



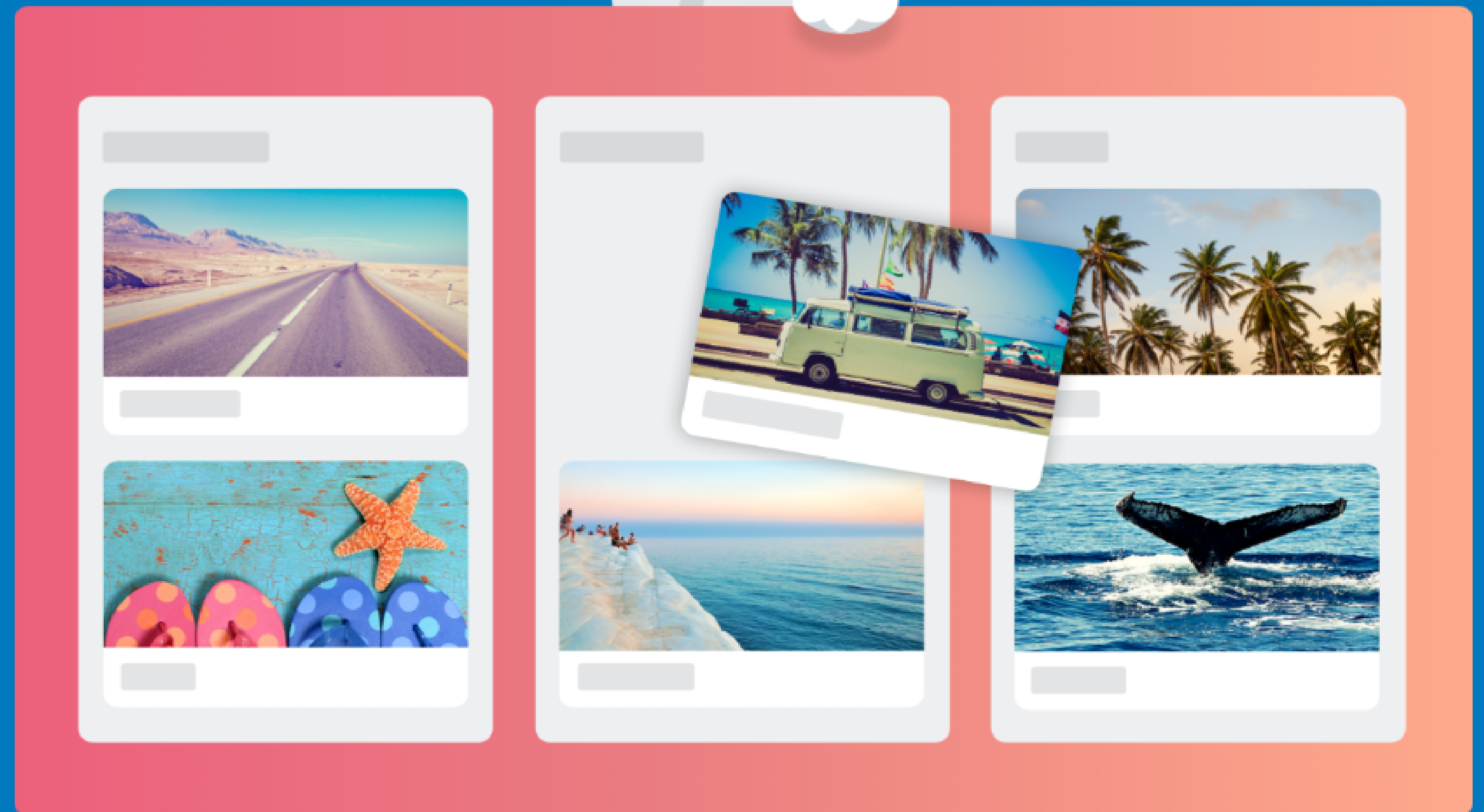
Trello

Project management

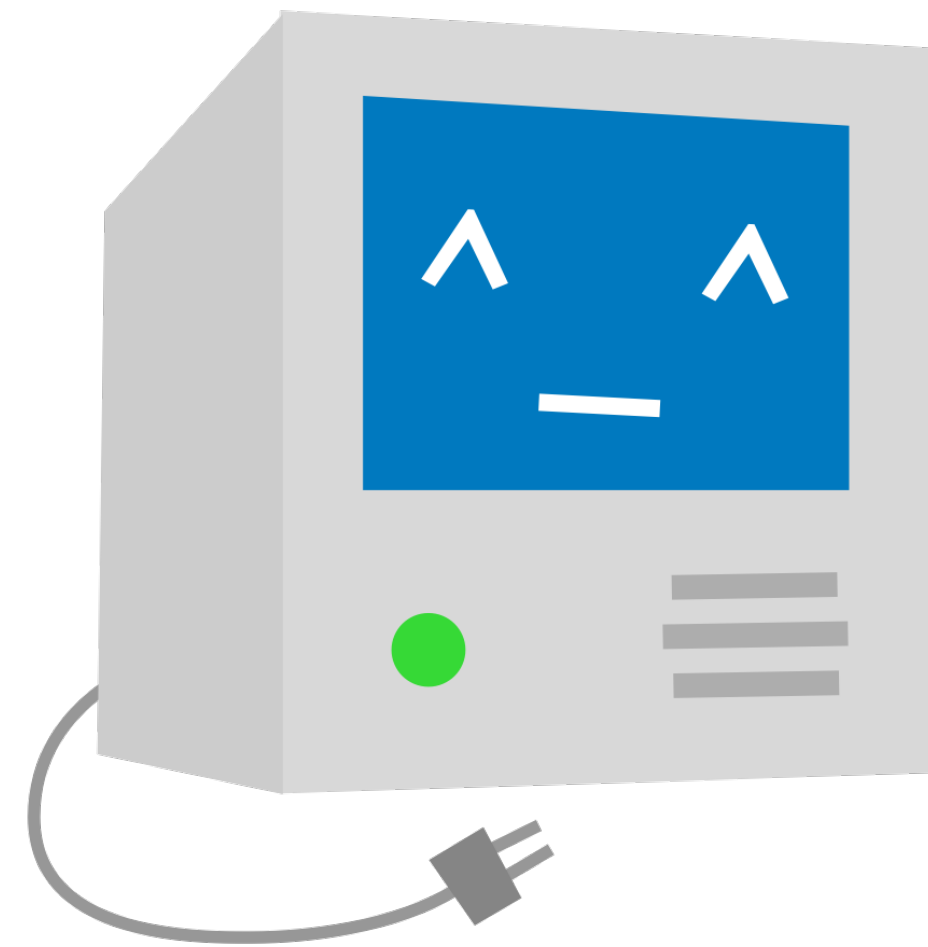
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IAT 334 (D103)
Preliminary / User research
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Intro to Trello



Trello is a free productivity and project management application.

It is multi-platform and seamlessly integrated across iOS, Android, and desktop browsers.

