Jan Losert [Follow]

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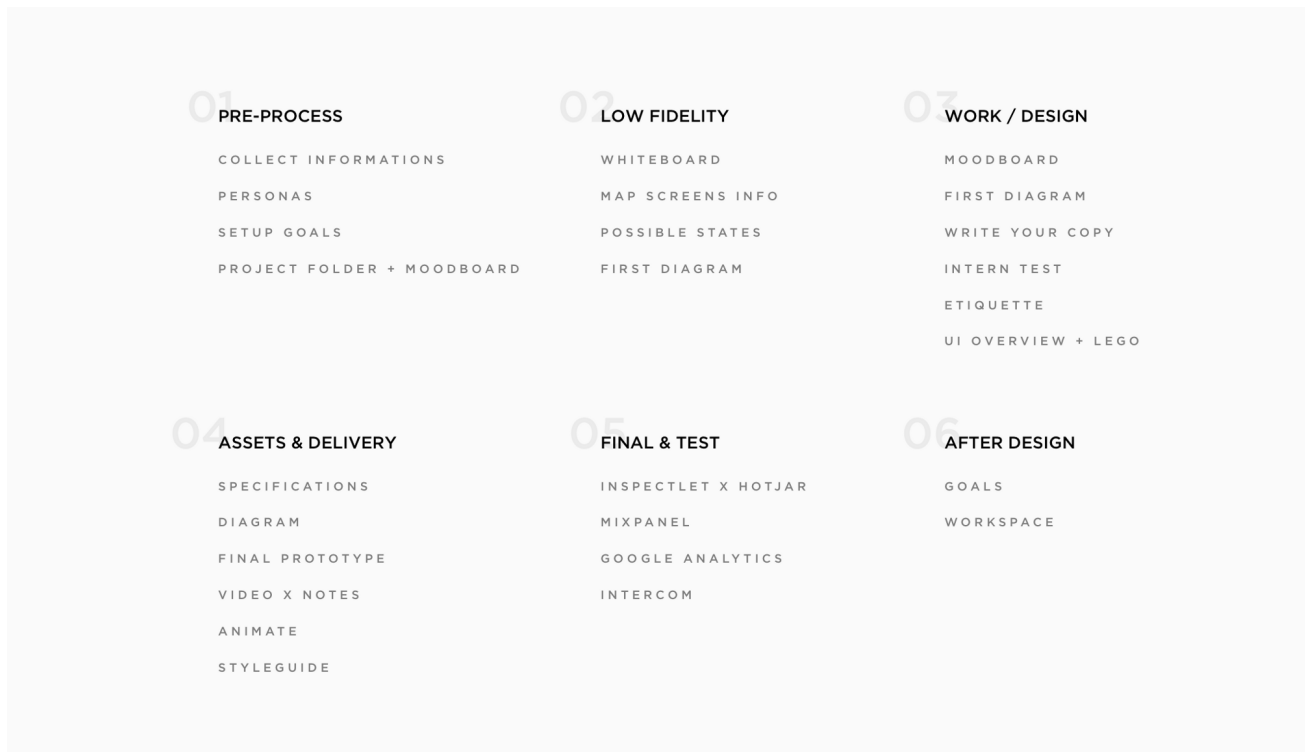
Oct 16, 2016 · 15 min read

26 Steps of Product & Dashboard Design

What I have learned during my 4-year journey of a Product Designer & Dashboard Designer

For the last four years I have continued to design dashboards and applications and I have learnt how to deal with different departments, and utilise their knowledge in order to make product designs both better and more efficient.

Today, I'm going to share all the steps I have learned and incorporated into my daily routine. These steps I believe have helped to make me a much better designer, and I want to share them with you.

01 PRE-PROCESS	02 LOW FIDELITY	03 WORK / DESIGN
COLLECT INFORMATIONS	WHITEBOARD	MOODBOARD
PERSONAS	MAP SCREENS INFO	FIRST DIAGRAM
SETUP GOALS	POSSIBLE STATES	WRITE YOUR COPY
PROJECT FOLDER + MOODBOARD	FIRST DIAGRAM	INTERN TEST
		ETIQUETTE
		UI OVERVIEW + LEGO

04 ASSETS & DELIVERY	05 FINAL & TEST	06 AFTER DESIGN
SPECIFICATIONS	INSPECTLET X HOTJAR	GOALS
DIAGRAM	MIXPANEL	WORKSPACE
FINAL PROTOTYPE	GOOGLE ANALYTICS	
VIDEO X NOTES	INTERCOM	
ANIMATE		
STYLEGUIDE		

1. Pre-Process

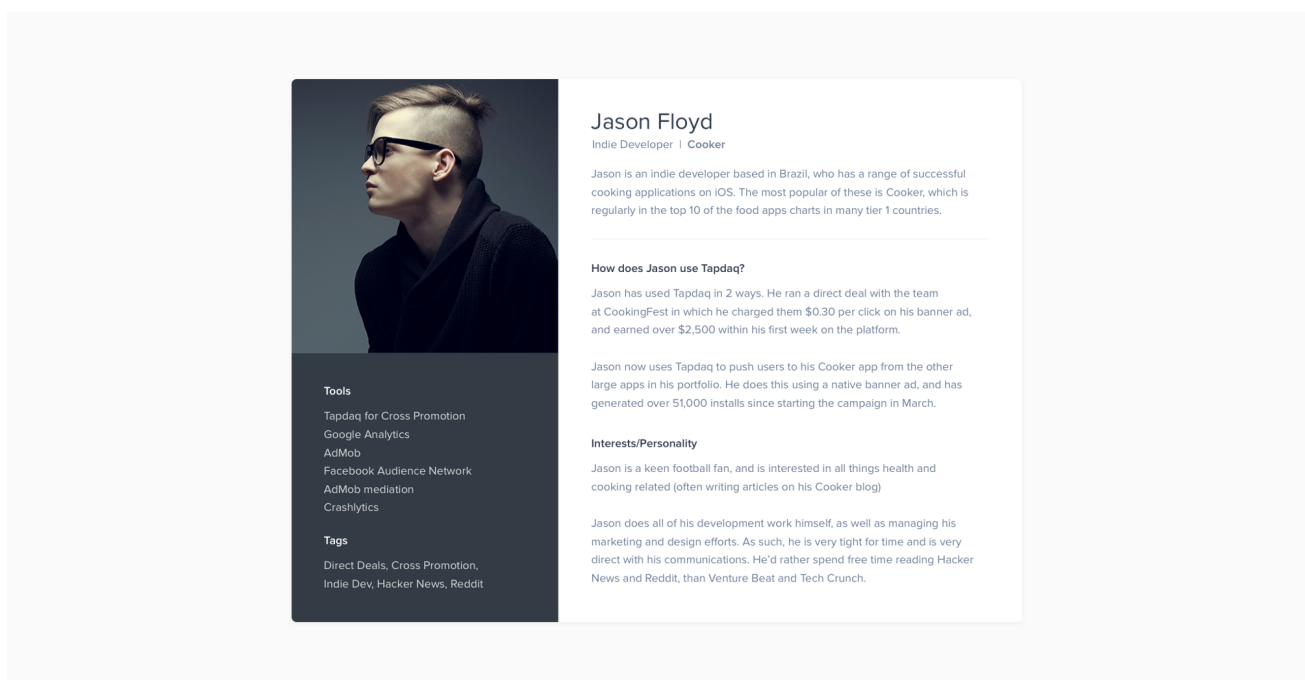### Get as much information as possible (Ask for three examples)

