

What this deck contains

- What Productiv does
- What I do at Productiv and why its unique
- An example case study of work from my time here

To unlock these other thrilling deck-upgrades, lets connect !

- Live explanation in my fantastic voice
- Live demo of the case study
- The 3 critical events that lead to me becoming a designer
- My casual startups, the TEDx talk
- Snippets of my past work experience (Ernst Young, Waymo, MIT etc)
- Some cheesy drone video montages

I currently work at a company calledProductiv

## Here is what you need to know

## Productiv x Me

## Productiv

- Series C B2B startup in Palo Alto
- SaaS data analytics: New category
- Joined Feb 2020. Employee #23. Designer #2.
- Today: Backfilling 2 PM + Sole Product Designer



## Only 3% of IT executives have complete and real-time visibility into their SaaS tools



To track 100's of millions of \$ in annual recurring spend !

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Confluence (team.)	EAD-2104 Green				+ Tamara Blake	→ Maturity	e Microsoft	E3 PowerBI Pro	6/30/21		\$186,323	\$33.034	3755	3664	91	N/A	None	90 days non usage audit	N/A N/A	Yes	
Confluence (engwiki.)	EAD-2104 Green				<ul> <li>Monika Antos</li> </ul>	→ Maturity	10 Microsoft	P1	6/30/21		\$13,142	\$52,567	1470	1385	85	N/A	None	Profile review audit	N/A	Yes	
Bit.ly	EAD-2133 Yellow			Jun 25, 20202 Medium		→ Maturity	11 Microsoft	Project Online	6/30/21		\$201	\$802	3	3	0	N/A	None	90 days non usage audit	N/A	Yes	
Sli.do	EAD-2108 Yellow			Jun 28, 2020 Medium	<ul> <li>Bart Tissue</li> </ul>	Growth	12 Microsoft	Visio Online	6/30/21		\$1,587	\$6,348	46	46	0	N/A	None	90 days non usage audit	N/A	Yes	
Lucidchart	EAD-2125 Yellow		1111	Jul 2, 2020 Medium		Maturity	13 Microsoft	SQL CAL	6/30/21		\$111	\$444	1	0	1	N/A	None	90 days non usage audit	N/A	Server	
Lucidpress	EAD-2125 Green			Jul 2, 2020 Low		S Decline	Microsoft	Visio Standard	6/30/21		\$165	\$660	1	0	1	N/A	None	90 days non usage audit	N/A N/A	Yes	
SurveyMonkey	EAD-2126 Yellow			Aug 13, 2020 Medium			15 Microsoft 16 Microsoft	Visual Studio Enterprise MSDN Visual Studio Pro MSDN	6/30/21 6/30/21		\$3,741 \$5,355	\$14,964 \$21,420	1	1	0	N/A N/A	None	90 days non usage audit 90 days non usage audit	N/A N/A	Yes	
Wufoo						∿ Decline	AT Microsoft	Windows Remote Desktop CAL	6/30/21		\$1,380	\$5,520	20	20	0	N/A	None	90 days non usage audit	N/A	Yes	
Formstack	EAD-2131 Green			Aug 20, 2020 High	<ul> <li>Bart Tissue</li> </ul>	Maturity	Microsoft	Windows Server Standard	6/30/21		\$42,432	\$169,728	104	104	0	N/A	Retire	Betire	N/A	Server	
Adobe	EAD-2129 Yellow EAD-2107 Yellow				<ul> <li>Monika Antos</li> <li>James Ford</li> </ul>	→ Maturity	19 Microsoft	Windows Server Datacenter	6/30/21		\$480	\$1,920	8	8	0	N/A	Retire	Retire	N/A	Server	
Slack	EAD-2107 Tellow EAD-2100 Green			Oct 31, 2020 Figh Oct 30, 2024 Medium		→ Maturity 2 Growth	20 Okta	Okta	6/20/21		\$90,000	\$366,373	6500	6,358	142	None	Dynamic usage	Dynamic usage	None	Yes	
