



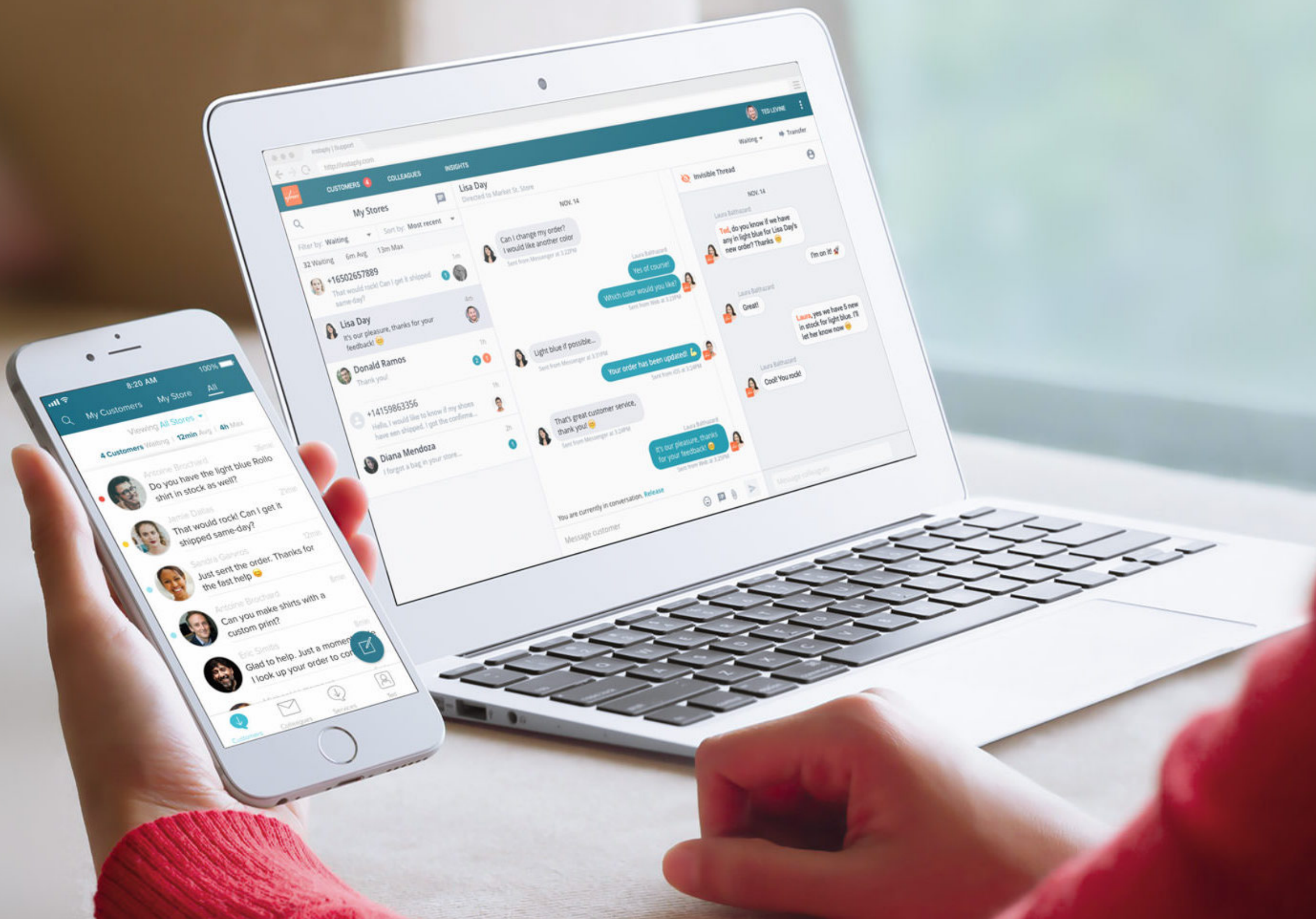
CASE STUDY

Instaply Mobile & Web App

tedlev.com

ted@tedlev.com

415-878-6264



8:20 AM 100%
My Customers My Store All
Viewing All Stores
4 Customers Waiting 12min Avg 14h Max

- Antoine Brochard
Do you have the light blue Rollo shirt in stock as well?
- Jamie Dabbs
That would rock! Can I get it shipped same-day?
- Sandra Gervais
Just sent the order. Thanks for the fast help!
- Antoine Brochard
Can you make shirts with a custom print?
- Eric Smith
Glad to help. Just a moment I look up your order to con...

Customers Colleagues Services

Instagram | Support
http://instagram.com
CUSTOMERS COLLEAGUES INSIGHTS
My Stores
Filter by: Waiting Sort by: Most recent
32 Waiting 6m Avg 13m Max
+16502657889
That would rock! Can I get it shipped same-day?- Lisa Day
It's our pleasure, thanks for your feedback!
- Donald Ramos
Thank you!
- +14159863356
Hello, I would like to know if my shoes have been shipped. I got the confirm...
- Diana Mendoza
I forgot a bag in your store...

Nov 14

Lisa Day
Can I change my order?
I would like another color

Laura Ballhazard
Yes of course!
Which color would you like?

Lisa Day
Light blue if possible...

Laura Ballhazard
Your order has been updated!

Lisa Day
That's great customer service, thank you!

Laura Ballhazard
It's our pleasure, thanks for your feedback!

Waiting Transfer
Invisible Thread
Nov 14
Laura Ballhazard
Ted, do you know if we have any in light blue for Lisa Day's new order? Thanks

Lisa Ballhazard
Great!

Laura Ballhazard
Cool! You rock!

You are currently in conversation. Release
Message customer

The Problem

Providing and receiving support is **expensive, time-consuming, and inconvenient**.

For Customers Difficulty of access and investment of time are high-friction deterrents **across all phases of their journey**, preventing potential customers from making purchases and building a brand relationship.

For Retailers Offering a support number has meant **hiring dedicated staff to incoming calls**; and adding **more channels of support like SMS or in-app messaging is often technically infeasible**, while adding burden to support staff to handle even more incoming requests.

Instaply's Solution

Businesses need numerous people and tools to manage their customers' incoming support inquiries – before purchase, during, and after. Often, this has yielded systems aimed at filtering and redirecting, like an automated phone prompt + long queues of customers on hold.

Instaply is a turn-key solution that fixes this issue in both directions:

Customers Can Use Modern Channels

Modern, asynchronous, rich messaging support is provided across SMS, in-app chat, and our own messaging app akin to GetHuman.

Push notifications mean never being tied to a phone waiting for a reply.

Businesses Can Reply Seamlessly & Easily

Instaply consolidates everything into a cross-platform dashboard “triage” interface.

Companies can more easily manage and resolve customer inquiries, building a stronger relationship with their customers.

My Role

As the sole **Lead UX Designer**, I drove our **research, execution, and design mentorship** for the startup's team of product managers, engineers, and leaders.

1. **Conducting research to inform our product development strategy** with our customers' usability issues and creative workarounds
2. **Feature implementation and componentized redesign** based on research insights, using collaborative ideation, low-, mid- and high-fidelity prototyping, and IA/Journey/System maps
3. Guided the team on **mobile best-practices for iOS, Android, and Windows Phone**
4. **Integrated the design process into our development process and mentoring the team** in how and why design tools are used

Product Goal

Design a cross-platform solution to **foster deeper customer relationships** with **seamless support access**.

Create a **support triage interface** that makes managing **10x more support queries faster and simpler**.

Impact & Results

20x Customer engagement increase

of daily message volume during my time on the project

5x Adoption increase of active stores

using our platform during my time on the project

In-Context feedback capture system

which I hand-coded, to both dog-food our system and track impact on our new feature rollouts

\$10M Funding raised from investors

using our prototypes, pilot research, and insights

3x New channel integrations added

including SMS, voice-to-text, and in-app chat SDK, which I flow-mapped and wireframed

140% Faster support triage task-completion + 2x More messaging screen real-estate

after my usability and ergonomics audit reduced UI clutter and I introduced modern affordances to the triage system

PROCESS

Research & Discovery

Quantitative Research

Usage Data Analysis

When I joined the team, one of my first projects was to **audit our quantitative metrics reporting systems, and then iterate on how we could better evaluate performance and impact.**

SHOWN ON RIGHT:

I culled our existing core logs to see how our messaging UI was being used, and discovered that many users were entering entire messages into the *To:* field.

This launched my mini-stream reworking of the affordances and interaction patterns around the New Message area, including adding cues to the overall UI to help orient users in active input fields.

<input checked="" type="checkbox"/> @timestamp	2015-02-08	frac	users,businesses	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_10_3) AppleWebKit/537.36 (KHTML, ...
<input type="checkbox"/> @version	2015-02-08	Norauto	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> _id	2015-02-08	Nora	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> _index	2015-02-08	N	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> _type	2015-02-08	N	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
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<input type="checkbox"/> api_version	2015-02-08	frac	users,businesses	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_10_3) AppleWebKit/537.36 (KHTML, ...
<input type="checkbox"/> authentication	2015-02-08	frac	users,businesses	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_10_3) AppleWebKit/537.36 (KHTML, ...
<input type="checkbox"/> clientIpAddress	2015-02-08	fr	users,businesses	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_10_3) AppleWebKit/537.36 (KHTML, ...
<input type="checkbox"/> content_type	2015-02-08	do you have a number for your store?	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> environment	2015-02-08	do you have a number for your st	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> facility	2015-02-08	do you have a number for your	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
<input type="checkbox"/> facility_label	2015-02-08	do you have a number f	businesses	Instaply/3.15.10 (iPhone; iOS 8.3; Scale/2.00; com.instaply)
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<input type="checkbox"/> ip_address	2015-02-08	do you ha	businesses	Instaply/3.15.10 (iPhone; iOS 8.4; Scale/2.00; com.instaply)
<input type="checkbox"/> level	2015-02-08	do yo	businesses	Instaply/3.15.10 (iPhone; iOS 8.4; Scale/2.00; com.instaply)
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<input type="checkbox"/> location.lon	2015-02-08	Crossland	businesses	Instaply/3.15.10 (iPhone; iOS 8.4; Scale/2.00; com.instaply)
<input type="checkbox"/> log_type	2015-02-08	Cro	businesses	Instaply/3.15.10 (iPhone; iOS 8.4; Scale/2.00; com.instaply)
<input type="checkbox"/> logger_name	2015-02-08	Impossible de signer la demande prêt sur le net	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> message	2015-02-08	Impossible de signer la demande prêt sur le	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> method	2015-02-08	Impossible de signer la demande prêt	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> priority	2015-02-08	Impossible de signer la demande prêt	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> query_param_employees_filter	2015-02-08	Impossible de signer la demande pr	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> customer_representative	2015-02-08	Impossible de signer la demande	businesses	Mozilla/5.0 (Windows NT 6.1) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/...
<input type="checkbox"/> query_param_expand	2015-02-08			
<input type="checkbox"/> query_param_latitude	2015-02-08			
<input type="checkbox"/> query_param_longitude	2015-02-08			
<input type="checkbox"/> query_param_q	2015-02-08			
<input type="checkbox"/> query_param_sort	2015-02-08			
<input type="checkbox"/> query_param_type	2015-02-08			
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<input type="checkbox"/> request_referrer	2015-02-08			
<input type="checkbox"/> request_tracker	2015-02-08			
<input checked="" type="checkbox"/> searchedTypes	2015-02-08			
<input type="checkbox"/> severity				
<input type="checkbox"/> severity_label				
<input type="checkbox"/> _source				

Qualitative Research

Performing In-Context Usability Tests

I travelled to **headquarters and support centers across France, Belgium, and Spain** to hear from our user spectrum, including department leads, directors, team leaders, call center advisors, and consumers in stores.

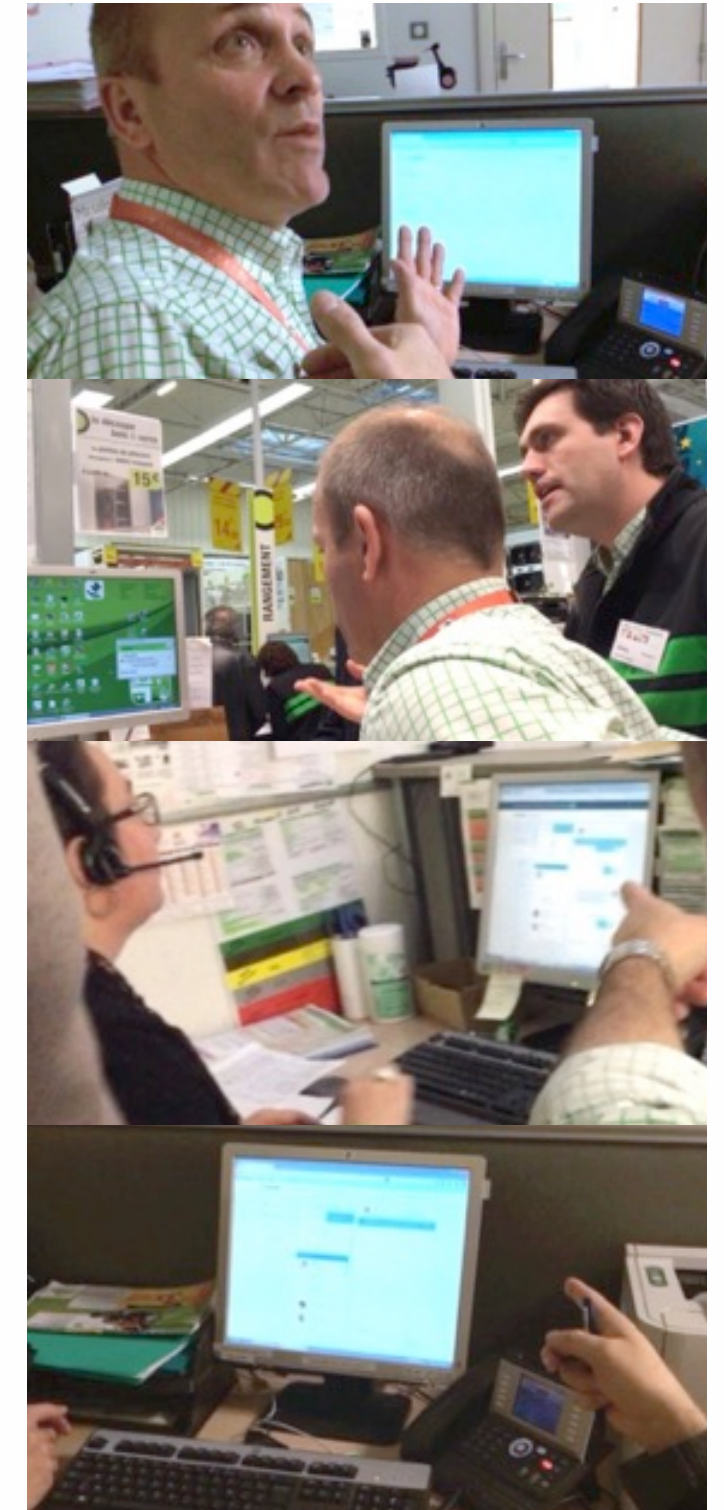
SHOWN ON RIGHT:

I performed 1-on-1 moderated testing and over-the-shoulder observation to record points of delight and stress for our core assumed tasks and workflows.