For me, nothing gives me more clarity than seeing a real working example. When I am working with a new client or on a brand new landing page for a product, I find as the easiest to ask the client to provide three or four inspirational pages, because this really helps both parties. Getting your client to put ideas onto the table gives you an opportunity to easily understand what they like, and what they expect from the finished design.

If you're working with multiple teams you should aim to spend as much time with the developers on a product as you do with your designer colleagues. What I've learned while working on Tapdaq the key to making an effective design decision is to ensure you speak with the dev team as much as you can. In my case, there are always cases of a solution to a problem whereby I couldn't come up with that solution by myself. I'd say the goal is to eliminate as many questions as possible before you move into development.

Learn About Personas

At first, I must say I was skeptical about personas, but now it all makes sense to me.

So in complete contrast to my older process, I can see how personas are super important while working on product features, especially when the solution has many different edge cases. It helps you to understand who are you really designing for. I aim to have around four to five personas. In the best way to have personas as an actual users, this can help you identify issues while chatting or walking through your solution with them on a call or in person.


Jason Floyd

Indie Developer | Cooker

Jason is an indie developer based in Brazil, who has a range of successful cooking applications on iOS. The most popular of these is Cooker, which is regularly in the top 10 of the food apps charts in many tier 1 countries.

How does Jason use Tapdaq?

Jason has used Tapdaq in 2 ways. He ran a direct deal with the team at CookingFest in which he charged them $0.30 per click on his banner ad, and earned over $2,500 within his first week on the platform.

Jason now uses Tapdaq to push users to his Cooker app from the other large apps in his portfolio. He does this using a native banner ad, and has generated over 51,000 installs since starting the campaign in March.

Interests/Personality

Jason is a keen football fan, and is interested in all things health and cooking related (often writing articles on his Cooker blog)

Jason does all of his development work himself, as well as managing his marketing and design efforts. As such, he is very tight for time and is very direct with his communications. He'd rather spend free time reading Hacker News and Reddit, than Venture Beat and Tech Crunch.

Tools
Tapdaq for Cross Promotion
Google Analytics
AdMob
Facebook Audience Network
AdMob mediation
Crashlytics

Tags
Direct Deals, Cross Promotion, Indie Dev, Hacker News, Reddit

Persona Template — Download it here: http://janlosert.com/persona-template.zip

Setup Exact Goals — What Exactly Should We Track?

I think most designers/clients ignore this step, but one of the most important aspects of design for both parties is to understand the goals of the product you are designing. We tend to jump straight into pixels and quickly flesh out the UI of the project. If it's a brand new website, or a new feature, be sure to set clear goals of what you want to achieve.

Since everything is trackable, speak about the exact points you're going to track. For example, these could range from new sign ups, to a number of customers using Paypal vs. purchases with credit cards. Always make sure you know how high you're aiming for at the start!

P.S.—You'll need this anyway for setting up funnels on Mixpanel later in this process.
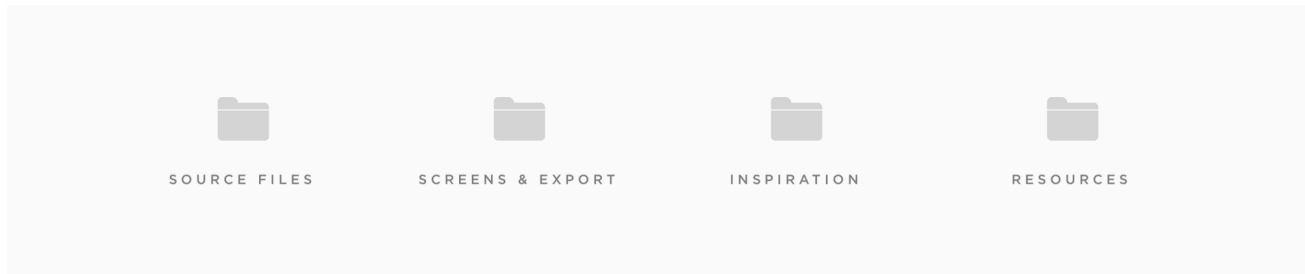
Project Structure

Set up Project Folder and Start Collecting Moodboard

There are plenty of sites for inspiration—Dribbble, Behance, Pttrns, Pinterest etc. It's really easy to find similar projects to the one you shall be working on. Additionally, there may be already a solution to a problem you're experiencing and trying to solve.

When I start working on a new project, I always setup a folder with folders named—Source Files, Screens & Export, Inspiration & Resources. I save everything I find on the internet to Inspiration folder to be able to use it later to create basic moodboards. This folder could be filled with anything from plugins, swatches or even full case studies from Behance.

2. Going Low Fidelity

Whiteboard

If anyone can remember, I didn't care much about the quality of wireframes in my previous article. The methods I use now are the following:

If we want to add a new feature or redesign a process we sit down and everybody at the meeting starts sketching ideas on a whiteboard, paper or even an iPad. This action allows us to put everyone on the team in the designer's position. Later we end up with two design options to see which one works the best. We always try to go through the whole

experience and discuss most of the edge cases during this part of the process. It is really crucial to address them now as opposed to during the design phase, or even worse, during the development part. That's when you can lose a lot time and energy instead.

Map out all of your screens info (What data a user needs to input)

This is the time to go beyond the whiteboard and list out all of the user's inputs and stories. Write down what exactly should a user insert into a particular screen and how can a user achieve the desired goals.

