

SuccessFactors User Experience Enhancements

Objectives

- Improve overall User Experience for SuccessFactors customers
- Increase convergence of potential customers
- Reduce churn and abandonment/drop-off rates
- Improve key processes and tasks for users of our products
- Reduce confusion by increasing user support and help resources
- Fix usability problems that interfere with desired calls to actions
- Standardize visual design and interaction patterns across product modules

Issue Areas

- Usability: Tasks & processes difficult to learn, lack of feedback, bugs
- Information Architecture: Confusing navigation & lack of user orientation
- Interaction design: Inconsistent use of UI design patterns and components
- Visual design: Need for detailed graphic standards & branding guidelines
- Content: Lack of instructional copy, help, support & learning resources

Specific Recommendations

1 Provide Better Help & Instruction Across Product Lines.

Goal: Provide inline help solutions and a consistent help section, as well as provide support and learning resources.

Benefits: Avoids confusion and frustration, increases ease of use, answers crucial usability questions (What is it? How does it work? What do I do now?) and explains the value of product features.

2 Standardized the User Interface.

Goal: Standardize visual design, interaction design and UI design patterns across all product modules.

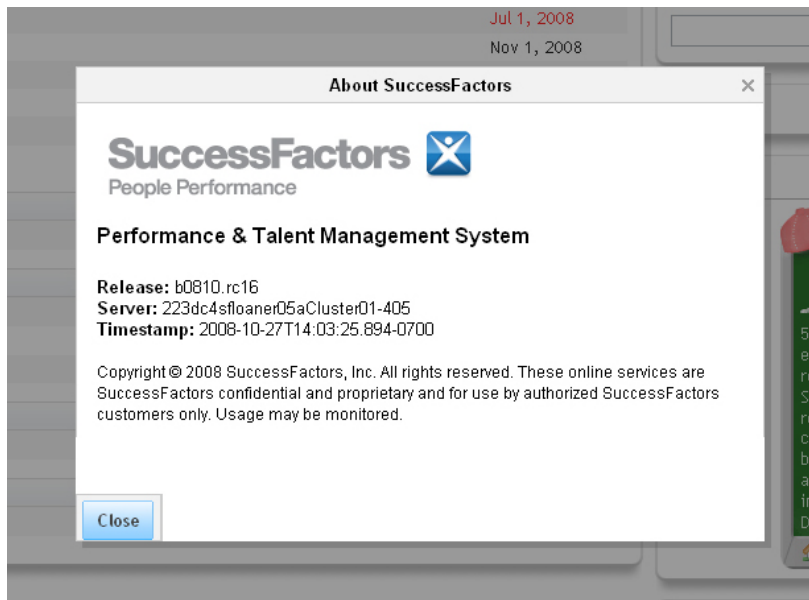
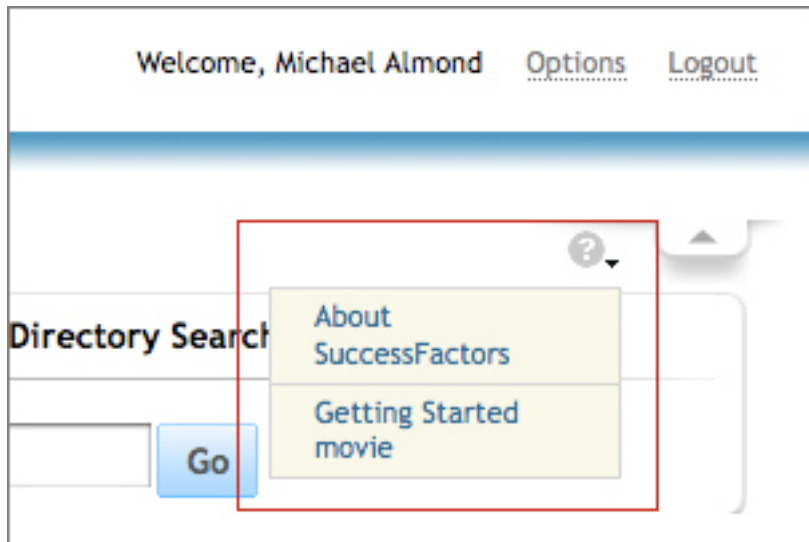
Benefits: Prevents re-learning tasks and processes, creates comfort level using new and existing features, communicates trust, professionalism, and attention to detail (brand enhancement).

