



# UX TRANSITION WORKSHOP

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# OEDIS

# CHALLENGES

- ▶ Requirements mature before introduction of UX services
- ▶ Business expectations not clearly established (e.g., "look and feel")
- ▶ Development team unavailable for appropriate scoping of UI requirements

# STRATEGY

- ▶ Review project requirements
- ▶ Create high-level UX artifacts - wireframes & flow maps
- ▶ Conduct user interviews and solicit stakeholder input to understand & validate UX goals
- ▶ Produce UX artifacts (e.g., personas, scenarios and mental models) to support UI design efforts
- ▶ Develop high-fidelity, interactive wireframes and define benchmarks for evaluation in user sessions
- ▶ Test design assumptions and iterate

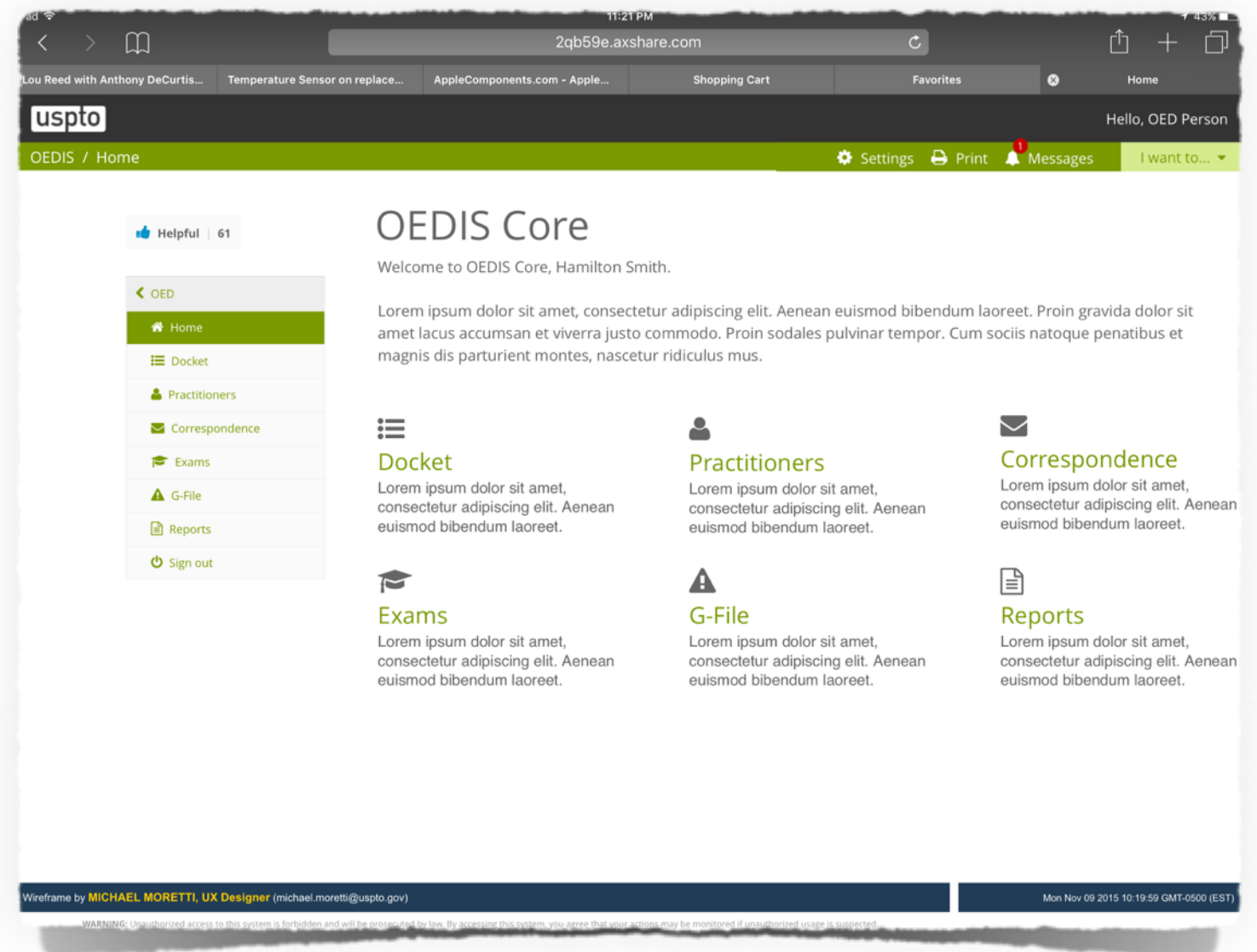
# DELIVERABLES

- ▶ Wireframes
- ▶ Mental Models
- ▶ User Interviews
- ▶ Personas
- ▶ Diagrams

## WIREFRAMES

PROJECT WIREFRAMES CREATED IN AXURE, EXPORTED TO HTML

- Core and Customer Interface (CI)
- Detailed functionality
- Interactive
- Follow USPTO Design Library
- High-fidelity prototype



# MENTAL MODELS

MAPPING BEHAVIORS TO FEATURES WHICH SUPPORT THEM

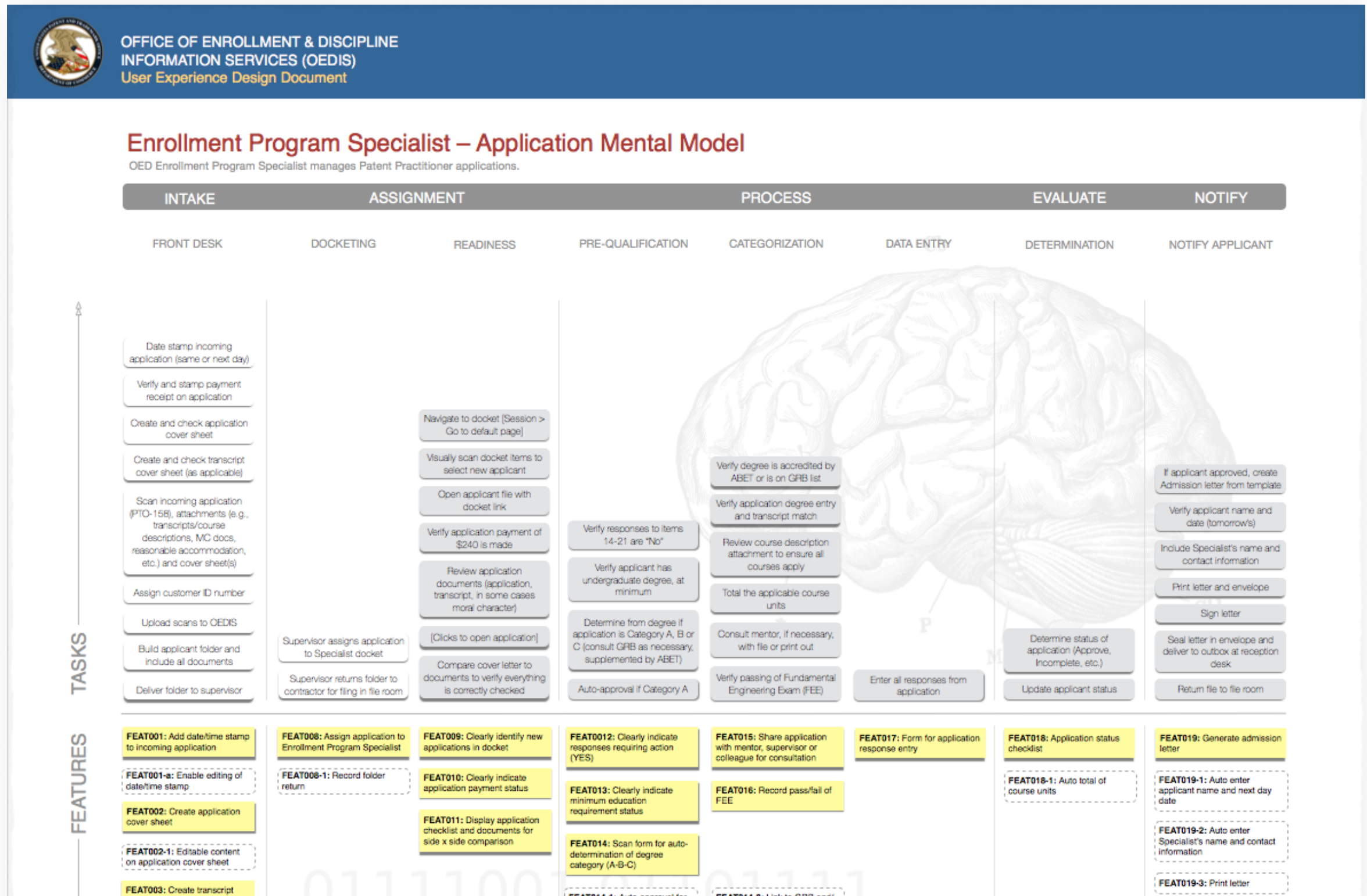
- Gap analysis
- Scenarios
- Audience segments