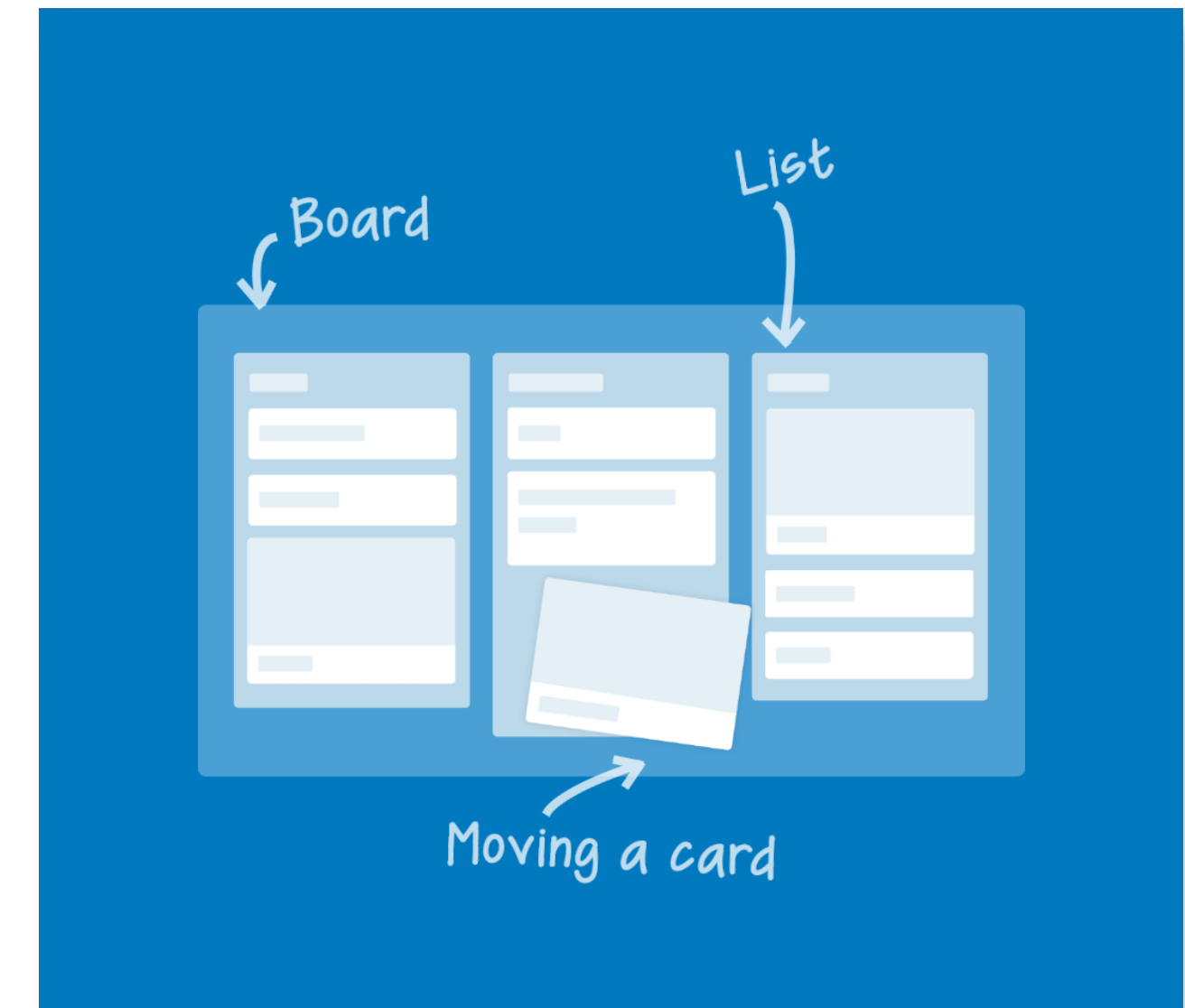
It borrows from a system first used by Japanese car manufacturer Toyota, called Kanban boards.

かんばん
/känbän/



In simple terms, the organizational system can be best described as post-it notes on a whiteboard.

It uses the concept of sticky notes or 'cards' filed into categories or lists, and pinned to a large board—representing an entire project.

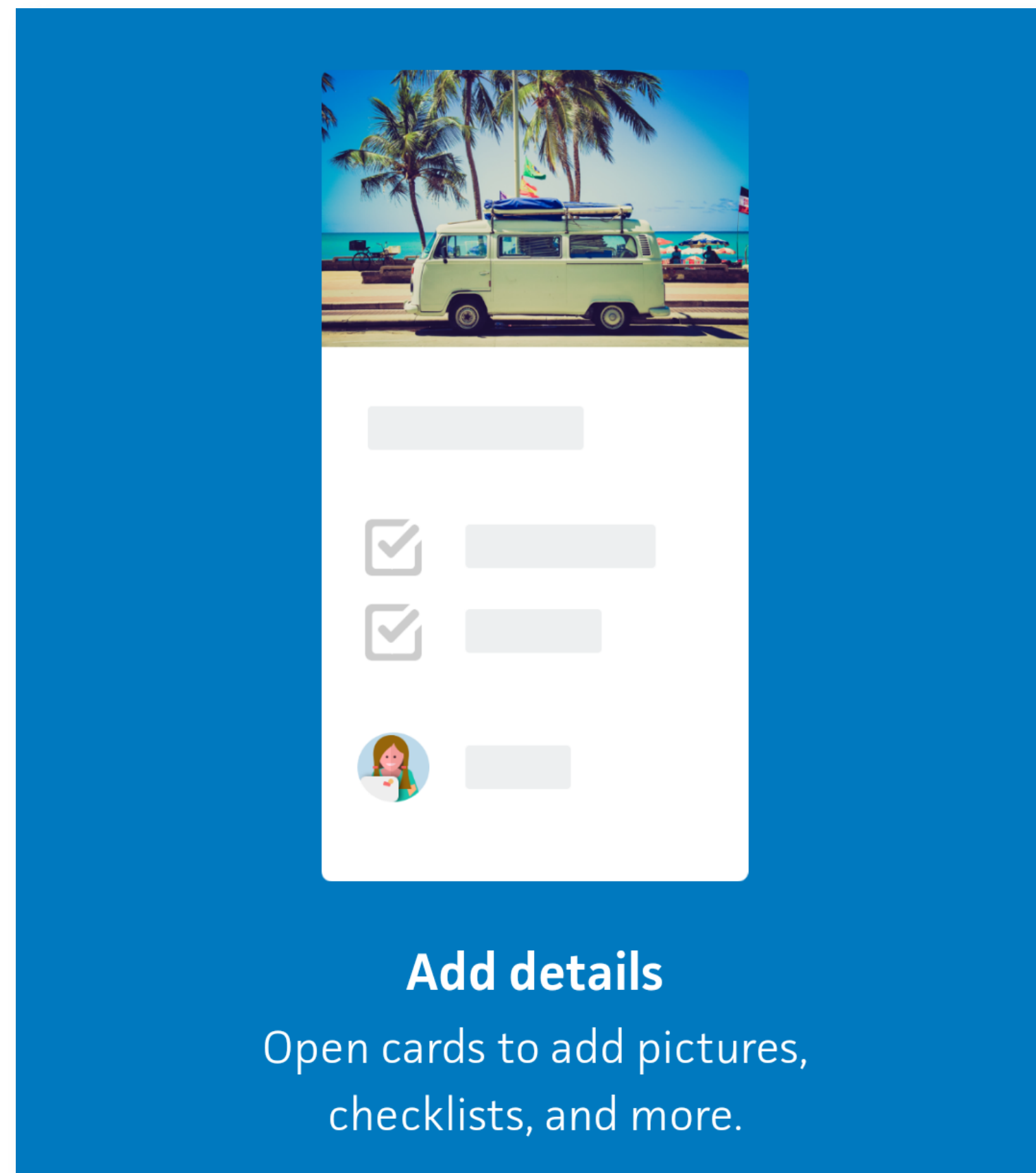


Each card can be a specific note, task, or checklist relevant to a project.