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TextExpander	EAD-2174 Green			Dec 9, 2020 Medium	· Bart Tissue	Maturity	Talend Inc	Talend Stitch	6/15/20		\$5,137	\$20,548	5	5	0	N/A	Dynamic usage	Dynamic usage	N/A	Yes	
Balsamiq	1			Low	*		Talend Inc	Talend MDM Platform	6/15/20		\$15,847	\$63,388	2	2	0	N/A	None	None	N/A	Yes	
Grasshopper				Low	- James Ford		27 Talend Inc	Talend MDM Runtime Servers	6/15/20		\$10,887	\$43,546	5	5	0	N/A	None	None	N/A	Yes	
efax	EAD-2110 Yellow			Low	<ul> <li>Bart Tissue</li> </ul>	> Decline	28 AT&T	Box	N/A billed monthly		\$11,340	\$45,360	150	229	0	0	90 days non usage audit	90 days non usage audit	\$22,968	Yes	
HelloFax	EAD-2114 Yellow				<ul> <li>James Ford</li> </ul>		LeanData, Inc.	Salesforce Routing Tool	N/A		\$44,000	\$174,780	700	660	40	N/A	Dynamic usage	Dynamic usage	N/A	Yes	
MailChimp				Low	<ul> <li>Bart Tissue</li> </ul>		29 90 Proofpoint	TRAP	2/1/23		\$31,000	\$135,372	7500	5800	1700	N/A	None		N/A till 2023	Yes	No
Zylo	EAD-2113 Green			Jun 16, 2020 Low	- James Ford	Decline	30 Proorpoint 31 Gartner	Gartner Subscription	1/17/21		\$40,000	156,800	4 member, 2 leader	4,2	1700	N/A	None	90 days non usage audit	N/A bil 2023	Yes	INC
Code42 (FKA CrashPlan)	EAD-2130			Aug 18, 2020 Medium	<ul> <li>James Ford</li> </ul>		32 Freshworks	Freshservice	1/10/21		\$35,000	\$174,460	274	199	75	N/A	None	Profile review audit	N/A	Yes	
Sendgrid				Low	<ul> <li>Micah /</li> </ul>		33 Zscaler	ZPA	5/18/22		\$31,000	\$146,007	6450	4400	2050	N/A	None	Profile review audit	N/A till 2022	Yes	N
IDoneThis					*		34 VMWare	WorkspaceONE	1/29/23		\$31,000	\$125,000	2417	2000	417	N/A	None		N/A till 2023	Yes	
InVision					*	S Decline	35 Amazon - AWS, Jira & Wiki	EC2	N/A		\$30,000	\$120,000	N/A	N/A	N/A	N/A	None		N/A	Server	
					*		AWS, Backups/Expensed Equipment Symanter	nt EC2, RDS, VPC, RTE53 Symantec Endpoint Protection	N/A 2/1/21		\$30,000	\$127,608	N/A 5000	N/A 4500	N/A 500	N/A N/A	None		N/A None	Server	
					*		37 Symantec 38 Logicmonitor	Monitoring	12/31/20		\$14,000 \$9,000	\$36,000	400	330	70	N/A	None		None N/A		
							Coyote Creek	Atlassian Confluence	5/4/21		\$16,000	\$63,000	10000	6500	3500	N/A	None	90 days non usage audit	N/A	Yes	
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	1-						41 Splunk	Splunk	10/17/22		\$5,000	\$21,930	20GB/day	30	-10	N/A			N/A		
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							43 Incontact Inc (4593185) 44 Oracle	RingCentral Contact Center Enterprise Database	N/A		\$291,000	\$1,164,000	N/A 24	N/A 24	N/A	N/A	Dynamic usage Retire	Dynamic usage Retire	N/A N/A	Yes	
							45 Icertis, Inc.	kertis	07/14/21		\$45,000	\$190,000	1500	458	1042	N/A	Full audit	Full audit	N/A	Yes	
							Dun & Bradstreet Inc (D&B)	Account Profiling App	N/A		\$42,000		Unlimited Users (Records based)	N/A	N/A	N/A	Dynamic usage	Dynamic usage	N/A	Server	
							ER/DR: Cloud Storage	Note: Need to convert this to Capex for DR project for Hadoop	N/A		\$25,000		Note: Need to convert a portion of this to Capex or DR project for Hadoop	N/A	N/A	N/A	Utilization Audit	Utilization Audit	N/A	Server	