Audio clips, notes, photos, and videos show how they used the tool in-context, and **capturing workarounds they created to make Instaply work for their needs.**



Stéphanie, Customer Advisor at Banque Accord
Nicolas, Advisor Manager at Banque Accord



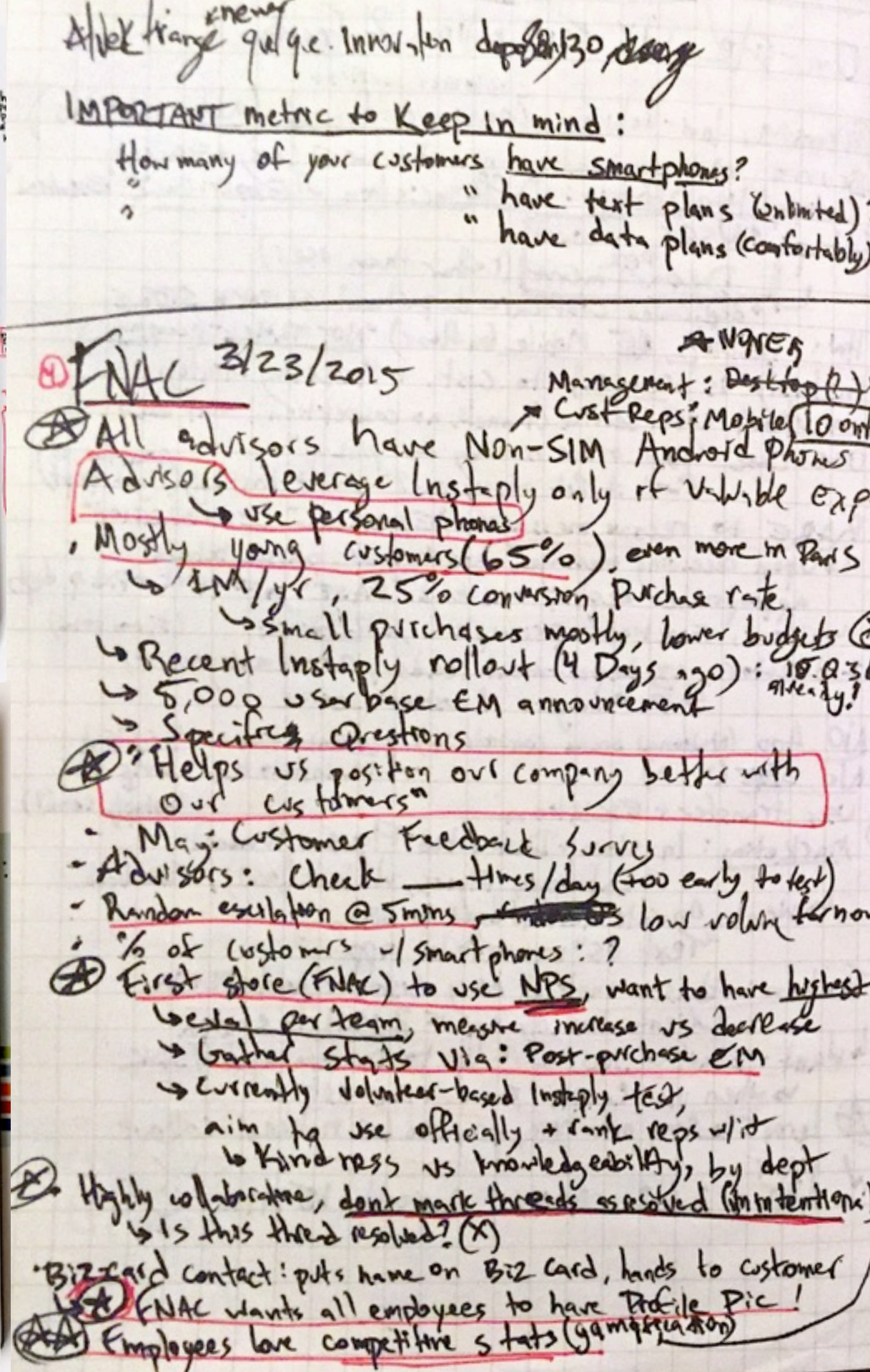
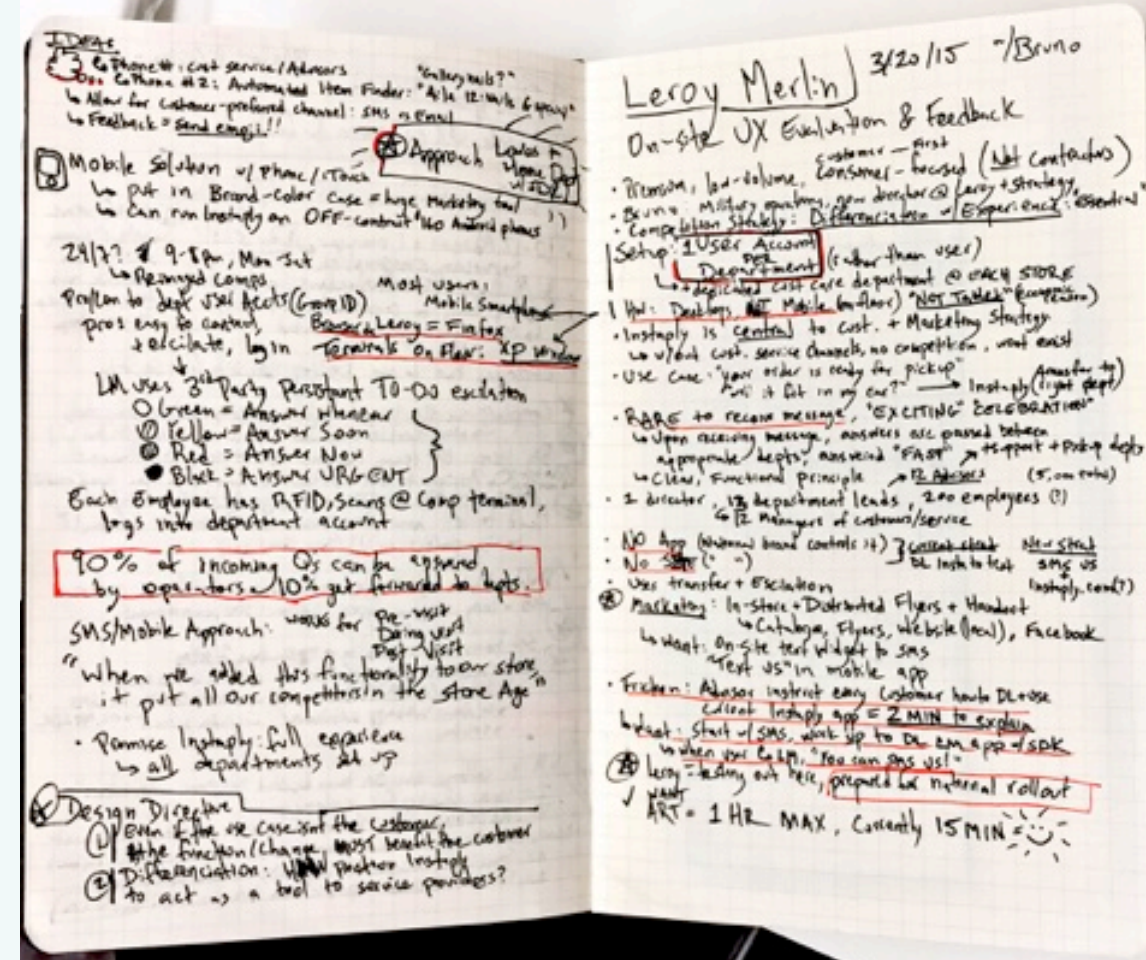
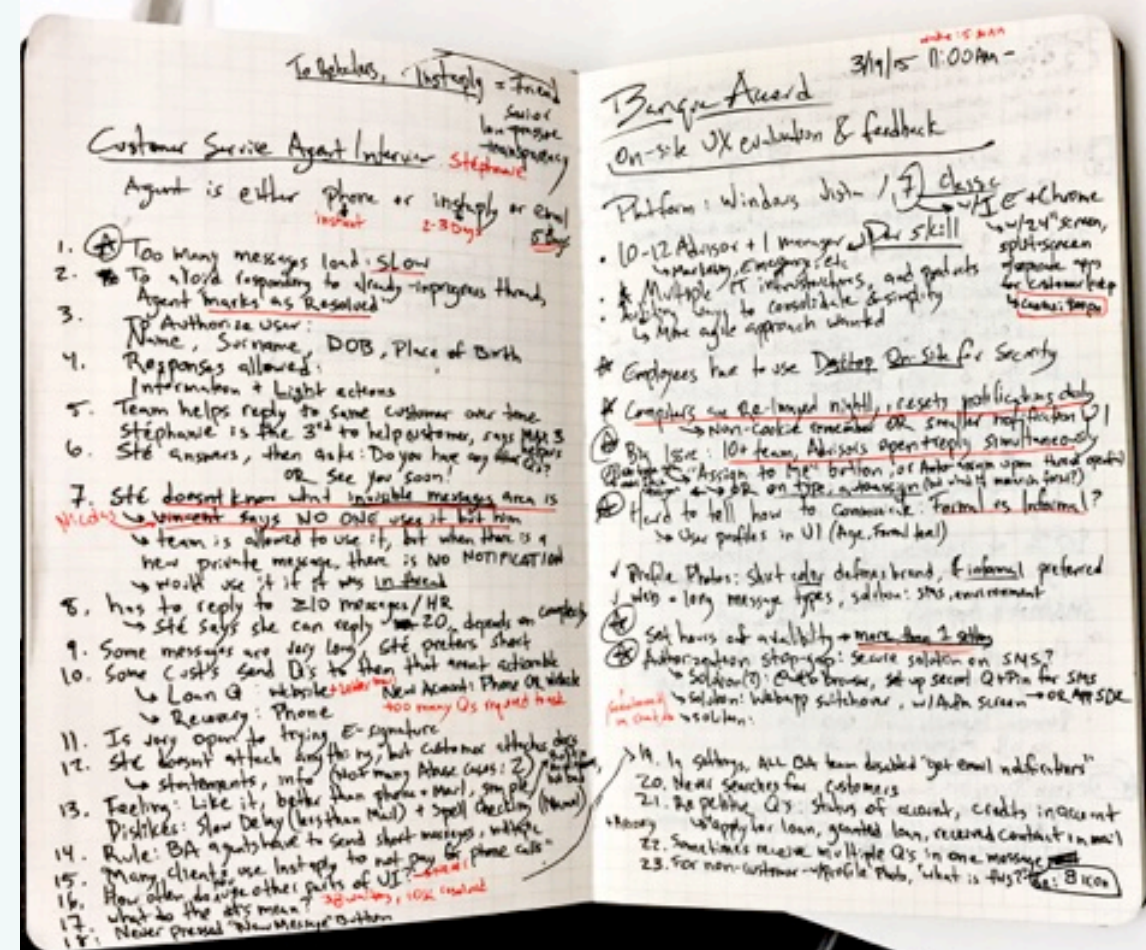
Bruno, Director/Strategy @ Leroy Merlin
Support Staff & Floor Associates

Building Key Insights

After completing my interviews, I catalogued key insights, quotes and figures from our spectrum of users, including culling my recordings and extracting important screen captures that our pilot users presented.

SHOWN ON RIGHT:

Interview and testing notes for our major European launch partners: FNAC, Banque Accord, Oney, Leroy Merlin, and Boulanger – with **pull** quotes that persisted into our product iterations.

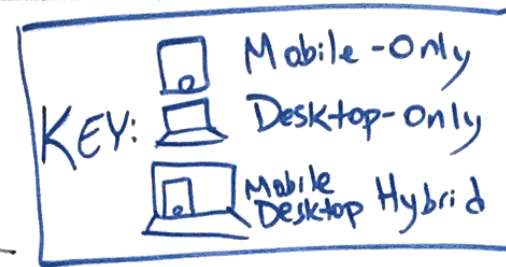


User & Channel Mapping

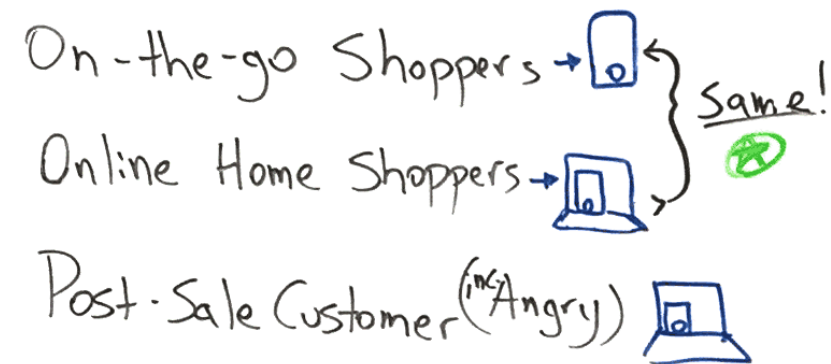
After exploding the array of possible users our product reached, I worked with the team to **select our prime targets for upcoming projects**, shown in green.

The **Consumer** persona initially had 3 groups, however after reviewing our research insights, I concluded we needed to consolidate it into two groups aligned with purchase phases, to **better articulate the multi-channel reality shoppers navigate**.