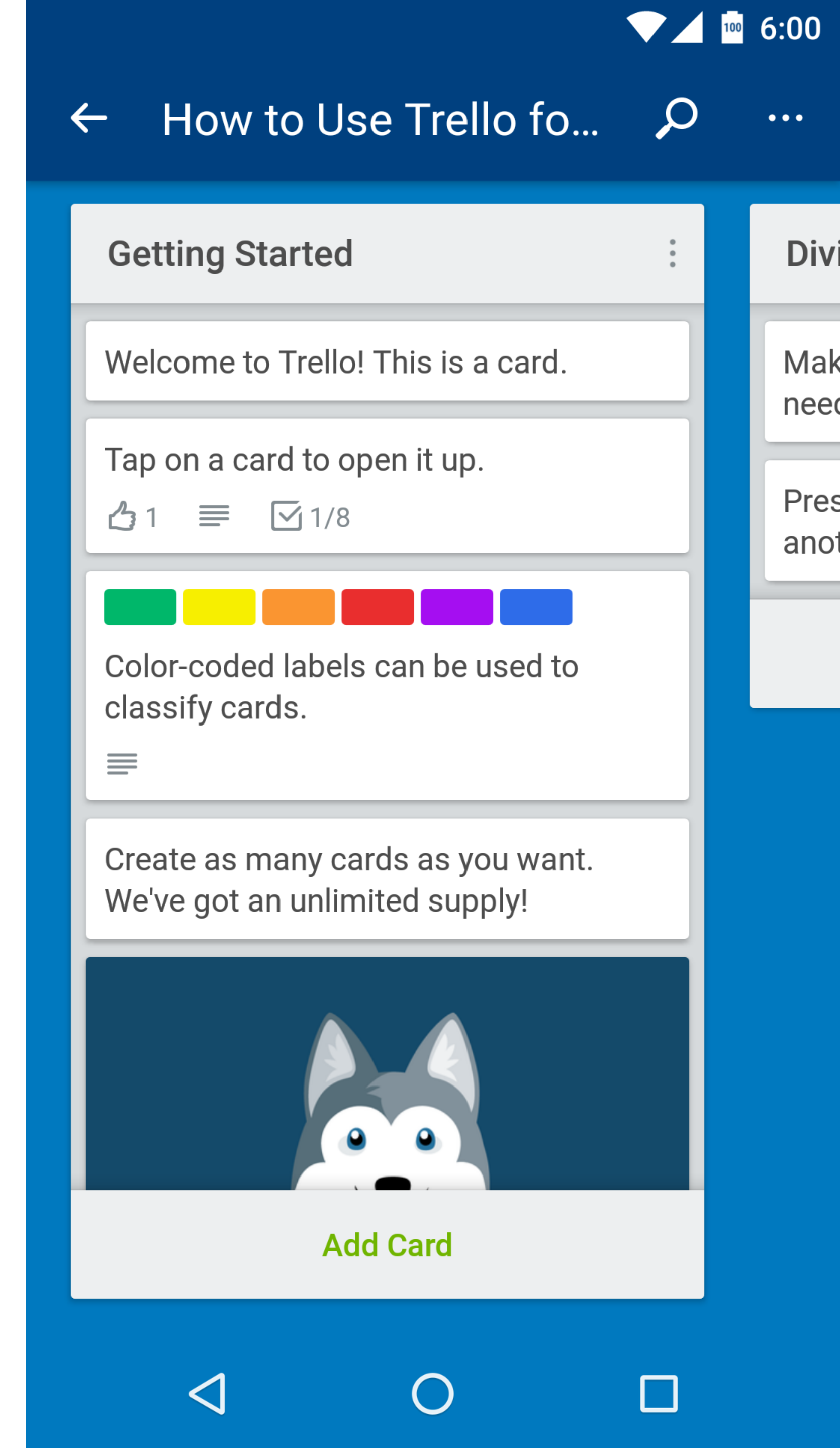
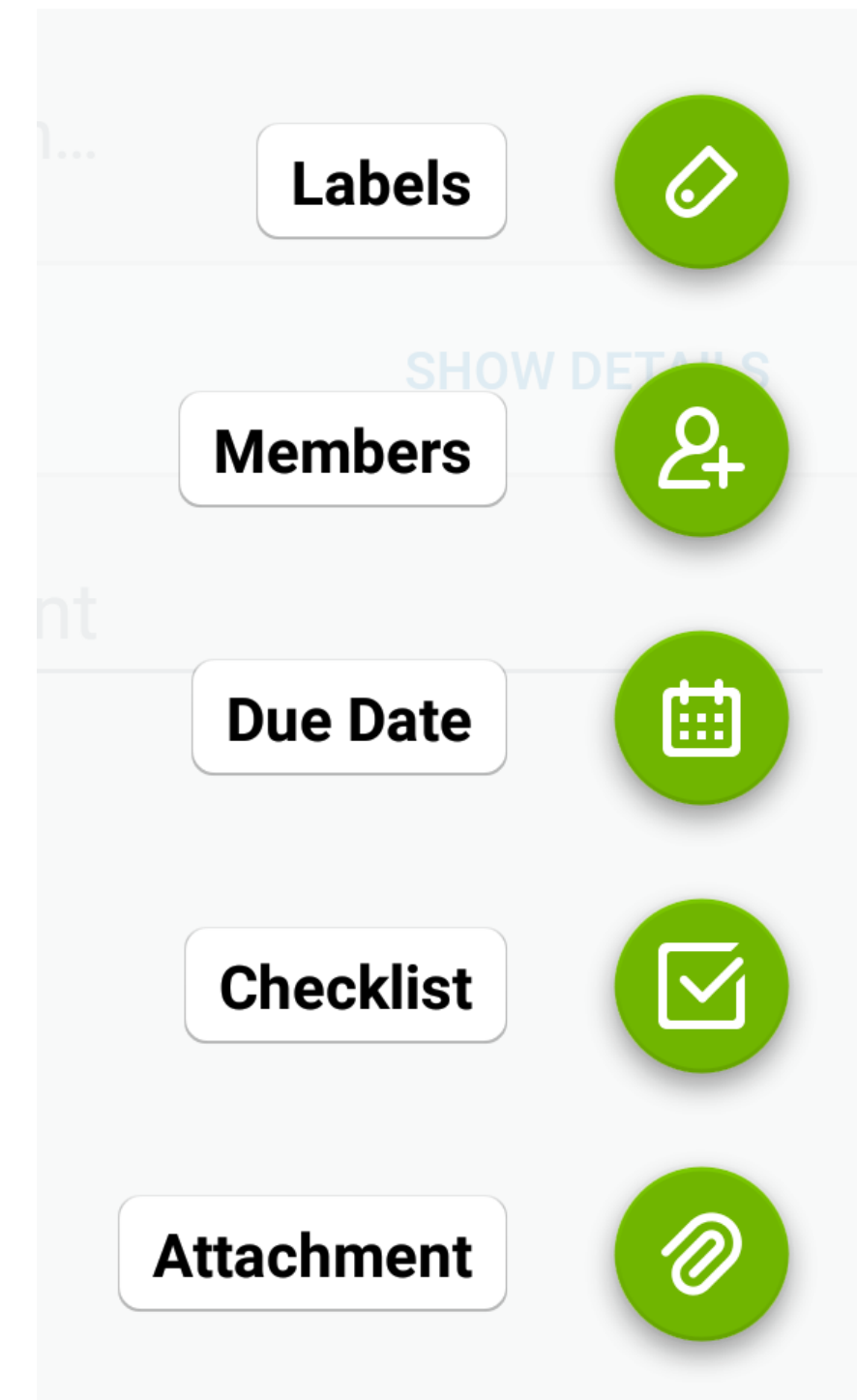
Task cards can be separated into different categories in the form of lists, and dragged and dropped to another list

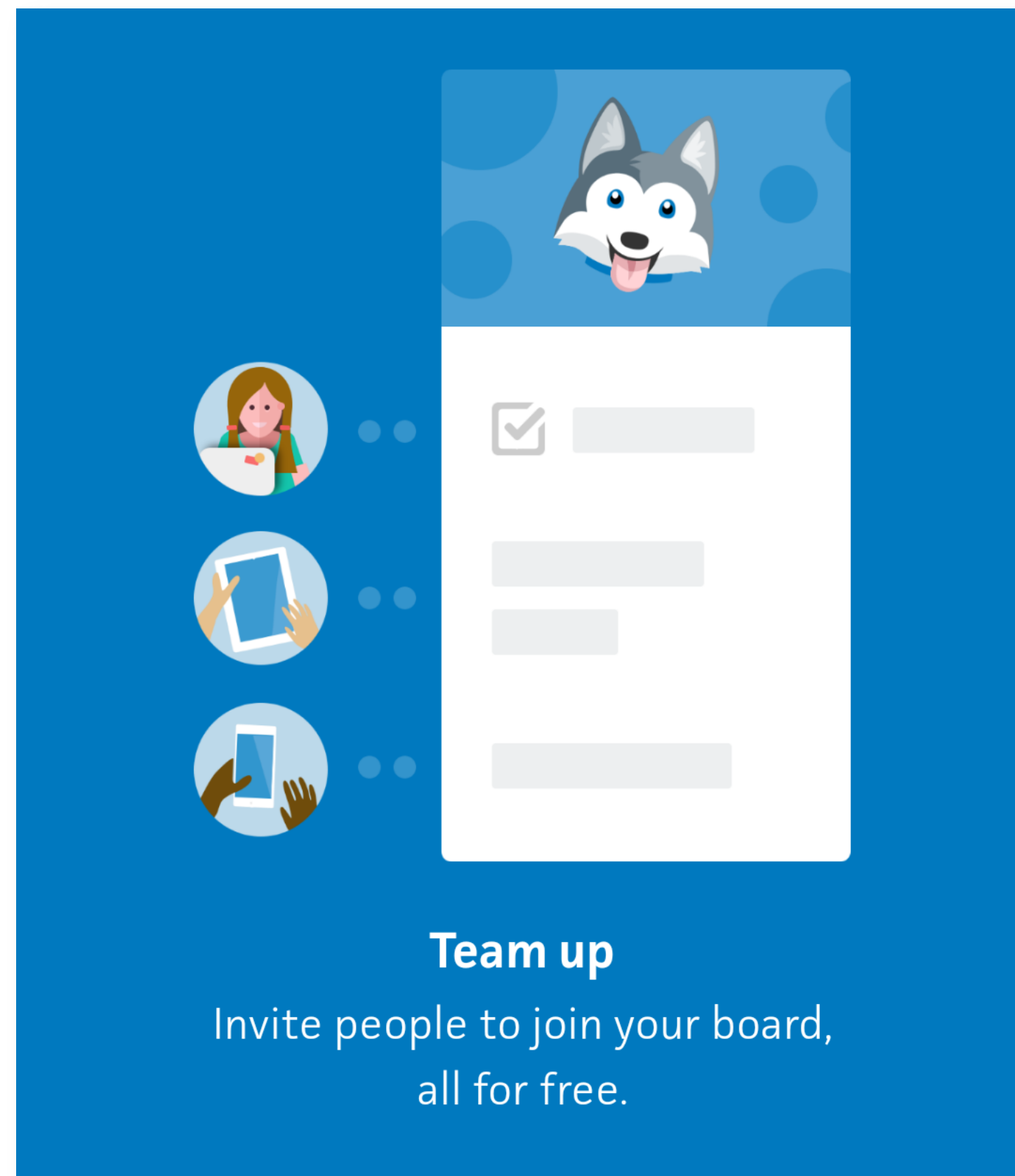
For example, to track the stages of a project, cards might move between these lists