"A mental model helps you visualize how your business strategy looks compared to the existing user experience."

*– Indi Young*



## MENTAL MODELS





## USER INTERVIEWS

GETTING TO KNOW OUR USERS AND THEIR NEEDS

- Enrollment Program Specialists
- Program Analysts
- Discipline Attorneys






### WHAT THEY'RE SAYING...

- ▶ "OEDIS works well enough for me to get my job done, but it often means wasted time - I really feel that it's limited in its capacity to grow with the demands of the Office and my own professional abilities."
- ▶ "Among the limitations that I run into with OEDIS is that it tends to complicate otherwise simple tasks and doesn't give me much useful feedback."
- ▶ "My primary interaction with OEDIS is as a resource for account info and correspondence for determining his or her status throughout my investigations."

## PERSONAS


WHO OUR USERS ARE: WHAT THEY DO, WANT... AND DON'T WANT

- Enrollment Program Specialists
- Program Analysts
- Discipline Attorneys

UNITED STATES  
PATENT AND TRADEMARK OFFICE

Program Analyst

Blanche Duval



**Profession:** Program Analyst, OED

**Role:** Program management administrative duties

**Education:** B.A Business Administration, York College

**Environment:** Office on main USPTO campus

**Technology use:** Proficient in Office 365, CuteFTP, Remote Access, Windows and OEDIS (web-based application)

*"Among the limitations that I run into with OEDIS is that it tends to complicate otherwise simple tasks and doesn't give me much useful feedback."*


**About Blanche**

Blanche has been working in the unit since OEDIS has launched, and is a senior analyst at the GS-12 level. She has her own office, equipped with a late-model Windows PC and 21" display, network telephone and a separate table for meeting with co-workers or visitors. She keeps her workspaces, both virtual and physical, well-organized, in order to maximize her efficiency in a role which is filled with data and documents.

Her day-to-day duties primarily consist of processing incoming patent attorney and agent correspondence, including applications for examination, reciprocity, reinstatement, and waivers of the examination, as well as examination results. She forwards her work, through the supervisor, to Enrollment Program Specialists for further processing. She maintains physical applicant and registered practitioner files. She reviews, analyzes, and conducts project quality control services, and oversees customer surveys and satisfaction measures.

Because of her experience, Blanche often trains, mentors and guides junior analysts, though she may elect to assume more complex responsibilities for which they are not yet trained. She feels that because the system is not designed to handle the "exceptions to the rule", of which there are many, it is frequently more efficient for her to undertake many tasks herself (e.g., working with XML error files.