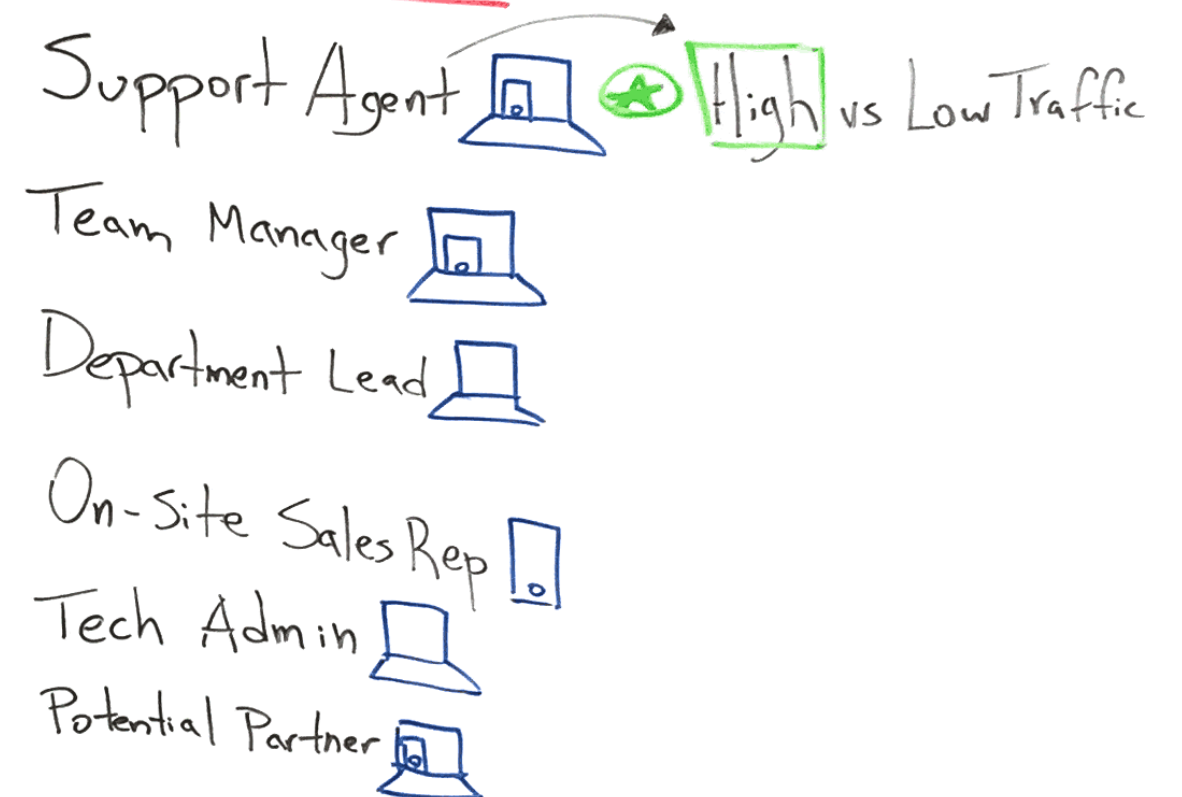
TARGET USER PERSONAS



Consumers



Business Prof's



Objectives

1. Define which user groups we are designing for.
2. Build metrics to track primary flows of users
 - ↳ Find issues w/current app IxD
 - ↳ Re-visit full stats & user data to audit & redefine our assumed personas.
3. Conduct User Testing to evaluate flow completion vs drop-offs.

Defining Core Personas

We arrived on **two core groups of users that we developed stories for**, shown on right.

These personas included vision statements and key needs, goals, and tasks that surfaced from our observational research of the consumer and support journeys.

Persona: High Traffic Support Agent

 Heather Leeds
Customer Support Agent
@ Finance Bank

Story

"I'm on a team of 12 advisors that handle all incoming messages. We try to handle all questions quickly & fully; and when we can't fully answer it ourselves, we'll discuss the issue as a team; and if that fails, we'll send it to the appropriate 'special cases' department."

Persona: Consumer

 John Anderton
Health Broker & Dad

Story

"I'm an active Dad with a busy work-life schedule, and I'm looking for a tent I can buy for our upcoming family camping trip."

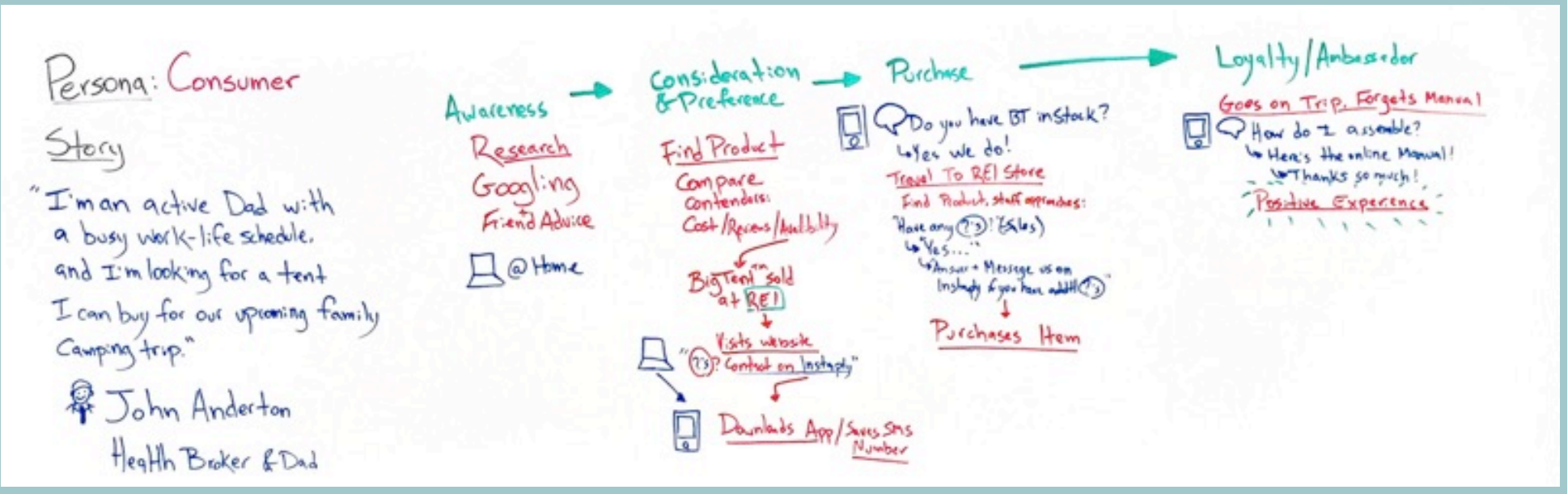
Persona Journey Mapping

For each persona, I created journey maps that identify what is needed (Instaply or external), why they need it, and how they reach their goal.

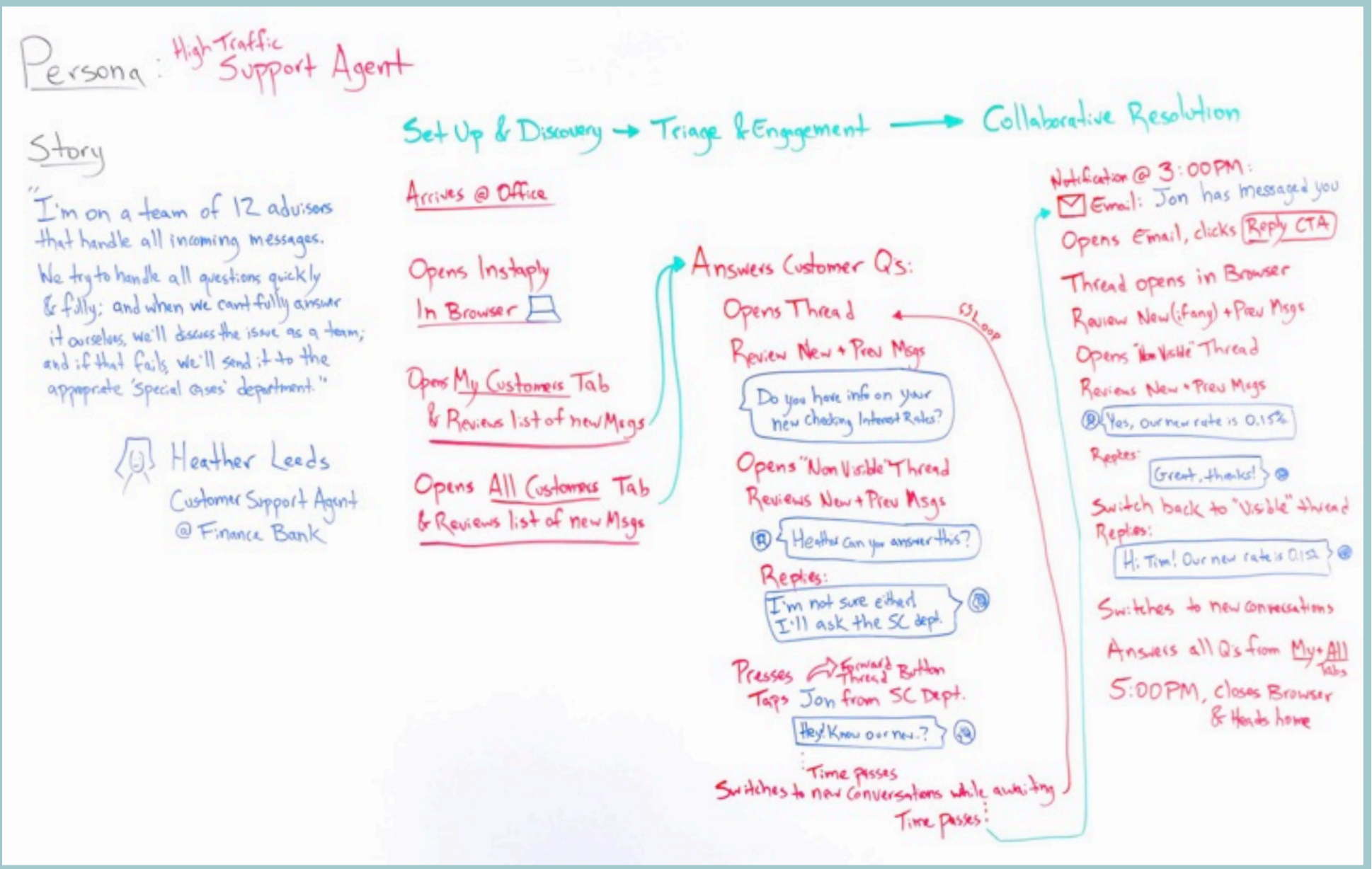
We visualized ideal journeys and used them as a reference point to audit the current system for redundant and/or inefficient areas.

SHOWN ON RIGHT:
Transitioning from current to ideal journey mapping, the **Support Agent** journey revealed drop-off points during their Triage & Engagement chapter due to reliance on external notification systems.

Consumer Journey



Agent Journey

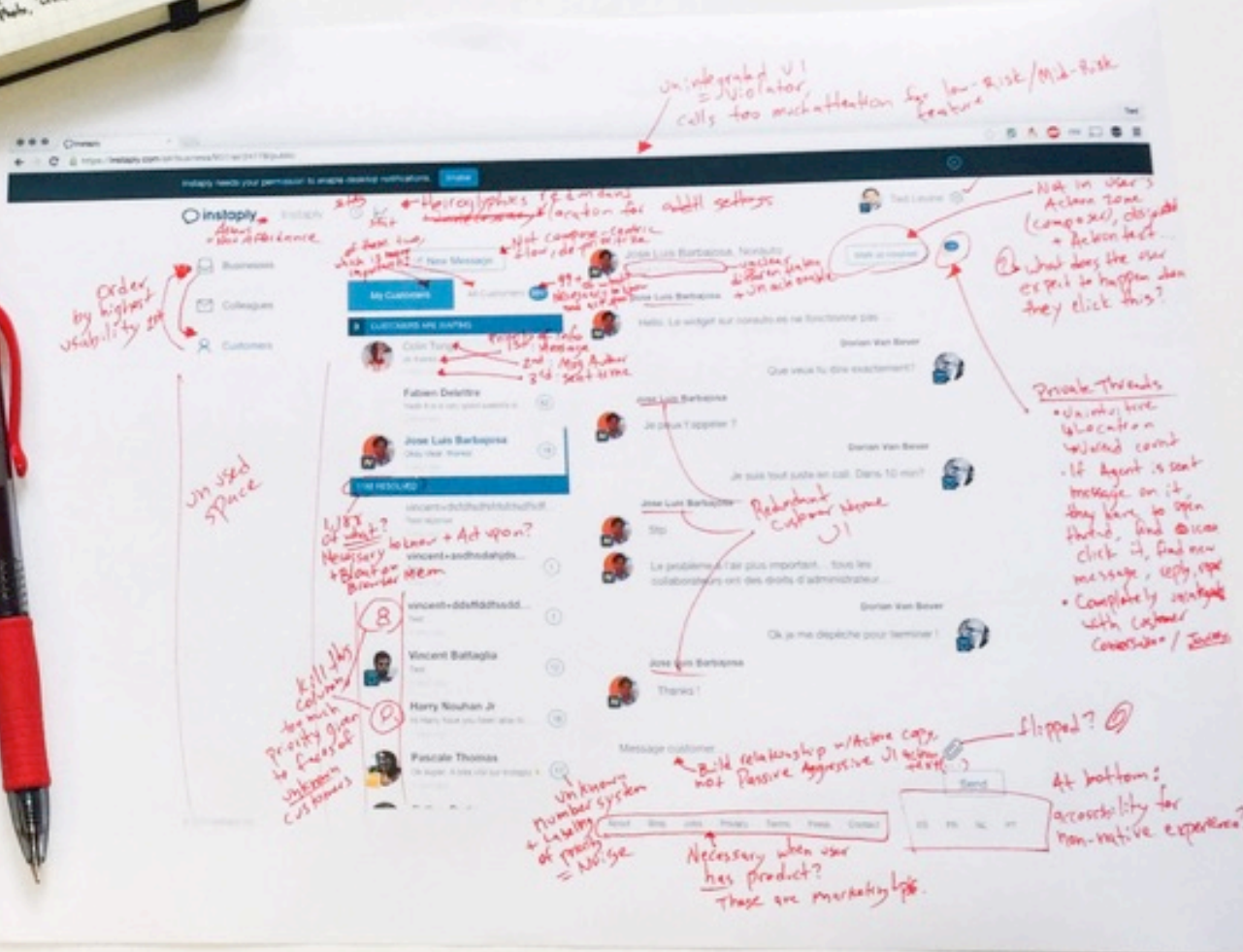
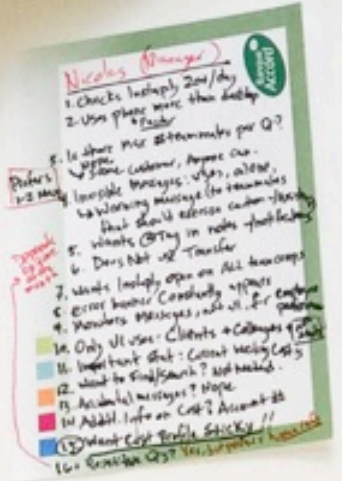
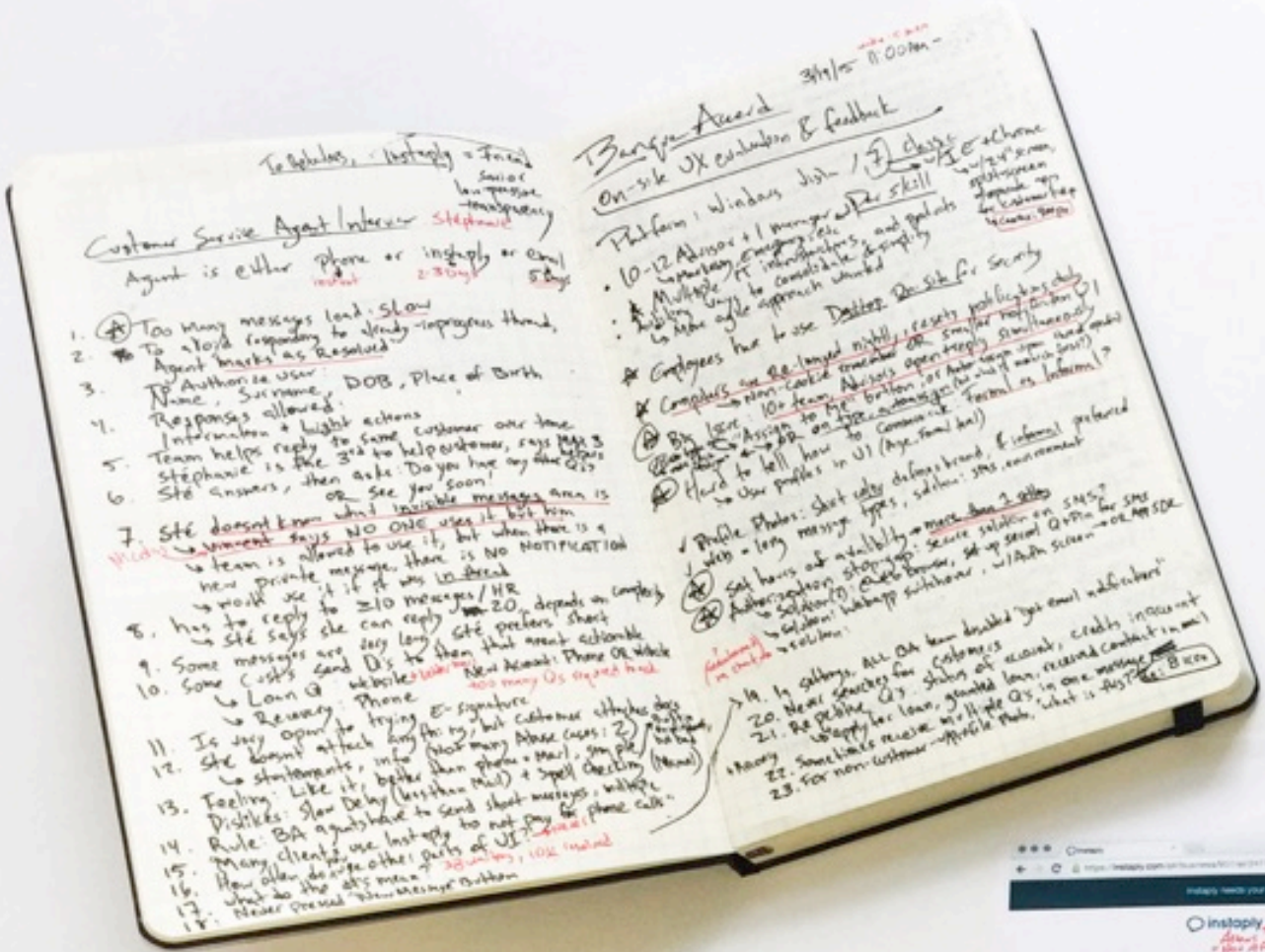