To do Doing Done



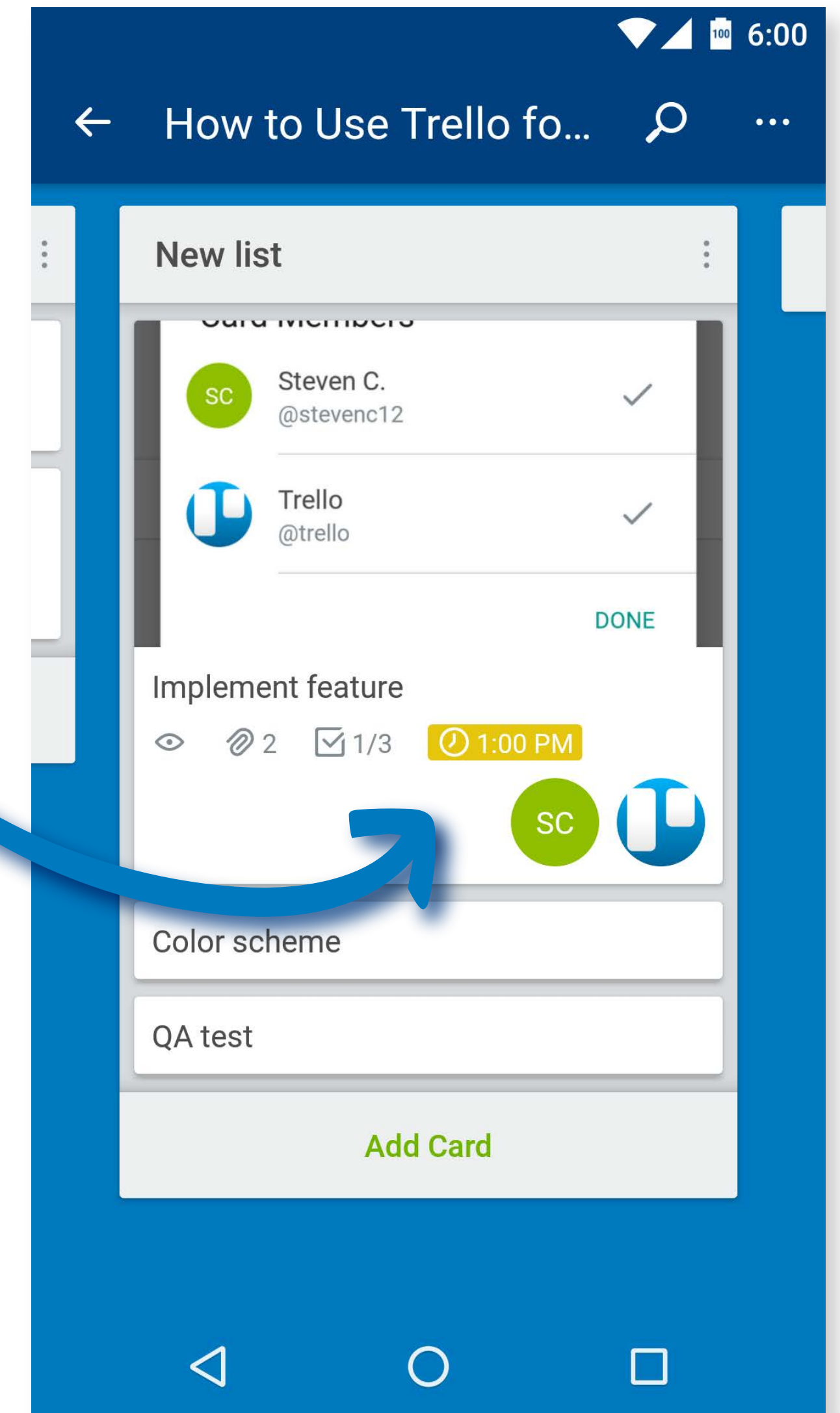
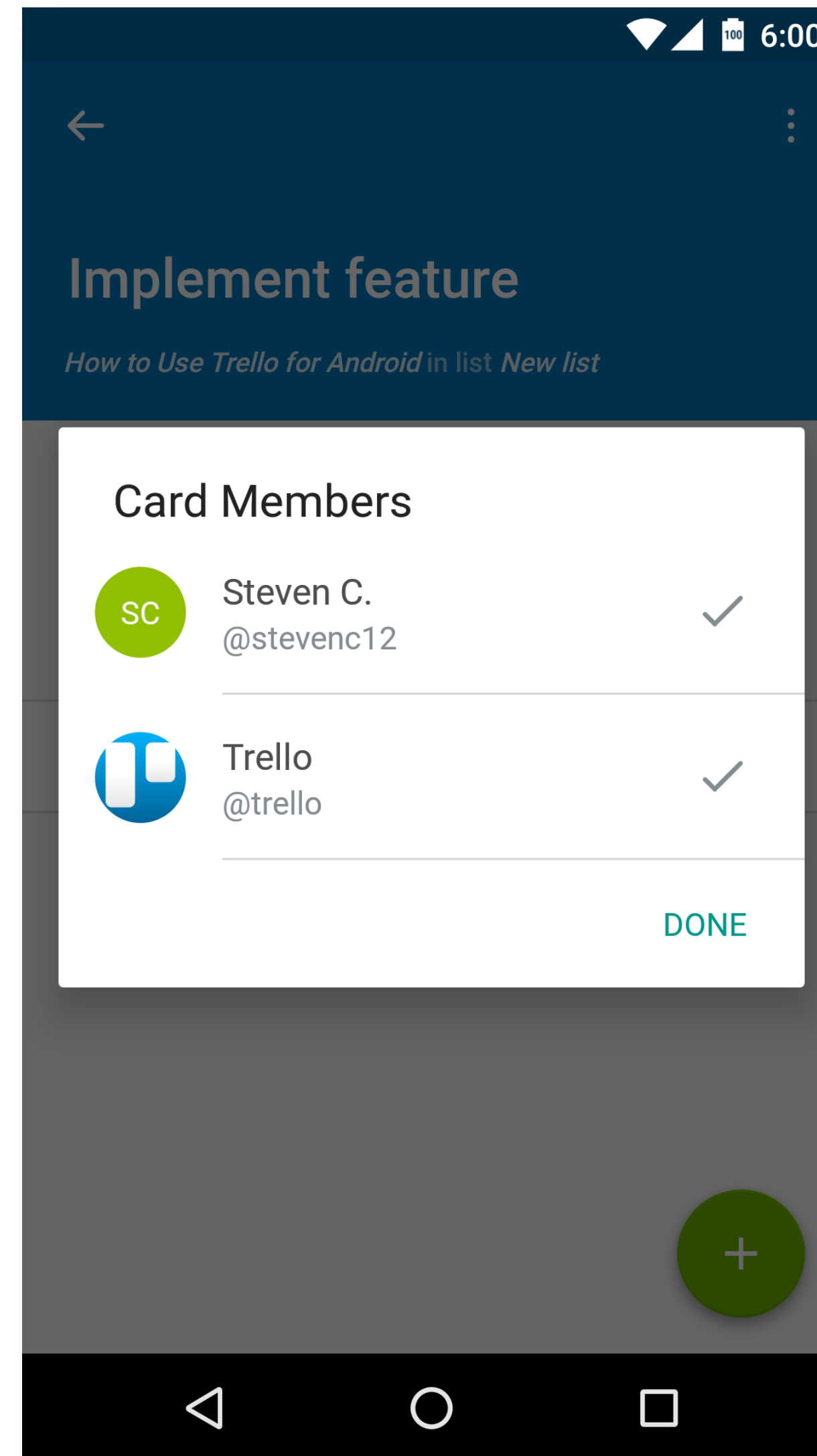
Cards are customizable and can keep track of deadlines, add file attachments, photos, tags and colour-coded labels for further categorization