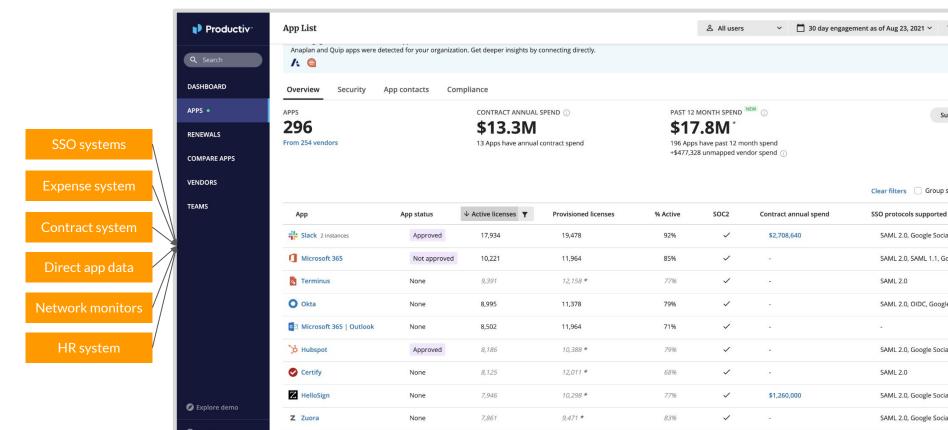
## Spreadsheets cannot: Empower CIOs / IT Orgs to focus on boosting productivity

Other things spreadsheets cannot do

- Stay up to date: someone has to update them. Almost every week
- Give visibility into actual usage / ROI
- Be used to track of enforce Security, Privacy Regulatory Compliance
- Automate workflows
- Prevent surprise SaaS bills

## **The Solution**

A SaaS Management platform. Aggregate and correlate data from multiple sources to provide visibility, insight and automated action to unlock productivity in your organization



## The challenge? We are as good as the data we get

A mix of factors like Security/Privacy postures, Compliance requirements, Legacy systems or simple unwillingness to provide data can result in lot of data permutations

Best case scenario	HR data	Single-sign-on	Expenses	Contracts	Network monitors	Direct app data
Scenario A	×	X	Expenses	Contracts	x	Direct app data
Scenario B	HR data	Single-sign-on	Expenses	Contracts	Network monitors	X
Scenario C	X	Single-sign-on	Expenses	X	Network monitors	Direct app data
	HR data	Single-sign-on	x	Contracts	X	Direct app data
	HR data	X	X	Contracts	Network monitors	Direct app data
	Х	Single-sign-on	X	Contracts	Х	Х

My role's landscape

#### Backfilling 2 Product managers + Product designer for all 4 feature teams

Product landscape I design and ship product across

## 2 Products

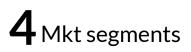
Productiv Platform Employee-facing add-on

## **3** Pricing tiers

Essentials Lite Pro

## **5** Personas

CIO / Exec Portfolio owner IT ops / App owner Vendor Ancillary



SMB Mid Market Enterprise Large Enterprise My role's challenge: How do we ...

Power real-time, compelling, and comparable insights and value to our diverse users regardless of how much data they give us?

Data complexities



Product landscape

Customer success	Gathering customer feedback, triaging incoming feature requests
GTM/Sales	Maintain competitive product edge
<b>Customer Education</b>	Partner on customer documentation and help center content
Product Marketing	Announcement pipelines
Front end Engg	Analytics + building the UI
Back End Engg	Understand data model, limitations and opportunities

Select

## **Features I shipped**

In 18 months



#### Select

## **Shipped features**

- Recommendations engine (Case Study #1)
- Navigation architecture v2.0 + new pricing tier (Case study #2)
- Persona level differentiated product experience
- App overlap landscape
- Project PEAS : New add-on product, to be launched
- Automated renewal workflows (WIP)
- Exec insights Dashboard (WIP)
- 2 add on product concepts + market validation
- Many tweaks, improvements, fixes etc !

