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UX/UI & Digital Strategy

CASE STUDY

FormXure Software

B2B Software App that reduces the labor and time and increases the business for construction

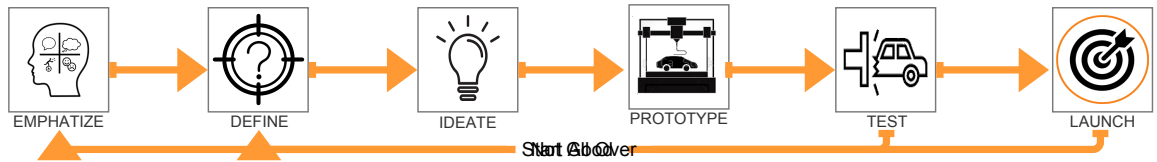
PROBLEM

I spent 9 years in this industry so I had the advantage to know quite a lot about the estimation and design process and potential users where I came up with an idea of a solution. I wanted to create a software to empower account managers to be able to create professional estimations with drawings and materials take off without CAD designers help and when they win the bid, they can send the project to designers as CAD and Excel format for more business with more profit margins.

ROLE

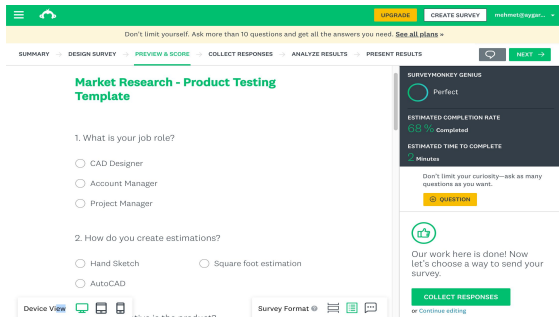
Founder, UX/UI practitioner, Creative designer, Developer.
In order to provide best possible experience I put the entire project human centered design process.

PROCESS



Quantitative Study

Survey to 5000 pro's



Sent out a survey to 5000 professionals in the industry and analyzed to identify strong patterns and identify user types



EMPHATIZE


Qualitative Study
5 User interviews
2 Contextual Inquiries

Qualitative study allowed me to create an Empathy Map via user interviews and contextual inquiries.



PERSONA

Substantial amount of information is gathered at this stage to use during the next stages and to develop the best possible understanding of the users, their needs, and the problems that underlie the development of the FormXure software.



TOM SCHNEIDER
CAD Designer
Lives in suburbs
High School Degree

Tom is a CAD Designer who has been in the construction industry around 5 years. He wants to put few more years and become a sales person and make more money. His job is so demanding. He has to support about 5 account managers who has multiple projects going on and everybody wants their drawings by yesterday. He wishes he would have help to complete these drawings. He is drawing everything from scratch and using AutoCAD and doing same things again and again manually and make quite a lot of mistakes as there is never enough time to check own drawings to correct.

"I wish there would be a better CAD system to help me draw walls much easier and generate materials count automatically si I could deliver jobs faster!"


What Tom needs from such system as a CAD Designer

Ability to

- draw blueprints easier and faster
- generate materials list automatically
- generate plan, section and elevation views automatically
- export materials count to excel
- export drawings to AutoCAD
- Plot large scale drawings

What Tom must have to do his job

Large monitor Fast computer Drawing table MS Excel AutoCAD Calculator Scalesmeter Plotter



Dave Reynolds
Construction Sales
Lives in suburbs
High School Degree

Dave is a salesman in Construction Industry for more than 20 years. He has a territory around where he lives and he spend most of his time driving and on the phone. He drives 1000's of miles every month to bring project drawings back and forth and visit job sites to make sure customers have everything they need. He wished he knew how to use CAD so he didn't have to wait long times for CAD designers to complete his projects. Especially wrong material counts create extra cost when they make mistakes which they do a lot.

"I wish I could draw customer drawings myself without CAD designers help quickly and create professional estimates that has drawings and materials count!"

What Dave needs from such system as a salesman

Ability to

- draw blueprints by himself easily
- generate materials list without counting by hand
- generate professional looking estimates fast
- print drawings he created
- print materials take of
- email estimates to customers
- email take off to his warehouse
- modify drawings himself when there is a need

What Dave must have to do his job

Laptop Phone MS Word MS Excel Internet Calculator Measure tape

Since we had two user types we had to understand them well to see if we can create a single solution that could satisfy each one of their needs from such system.

USER JOURNEY

Since there is no product yet we had to postpone this exercise for after the release.