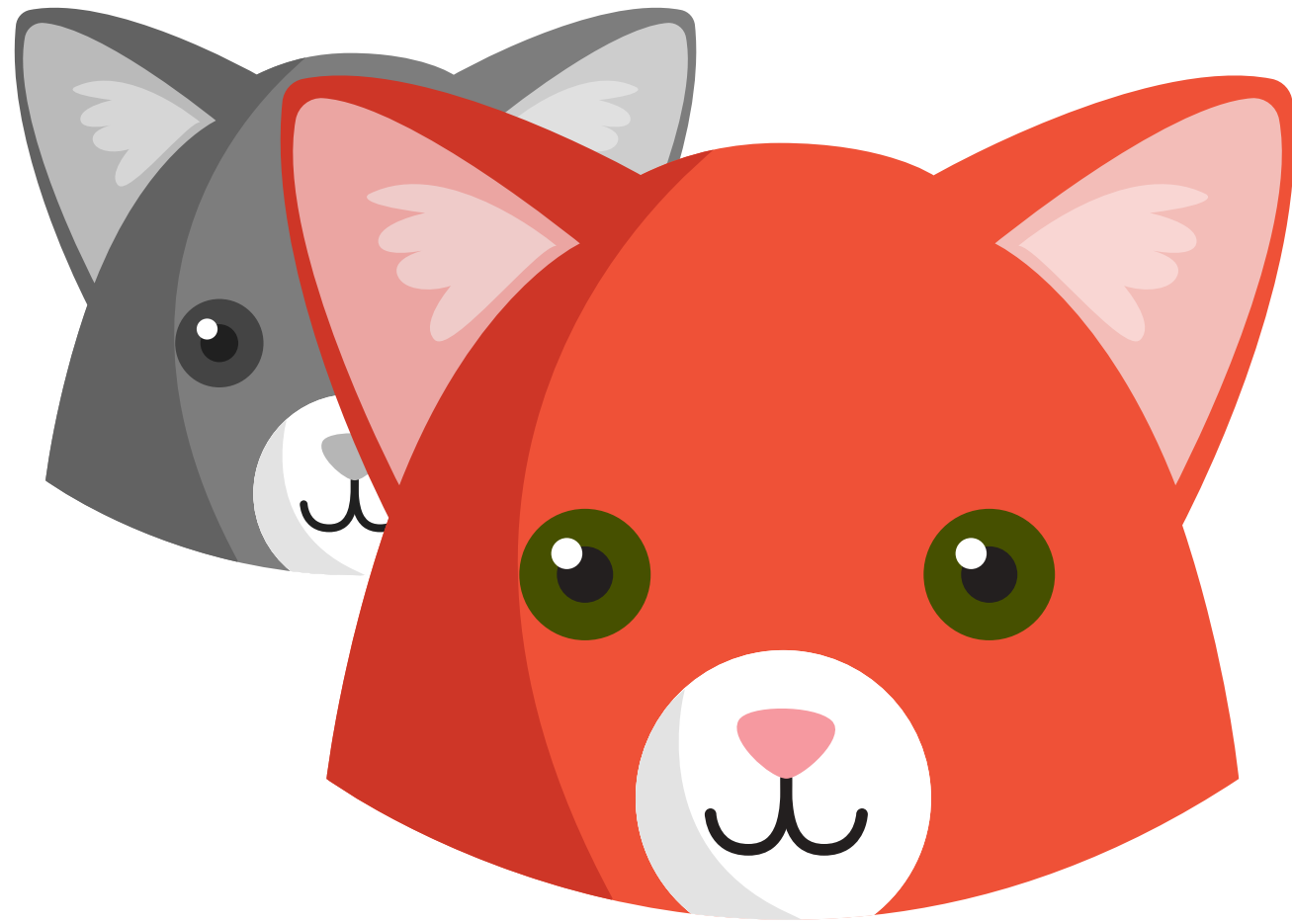




What makes Trello unique is its ability to collaborate with others via its social features. Users can join group boards which are shared and editable between members.

Members get notifications on card changes, or new comments and new activities within each project.





Primary user

General: Anyone who has a project they want to keep track of progress, deadlines, to-do lists

More specific:

Trello shines in its collaborative aspect, so likely users include

1. Industry professionals on project teams
2. Students doing academic group projects
> within our capacity to survey

i.e. Team-based workflows with users who heavily rely on project organization to ensure success.

“Whether it's managing a team, writing an epic screenplay, or just making a grocery list”



IDEO Method Cards

We asked a list of ~20 targeted questions to each participant in order to figure out characteristics of both existing and potential users.

For this stage of background analysis, more involved or experience-dependant methods of observation like asking users to draw Cognitive Maps were not necessary.

We simply needed to figure out the goals of each user and their relevant contexts for understanding the app.

Interviewing them to acquire these goals either directly, or indirectly through analysis of their habits was considered the best option to not delve too deeply into features, and yet gain sufficient contextual information.

Integrating “why” and “how” questions with the questionnaires allowed us to gather more meaningful and personal responses.

Learn

Look

Ask

Try

Competitive Product Survey

HOW: Collect, compare, and conduct evaluations of the product's competition.

WHY: This is a useful way to establish functional requirements, performance standards, and other benchmarks.

Developing a new soft drink, the IDEO design team surveyed the competition for functionality and form factors.

IDEO www.ideo.com



While interviewing users, we also asked them for existing productivity applications they have or are currently using.

Our reasoning was that some of Trello's basic features are native to popular, widely known apps, or apps already bundled with the operating system, and it doesn't fulfill a completely niche spot in overall ecosystem of productivity tools.

This means that most users are already using or have used other products from Trello's competitors before, which include the very basic features fundamental to Trello such as list-making, setting deadlines, or creating reminders.

To aid our questionnaire responses, we decided to evaluate these existing competitors (some of which are mentioned by our interviewees) in hopes of learning about why they are currently being used instead of Trello, despite sharing many similar features and goals.

User Research - Questionnaires

Style of questions catered towards eliciting the goals and habits of each user from a broad perspective during their usage of Trello or other project management & productivity apps that share similar goals or features

Sample Questions

What app(s) do you use to manage scheduling, making lists, sorting tasks?

Why do you use Trello (or these apps) and what goals do you intend on achieving with such apps?

What makes you more inclined to use this app compared to others that you have tried?

What kind of things do you keep track of in this app?

What part of the app do you use the most and in what main way do you use it for?

Do you use this app mainly for personal or collaborative use? How so?

Tell us about an experience you had using it for a project.

How often do you check your lists throughout the day/week?

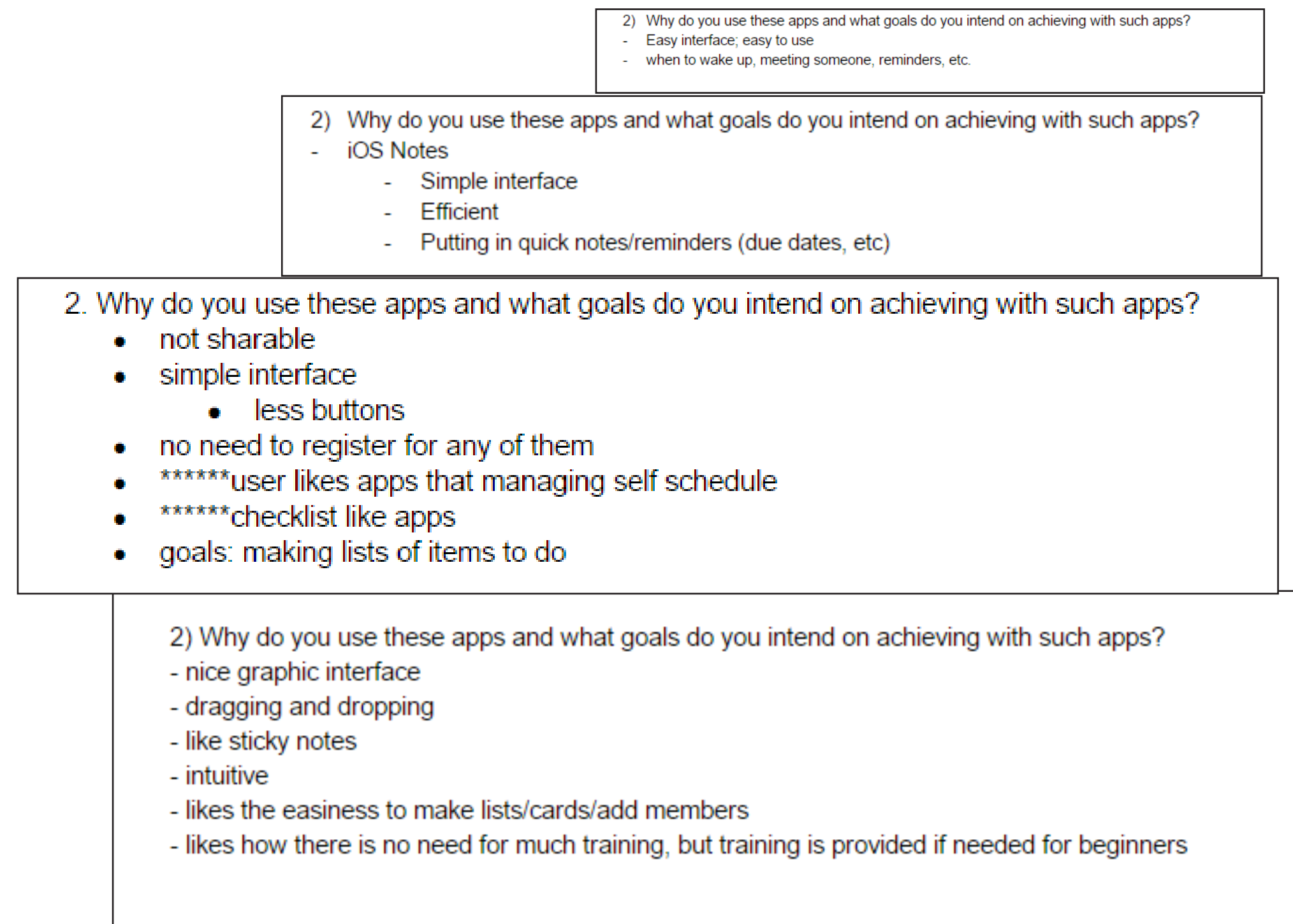
What's the average time for each session of use?

