



NextivaOne

Automations

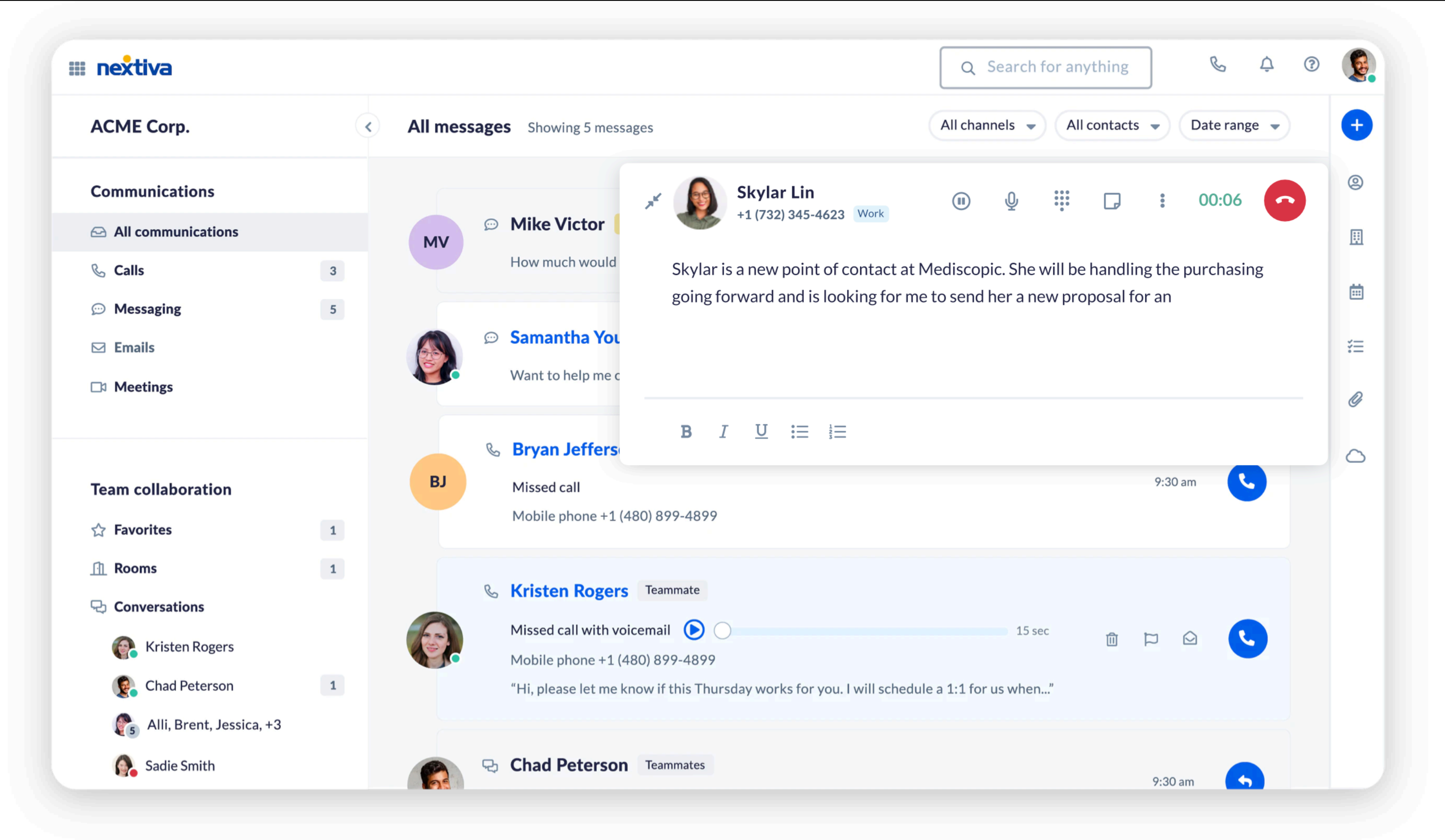
February 2021 <-> May 2022

What is NextivaOne?



- Nextiva core business is voice on internet (VOIP)
- The company exists since more than 12 years
- They built many apps for customers around communications
- In 2020, they decided to merge all apps inside one: Nextiva One
- The goal is to use customer data to provide a more complete solution
- Using AI to detect sentiments of customers, business opportunities
- CRM focused, with add-ons like Automations, Survey, etc.

Little teaser



Automations: problem to solve



- Nextiva built a powerful engine for automations few years ago
- It was mostly built by engineers (no focus on user experience)
- Very hard to use (not user friendly)
- Using legacy technologies (maybe not the best choice)
- Negative feedback of users
- Goal was to rebuild it with a focus on user experience
- Bring automations to the new product NextivaOne as an add-on

Design process



- Worked with Julio Chavez team to understand the backend
- They built a new backend when I joined the company
- The goal was to add a UI/UX on top of it
- Worked with stack-holders to understand the goals
- Made research about the best solutions in the market
- Built user flow and wireframes to validate ideas
- Built mockups and high-fidelity prototypes, managed user testings.
- Followed engineers implementation (QA design)

Challenges



- Worked remotely from Phoenix, AZ with a team in Mexico
- No PM at the beginning of the project, understanding how it works
- Design system was a work in progress, helped the team
- Design team grew from 4 designers to 15 in a year
- Not enough time for user testings, research
- Not enough frontend engineers (history of backend)
- 200 million funding from Goldman Sachs (pressure to deliver)
- Backend linked to Cisco legacy (bugs)
- Adding automations and values on top of Nextiva One

Accomplishments



- Built a friendly tool based on templates
- Got congratulations of many stack holders and product managers
- Helped Nextiva to get 200 million funding by showing prototypes
- Integrated the service inside NextivaOne for day one launch
- Helped the team to build a strong design system of 50 components
- Worked closely with engineers to check the product quality
- Mentored stack-holders about the value of design (trust won)
- Started conversations and sessions with a new AI team

Demo



Let's discover it :-)

www.digicali.com/nextiva