Heuristic Usability Auditing

Combining our field studies, usage data, and our persona/journey maps, I led a heuristic audit of the Service Agent web interface and flows.

Our usability studies influenced a majority of the notes. One study asked users to describe what they expected each element on the main screen would do after tapping it.

For the majority of users, the existing interface's structure, ambiguous labeling and feature iconography were the largest areas of confusion.



PROCESS

Research Artifacts

Principles



Integrate
Seamlessly

Special focus for **consumer** ideation

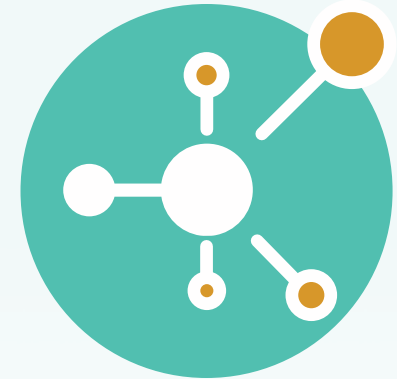


Promote Rich
Engagement



Optimize Efficiency
& Ergonomics

Special focus for **business** ideation



Drive Deeper
Partnerships

I defined product principles which focused our research and ideation process on real consumer and business needs.

Final Persona: Advisor

A final advisor persona was created and included in all solution artifacts connected to our customer support agent’s interfaces.

SHOWN ON RIGHT:

As I was the sole UX designer on the team of business leadership, engineers and project managers, **I led knowledge-sharing workshops and included notes in all of my artifacts that helped illustrate how and why these design components would fit in our overall product development.**



Advisor User Julianne Louis

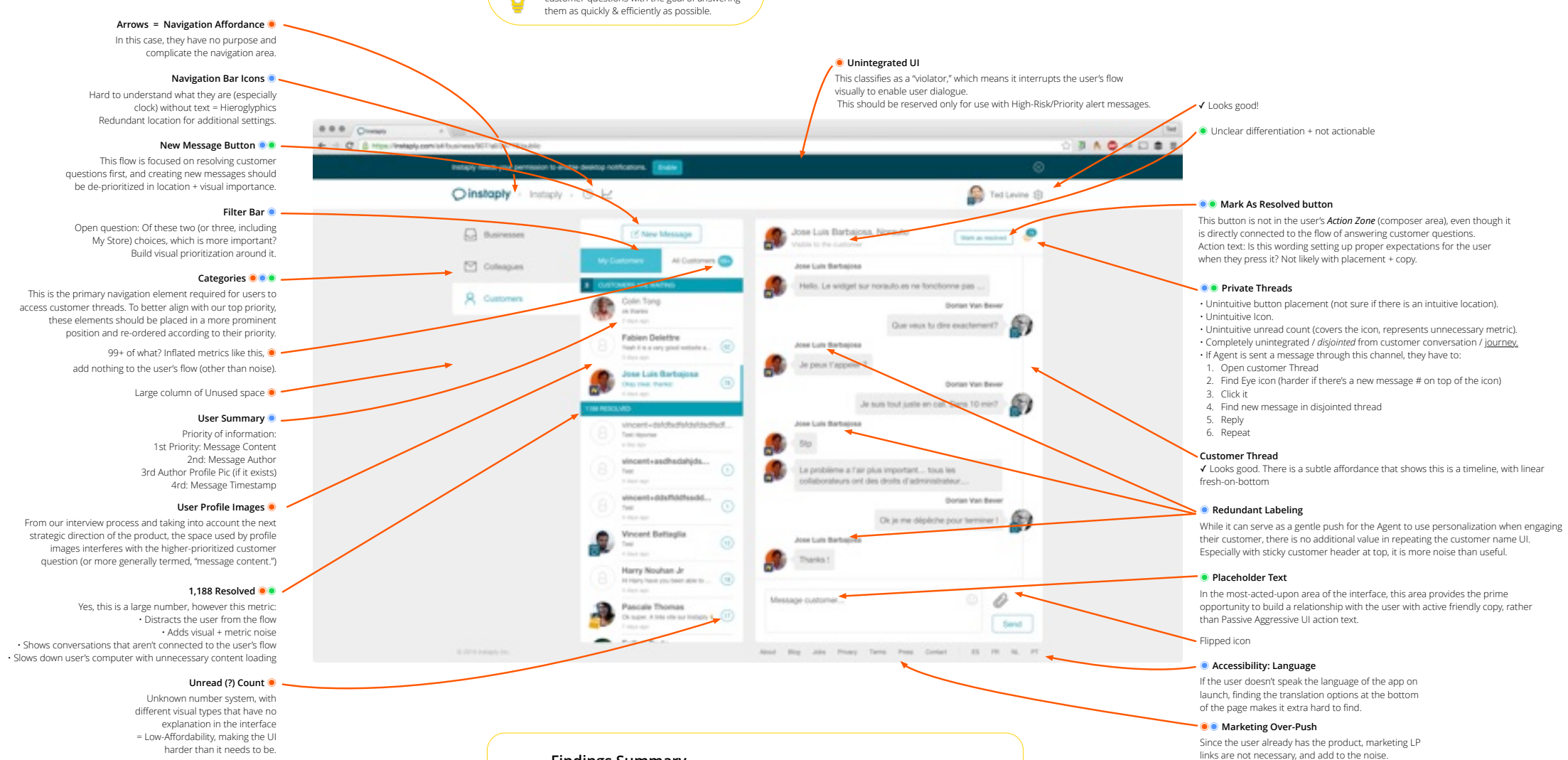
“I’m on a team of four advisors that handle all incoming customer questions. We try to handle all questions quickly and fully; and only when we can’t fully answer a question ourselves, we’ll discuss the issue as a team; and if that fails, we will send it to the appropriate rep on the floor.”



Ted’s Notes

Julie is an ideal user I’ve created to help us explore how to optimize the Instaply experience for this primary use case.

SHOWN ON RIGHT:
Audit notes were assigned UX categories:
IA, Flow, or Feature Integration.



1. **🔴 Undefined IA** Navigation and content areas are currently spread out across the interface. Establishing the IA will give emphasis on the right content areas, while putting lesser content/functionality into logically grouped "disclosure areas."
2. **🟢 Undefined Flow** On a final note, there are a few areas with high value but are not accessible as the user completes their flow. Examples include: Navigation bar icons, Non-Visible Threads and Mark As Resolved buttons. All could provide wanted functionality to the user, but since they were designed without a flow in mind, their interaction design is significantly disjointed.
3. **🔴 Noise / Feature Bloat** The best solution is to attack this head-on by reducing the number of non-essential features from the main UI, creating "fake doors" for the extraneous features to test and re-introduce if usage metrics shows they are in use by our primary users.

IA & Flow Development

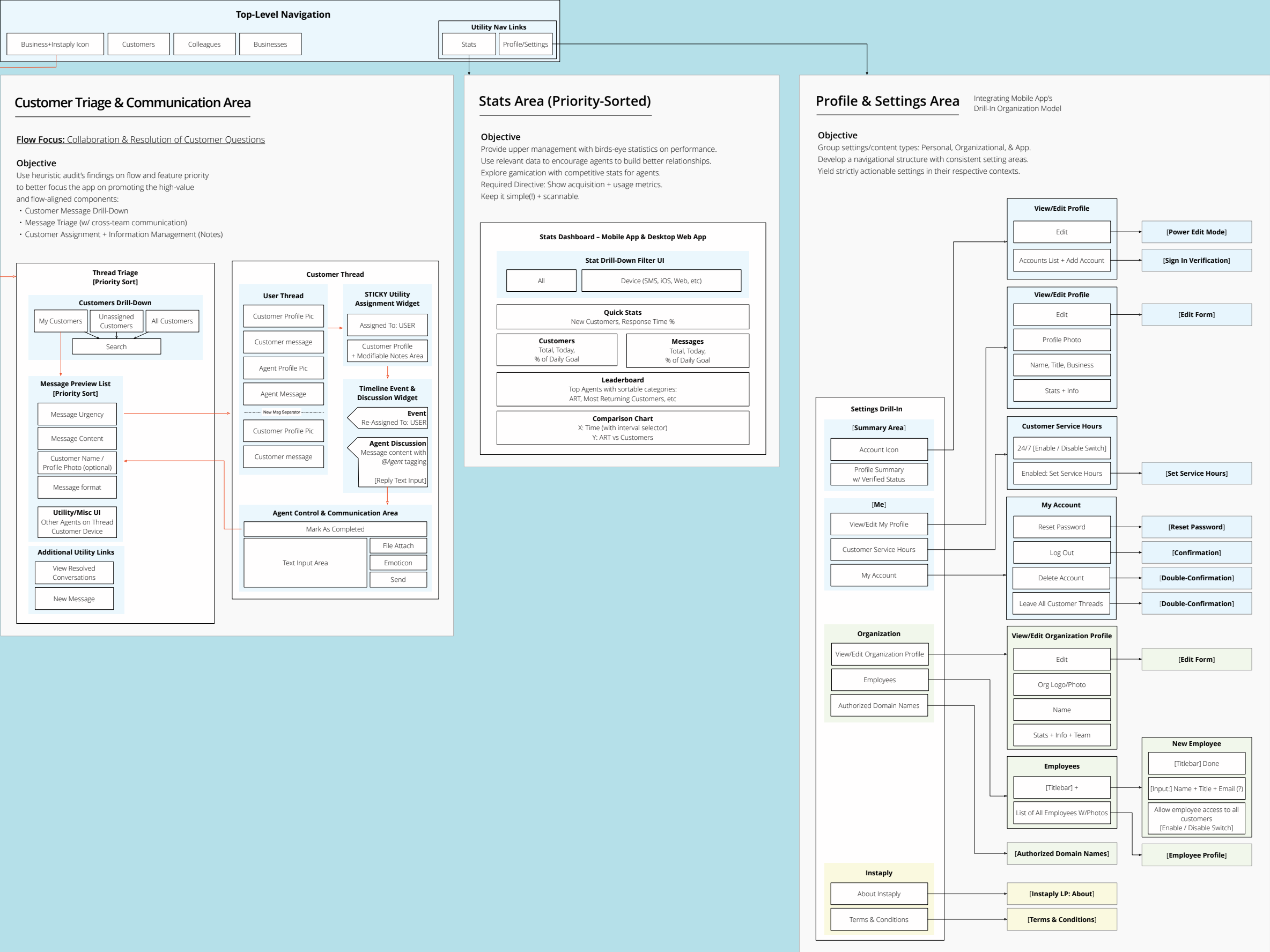
Using the usability audit’s findings on flow and feature priority, I built an information architecture map that promotes high-value functions and components essential to flow completion.