Do you switch between multiple platforms throughout the day to view, edit, or create lists or do you only stick to one device to do it?

Where and when do you most frequently use this app? i.e. at home, at school, at work, on the go, at night, in your spare time, etc. Why, if for any specific reason?

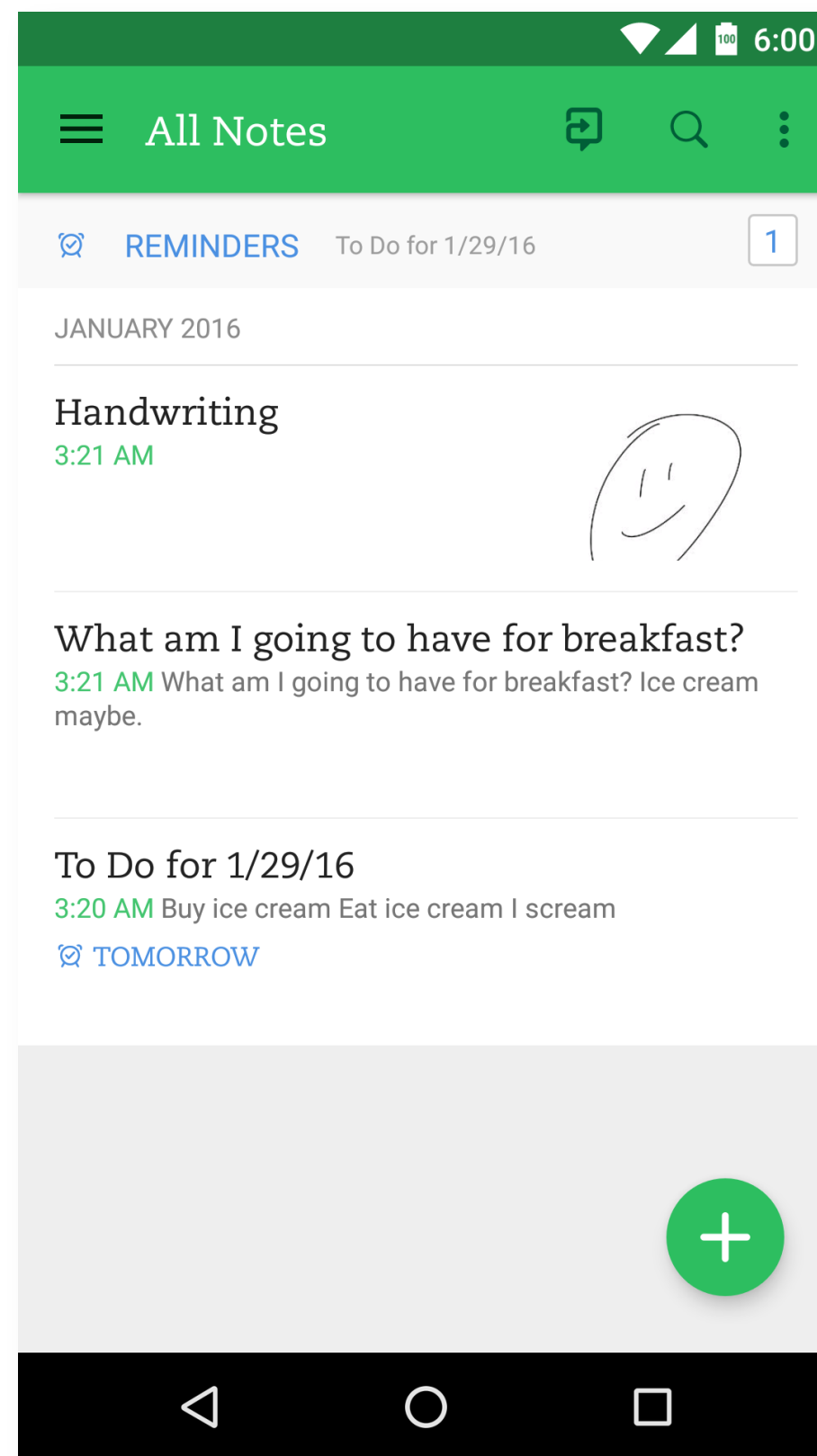
Research Findings

Through our research findings, we were able to find common interests between our subjects, e.g. everyone wanting an application with a simple interface to quickly accomplish their “application” goals. These range from adding quick reminders for tasks that needed to be completed later in the day to scheduling in an appointment, to quickly sharing a document with others.



Common goals

- > Plan out a project or list and keep track of it, daily
- > Intuitive, easy to learn, simplistic minimal interface
- > Less clicks or taps to reach key features
- > Set reminders for deadlines, appointments, and other time-sensitive events
- > When collaborating, the ability to work together in real-time



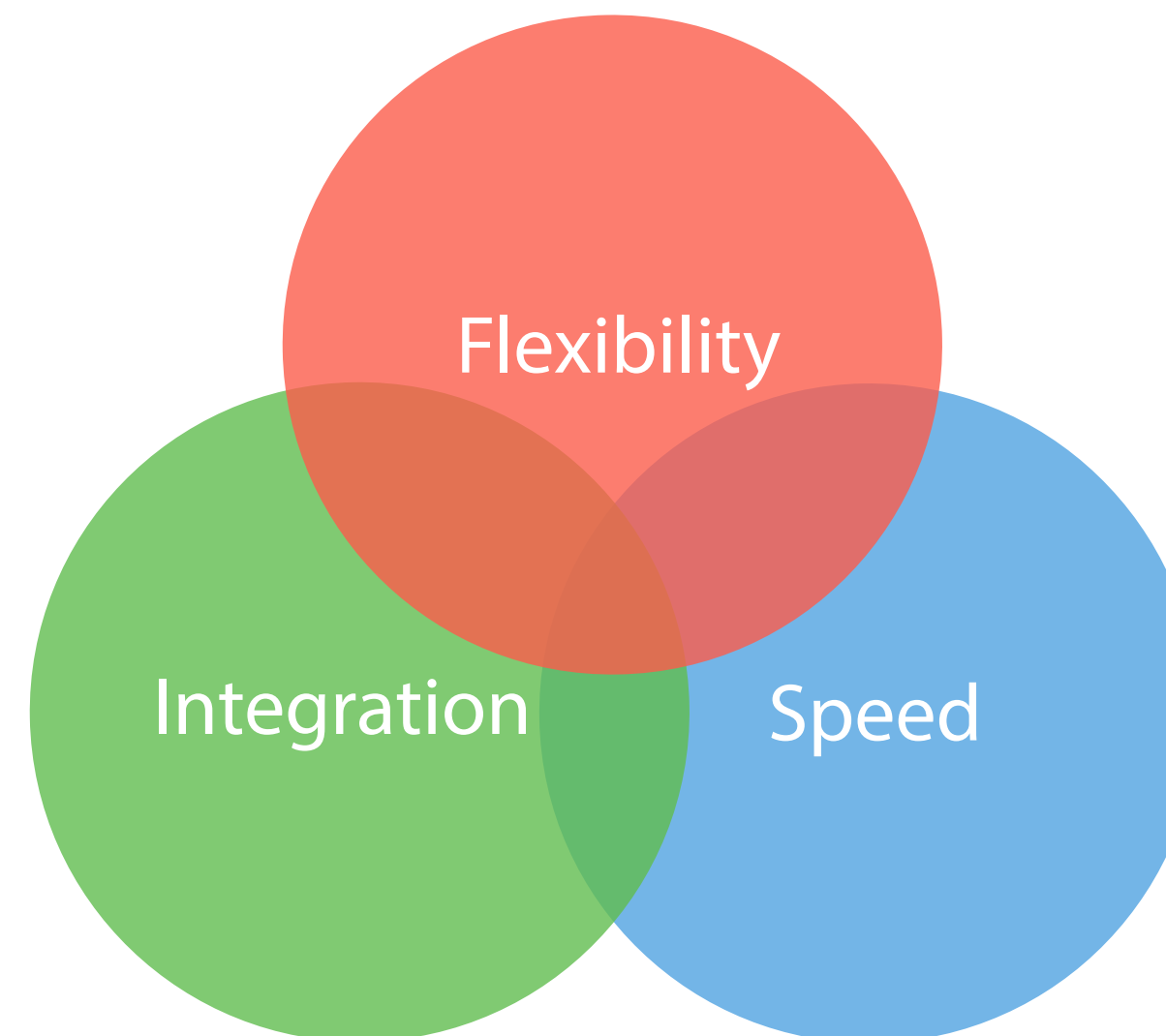
Evernote (Android)