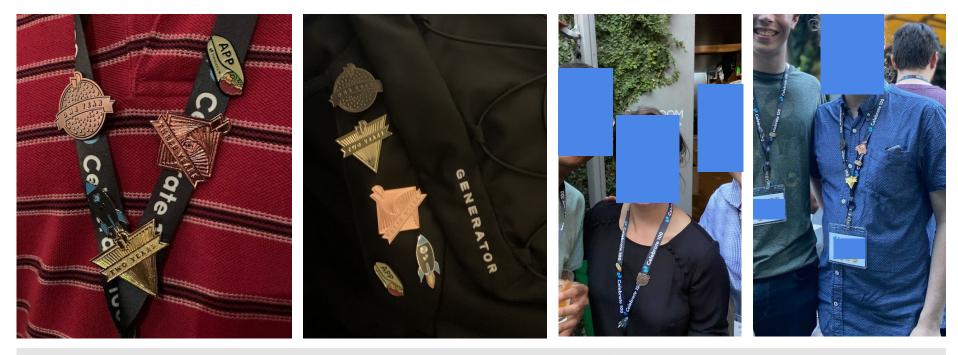
I also used to moonlight as the

## Self proclaimed Chief Swag Design Officer

Left: Cat-friendly New-hire schwag box Next: Anniversary celebration pins for employees



If I fits, I sits





Case Study #1

Productiv
Recommendations engine

Timeline: 2 months <u>Team: Me + Design Manager</u>

My scope

- Product Management
- User Validation
- Pixels + Spec
- Usability testing
- Phased rollout



#### Consider these two users from our five personas



#### An IT app owner at a large Enterprise

IT app owners are responsible for the implementation, adoption and management of a single/few apps at an org

*"I want to automate meeting compliance requirements. And nobody should have unnecessary access to tools"* 

→ Goal: Security and compliance



#### **Procurement + Finance person**

Responsible for keeping tabs on spend and \$

"We should only pay for only the # licenses we actually need"

#### $\rightarrow$ Goal: Cost savings

There exists a feature for these 2 users

## Automated workflows that reclaim licenses from inactive and/or inefficient users



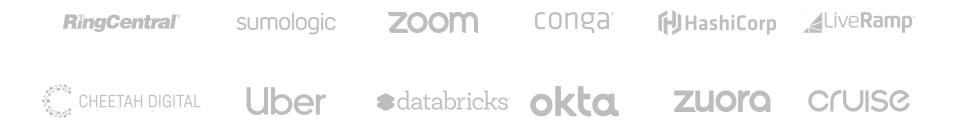
But, the problem?

## Very low adoption...

Through Customer Success managers, we spoke to some customers

What is preventing you from setting up workflows? Can you show me how you'd set up a workflow? What has your experience been with workflows?

...



### We found 2 problems in 2 categories ...

1x UX problem

1x Business/Product problem

## Users had no **preview** into what the outcome of the workflows would be

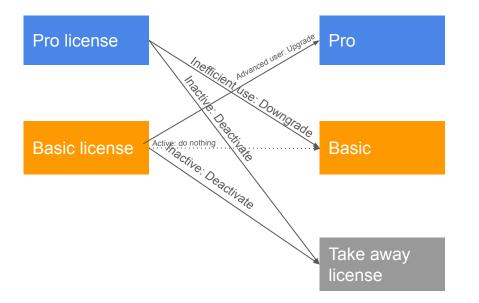
#### The MVP product had (somehow) skipped 2 steps

E2E Visibility	Visualize	Insights	Enable actions	Smart automations	Track results
$\checkmark$	??	??	$\checkmark$	$\checkmark$	$\checkmark$

The next steps...

