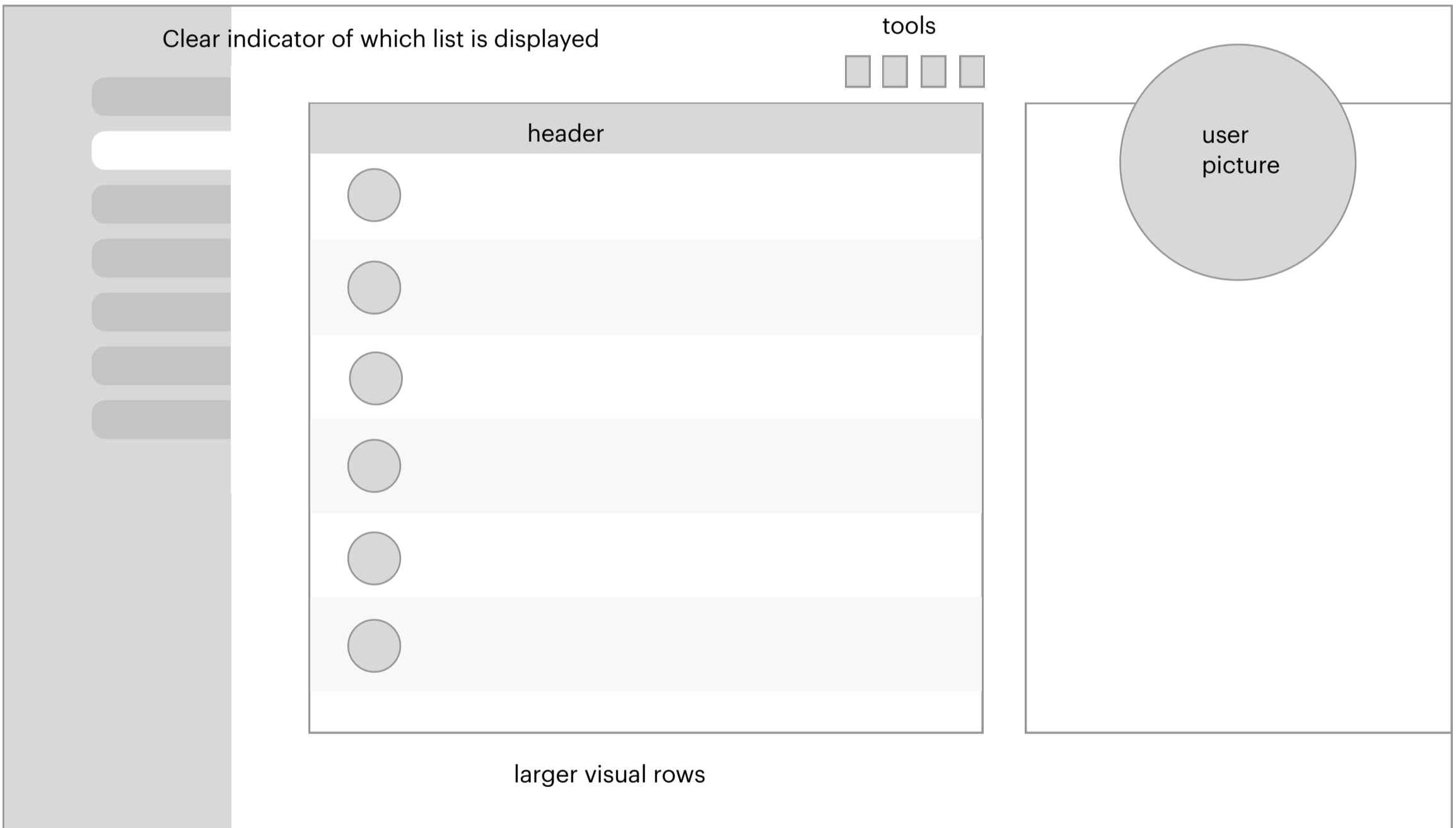
4 Wireframes

The next step is to study ideas about how to organize items and components, views. Wireframes are useful for this step and many brainstorming sessions will be needed and choices validated before to do any mockup.

Main idea



Main idea



5 Mockups

After the validation of wireframes, the goal is to build mockups matching the design system used by the company or create one if needed. I also like to integrate the branding to make sure that the atmosphere of the user experience is connected with the spirit of the brand. Multiple ideations will be needed before to make sure that the user experience is right. Some user testing will be needed to validate some ideas creating debates.

CONTACTS MANAGEMENT

NAME	LOCATION	INTEREST
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	Chat
Anna Smith	Phoenix, AZ	
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Sacramento, CA	Phone Video
Anna Franck	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	CRM Phone
Eric Paris	Tampe, AZ	Chat
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	Chat Video

Anna Franck
Sr. Customer Manager

Chat Now

Call Now

CONTACTS MANAGEMENT modern look

NAME	LOCATION	INTEREST
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	Chat
Anna Smith	Phoenix, AZ	
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Sacramento, CA	Phone Video
Anna Franck	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	CRM Phone
Eric Paris	Tampe, AZ	Chat
Eric Berdu	Phoenix, AZ	Chat Video
Eric Berdu	Phoenix, AZ	Chat Video

Anna Franck
Sr. Customer Manager

Chat Now

Call Now

Dynamic card appearing with an effect with integrated most used functions

Following design system guidelines

Tags to sort key data