

Field: UX/UI Design

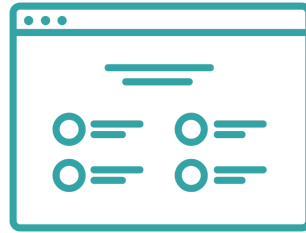
Project Type: Web App Design

Project Detail: Simple Project Management Tool

RookieUp

Web App Design Project Framework

Simple Project Management Tool



This is a Web App Design project! Think about a **web app** as a website that users can login to and interact with, versus a traditional website that just displays the same static information to every user. Platforms like Facebook, Gmail, Wordpress, and millions of other services are web apps! Your client for this project is an **enterprise project management software** company that is looking to design a much simpler version of its current project management tool to appeal specifically to individuals and startups.

*Please note that the **design processes** outlined in our frameworks are **very detailed** because we want to guide you through the process that real world designers would follow when working on a project like this. However, the approach you take when actually designing the project is entirely up to you. We just want to provide the necessary guidance so you can learn to think like a real designer while coming up with creative solutions that are unique to you!*

ABOUT THE CLIENT

- **DESCRIPTION OF COMPANY + PRODUCT:** Your client is an enterprise project management company. For 15 years, they have been creating tools that huge, international corporations use to manage large-scale projects between teams. With the success of companies like Basecamp and Trello, they have decided to create a simple project management web app that will help them appeal to and build relationships with younger companies that they hope will eventually become users of their legacy product. The new tool will be free and easy to use.
- **INDUSTRY:** Enterprise software // Project management tools

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CLIENT RATIONALE + DESIGN NEEDS

The client's current product is both too expensive and **too complex** for the needs of younger companies. Their hope is to design a **simple web-based app that** lets companies **set up free accounts, add team members, create projects, and manage basic timelines/deliverables/statuses** per project. The client originally considered creating a stripped-down version of its main legacy product, but that product has grown so complex that they decided to start from scratch for this new app. They hope that your design has the **necessary features** and is **visually appealing** enough to persuade young companies to switch from other project management tools that are popular amongst early-stage startups and teams.

CLIENT ASKS + DELIVERABLES

In addition to the design of the desktop app, the client would like to develop a very basic style guide that can be applied to the app. The full list of deliverables:

- Styleguide / brand guidelines for the web app:
 - Color palette + Typography guide (headings, body copy)
 - Button, links and states (default, hover, active/pressed, etc.)
 - Form elements (inputs, radio buttons, etc.) and their states (hover, focused, errors, etc.)
- A prototype of how the app works and looks. This can be a mixture of wireframes or high-fidelity designs (make use of Marvel or InVision and/or Framer). You should design high-fidelity screens for:
 - The **main project management dashboard** (all of the users' boards/teams)
 - The **main dashboard for a specific team**
 - **Creating a new project**
 - **Viewing a project**
 - **Editing/assigning/managing a specific project**

PROJECT CONSTRAINTS

Recruiters and potential clients love to see real client work in portfolios, as it can help to differentiate you from other junior designers, and it tells an employer that you're able to work within real world constraints, which you'll definitely have to take into account in a real design job.

The client needs certain features to be included, and would like you to also think about additional features that competing products have overlooked. The required features are:

- Ability to **group smaller sub-projects** under a larger "parent project"
- Ability to assign owners to parent projects, sub-projects, and tasks within each sub-project

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- Ability to assign due dates, “marked complete”, and add comments to each project type
 - Ability to indicate dependencies/blockers between projects
 - Ability to add attachments
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Recommended Approach

SUGGESTED TIMELINE

3-5 hours: **Discovery**

- Conduct and document competitive and customer research
- Craft personas and use cases
- Create moodboards and sketch ideas based on functionality and interface design inspiration
 - *Submit for written feedback #1*

5 - 10 hours: **Design**

- Write out a user flow
- Create wireframes based on user flow, sketches, and moodboards
- Create first prototypes
- Conduct and document initial usability research
- Refine design based on research
 - *Submit for written feedback #2*

3 - 6 hours: **Evaluate + Finalize**

- Finalize wireframes based on feedback
- Create style guide prior to beginning high-fidelity designs
- Design high-fidelity UI of pages based off of your wireframes using your style guide (colors, icons, buttons, and general look and feel)
- Finalize colors, icons, buttons, and general look and feel
- Conduct usability evaluation + document results
- Create final prototype or design for portfolio
- Document next step, learnings, and findings
 - *Schedule video session for final review*