- Much more functionality
- List view
- Chat function
- Less useful for an overall view
- Multiplatform

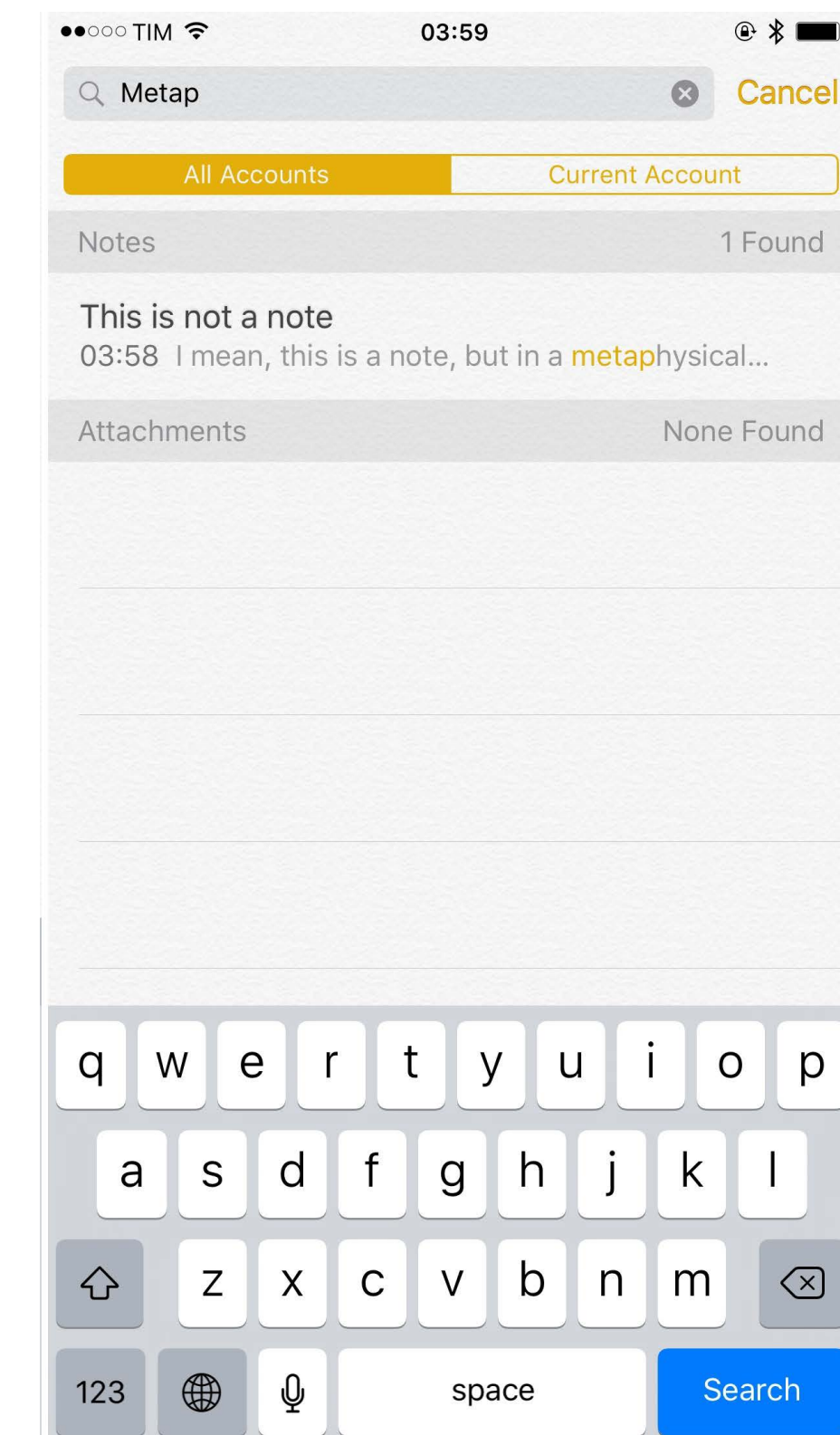


Calendar (iOS)

- Monthly view
- All events must have a date
- Not as flexible for things other than events

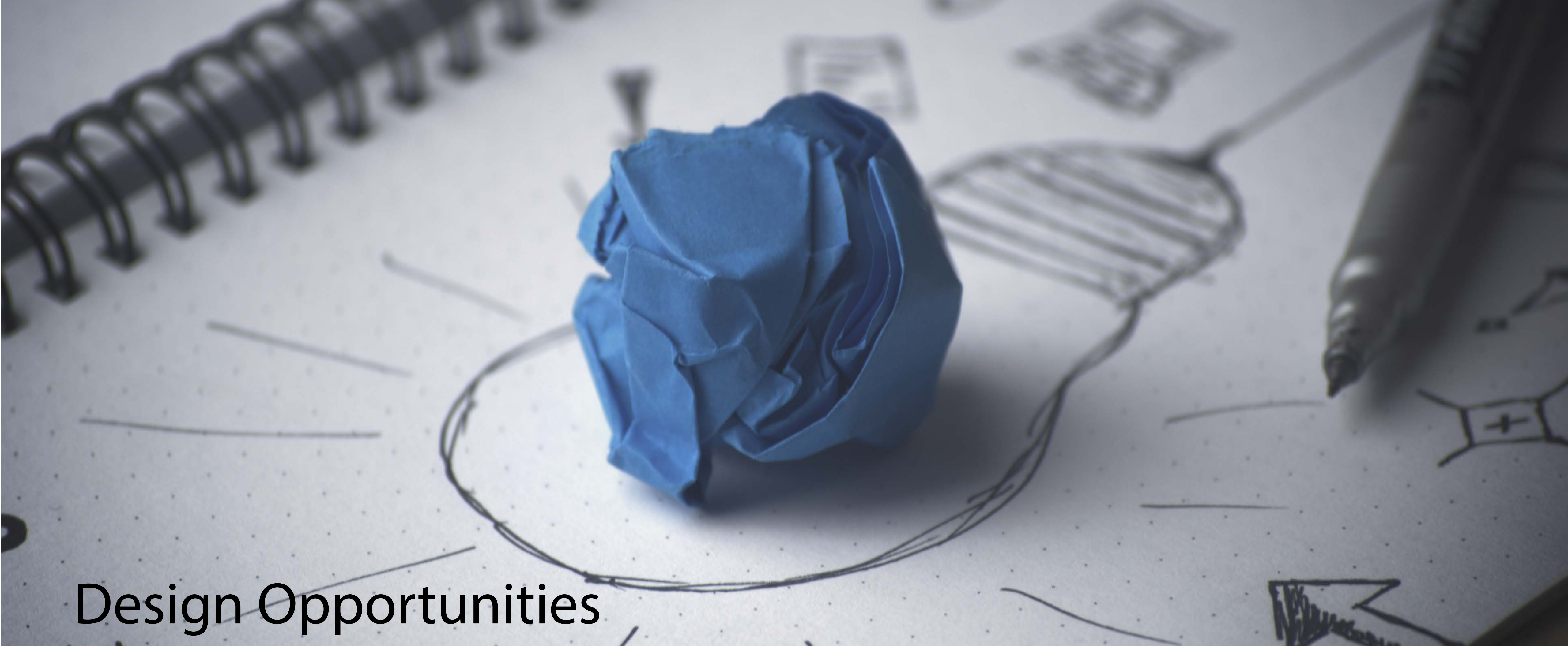


We researched competitors including Evernote, Google Drive and preinstalled apps like iOS Notes and iOS Calendar.