Write down all possible states

Because all dashboards, apps or websites' forms have different states, this is another important step you shouldn't forget.

While designing we need to be sure to address all of them. It's nice to have shiny graphs and cool profile pictures in our Sketch files or PSDs. However, most likely, users will see the opposite side of your app. Especially when they come to your product. It's necessary to be prepared. Below is an example of how we deal with empty states in one of our data components.
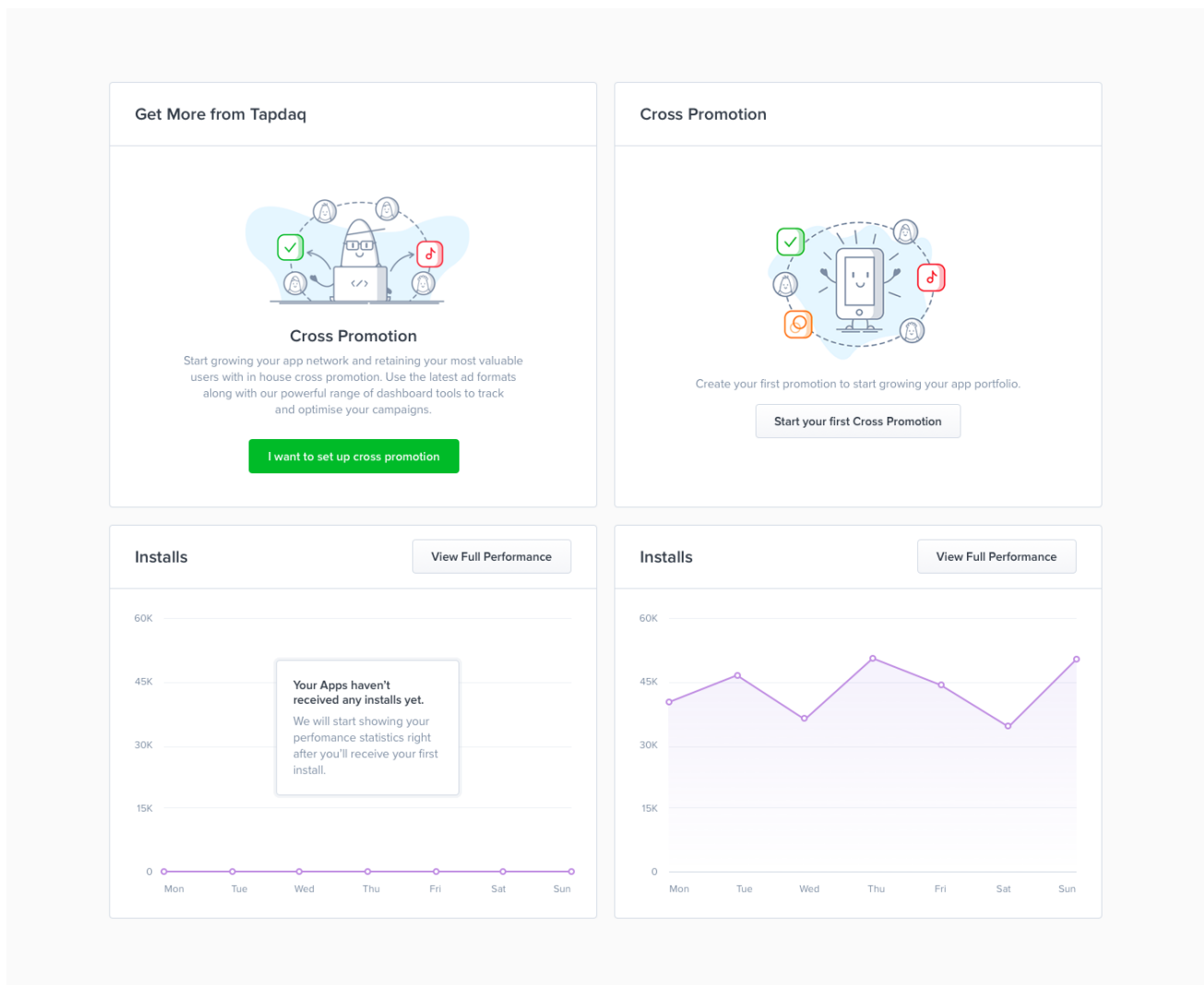
Tapdaq — Cross Promotion Widget States

Prepare First Diagram

All of this leads to the final part of low fidelity. Thanks to the outcome result of the whiteboard task we now know all of the possible states, user's inputs and goals. To sum up all interactions I create a diagram and to be honest I've changed the style of doing this many times: Going from Sketch files with rasterised layouts to just rectangles symbolising each page with their names below. That being said, the process was always painful, I usually end up in a situation where we want to change or add something later on in the process. With these solutions I'm usually forced to do many more steps; such as changing the positions of lines, arrows and images.

After all we ended up with using Camunda Modeler, which is a not exactly a design tool. It's a simple app for creating technical diagrams. Which sounds odd, but this app is developed to help you build basic