3 Improve Task Completion.

Goal: Make tasks and processes easier to use by providing clearer interaction options, fixing usability issues and following conventions.

Benefits: Prevents frustration and drop off, increases success rate for task completion, and provides increased satisfaction for users of our product.

Recommendation: Provide Better Help & Instruction



Issue Type: Usability, Content, Brand enhancement

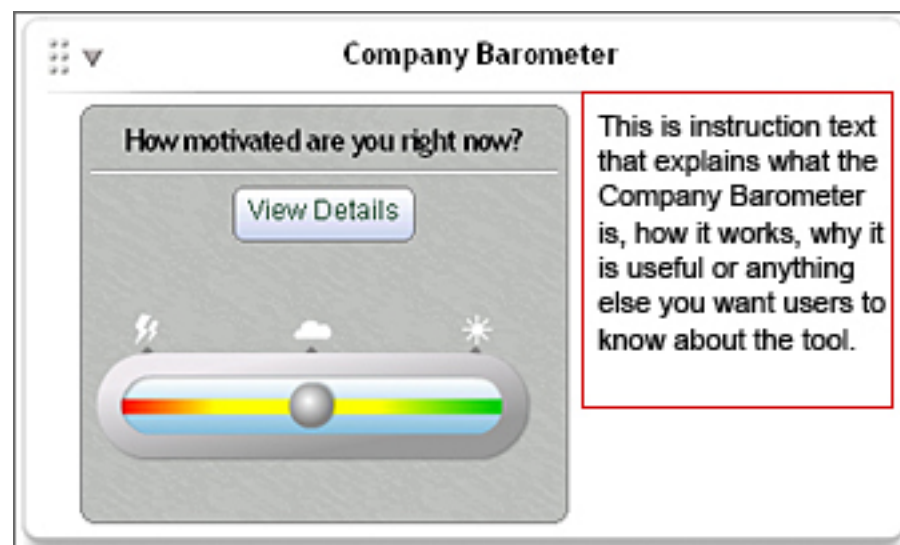
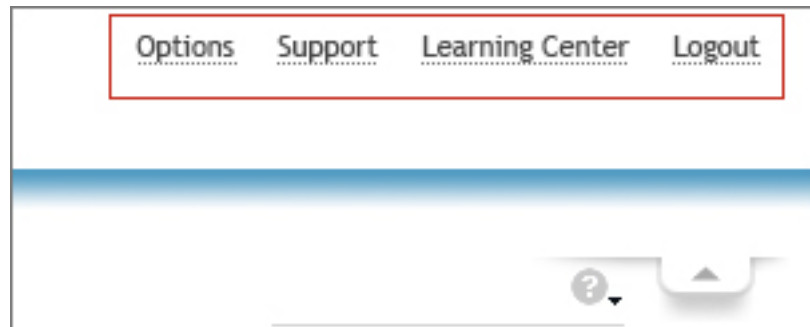
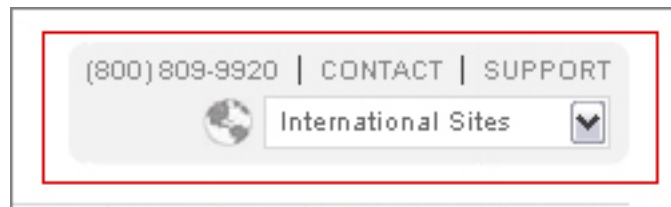
Issue Details: Many tasks and UI elements are not easy to understand or use because of a lack of instruction, help, tool tips, support links and learning resources.

Example: Currently, there is a **Help** icon on the V11 banner that drops down a menu with two items.

The first is a link, [About SuccessFactors](#), that opens an overlay with information about the current software release. While this is conventional, it usually follows a link to get help with the software, something like: [SuccessFactors Help](#).