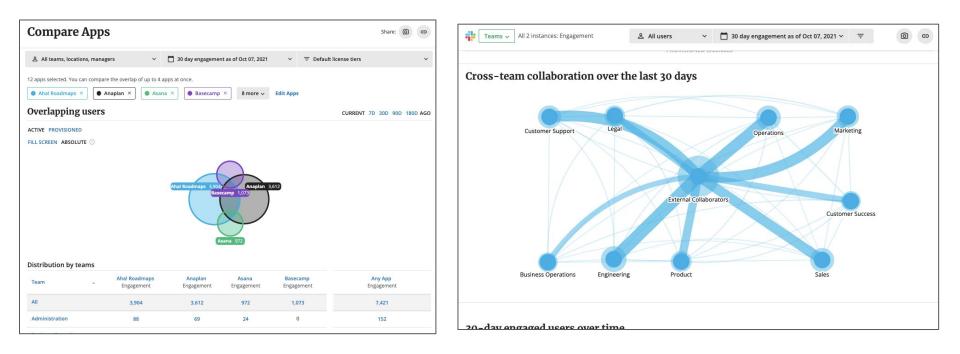
We need to **visualize the data + insights** to give the users a **live preview** of the outcome and **breakdown of the outcome** 

#### Rough diagram of what the workflows do



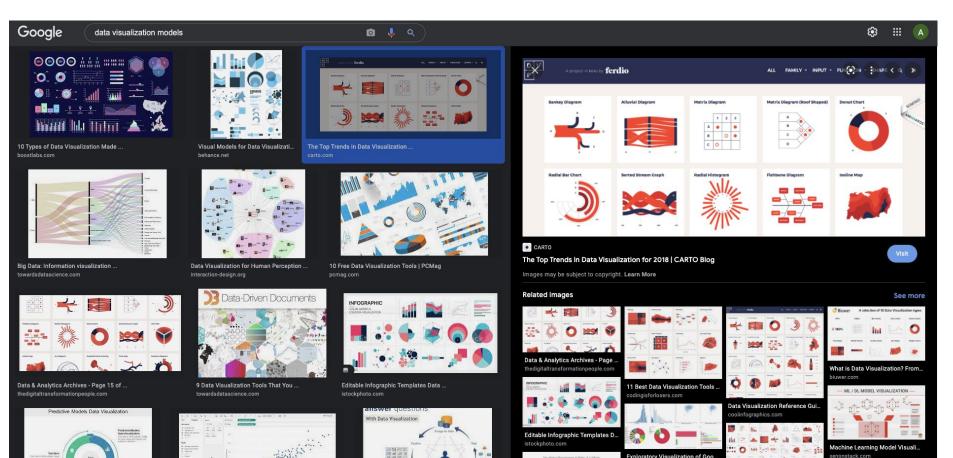
## Looking at existing data viz in the product

There was nothing we could re-use

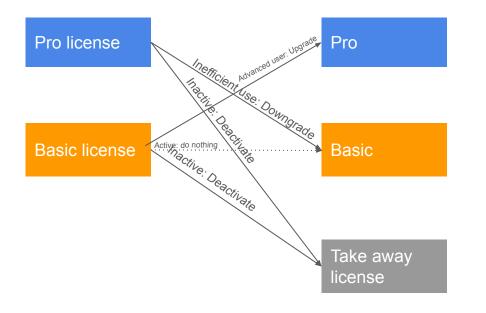


## We looked for existing data viz models

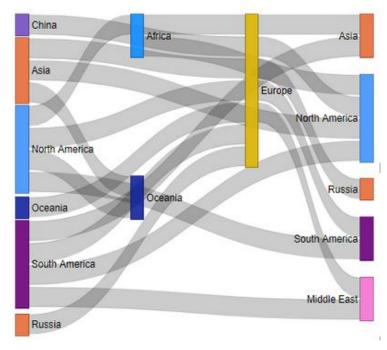
Read as: we googled all existing viz models



#### Rough diagram of what the workflows do



## $\rightarrow$ Matched Data Visualization: Sankey diagram



Example of shipping route vizualisation from powerbi.com



## Low coverage over different contract types

We only supported 1 contract type...