diagrams. Most importantly everything created is completely scalable. You can easily drag and drop any point and it will automatically create lines and arrows for you. You can also choose from different types of points which can be helpful, for example, for highlighting when a user receives an email from Intercom. Camunda allows exporting to SVG that makes it easy to colour trackable points in Sketch.
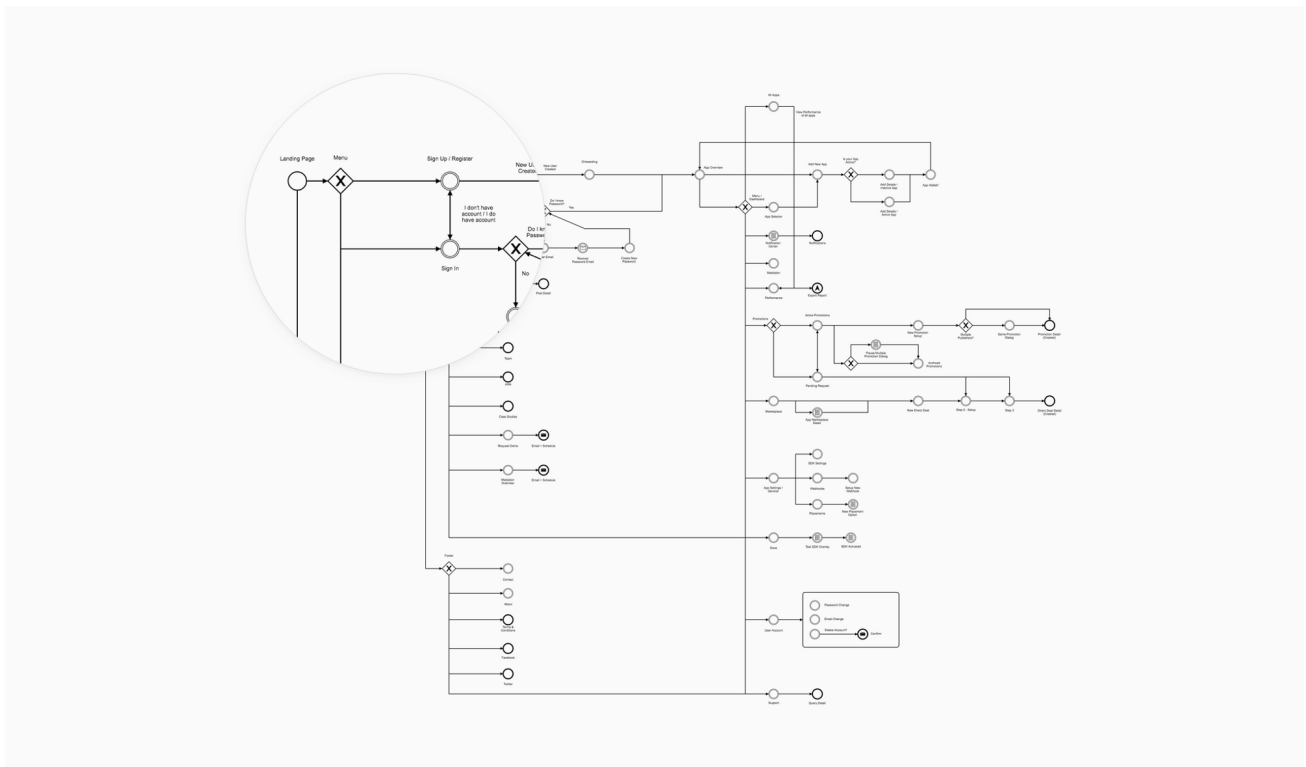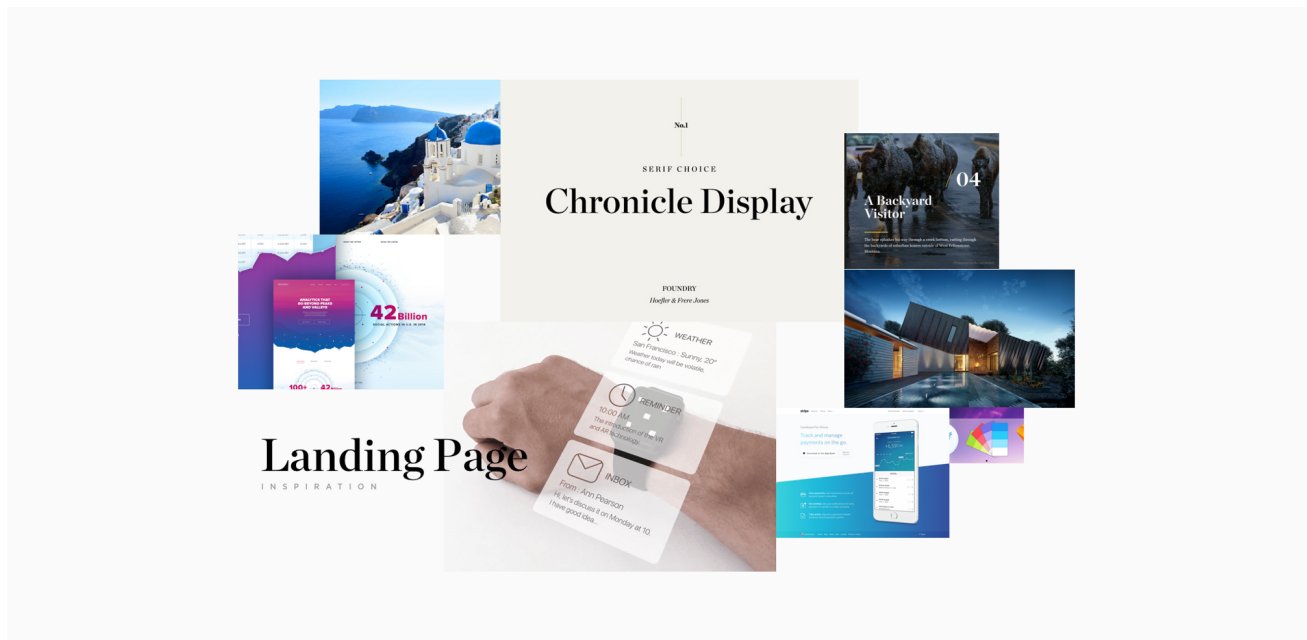

Tapdaq Menu + Screens Structure (Export from Camunda Modeler)

3. Work / Design

Moodboard

I'm able to start with the creation of moodboard, as I collect all images to my Inspiration folder. I use moodboards mainly to discuss my thoughts with colleagues and describe some of the visual ideas, before I start with the pixel process.

Moodboard with Chronicle Display and bright blue colours

First Draft

Designing is always an ongoing process. You're going to iterate a lot along your way to a great result. With first draft is also comes gathering of first feedback. You don't have to come to pixel perfect design in order to start receiving feedback from your teammates, clients or potential users. To get their first thoughts and to start a discussion, I usually mix screens from our current designs. This allows us to start playing with real looking designs in less than a day. You can do a first simple prototype to test if things connect well together.

Write Your Copy (Tone)

Copy is one of the key aspects of users' decisions and I take it as a crucial part of the design. I'm not a native speaker but I'm still capable to set the tone of the copy. There is nothing worse than a nice design with confusing dialogs where users are struggling to find the next step.

First Intern Test

With your first draft you can quickly create a prototype in Marvelapp or Invision. This is something that I started doing recently and it turns out it's another amazing validating aspect. With a prototype you can now easily set up a call with 3 or 4 people from your team and share the prototype link with them and try to ask a few questions while test on them particular flows/scenarios. This way you can easily test your

questioning skills and obviously test your design decisions on real users without worrying about wasted resources and time. I usually tend to choose people who are not that much involved in dashboard development. Also try to avoid watching someone who has already had a chance to play with the prototype before.