Similar to my heuristic usability audit, the final artifacts were presented and given a video walkthrough for the global team.

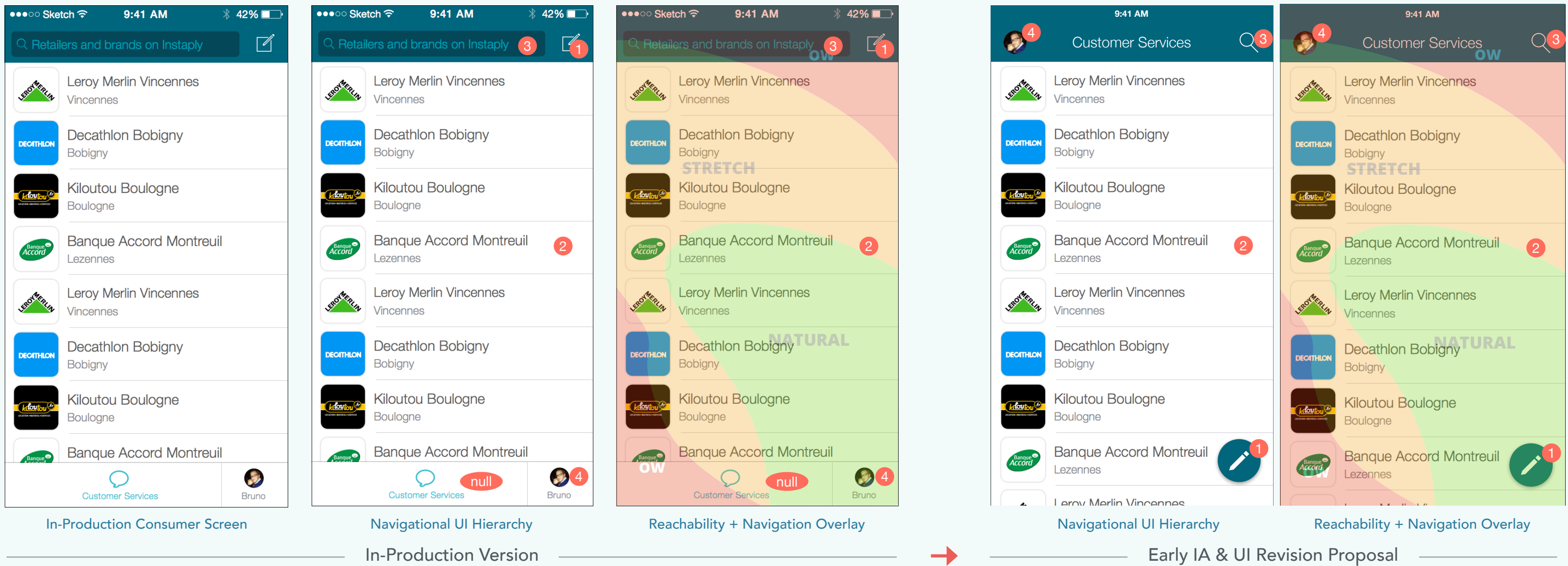
Information Architecture & Core Flow Map



Ted's Notes
Using our findings this heuristic audit on flow and feature priority, we can better focus on promoting the high-value and flow-aligned components.



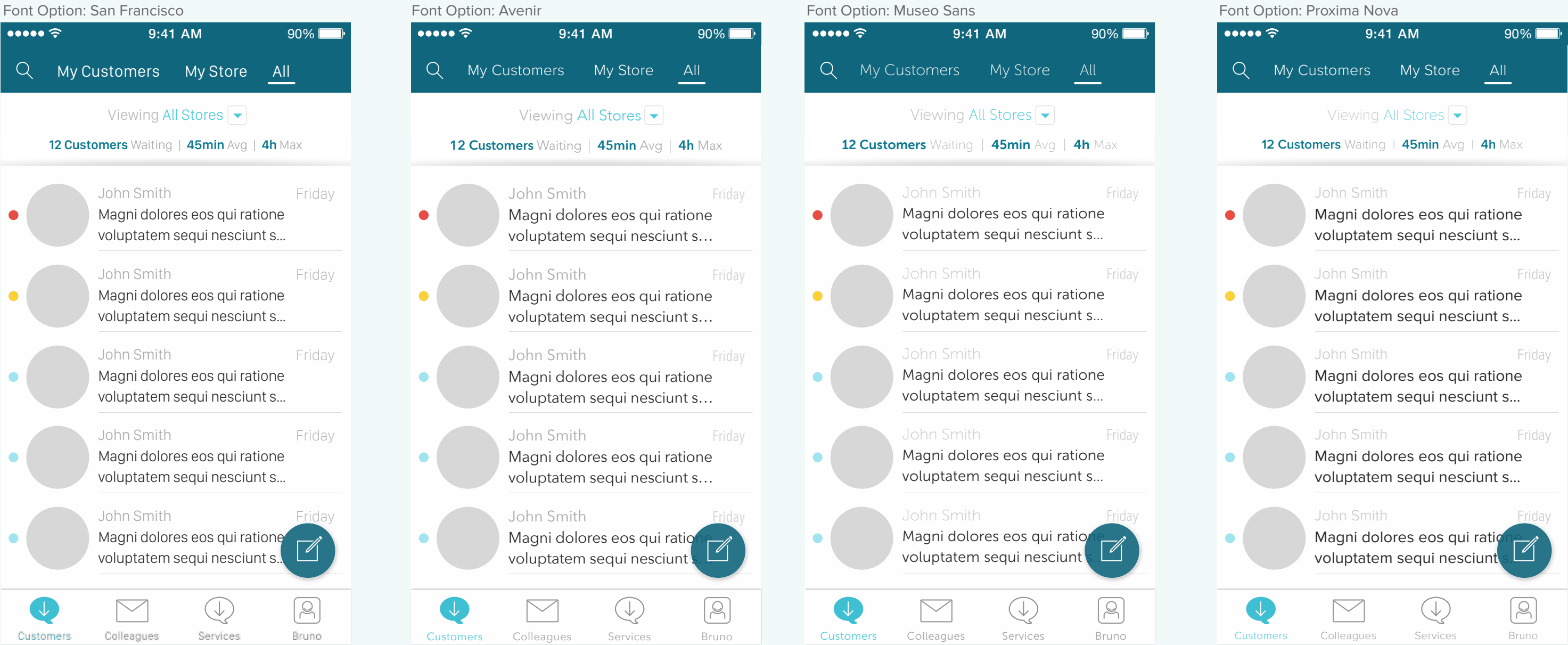
IA & Reachability Auditing



I performed **mobile-focused ergonomics testing** on the consumers' and retailers' mobile apps.

This resulting restructured UI places flow-critical elements in the most reachable zones of the screen.

Typography & Legibility Study



Each design was **tested for character legibility directly on mobile screens**, from small and large. Finding the right typography and colors drove critical positive impact for Support Agents' task completion time.

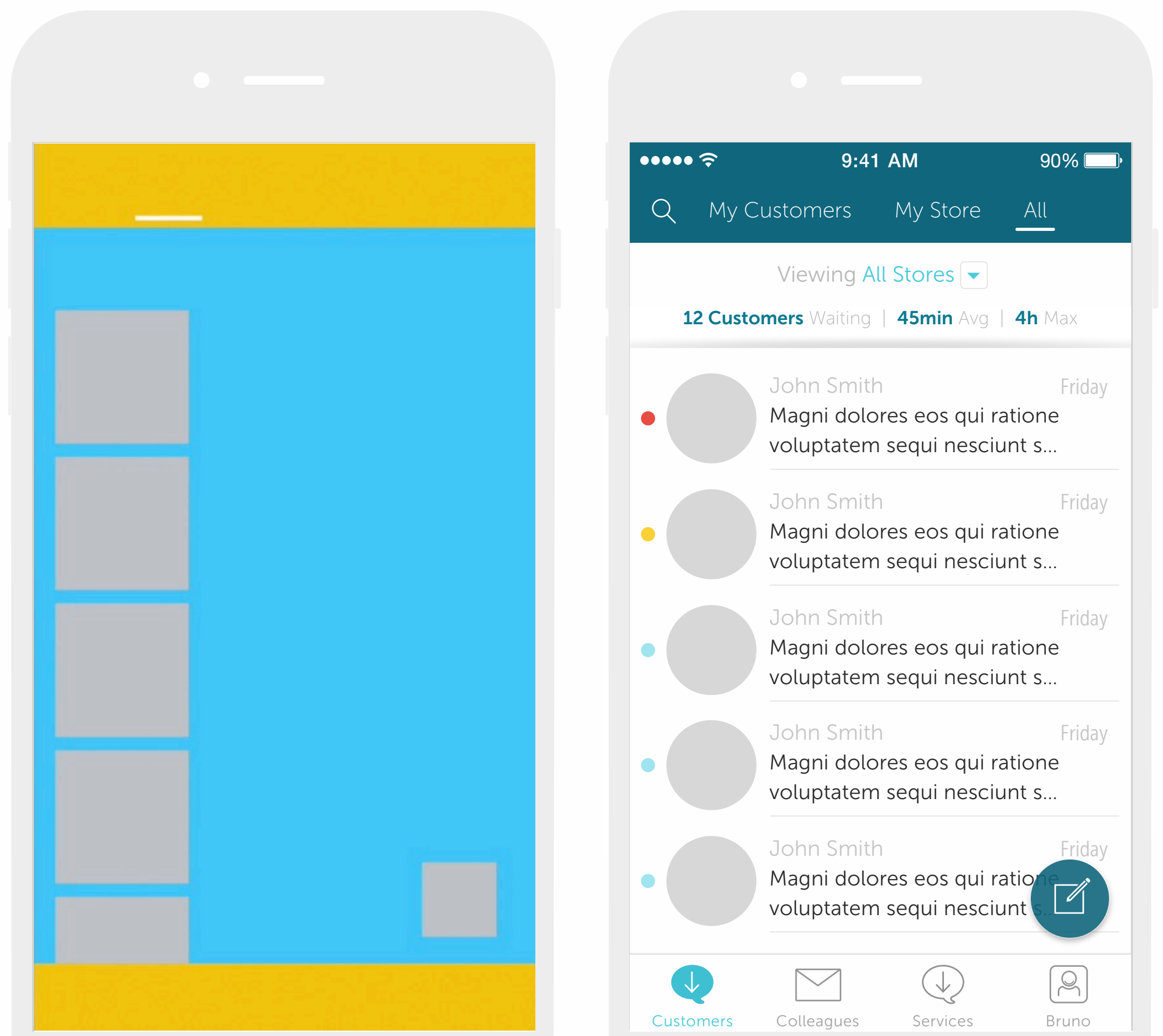
Rapid Interactive Prototyping

Interactive prototypes were built in mid- and high-fidelity prototypes for task, interaction and affordance testing.

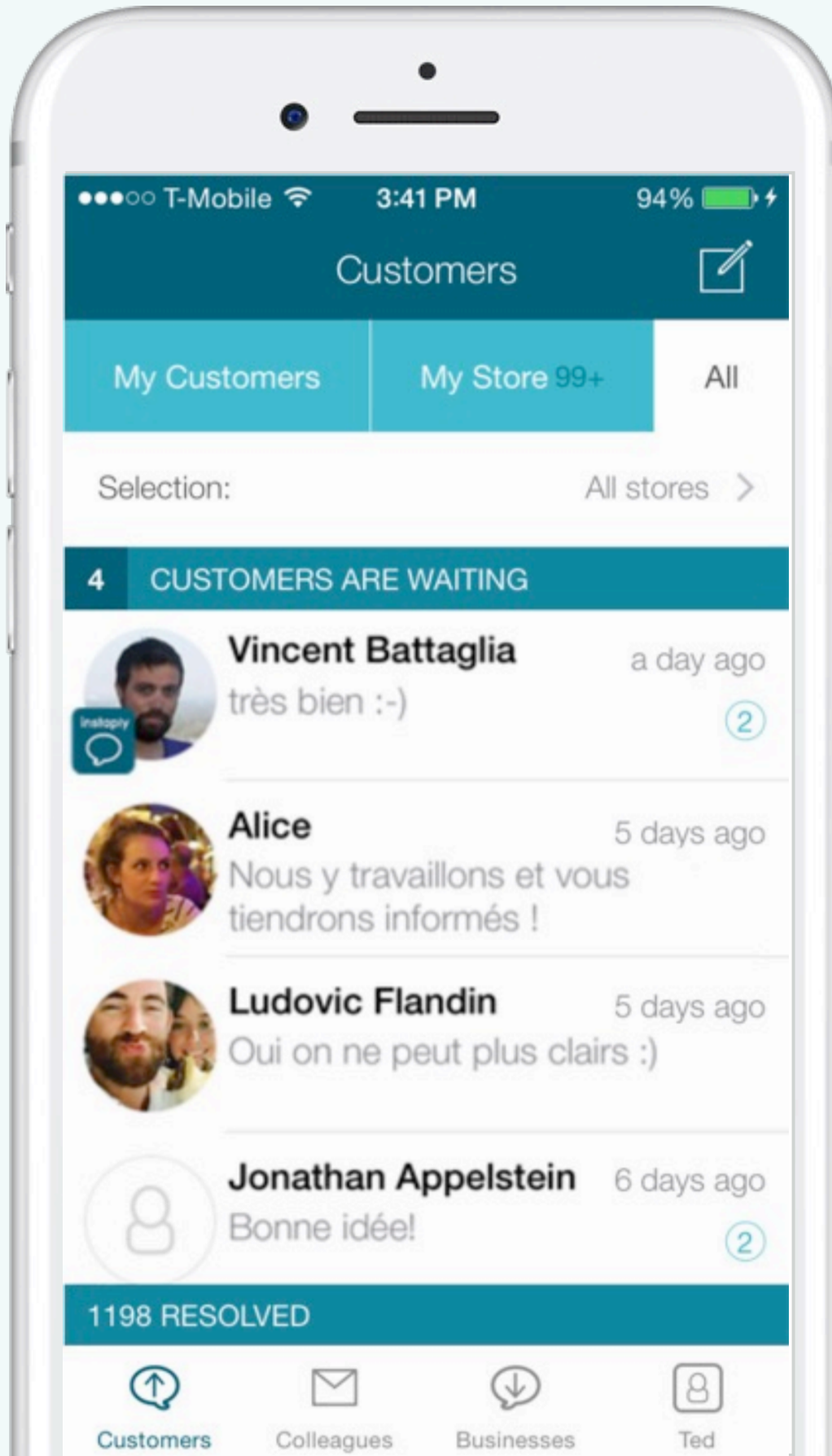
As I iterated, I **discovered new ways to surface information**, such as introducing a **lower-elevation store filter drawer** revealed below the customer list.