During the Define stage, I put together the information I have created and gathered during the Empathize stage. I analyzed my observations and synthesized them in order to define the core problems that I have identified up to this point.



Problem Statements

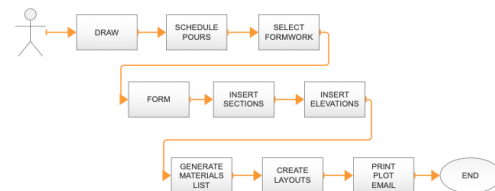
CAD Designers: They were not able to create designs easy and fast enough to meet project deadlines. Drawing walls and applying engineered formwork one by one was extremely time consuming task and vulnerable to human errors. They needed a software to help them draw easily and obtain materials list automatically to meet the demand.

Account Managers: Creating professional looking estimates with drawings and materials list was impossible for them to accomplish and wait for CAD Designers to generate those would mean a loss of bid for them. They needed a solution to enable them to generate professional looking drawings and accurate materials list easy and fast to win bids.

At this stage I was ready to start generating ideas. First I created a task flow that would make sense to users.



FormXure User Flow



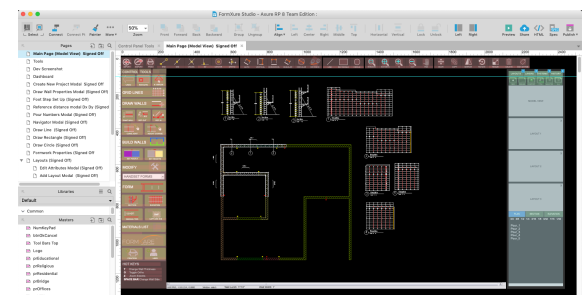
Early Concept Wires

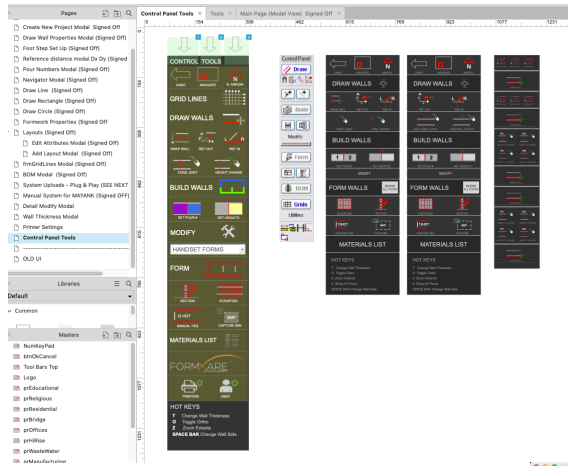


Then created a concept wireframe where the major tasks will be handled to test with users before I go to next steps.



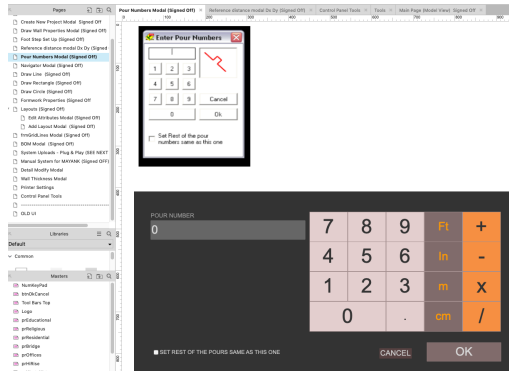
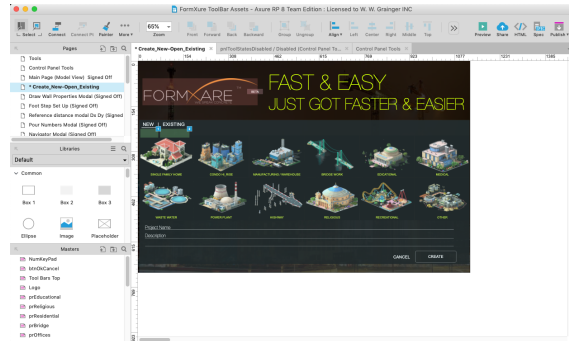
I created few main screens and interactions and tested with both user types and iterated before start developing.





Created clickable prototypes for main tool bar to test and find the best possible approach.

Created project creation and selection screen and tested.



On UI design, first I didn't create a style guide and used windows native objects that made the product looking way too cheap then I had to go back and replace about 80 screens to look more modern and stylish while I was fixing the bugs.

Design Thinking process allowed us to create a solution for 2 user types and enabled them to do their jobs much easier and faster. At some point we included nice to haves that made users confused a bit. We should have stick to original plan with MVP to goto market earlier.