Etiquette

We all know how hard it is to stay tidy. How to deliver yet another feature. This usually leads to a messy Sketch or PSD files. I've learned a lot while designing the Dashboard UI Kit , especially about differences between working as a one-only designer in a startup, working in teams or working on my digital products. While I'm working in Tapdaq, I'm confident about the skills of my colleagues and even when I know I'm trying hard to keep files tidy, sometimes it's impossible! However when you do work in a team, I think about my PSD's like I'm creating them for someone else. I use the rule that if you have more than 8 layers in a folder, then you should create a new one.
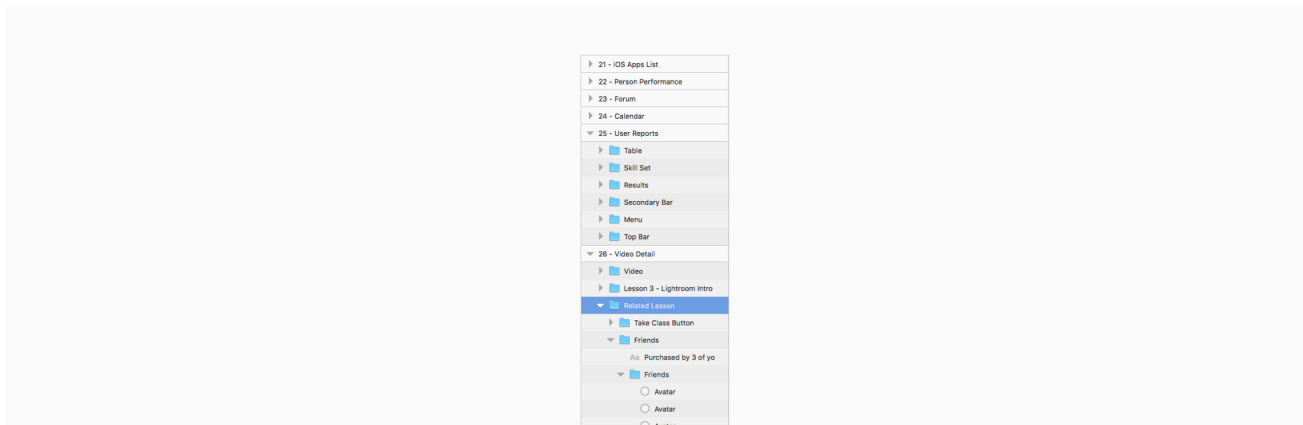
Dashboard UI Kit — Folders Structure

I found one great plugin for Sketch, which saved me hours while I worked on my UI Kits. Rename—https://github.com/rodi01 /RenameIt

You can still take a look at these old Etiquette guidelines (Anyway, most points work for any editor you'll use.)— http://photoshopetiquette.com/

Tip — Put everything in canvas

I've always struggled with designing nice headers while I the rest of the canvas was white. While designing I learned to put all the content in place first—just play with the layout and typography. It's much easier to design nice details and play with the whole concept with the content in place.

Create UI Elements and start playing with Lego

I'm probably late to the party and this will already sound outdated while I'm writing it. The reason why we haven't done any wireframing on the journey here is simple. Sketch 39 comes with something that I have found incredible and that is "shapes with resizing properties". It forced me to finally recreate all 50+ Tapdaq screens. This is something that makes designing easy for everyone on the team. Our Sketch file is pure drag-and-drop now. You can easily give any of your teammates a blank canvas and they can create almost hi-fidelity drafts. Thanks to this we are able to skip all wireframing tools and start with almost real looking pixels.

This also goes hand in hand with us being able to actually convert wireframes to real designs. Any PM can create wireframe and then I can easily take it over and transform to hi-fidelity.
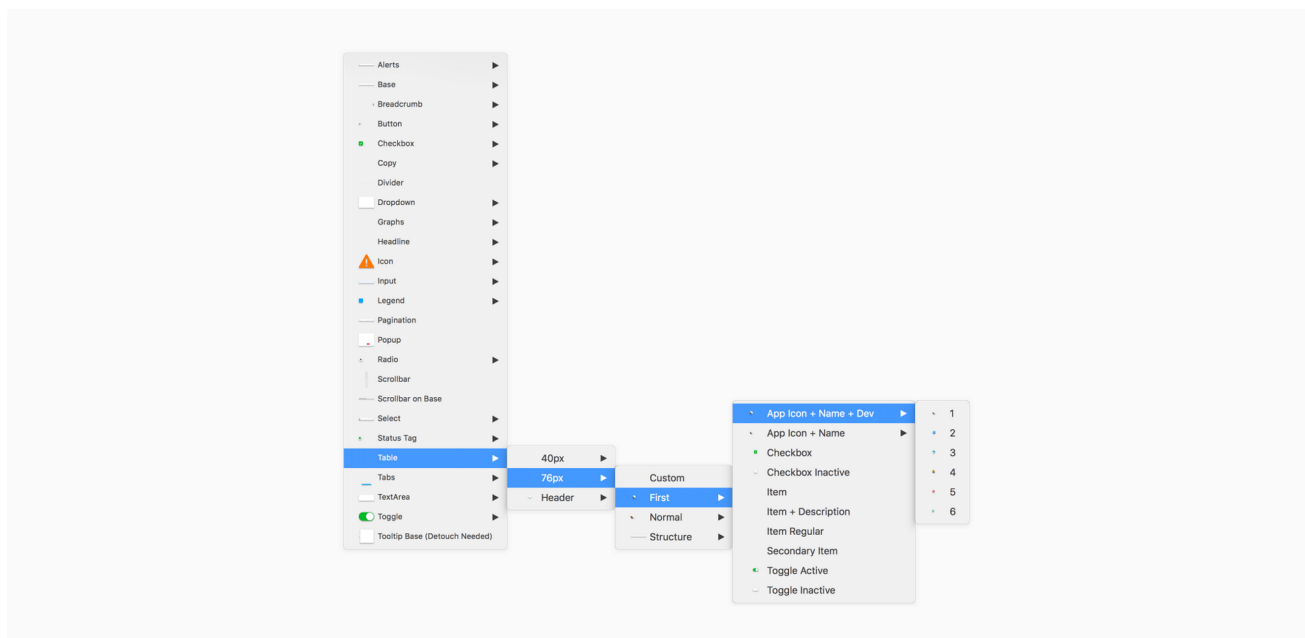
Drag & Drop Elements in Tapdaq Sketch File

4. Assets & Delivery

When you're done with designing and iterating based on first feedback you're not done yet. Now comes the time to hand your designs over to your engineers/devs.