The second link, [Getting Started movie](#), launches a screencast that gives a very broad overview of the product. It is more appropriate as a **Tour** or **Demo** than in **Help**. In addition, the lack of other movies to follow this suggests that there isn't any help once you have gotten the basics down.

Suggested Solutions: Help & Instruction

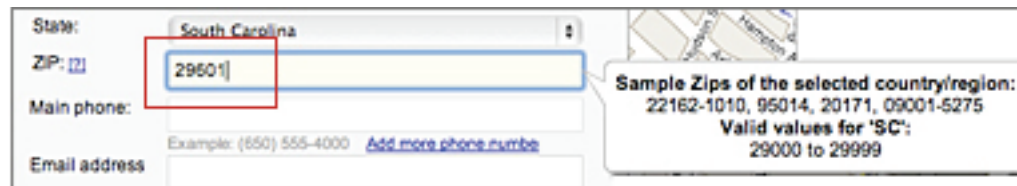


The SuccessFactors public Web site has global links to [Support](#) and [Contact](#) as part of the persistent navigation. While these are most certainly sales related, they do offer immediate help to the user. There isn't an equivalent on the product side.

Global Help: The addition of a [Support](#) link to the application's UI would provide a useful and persistent source of assistance. By providing useful information, it would help eliminate many usability problems and enhance our customers' User Experience. Other useful help features include [Learning Center](#), [Online Help](#), [FAQs](#), [Glossary](#), etc.

Inline Help: There should also be brief instructional text on the page that explains features that aren't intuitive, such as the Company Barometer (to the left).

Suggested Solutions: Help & Instruction



A form with fields for State, ZIP, Main phone, and Email address. The State is set to South Carolina. The ZIP field contains 29601 and is highlighted with a red box. A tooltip is displayed next to the ZIP field, showing sample ZIPs for the selected country/region and valid values for SC.

State: South Carolina

ZIP: 29601

Main phone: Example: (650) 555-4000 [Add more phone numbers](#)

Email address

Sample Zips of the selected country/region: 22162-1010, 95014, 20171, 09001-5275
Valid values for 'SC': 29000 to 29999

Automatic Inline Help has relevant text appear when a user clicks in a specific field of a form. Help text can be displayed within input fields as well, but only for showing the exact format to use when providing answers. (format date: xx/xx/xxxx)



A form with fields for First Name and Last Name. The First Name field contains Matthew and the Last Name field contains Smith. A red question mark icon is next to the First Name label. A tooltip is displayed next to the First Name field, explaining the need for a name.

First Name required ?

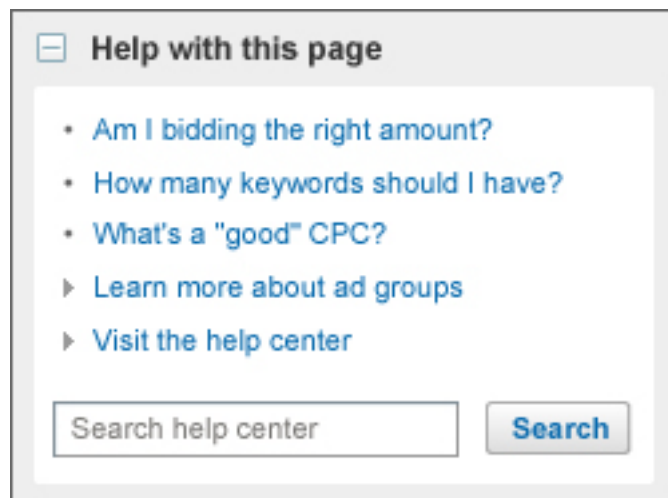
Matthew

Last Name

Smith

This is so we can call you names.
That sounds bad but it's actually good. We need your name so we can call you by name, rather than "hey you!" or something like that. We don't need your last name if you don't want to put it in there.

User-Activated Inline Help let's people access help when they need it. User clicks an icon, say a question mark, to trigger relevant help text. When used on forms, the icon should be next to a label, not a field.



A help section titled "Help with this page" with a list of questions and a search bar.