PROGRAMS/APPS/TOOLS TO USE FOR THIS PROJECT

- Moodboarding + ideation: Niice, Pinterest, MilaNote, Designspiration, Behance, Pen and paper.
*Moodboarding can take place in program of your choice (InDesign recommended)
- Presentation Design: InDesign, Keynote, PowerPoint

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- Wireframes & High-fidelity Design: Sketch (Recommended), Illustrator, Photoshop, Framer, Figma
- Prototyping: InVision (Recommended), Marvel, Framer, Figma, Experience Design

LEARNING OBJECTIVES

All UX/UI Design projects should focus on core design principles of User Research & Interviewing, Interaction and Interface Design, Wireframing and Prototyping, and Iteration. A few additional learning objectives for this project are:

- Visually organizing multiple types of complex information on a single dashboard screen
- Presentation: good ideas and designs are great but presenting them in understandable, contextual, and beautiful ways persuades others of their importance.
- Speed: you need to learn to work fast, under pressure, and often under extreme deadlines. If you practice under these (realistic) circumstances then you'll be able to acclimate to new positions and roles more easily.
- Consistency: creating a brand, experience, and interface that look like they are all related is important, and often don't happen in a logical order.
- Experimentation: seldom is your first design or idea the best one. Come up with multiple ideas. Sketch and wireframe ideas quickly before choosing on a direction.

How to Get Started

It's time to get started! Remember that the design process has multiple components (you won't be diving into Sketch immediately).

1. Market & consumer research: Research other businesses within the same market. What are some trends in the industry? Familiarize yourself with the average consumer. Who are they? What makes them choose one brand over another? What makes them continue using the product and what makes them frustrated with current products? Think about what the consumer looks for in their ideal product and what drives their decision-making process.
2. User personas and use cases: Create initial user personas and use cases based on who the intended end users are and what they're going to be using this product for. If possible, try to create at least two different personas so that your end designs take into account needs of different types of users. Consider what types of startups would be using this and what they'd be using this for? Separately, consider what types of individuals and other organizations might find use for a simple project management tool.

3. **Create moodboards:** With your user personas in mind, write down 30 words that speak to the voice and overall feel of the app you hope to design. Narrow this list down to three keywords to help drive your visual research. Use this as inspiration for the types of images you'll use to create your moodboard. Collect imagery, app screens, videos, and interaction styles that speaks to the tone, brand voice, color palette, and typography style that the app will embody. Then, arrange it into a cohesive moodboard to inform your brainstorming process. It's often helpful to break out visual elements into separate moodboards for typography and type lockups, color, and layout.
4. **Ideate and Sketch:** With the help of your moodboard and user personas, begin to sketch your ideas for the app experience. Put anything that crosses your mind on paper. Your end goal for this exercise should be to identify the three ideas that you think best solve the user problem. Be sure to keep all sketches you make so you can showcase relevant ideas in your portfolio site. Sketching is a crucial part of the design process and you should go as wide as possible with your ideas. You'll refine later.
5. **User flows:** At this point, you should start creating a user flows to map out all of the different screens that you'll need to design for the app and show how each of them flows into the other. Mapping out all of the screens a user will interact with is the necessary precursor to creating actual wireframes for each page.
6. **Wireframe:** When you have a few strong ideas on paper, it's time to start creating low-fidelity mockups of your app. It's important to note that wireframes are done in grayscale, and place-holder boxes are used in place of images and icons at this point. Use a wireframing program to create digital versions of the different app screens (this should include form fields, buttons, icons, etc.). Refer to the Constraints section from earlier in the framework to ensure your screens allow for every action the client wants to allow within the app. If necessary, write down a list of every action a customer needs to be able to accomplish within the app.
 - Be sure to think about what screens the user might encounter in an error state (e.g. they forgot their password or did a search that turned up no results). Always think about these types of error state screens and design solutions for those as well, rather than just designing for the "Happy Path."
 - While wireframing consider your spacing. You want to have consistent spacing throughout your website. A helpful trick is to make small boxes the height or width of the amount of pixels you want in a given space, and use it to measure out similar spacing.
 - Main dashboard for all of a user's teams/boards

