

CASE STUDY

NATIONBUILDER GROUPS FEATURE, 2021

SKILLS

- Qualitative research
- UX design
- UI design

TOOLS

- Dropbox Paper
- Figma
- FullStory

ARTIFACTS

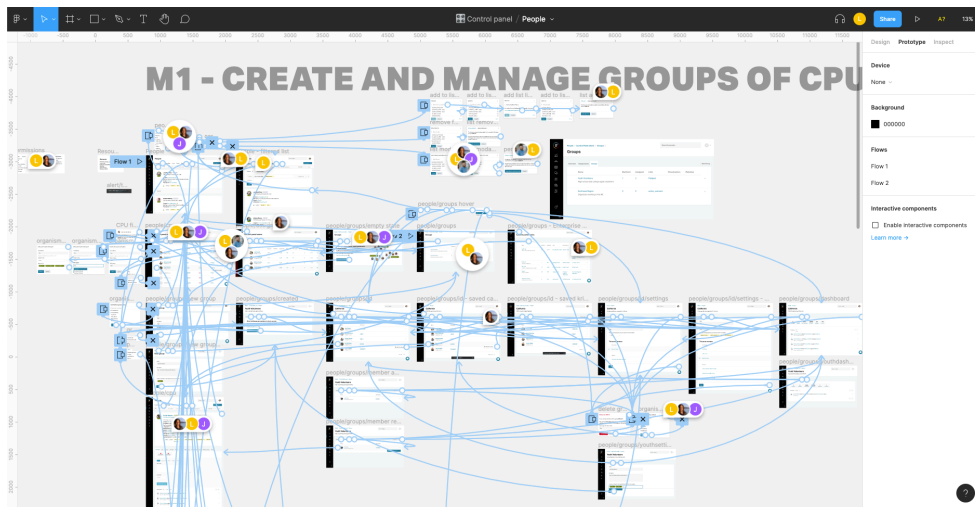
- Customer interview results
- Clickable prototype
- Detailed design specs

PROBLEM

Enterprise customers were frustrated with how our CRM limited assigning supporters to a sole “point person”, instead of a group of staffers. This led to workarounds where staffers would share passwords, or otherwise compromise information security. We considered changing our roles and permissions system to address this issue, but sought other solutions due to engineering complexity. Ultimately, we decided to expand the scope of our product to include the concept of “groups” of users who could share responsibility for supporter outreach, as well as website maintenance and other duties.

SOLUTION

I partnered with our product manager to conduct customer interviews, selecting a range of customers who our data showed had used other common workarounds for our system’s limitation. We learned what the baseline feature set would need to include in order for this feature to be successful, as well as additional context that helped us refine user-facing copy.



Prototype spaghetti is inevitable when you're usability testing a complex feature.

Working closely with product and engineering management, I helped define milestones that would allow us to iterate quickly to deliver useful improvements within our sprint cadence. I also created clickable prototypes in Figma to validate proposed workflows with stakeholders, internal resources, and customers.

Once mockups were nearing completion, I began building design specs in Dropbox Paper. These were broken out by milestone, and included edge cases, mockups, and links to existing patterns in our design system, and were cited by our engineers as “:chefs_kiss:”

Milestone 1: Create a group and add/manage members

Control panel users

Create groups to enable control panel users to share access

In addition to having individual point people who are responsible for your supporters, websites, and workflows, you can create groups of staff to manage actions in your nation.

[Learn more about groups](#)

[Create your first group](#)

1. Clicking Create your first group opens a new view (not modal)

- Name (required), Description (optional), list access (optional)
- Non-Enterprise customers can select one list for the group to access
- Enterprise customers can select multiple lists

New group

Name: California

Description:

New group

Name: California

Description:

@Jeff D same question here. Now that the rollout is Enterprise Only, what option will ...

Just the enterprise version!

Now that the rollout is Enterprise Only, what view Updated 2 months ago

Design specs in Dropbox paper, including comments.

RESULT

Because I instrumented FullStory user tracking for group creation and management on our production site, we've been able to track the steady growth of this feature among enterprise customers. We're also able to observe user sessions, helping us find opportunities to improve user affordances, clarify UI copy, and create targeted help documentation.