Specifications

One my main aims is to always be able to communicate my decisions with the team and be able to reduce difficulty for our developers as much as I can in order to provide them with the best possible resources. That for me is definitely the most important part of my job as a designer.

Since we documented all the interaction and have everything ready from the beginning of our process, creating specs is a piece of cake. I tend to write specs in Google Docs or below the screens in Sketch files. It's nice to handle your designs with explanations of all features so anybody can grab your file in the future.

Diagram

We used to do this technique while I've worked in Badoo for presentations with the team and stakeholders. This technique is nice for printing out designs and discussing them with the team. But nowadays I think there are better options. Such as having ready the final prototype.
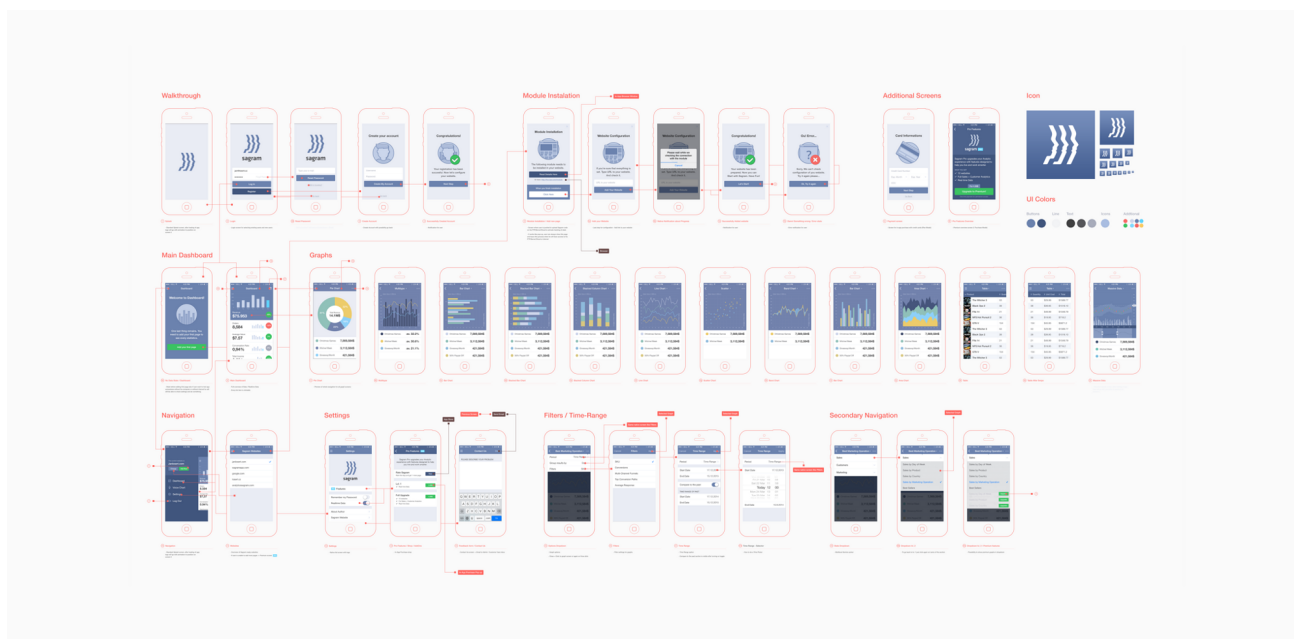
Full Diagram of Sagram Analytics App

Final Prototype

One of the key thing for me is to always have all interaction ready in prototype. I'm usually ending up having 3–5 prototypes on the way to the final one for those little session with teammates or to show some particular flows. I tend to prepare all states in Sketch in one artboard and then duplicate those artboards to have every state ready when exporting.

Like said before, you can either use Marvelapp or Invision. It's great to add comments to parts of your designs to expand your specification much more so that even copywriter can easily go and check in real pixels and flows if every copy and dialog works as required.

Quicktime Video > Notes

When I'm not presenting stuff on Hangout to the team or a client I'm sending a screenshare video of me going through the prototype and explaining everything what I've designed. It's a nice confirmation for me before any presentation that I know the answer on any question and possible fancy interactions I've decided to design. Could be also nicely used when working in remotely based teams. Everyone has access to replay the whole interaction thinking at anytime.

Animate

A nice final touch of your design you can use After Effects or Principle. It's good to explain how do you want this and that to move or hover.

Styleguide

Another crucial point for engineers is to know how things will react in different scenarios. Think about error state of input or where to show error message. Same as how disabled state of submit button will look like, where to put spinner in input etc. It's super easy for engineers go just through your Symbols artboard and style one by one element before they even start coding all screens thanks to having a Sketch file as Lego blocks. Styleguide and visual overview of all elements is actually one of the most requested features/designs for the next update of my Dashboard UI Kit.
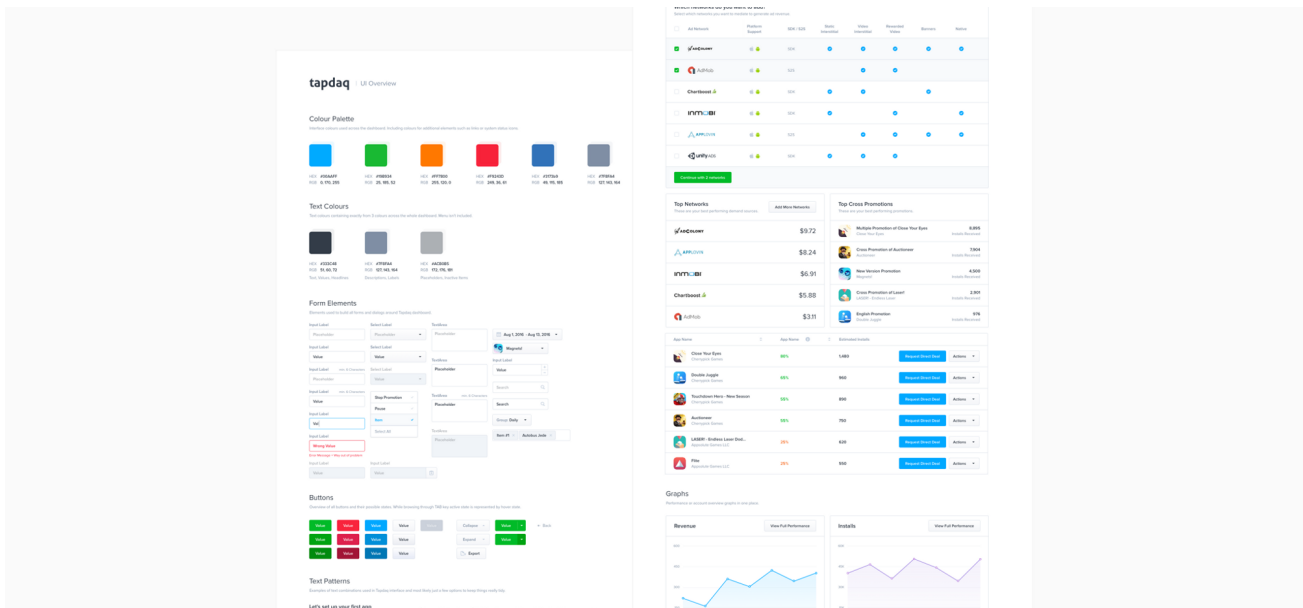
Tapdaq UI Overview — Styleguide