Help with this page

- [Am I bidding the right amount?](#)
- [How many keywords should I have?](#)
- [What's a "good" CPC?](#)
- ▶ [Learn more about ad groups](#)
- ▶ [Visit the help center](#)

Search help center

User-Activated Section Help: Use a designated section to display more complex instruction, like a sidebar or modal window.

Recommendation: Standardize the User Interface

Options Section: The four pages that currently exist under [Options](#) are not needed as they contain little content and what is there has not been standardized. In addition, each has usability problems, including the placement of form elements within tables that follow a fluid layout.

Options

- Password
- Notifications
- Change Language
- Forms

Current Password:	<input type="text"/>
New Password:	<input type="text"/>
Repeat New Password:	<input type="text"/>

[Set Password](#)

• Passwords must be from 2 to 18 characters long.
• Passwords are case sensitive. They are not required to be mixed case.
• Passwords do not have to contain non-alpha characters such as numbers or symbols.
• Passwords may contain any combination of letters and digits.

Form content should be flush left with action button under the fields. Also, this is not a lot of content for a whole new page. Password instruction is lost because it is placed below the content. Better if it were inline help.

Options

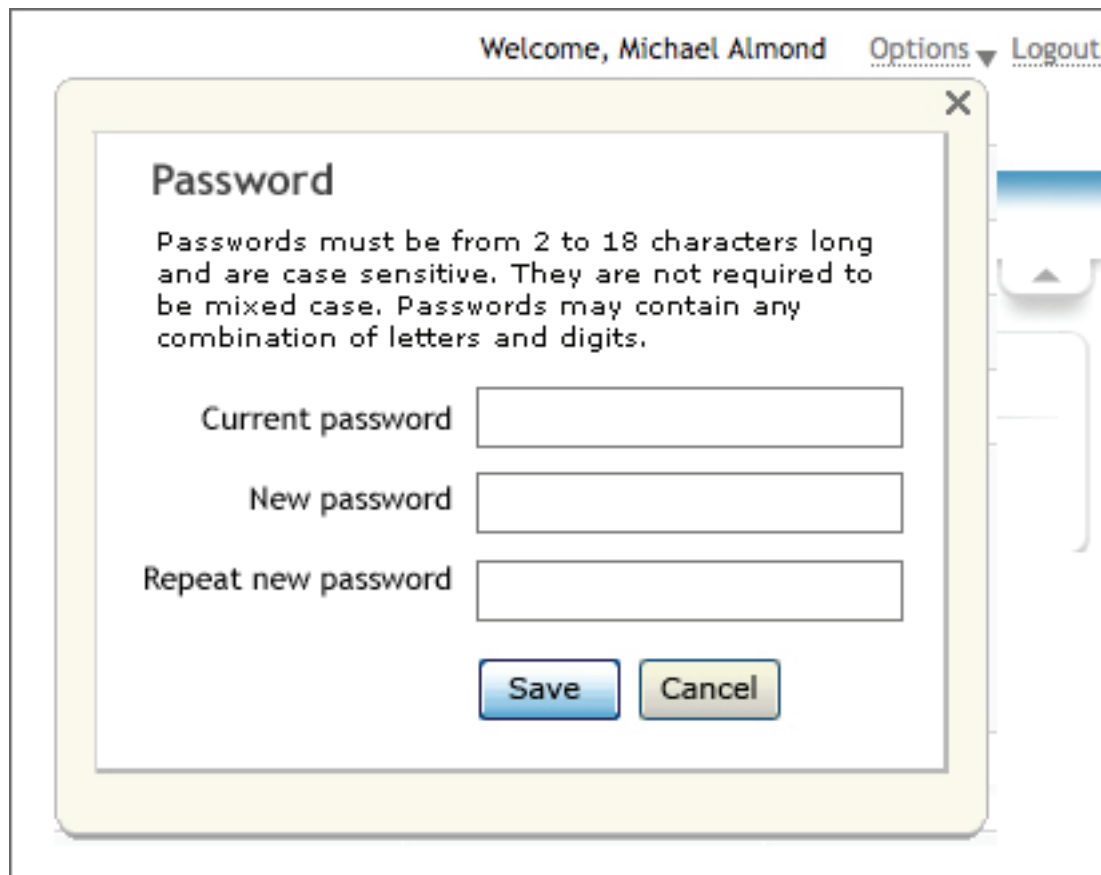
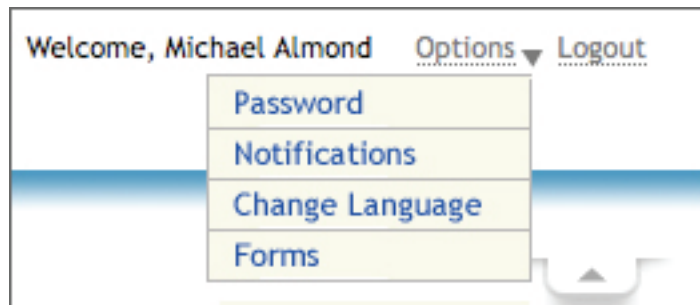
- Password
- Notifications
- Change Language
- Forms