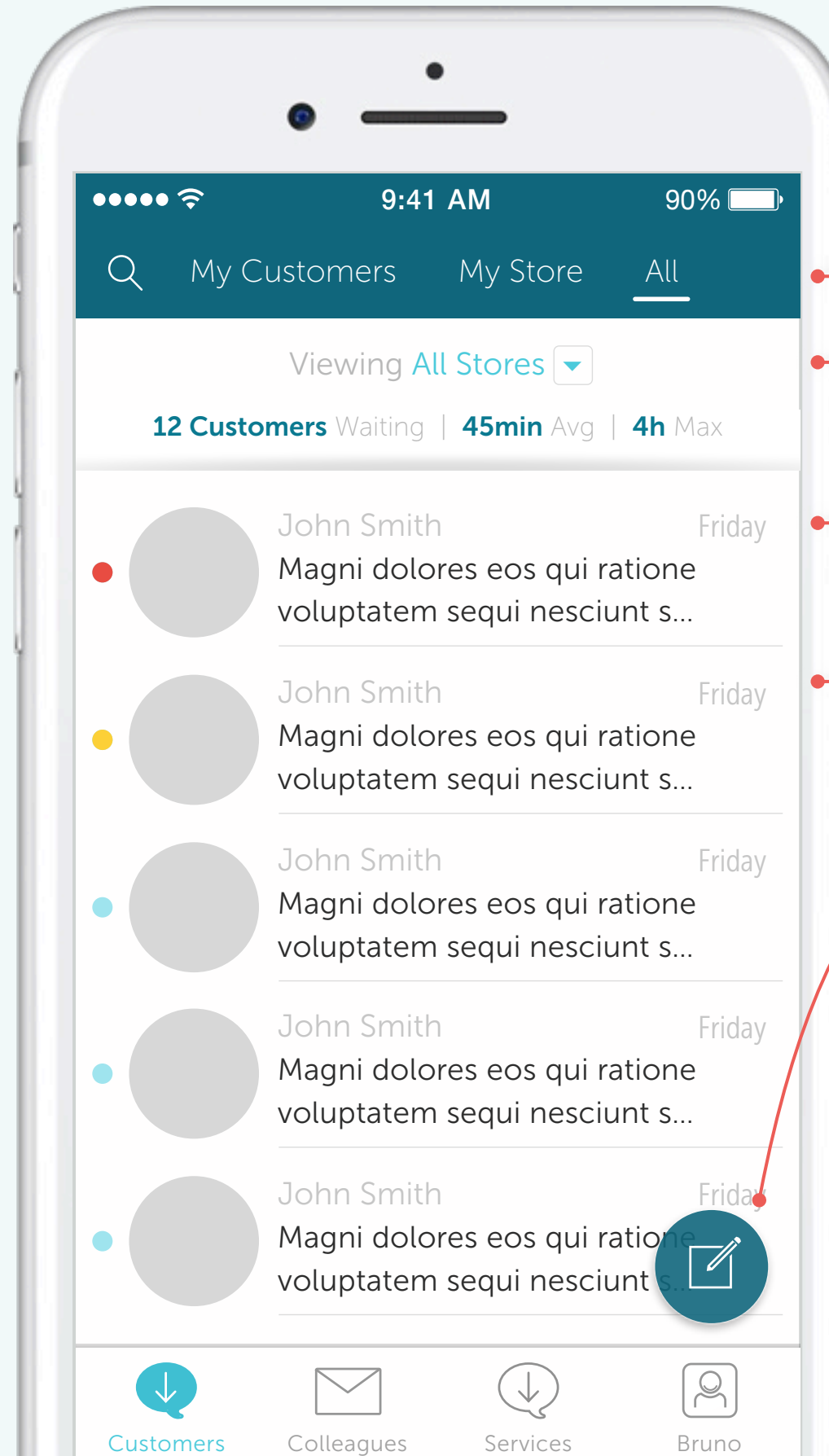
Watch the prototyping demo from testing to the final result:
<http://tedlev.com/instaplytouch>



Old In-Product UI



New UI Design



Final Prototype Design

Navigation bar with reduced visual space, but with new horizontal-slide navigability

Store selector and metrics given lower z-depth for scrolling affordance

New typographic exploration visually aligns the hierarchy of information its display in the UI

Color-code priority system (neutral, priority, urgent) was introduced to reduce cognitive load

Updated tab bar uses retina-optimized and iOS-aligned icons. Reachability-optimized UI means one-handed access for critical navigation.

The new interface features a modern navigational structure, a cleaner UI, and tighter focus on the triage task.

Instaply Support Webapp Redesign

*What if our support agents could connect more deeply with their customers,
coordinate with each other in the context of their support ticket,
and be relieved from managing their incoming customer queue?*

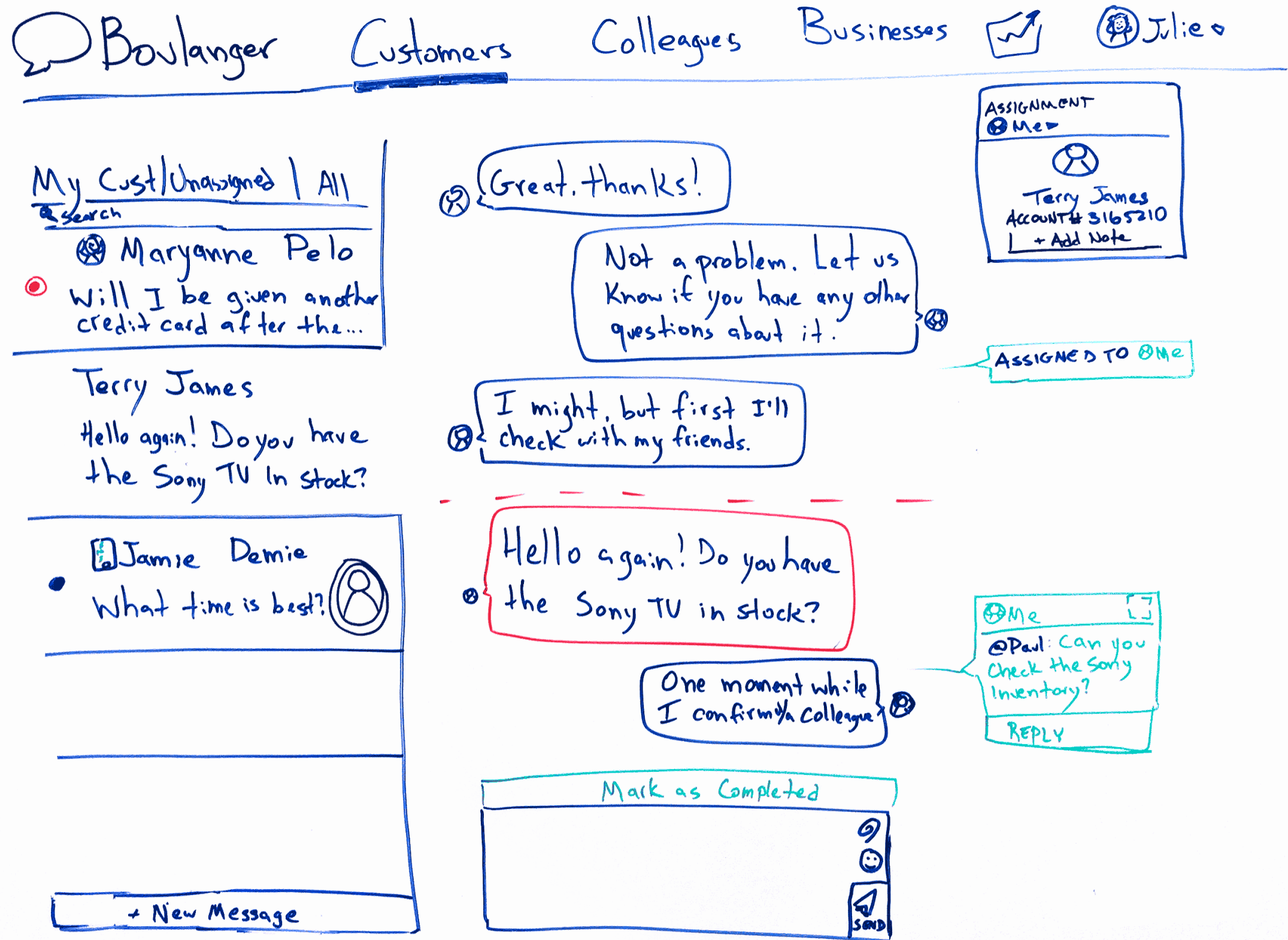
Iteration & Wireframing

In collaboration with our development team, I led a **divergent/convergent ideation session** to catch the team up on our user research insights, gather their ideas, and establish an agreed-upon short- and long-term product plan.

SHOWN ON RIGHT:

From there, I **created and iterated on the wireframed solution** in collaboration with our visual design in Europe to realize our improvements in context.

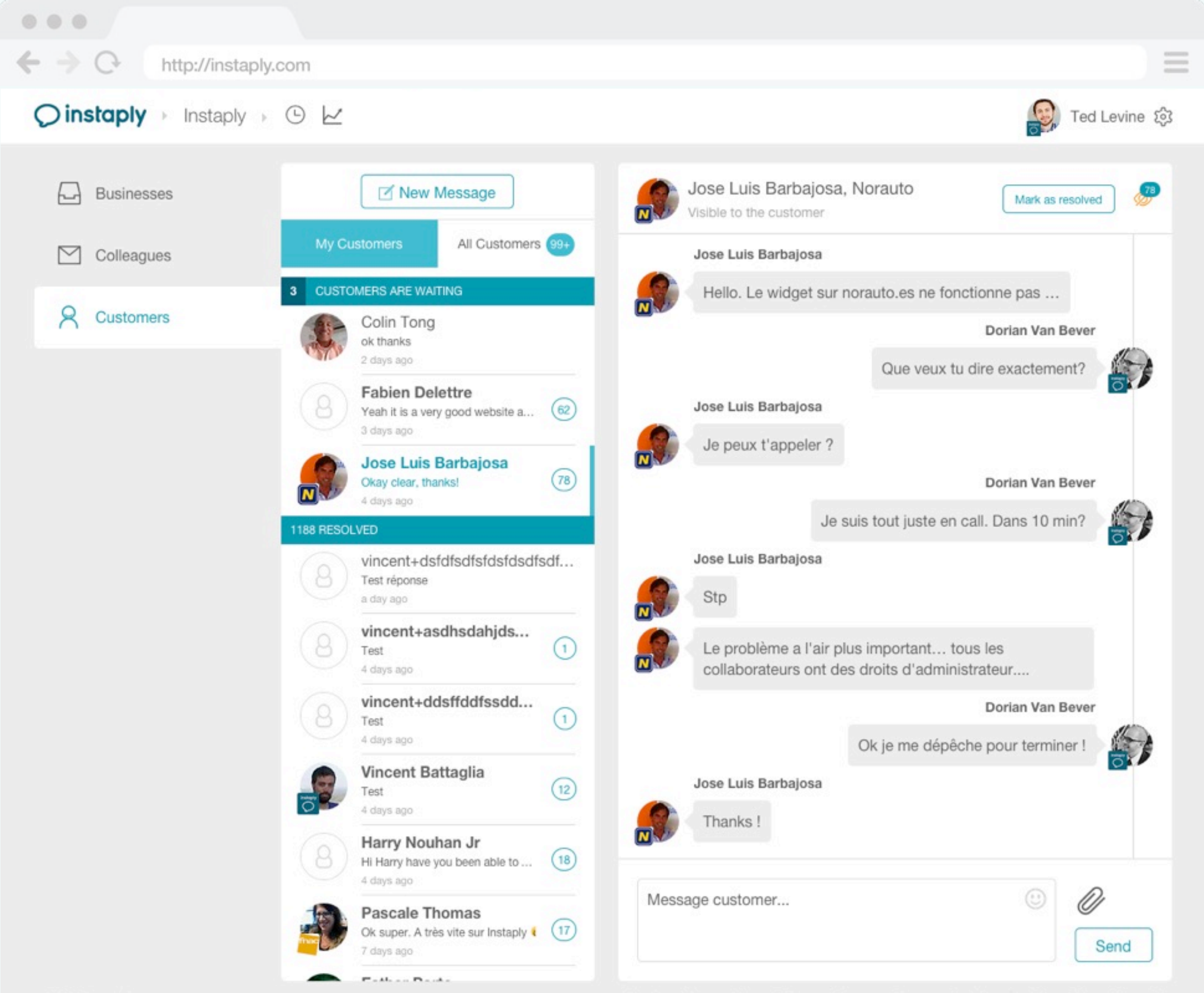
PERSONA: RETAILER (ADVISOR)
WEB APP UX PROPOSAL



In-Production UI: Pre-Redesign

This screenshot documents the interface prior to our research and design workstreams.