Program Analyst, OED

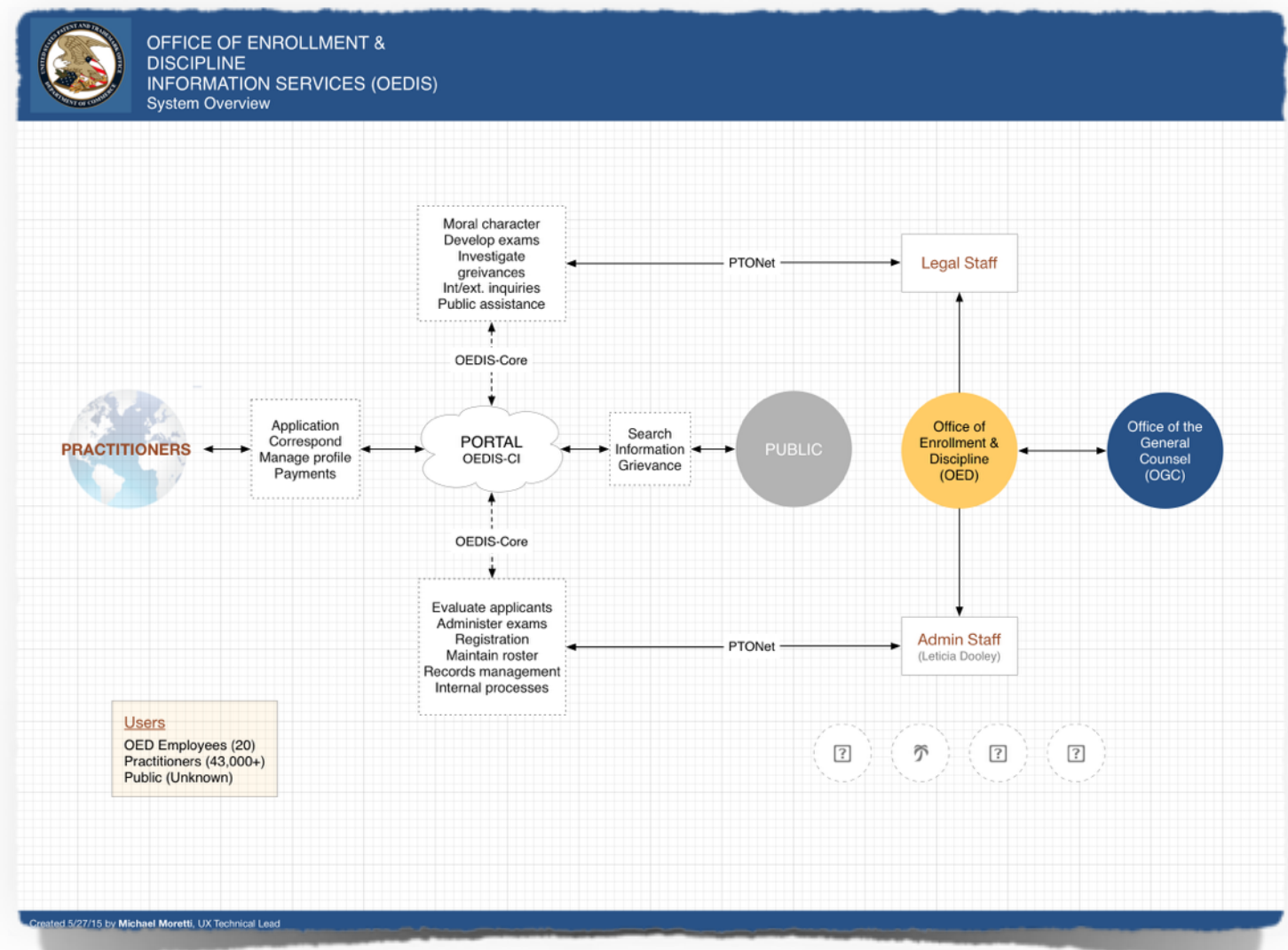
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Program Analyst