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- i. What information is absolutely necessary for this screen and what functions does a user need to be able to accomplish? Do they need to be able to do anything other than create a new board/team or click into a specific team? Spend time thinking about how you can visually showcase each distinct team/board and how you can allow a user to differentiate them quickly.
 - ii. Note that you don't need to design the "create new team" screens for this project, but you can if you'd like!
 - o Main project management dashboard
 - i. Think about what information a user intuitively expects to encounter when they first click into a specific board. Look at competitor products and see how they arrange information on the high-level dashboard.
 - ii. Apart from showcasing all of a team's projects, what other information can you surface for the user here? This is your chance to really differentiate the product from other simple project management apps out there. Instead of just showing the specific projects, can you also surface relevant information about a user's action items, to-do's, and next steps in a summarized format somewhere on this screen?
 - iii. Also consider what actions a user should be able to accomplish on this screen, apart from clicking into specific projects or tasks. Consider including the ability to add new tasks or projects, change status of items without clicking into them, etc. How do you make the actions a user can take intuitive with only your designs? Think about things like your button design, hover states, etc.
 - o Creating a new project
 - i. When a user clicks to create a new project, what options are available and what information is required for a new project to be created? Try to consider the necessary information that someone from their team would need to be able to see in order to understand this new project.
 - ii. Be sure to refer to the project constraints to see what options and functions the client needs the user to be able to complete for a specific project. Think about the logical order of creating a new project when determining the sequence of steps a user is prompted to complete (i.e. Name of Project → Description of Project → Add team members → etc.)
 - o Editing a project

- i. Once the project has been created, design the screen(s) for editing that project. Note that the editing screen might look the same as the initial project creation screen. That's up to you! Think about where the largest blocks of information will appear (specifically, comment threads). When someone adds an attachment, should a preview of the attachment appear or just an icon? Think about what the benefit of each option might be on a user's experience.
 - ii. Visually, how do different edits look? When the user adds a team member to the project, where does that information surface and in what form? What does it look like when a "status" is changed or a due date has already passed? What happens when a user marks that a certain project is "dependent" on another project? Does that information only appear on the dependent project or should it also appear on the project it's dependent on? When you're designing the edit screens, spend time to first list out every function the screen must allow for, and then create a structure for the screen so that every function has a place to live.
7. Open up a tool like Invision and start to create initial prototypes. One of the most important aspects of UX design is ensuring that the user understands what will happen when they click on a specific button or link. A prototype is a simulation of the final product that is interactive and allows a user to actually go through the flow of the site on their own.
 - o This is a crucial step: Wireframes are a great way to lay out the actual content that will appear on each screen, but **without prototyping and testing on real people, you won't understand how users actually flow through the app**. This is even more important when creating theoretical portfolio projects -- in a real world setting, you'll constantly test your assumptions with real users or colleagues, iterating as you go until the interaction of every screen has been tested and perfected, but when you're creating projects from scratch, you won't have as many chances to test your designs against real users. Therefore, we suggest either working closely with a mentor as you design this app or sharing your wireframes and prototypes with friends and asking them to go through the flow of the app and point out any screens where they are confused what they should do or situations when they click something and land on a page they were not expecting.
 - o Check out articles like [this](#) and [this](#) to get a deeper understanding for how prototyping should be incorporated into your design process.
8. Iterate: Continue to test your prototypes with a mentor or friends whenever you make changes to your wireframes or prototypes. App design is an active process and whenever you make adjustments, you need to test your assumptions against real users! **This is how you'll differentiate your portfolio from other junior designers who are only designing with**

aesthetics in mind. After reviewing your initial wireframes and moodboards (either with peers or with a mentor), get to a point where the overall flow of the app makes sense to users. Now you're ready to start to create a more detailed high-fidelity design of the screens for your mobile app, focusing on the overall look and feel.