Email Notifications:	<input checked="" type="checkbox"/>
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[Save Notification](#) [Reset](#)

Form content and action buttons should be flush left so they stack. Currently they appear unrelated and random. Also, set a maximum width for tables when used in a fluid layout

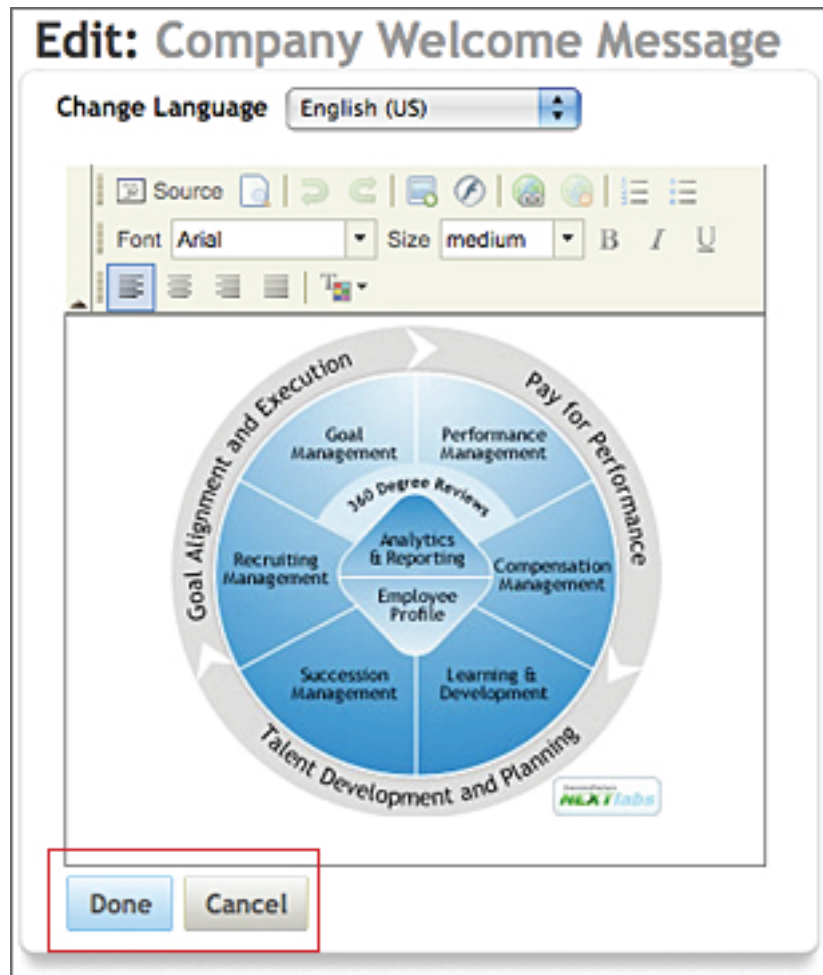
Suggested Solutions: Standardize the User Interface



Options Section: The four pages that currently exist at the second level of navigation under Options can be treated in manner that is much more user friendly; since the items are all utility settings, they can display in modal windows and thus avoid losing the current page view the user is on.