5. Final & Test

Since we are done with handing over our designs to engineers we are able to focus on the last part of the process—Tests of our decisions!

Inspectlet / HotJar

After the designs are turned into working code don't forget to include your Inspectlet or HotJar JS snippets. I'm always excited (or frustrated) to see how users navigate through our dashboard or what are they doing on my portfolio page. Inspectlet is amazing in capturing all of your user session. Works great for bigger projects as well. It comes with easy "/page" filtering which helps you watch session of a particular feature or flow. We use Inspectlet in Tapdaq. For my personal portfolio I use HotJar's free features to generate heatmaps and record at least a few users browsing my portfolio.

Mixpanel

Mixpanel works great for validating our goals (those which we setup at the very beginning of our process). Mixpanel helps to see how many users complete particular flows. How many users dropped before setting up the account. How many people went from main landing page to store and to our most valuable product.
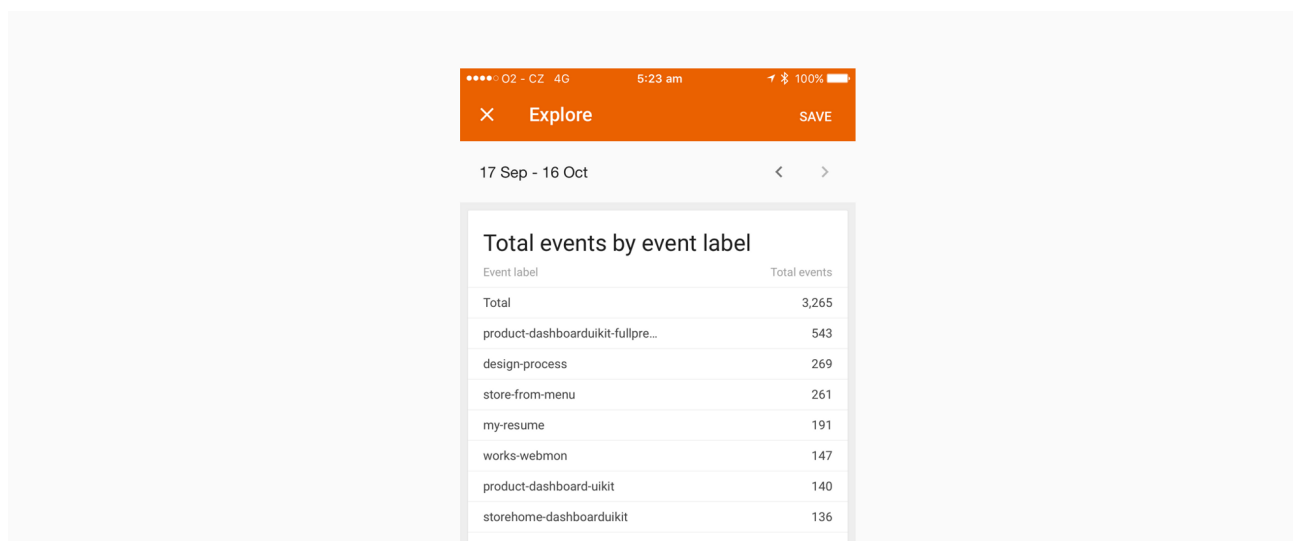
Google Analytics

I'm not capable of coding big things, but at least I'm able to work with CSS files and with simple code. Lately I was interested to see where users click and while looking at Hotjar heatmaps I've decided to setup basic click tracker in Google Analytics as well. You can easily track every of user's clicks on your website as well. Here is sample code for tracking clicks — http://pastebin.com/tdmFZN2k

```
                        <script>
                            function track(name,label){
                                ga('send', 'event', name, 'click', label, {
                                    hitCallback: function(){
    1. Add Script                    console.log('Event sent to Google Analytics');
                                    }
                                });
                            }
                        </script>


    2. Label Your Links     <a href="link" onclick="track('Click-Name','Click-Label')">Link</a>
```

Google Analytics Tracking Code

Google Analytics Tracking Results

As you can see I'm tracking every button, every link and I always attach different label to each of these anchor points. This helps me to easily map out user's behavior. For example, I found out that people used top navigation 5x more over the highlighted link in intro text. Feel free to code this snippet to your website as well.

P.S. It doesn't sadly count clicks from users with AdBlock.
Thanks @snapeuh for big help setting up this.

Intercom

When we agreed on our initial flows we were talking about part of the flows where user receives an email from Intercom. Our responsibility here is to ensure that all copy and the message itself makes sense and is actually helpful for the visitor. Be sure that your emails are guiding your user to your keen result and always try to provide specific support articles and info how to continue in the flow.