We needed to **exhaustively inventory** every. single. type of contract

- Contracts were a *required* data source to power these insights
- Contracts were the source for us to know things lik
  - Types and count of licenses
  - Payment terms
  - Non license costs
  - Overage charges
  - True-up mechanisms etc

We found

### 17 distinct, mutually exclusive contract types

And broke them down into 4 buckets based on customer data

## tier

User license-tier based

P0 87% customers 63% spend

## plan

Org-wide plan based

P1 65% customers 54% spend

## special

Zoom active hosts, Slack actvity etc P2 30% customers 70% spend

## consumption

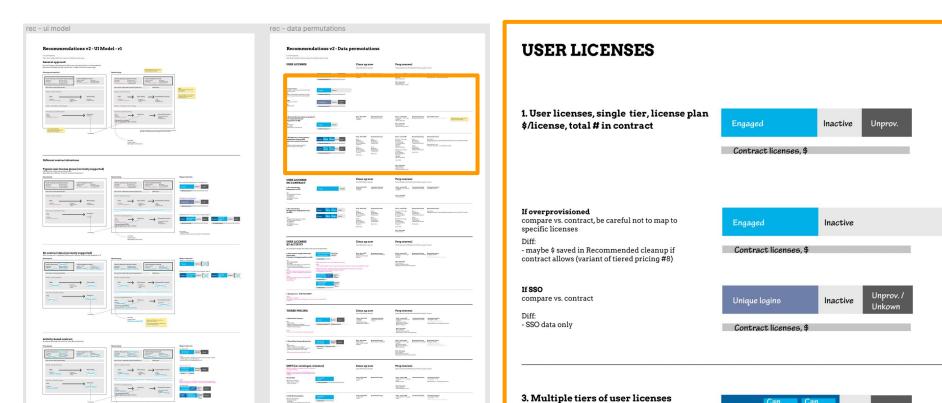
Usage of units (envelopes, Minutes, GBs etc) P3 35% customers 26% spend

- Many of them vendor/tool proprietary
- Each had 4-5 additional variables leading to more possibilities
- Classified into 4 buckets by similarity for scoping, phasing and building in partnership with Engg

#### Lets inventory

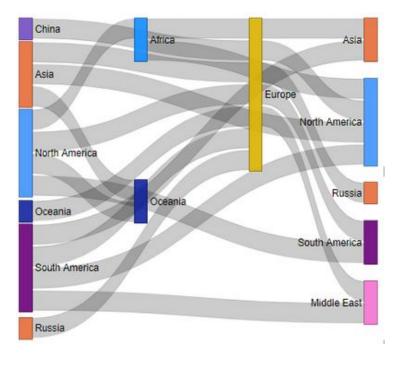
#### Every single type of contract that exists...

Spoke to customers and inventoried the nuances of all types of SaaS contracts that existed and came up with rough wireframes for the dataviz



## Let's put pixels (and a design system) to it

Objective: Create a system for the data viz which can extend and flex to the currently known and all future possible contract structures



#### The visualization **x** The data scenarios

#### **Recommendations v2 - Data permutations** School Of pieces seaders field are now to operate anon efficiently and save more USER LICENSES **Prep** renewal Clean up now license bdalff in Public date rang 2. Sume, but flat price (free or specific # Integration of South for unlimited nancement or \$2 Part-date stange Teal Transactive Impagement only (no 880) Tare A 30 appoints 10 departupes 1 departupes Tay & B.C., Report thereeses The B England M can appeals D an alterapate Faceton The D 10 supports 32 diseases 7 dispersion THODE USER LICENSES Clean up now Prep renewal NO CONTRACT Recommend on the Poll-dences