## DIAGRAMS

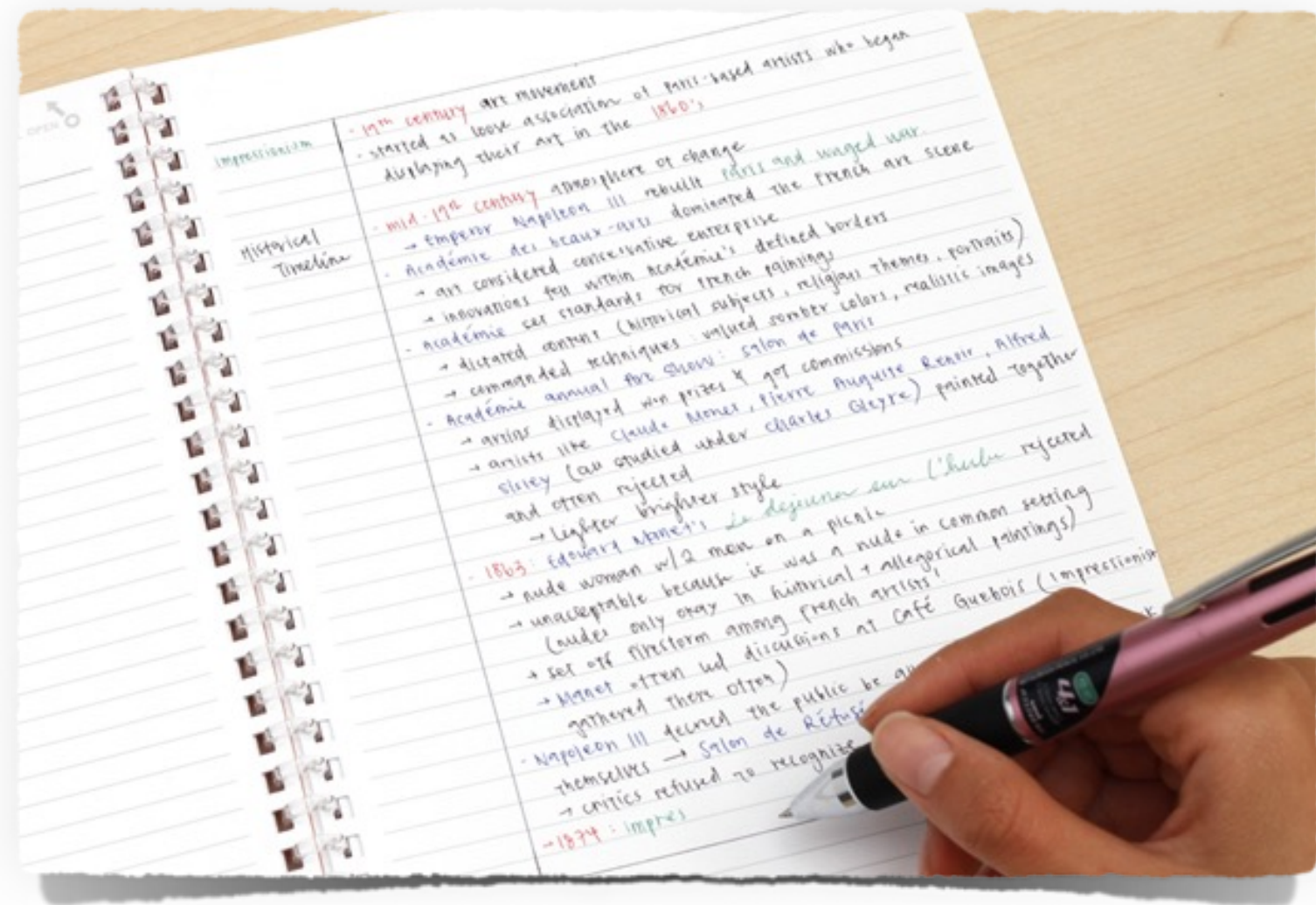
### HIGH LEVEL ORIENTATIONS ON THE PROJECT AND ITS ENVIRONMENT

- OED Information Architecture (MindMap)
- OEDIS Universe (Organization)



## MEETING NOTES

NOTES RELEVANT TO UX MATTERS



# RECOMMENDATIONS

- ▶ Extended Sprint 0 to facilitate UX "head start"
- ▶ Focus on outcomes over features when composing user stories
- ▶ Encourage more frequent in-person meetings & scrums
- ▶ Build and maintain a clear product roadmap
- ▶ Project is a great candidate for focus groups