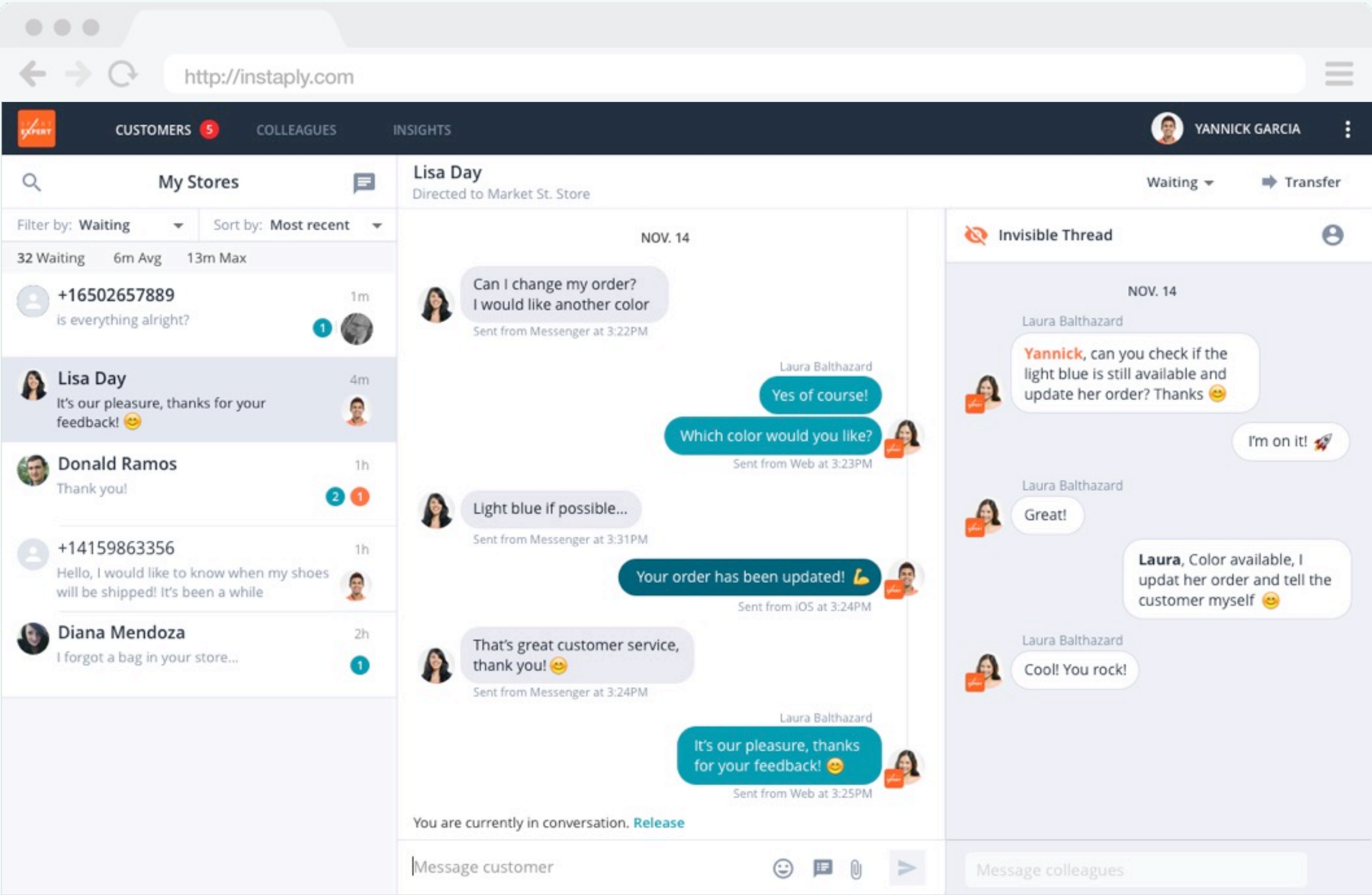
It was critical to retain the overall content structure and simplicity of the original design, since we had dozens of established brands relying on it worldwide.



In-Production UI: Post-Redesign

The redesign was **split into components for gradual rollout**, aligning with our engineering team’s 2-week agile sprint schedule.

SHOWN ON RIGHT:
Today, almost all of my wireframed solutions have been implemented in the live production webapp. These changes **catalyzed Instaply’s rapid message volume increase to +10M daily.**



Feature Implementation & Component-Level Optimizations

What if our under-the-hood fixes and feature releases made our product experience more seamless, for consumers and support agents alike?

Customer Sort Toggle

Testing revealed that support agents wanted to view their customer list by longest wait, instead of the then-default most-recent reply first. I iterated on where we could integrate a toggle, an explanation of the changed list, and waiting times.

SHOWN ON RIGHT:

My final solution uses an **animated microinteraction to confirm the toggled state**, a new color-coded prioritized waitlist, and takes up only 1% of the screen real estate.

The final assets included a new gridded UI system, interaction specifications, and a motion prototype for **engineering reference**. Additionally, I ran accessibility testing including total color blindness contrast checks.

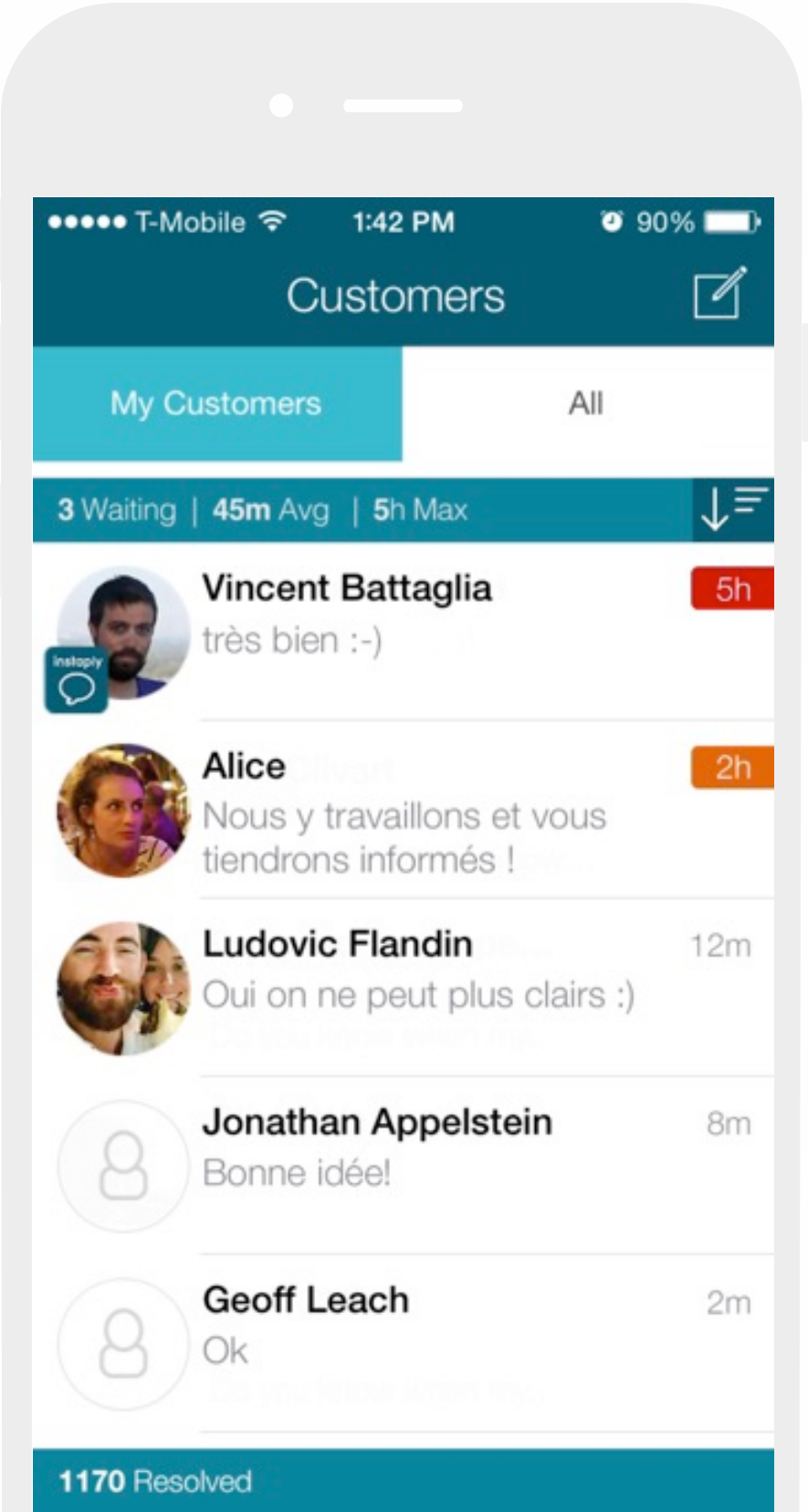


Watch the motion prototype demo:

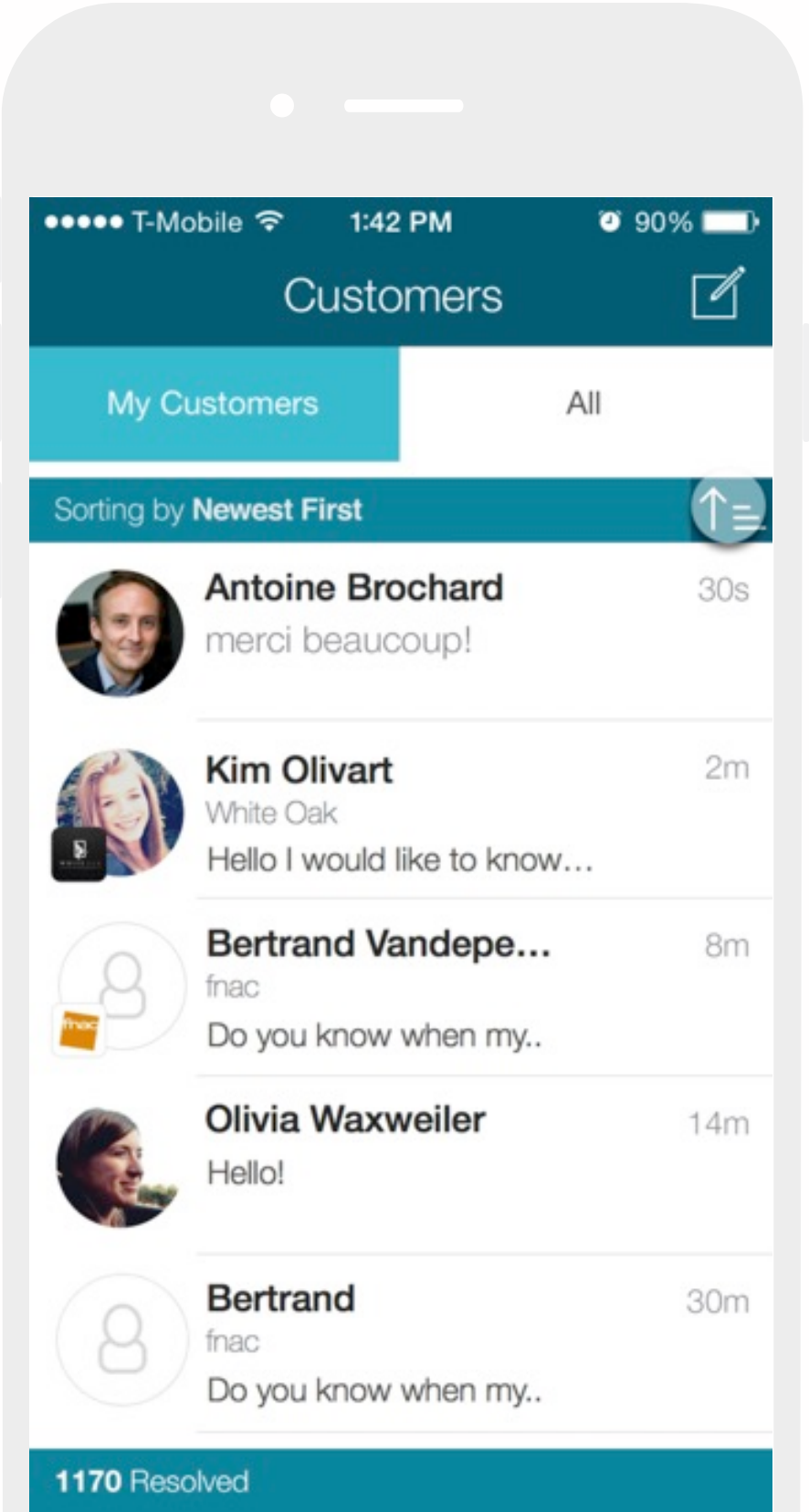
<http://tedlev.com/instaplymotion>

View the presentation: tedlev.com/instaplysort

Customer View
Longest Wait



Sort Toggled
Transitioning State



FEATURE IMPLEMENTATION & OPTIMIZATIONS

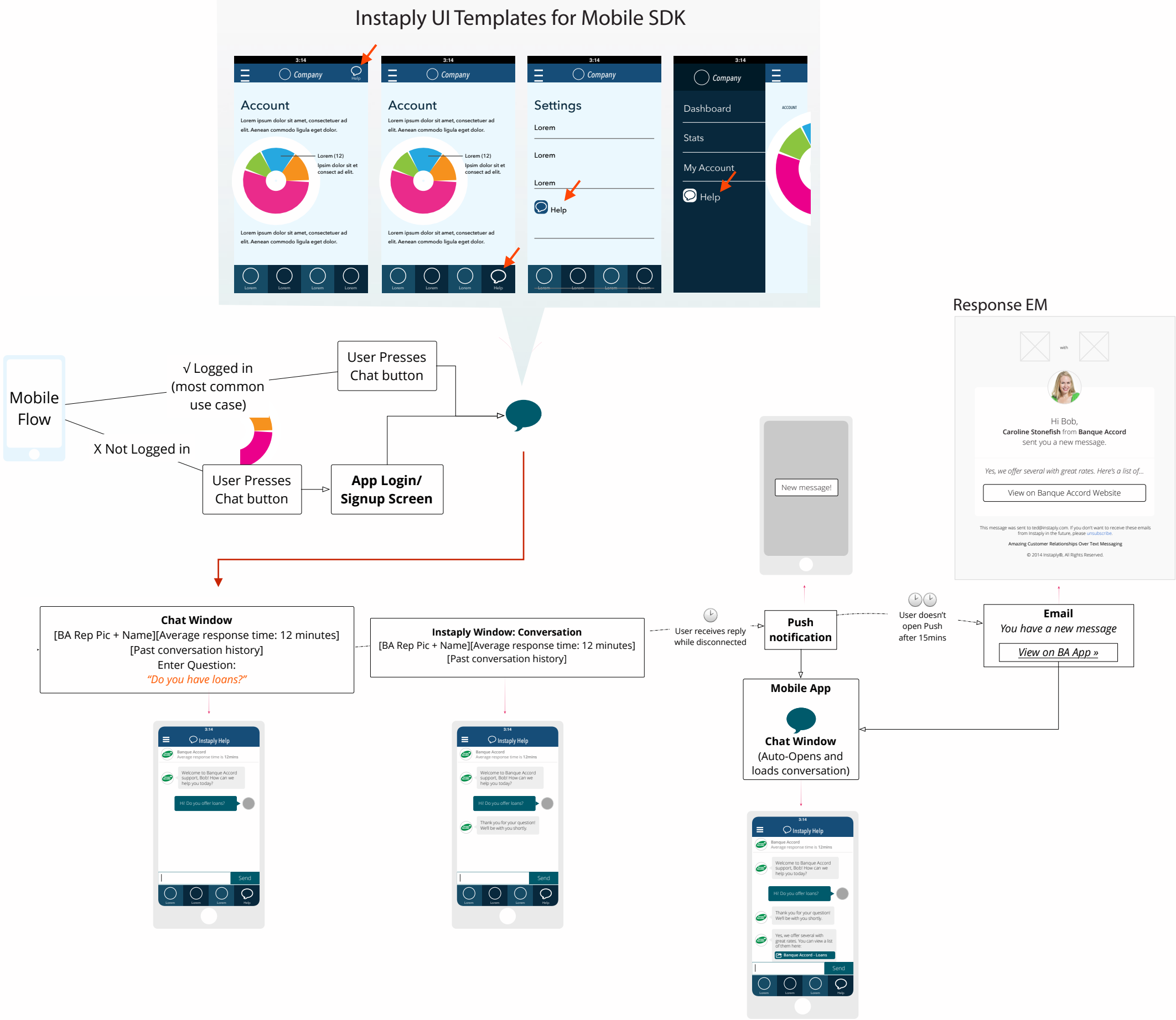
Mobile In-App Chat Integration

I created an **integration strategy, flow map and wireframes** for each of Instaply’s added **communication channels**.