Rong-Administrative

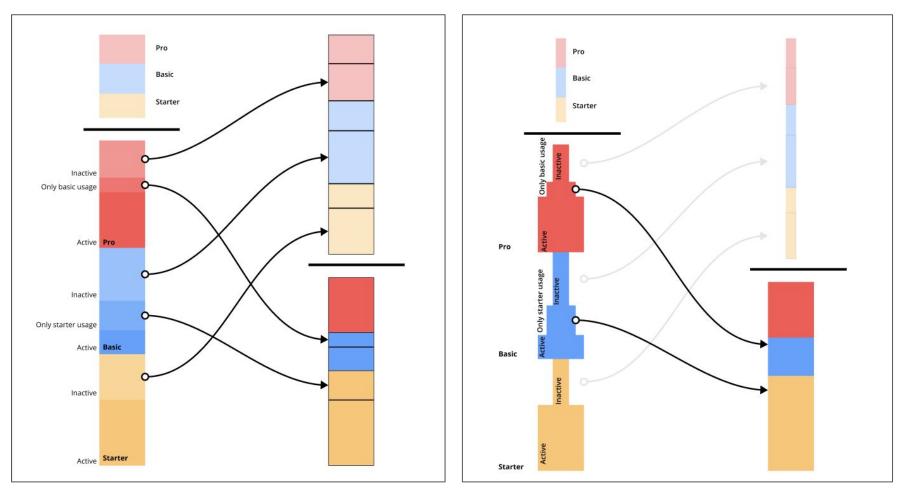
Recentmend (biane)

Hang- personal little

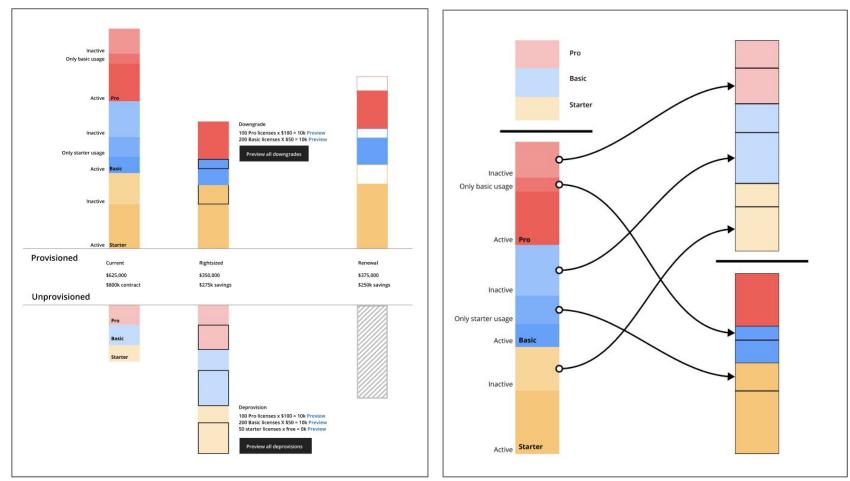
5. No contract data

# The Data viz **Exploration + Ideation**

#### Data modality: Color, Shape, Opacity, Location etc

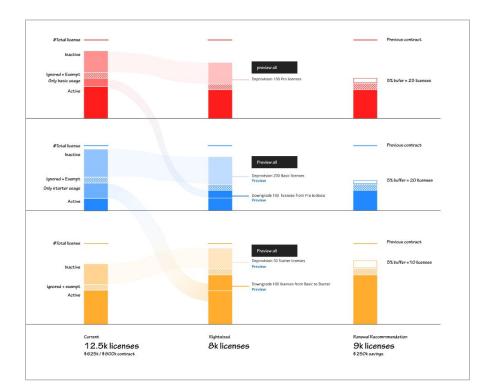


#### Visualization Mental Model: Drawdown vs re-composition

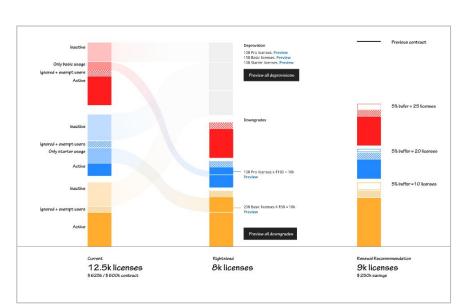


## Example: How do users think about their contracts?

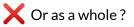
We learnt that contracts are negotiated at the tier level and that's how customer wanted their insights represented