9. Create a style guide based on your moodboard to help you build a high-fidelity version of the web app. See our [Design Terminology](#) document for help creating a style guide.
10. Create high-fidelity designs: Use your style guide to create a more detailed high-fidelity design of your app, focusing on adding color, icons, fonts, buttons, and any other elements that you think should be included in the final version of the app.
 - When you're creating the high-fidelity designs for digital products, it's important to think about the main design principles of Alignment, Repetition, Hierarchy, Balance, and Contrast. Even if you're focused on UX work, being able to apply these basic design principles is crucial if you want to turn your low-fidelity wireframes into enjoyable and clean final products. Check out the [RookieUp Intro to Visual Design Curriculum](#) for lessons on each of these five principles.
 - As you start to create the high fidelity designs, focus on consistency across every screen. This applies to:
 - i. Overall style and aesthetic consistency (Use the same styles of imagery or graphics, and when using icons or graphic elements try not to use too many different illustration styles across different pages of the site. Look [here](#) for icon inspiration!)
 - ii. Spacing
 - iii. Buttons and icons (Apply consistent corners, border width, spacing, margins, color, etc.)
 - iv. Typography (Use no more than two fonts across the entire product and apply consistent line height, font size hierarchy, and font styles. Look [here](#) for font inspiration.)
 - v. Color palette (Use a consistent color palette across the entire experience, generally focusing on no more than a couple of primary and a couple of secondary colors. Look [here](#) for color inspiration and choose 2-4 primary colors for your brand.)
11. Mobile! If you haven't already done so, ensure that your designs incorporate breakpoints for tablet and mobile sizes. Ideally, you've been designing with mobile in mind but if not, take the time now to showcase how your wireframes and high-fidelity designs would change for a mobile screen.

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12. Finalize: At this point, it's time to make the app design consistent and pixel perfect! Double and triple check each element and each page to ensure consistency of fonts, button sizes, and every other element of the app. Ensure you've built versions of each page for various device sizes.
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Additional Tips & Resources

CADENCE FOR REVIEWING WITH MENTOR

We'd recommend working on 3 iterations of this project.

1. Complete the "How to Get Started" section to fill in industry and company details.
2. Follow steps 1-4 from the "Next Steps to Take" section above to complete your first draft
3. Submit your moodboards/sketches/ideas to your mentor for first round of written feedback
4. Based on your mentor's feedback, create your first wireframes and prototype.
5. Submit for second round of written feedback
6. Based on mentor's feedback, refine second draft.
7. Schedule one of your 30 minute video sessions to do a final review of your project and discuss any final edits that need to be made. Discuss how your project should be showcased on your portfolio site.
8. Afterwards: Make additional edits as necessary and layout your project for your portfolio site. Write descriptions of your process and gather early sketches, moodboards, and notes. Add your project to your portfolio site.

EXAMPLES AND INSPIRATION

- Popular project management tools: [Trello](#), [Basecamp](#), [Jira](#)
- [20 of the most powerful web apps](#)
- [10 real time web apps](#)

HOW TO PRESENT THIS WORK ON YOUR PORTFOLIO

After finishing the final draft of this project, it's important to take the time to showcase it correctly on your portfolio site. Think about presenting this project as a comprehensive case study, clearly articulating the problems you were trying to solve and how you arrived at the solutions for those problems.

Here's how we'd suggest showcasing this particular project:

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- Start with a brief overview of the project, including the client, the problem they were trying to solve, your approach, your role in the project, any constraints you had to work within, and the final deliverables of the project. Also discuss any KPI's you were designing for and specific goals the client was trying to achieve.
- Showcase the final design of the app to entice viewers to read more. Aim to catch the viewer's eye and lead them to the important items.
- Next, dive into your process, including:
 - Research you conducted (competitive analysis, interviews, etc.)
 - Your ideation process (customer journeys, personas, use cases, etc.)
 - Your early designs (sketches, wireframes, and screen flows)
 - Your higher-fidelity designs and your prototypes, including iterations and changes you made after conducting user testing
- When relevant, discuss the main problems you faced, how you overcame them, and what the results were. Also discuss when and with whom you validated your different design decisions throughout the process. Remember, employers want to understand *why* you made the decisions you made, not just the end result.
- Showcase the final designs or prototype, ideally mocked up onto multiple devices (desktop, mobile, tablet)
- Have a brief conclusion, including what you learned and what the next stage of the project is (when applicable)

ADDITIONAL PROJECTS TO WORK ON AFTERWARDS

Here are a few other projects you can work on afterwards to expand upon the design work you did for this client. The following are types of projects a real client or employer would likely need at some point after an initial Mobile App Design project was completed:

- Single Page Marketing Website
- Marketing Campaign (announcing the new app)
- A mobile app for the same product

DESIGN RESOURCES / RELEVANT CLASSES

Finally, here is the relevant RookieUp Curriculum we'd recommend working on in conjunction with this project:

- RookieUp Curriculum: Intro to UX/UI
- RookieUp/Skillshare Curriculum: Intro to UX/UI