6. After Design / How do I manage my work

Goals

For the last part of the journey I'm setting up for myself one month sprints divided into work/Tapdaq related goals, personal project goals and life goals. I'm still using Things by Cultured Code to split down those projects into small tasks which are easy to sign off. I used to work on 5 different projects at the same time and always ended up frustrated by not being able to push anything over the finish line. Nowadays I'm aiming to release at least one thing each month. That "thing" could be anything from 2 new subpages on my portfolio, a new product or a client's new landing page. Just to keep myself going and stay happy with finishing stuff.
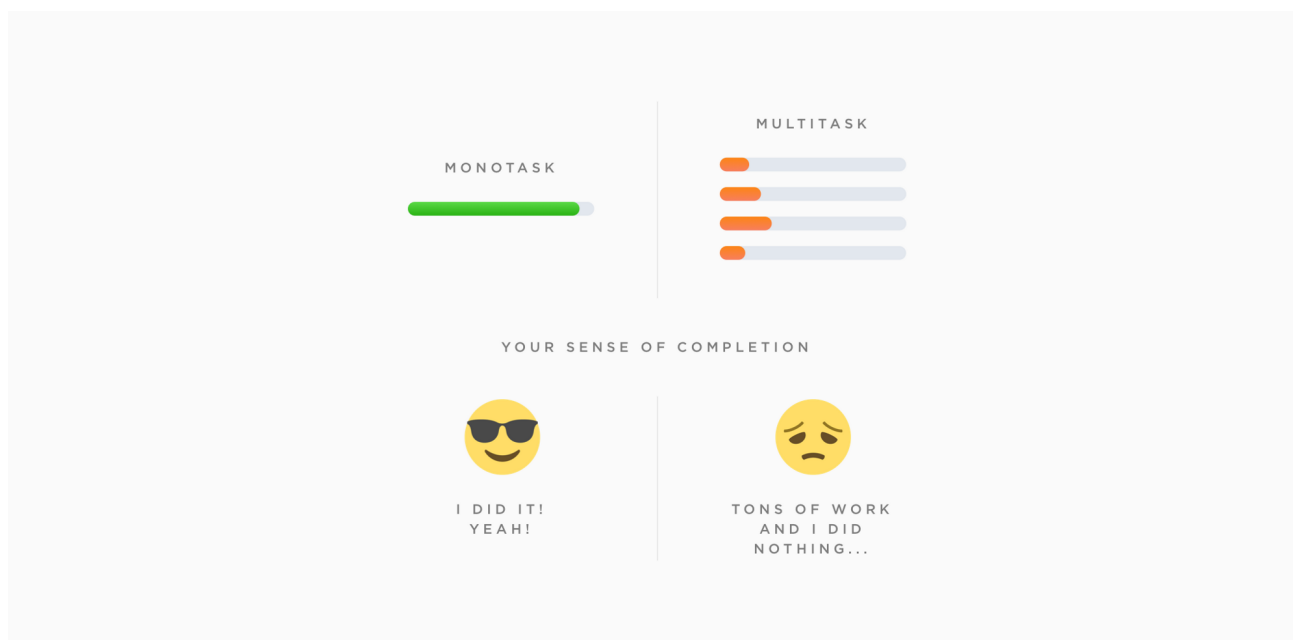
Originally from Siavash Mahmoudian — https://mobile.twitter.com/siavash/status/618093511066435585

Workspace

I'm already using sketch for most of my designs, but I've got a lot of people on Instagram asking for my Photoshop workspace, so here you go! http://janlosert.com/workspace.zip

7. The last few words

This was an overview of all the steps I'm taking to deliver my designs, I'm obviously not following the same routine all the time, but this gives you an idea of how I do work.

Leave dribbble behind

From what I've learned and how my designs have changed over past 4 years, I've got to the point where Dribbble is the best way for us designers to attract new clients and show off our work. But it's not necessarily the place you want to create your designs for. I've always aimed to have nice pixels with sexy profile pictures, but that's not what real users need and will use. This is one example from Tapdaq, something what I've designed with thinking of nice shot for Instagram and Dribbble and this is how the current screen looks after I've spend hours of watching people editing their profiles and after I've realized what info they actually request and need.
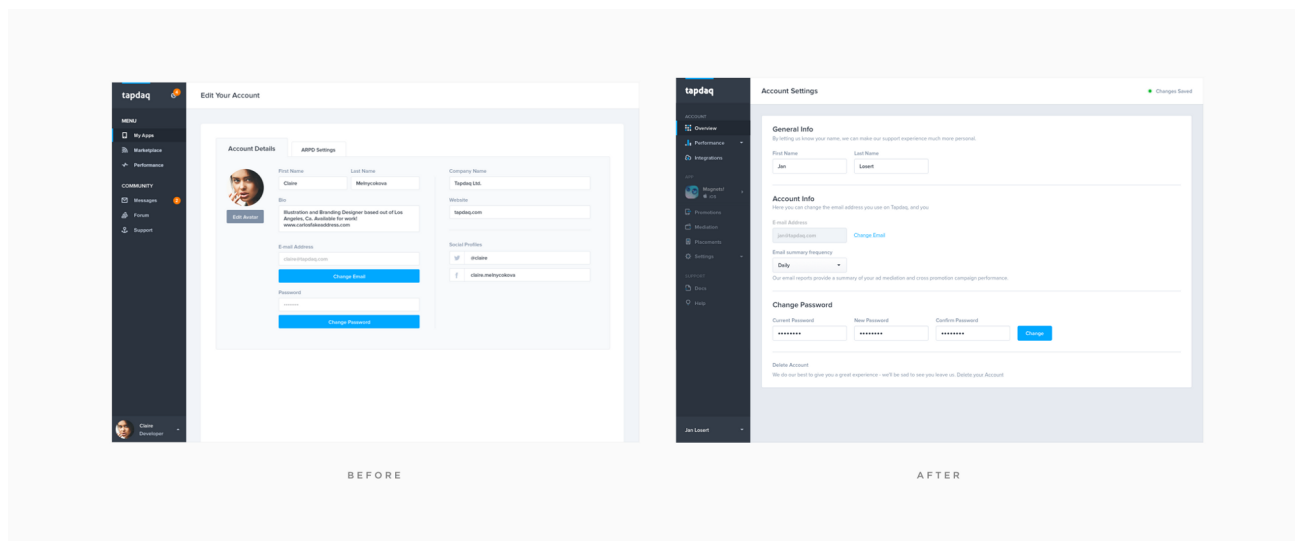
Account Settings — Before & After

You may receive 500 likes for bright crazy animation of a potato or

sliding pizza but what's really important is that your users will find how to manage frequency of company emails or how to filter their performance analytics.

Future

My next mission is most importantly to dive more into UX and research. To be able to share in my next article an overview of the UX tools I use for A/B testing and for gathering data. I'm still quite new to UX and I haven't had many opportunities to learn in previous jobs. But currently I'm passionate about tracking and watching every user's move on every new project I'm working on.

The End

I'd be happy to hear about your work process, which steps you usually take in your personal projects or how your process is different while working in teams. I love to see other people's workspaces. And most importantly feel free to share your thoughts about all/additional steps in my process.

I'm posting more from Tapdaq and my personal projects on **Dribbble**. and I'll be happy to hear your thoughts on **Twitter**.