Notes (iOS)

- List view
- 2 clicks to creating a note
- Can draw / attach images
- No search / filter



Design Opportunities

Through our research, we discovered that alongside using applications for collaborative work, people also used instant messaging services such as Skype or Facebook messenger to communicate with project members.

Moreover, through background research, we found that a lot of industry professionals use a mix of both Trello and Slack, a messaging app.

A potential stream that we could approach would be adding in real time a feature into Trello such as an instant messaging system, or perhaps a function to “draw” on a real time canvas to collaborate with others, to capitalize on the idea of being an “all-in-one” app.

Personas / Collaborative



Andrew H.



Profile

Age: 21

Gender: Male

Occupation: Visual Media Intern (Co-op)

Description



Andrew is a 3rd-year university student currently interning at a local web development company. His workflow consists of creating and prototyping visual assets to hand-off to the rest of the team.

He relies on social communication tools to discuss current project needs with his colleagues. Due to the nature of his role, Andrew's assignments are frequently updated—whenever his team members make a request for an asset to be made.

Goals



- ☐ Track progress of collaborative efforts
- ☐ Communicate deadlines with team
- ☐ Quickly note or list new project requirements
- ☐ Conveniently access information with one glance
- ☐ Clean and hierarchical for readability

Experience

Using social media tools



Using similar productivity apps



Basic touch screen interactions (swiping, drag and drop, sliding)



Dedication to time management



Quote

"How far along is the login interface from completion? Does Michael want me to create more icons for it?"

Motivations



- + Difficulty in trying to remember every task assigned without writing it down
- + Document work in case of being held accountable by management
- + Self reminders for professionalism, and to feel motivated to focus on work

Frustrations



- Too many menus or clicks to access or note down something trivial
- Receiving push notifications for every small change or action regardless of importance
- Visually dull, boring, unpleasing interface

Environment



Daily, at the workplace, in a professional setting

On the go, when team calls on notice

Usually not after scheduled work hours

At home, late hours of the evening, to prepare for the next day

In the presence of, or switching between other communication apps

Triggers

- when notifications of reminders or deadlines pop up
- when user needs to send an attachment to teammate
- upon completion of tasks, when updating its status to let others know
- when another user mentions him



Collaborative + Personal

About



Erica is a third year student enrolled in school, has a part time job, and lives in her own. She is currently going from application to application to manage all of her scheduling, reminders, alarms, and communicating with her team for class projects. She finds it inconvenient to have to constantly switch between one application after the other in order to update her list of things to do. Erica aims to find a service that allows her to manage all of her tasks within a single application in order to organize her ever so busy schedule.

Biography

Name: Erica L.
Age: 21
Gender: Female
Occupation: Full Time Student

Goals

- to be able to access personal schedule along with projects in one convenient location
- to keep track of progress for tasks in collaborative situation
- aesthetically pleasing, visually and hierarchy simple/clean
- store all of her deadlines efficiently without the hassle of too many clicks
- conveniently access information at glance

Motivations

Needs to be able to find everything in a proper and convenient location while also being organized

“*I need a system that allows for everything to be conveniently located and organized in a single location*”

Skills & Experience

- Comfortable with standard smartphone interactions such as swiping, drag and drop, sliding
- Uses social media platforms that carry similar design elements within each of the systems; understands conventional semantics

Interaction Triggers

- Adding in a reminder for a later chore
- Needing to add an item to a list of things to do (i.e. grocery shopping list)
- When a notification from an application is recieved
- When there is needs to check if a task has been complete
- When there is a need to share a document to a team

Possible Touchpoints

When checking a push notification sent from the application

Frustrations

- Having an application that provides unclear training, making the application more difficult to learn
- Not being able to quickly navigate and access a what should be easy to find option or feature

Environmental Factors

- On the go from point A to point B
- Running household errands
- At school working in a studio
- At home within her bedroom
- At the library quieting working
- In the car prior to heading out

Life Goals

- To succeed in her academics while living willingly independent from her family
- To achieve a sense of accomplishment through her involvement in school extracurricular activity
- Be able to live life as organized as possible while leaving time to relax

In Hindsight

Through Survey and Questionnaire, we were able to ask a variety of questions to get a better understanding on Trello users and the goals the app was trying to achieve.

However, as new researchers, knowing what questions to ask served as a struggle for us.

It was only through going through multiple interviews were we able to refine, add, or remove questions to benefit our research.

While scouting out the competition, we were able to see what Trello has (or doesn't have) from competing applications.

This method requires ample time to understand and learn the app from inside-out, which meant a somewhat tiring process of studying in detail multiple applications within our given timeframe.

Due to time and networking constraints, we were unable to get in contact with industry professionals who use Trello and only reached out to students.

Answers from these professionals may have given us another perspective to enrich our personas and find better suggestions for competing apps to study.

Sources

Trello brand assets, colour palettes, theme inspiration
<https://trello.com/about/branding>

Persona 2 Quotation Mark Icon made by Freepik from
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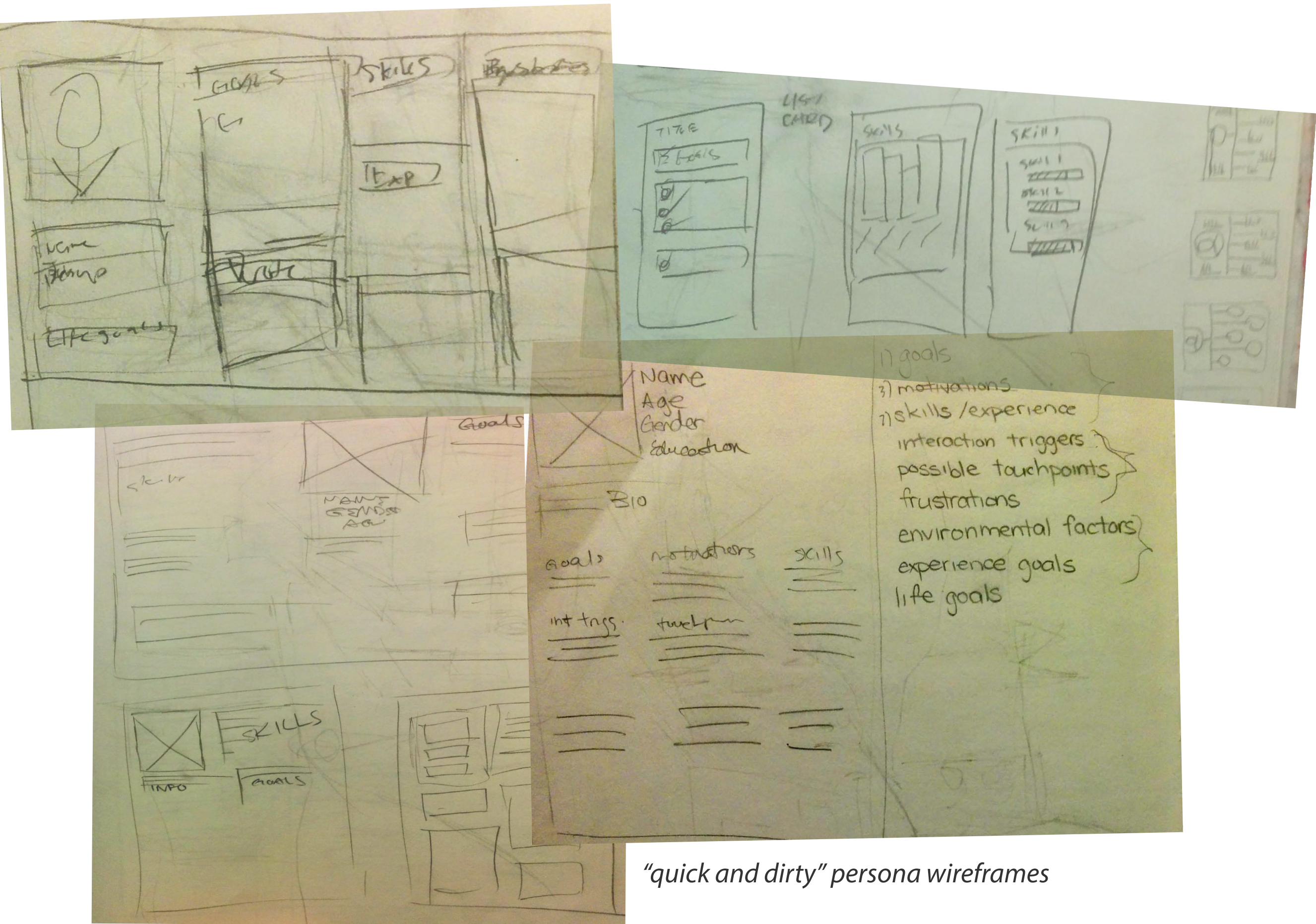
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“quick and dirty” persona wireframes