When user clicks [Options](#), a drop down menu appears (like the Help icon). Each of the navigation items will launch a dialog like the example to the left shows for the Password feature.

Recommendation: Standardize the User Interface



Issue Type: Interaction Design, Usability

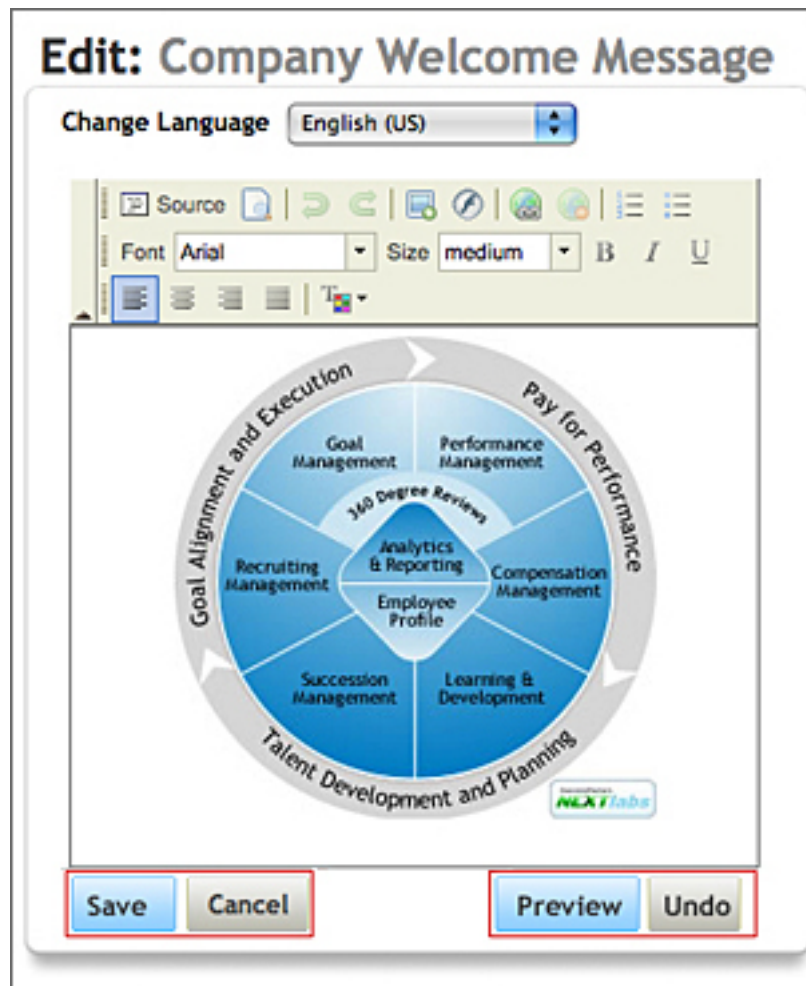
Issue Details: Many of our current interfaces lack important controls that users find helpful when completing tasks.

Example: Users can edit or modify a number of UI elements. Using the **Welcome Module** as an example, we've even provided a WYSIWYG (What-You-See-Is-What-You-Get) program used to create web pages.

Even though a lot of effort and time was used by a customer, they are presented with only two primary actions: [Done](#) and [Cancel](#).

This doesn't give a *save for later* type option or offer a *preview* before confirming the modified widget.

Suggested Solutions: Standardize the User Interface



Users have a set of primary and secondary actions now. Primary actions are [Save](#) and [Cancel](#). “Done” is ambiguous; users need to know they have saved their work, hence the change to “Save.”

There are also secondary actions now, which in this case offer assistance throughout the process. Users can [Preview](#) the item they have been working on before committing it to the page. They can [Undo](#), choose to [Confirm](#), or go back to [Edit](#). (Not shown in image to the left)

Once satisfied, they can complete the task or perhaps cancel the whole effort; at least they have some additional actions that help provide a better experience.