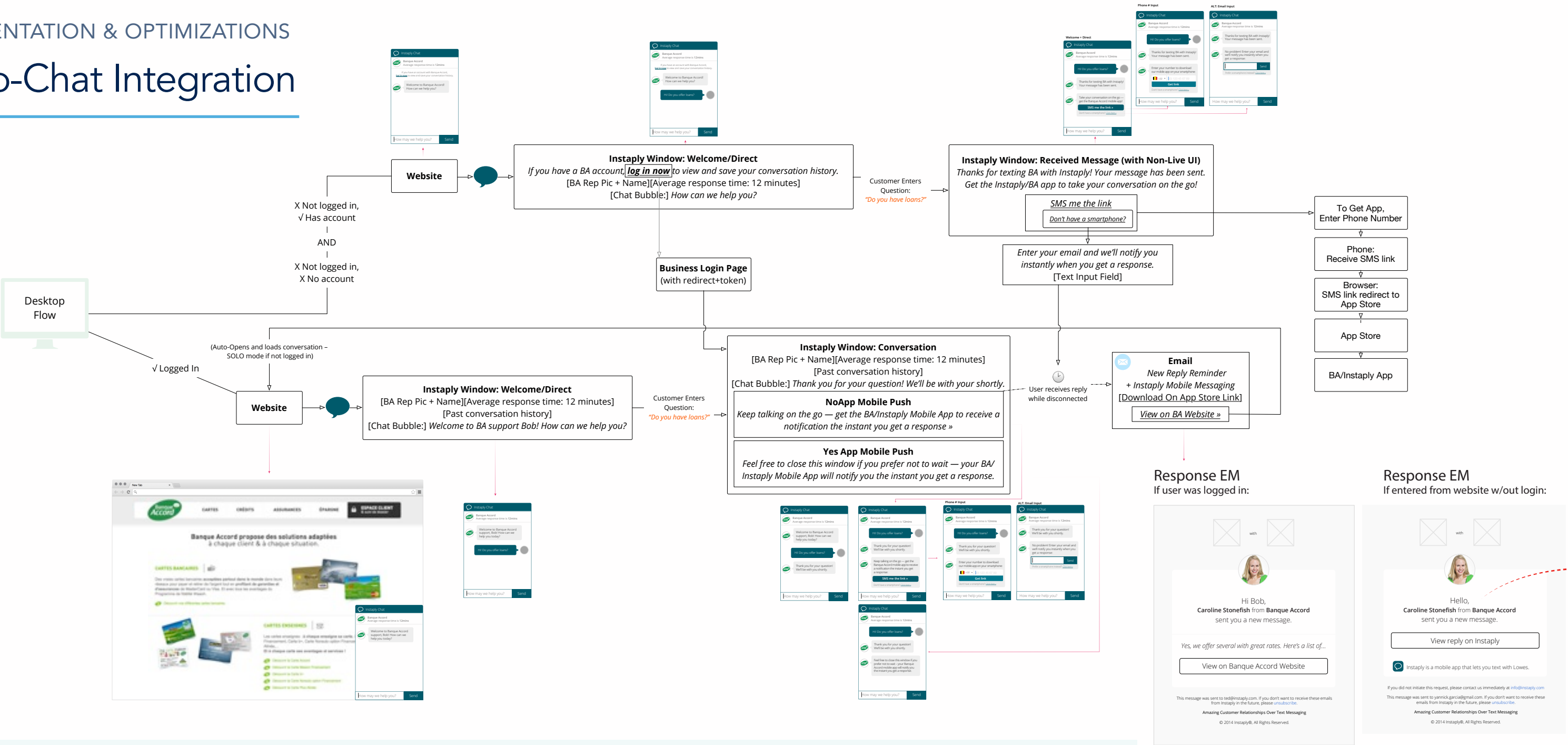
SHOWN ON RIGHT:

This flow details the mobile in-app chat integration, including **access touchpoints, conversation strategy, an omnichannel delegation aligned to the customer’s session**.

A high-impact opportunity emerged in this per-channel approach: by leveraging the SDK’s in-app integration, we could use the existing customer’s account session of the host app, **meaning less account setup and leading to significantly reduced friction and drop-off rates for the in-app messaging channel**.



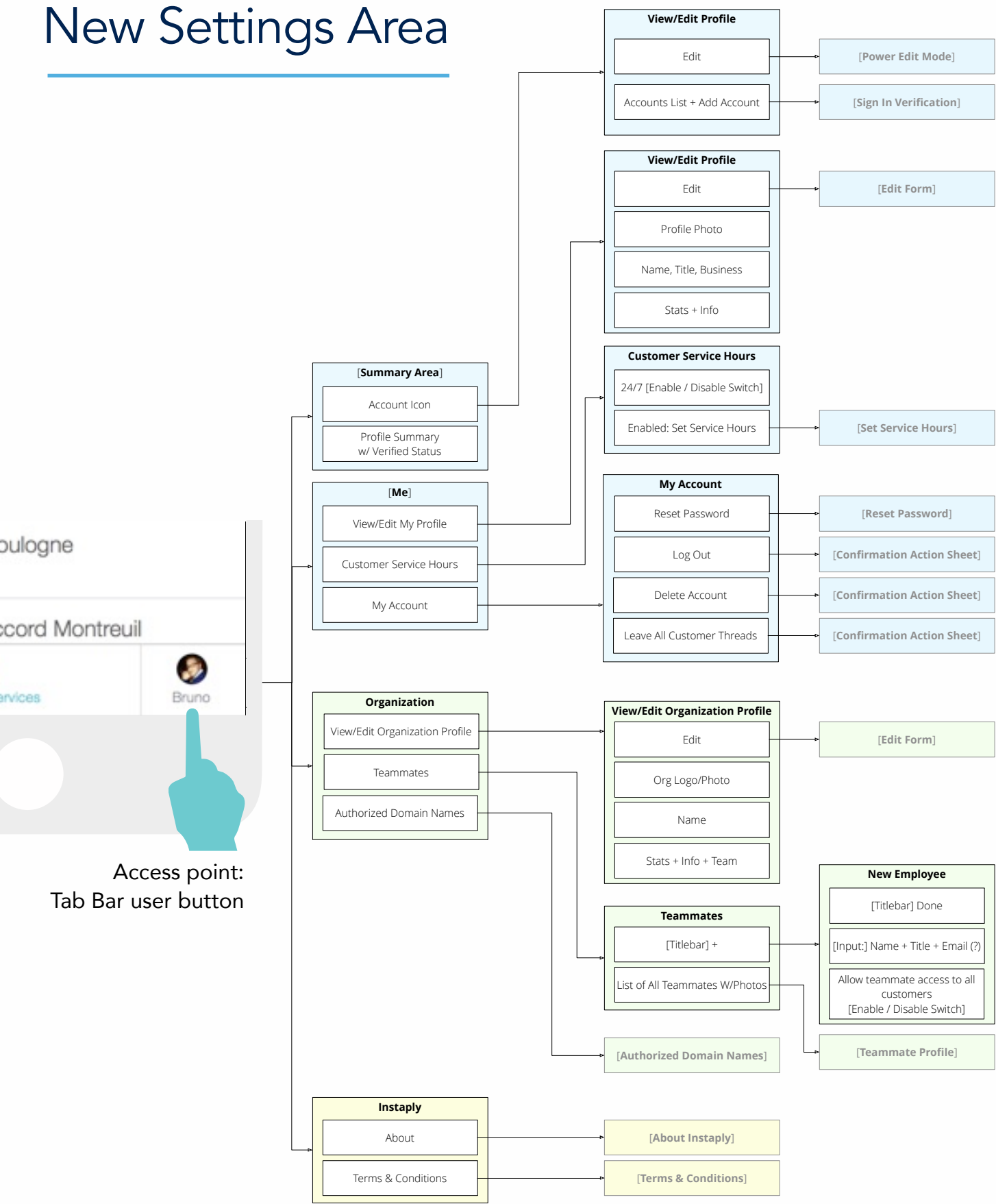
SMS + Web-Chat Integration



Similar to the in-app SDK solution, my integration strategy for SMS and embedded web chat was designed with the customer’s natural omnichannel journey in mind.

We enabled (and encouraged) customers to continue their threads on more convenient channels – open for both logged-in and anonymous users, all while onboarding them to the Instaply experience.

New Settings Area

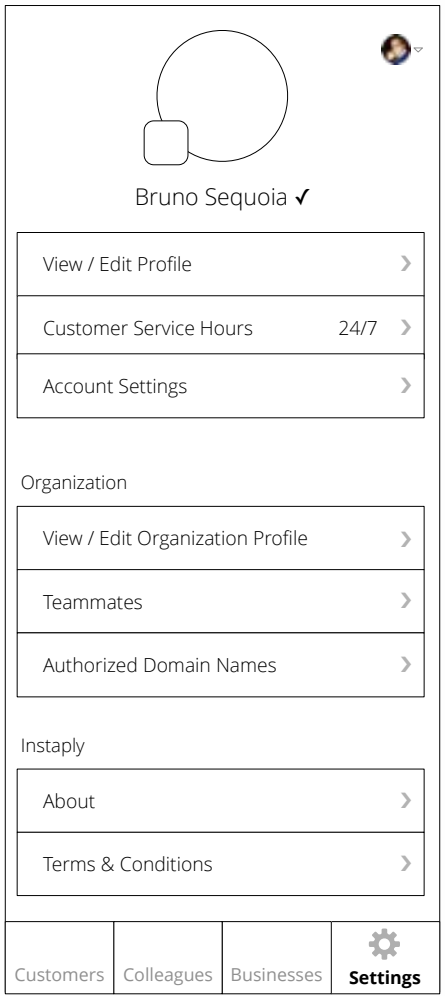


Iterations: Settings Landing Screen

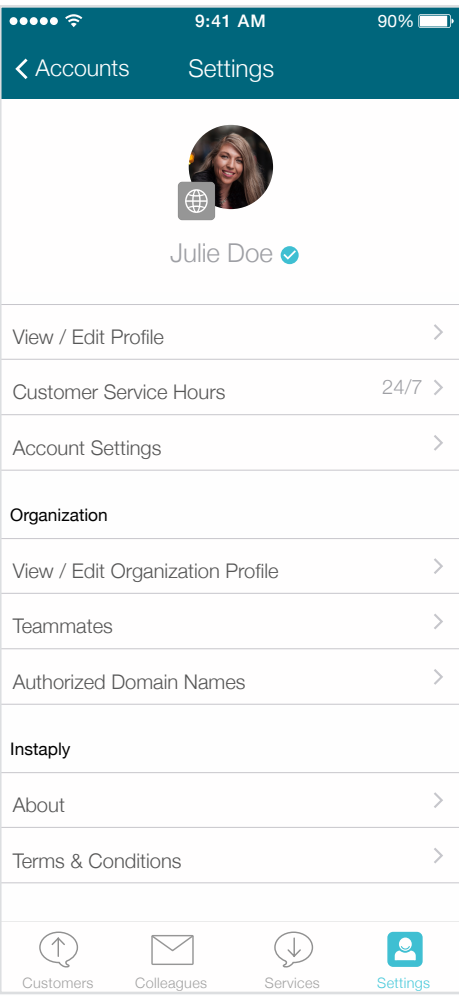
Low-Fi Whiteboard



Mid-Fi Testing/IA Wireframe



Final High-Fidelity Deliverable



The Settings area was based directly on findings from our interviews and in-production usage metrics.

I collected requested tasks and options and structured them into easy-to-understand categories via IA and flow maps.

The final wireframes show exclusively relevant and actionable settings in their respective contexts.

FOLLOWTHROUGH STRATEGY

Creating Key Metrics & Evaluation Tools

What if we could measure our impact across multiple levels of success?

*What if we could gather our customers' opinions on a new feature,
while keeping the flow lightweight?*

Metrics Strategy Development

Early on the project, I led team check-ins to gather and discuss current usage metrics for the product. Previous to my being on the team, I found out the group was only sifting through server log data to evaluate our usage and rollout impact.

SHOWN ON RIGHT:

After mentoring the team on product evaluation best practices, **we developed a list of core and deeper "challenge" metrics to evaluate from.**

Key Metrics Questions

① How many users are currently on Instaply?
↳ Customers vs Advisors

② How many messages has each user sent?
↳ 0msg vs ≤3msg vs >4msg
 ≤2s. = Dropoff vs ≤3msg vs >4msg
 >2s. = Newbie Worker vs Newbie Regular

③ What do they use?
↳ Screens vs Features (inside screens) vs Msg Channels (Email vs SMS vs Embed)

④ On which device(s) do they access it?
↳ Mobile vs Desktop
↳ What version of Device/OS/Browser?

Key
M = Messages
S. = Sessions
D. = Day(s)
W. = Week(s)

⑤ How long has the user been on Instaply?
↳ 0s. vs ≤2s. vs ≤10s. vs >10s.
 Dropoff vs Newbie Dropoff vs Newbie
 ↳ ≤2D. vs >3D. vs 1W. (consequently)
 Power User

Challenge Metrics

⑥ When is the user Most vs Least engaged?
↳ What are points of Delight? (Qualitative?)
↳ What are Dropoff points?
↳ When is site/App performance slowest?

⑦ For Customer Service Conversations, what is the Average wait per business & Combined?
↳ Customer waiting for Advisor response
↳ Advisor waiting for Advisor response

At-Rollout Feedback Gathering

I also helped fill our qualitative evaluation gap: when we rolled out a new feature, we didn't have surface area to capture customer feedback.

SHOWN ON RIGHT:

I designed and hand-coded our qualitative survey widget, which appears during or following use of a new feature, employing a smooth fade effect to reduce flow disruption.

The tool's introduction **enabled capturing feedback immediately and in-context**. It also led to a new practice during our standups: **review captured feedback and integrate a follow-up quick win solution into the dev sprint**.



See the widget used in the interface:
<http://tedlev.com/instaplywidget>