**V** By license tier ?







# Future prep Data viz System

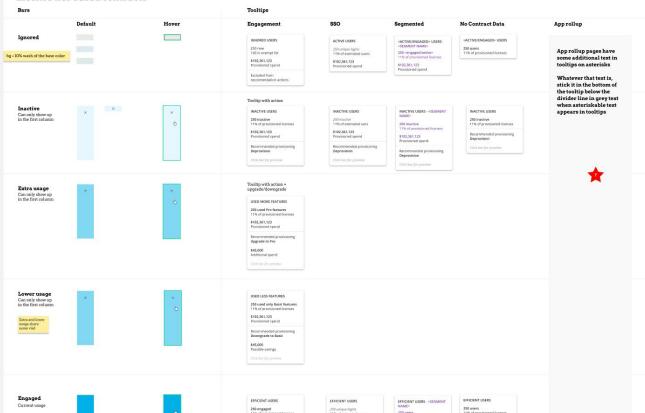
#### Building the system

Ensuring coverage over all data scenarios, zero states, error states

Designing for flexibility to allow to scale in the future. With minimal design intervention

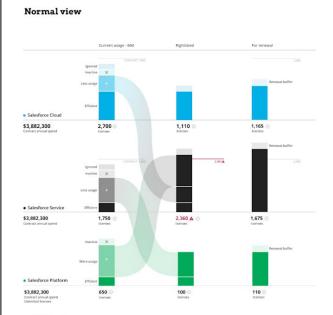
#### **Bars & tooltips**

#### License tier based contracts



Partial subsection from Engineering handoff spec

#### Putting it all together + interactions



What's different

Standard typography/style where we can, give things a little more breathing space, remove/simplify by receding supporting info

#### Typography follows standard style more closely

Typography follows standard style more closely - Larger text follows inland/3 text syling (18pc, bold/semibold), with padding/alignment tweaks - Body text is body text sine and style (14) - Diato headers follow table header style (semibold, gray, 14) - Diatoriz labels match other datoriz labels (semibold) except slightly smaller (12ps). Vertical center aligned to avoid cramming togeter at top - follow overprovisioning style elsewhere

#### Icons

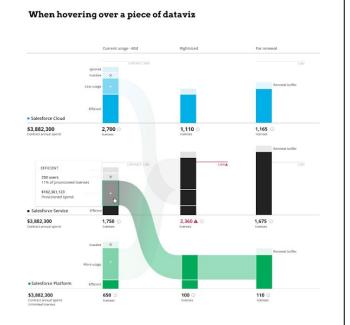
- not as many, doesn't stand out as much (supporting role), smaller to sit better in the min height standard tip icon style/color
 add circle label to license tier (to match table below)

#### Other - cleaner look with less lines

 follow graph chart styles & table styles in line color, weight, labels
 info tooltip follows standard style for title text style/color & background opacity ignored gets a pattern on top of inactive color
 Unlimited contract indicated with text only - add label to buffer

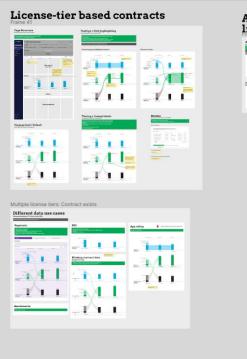
#### Sankey - not sure what's possible

- not-site what opposites
 - gradient starts/ends a little bit away from edge
 - non-symmetrical curve so you don't get a "C" effect when they cross / directionality more obvious





Recontractatio	ona v2-Datavia visaal	design		
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Activity based icenses	Consumption based license
	Converging the fund linear

Shared section relative to the entire project's final designs

Drum roll...

## **Demo time**

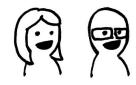
And finally, **Rolling it out** 

Other steps needed for a successful feature rollout

- Customer facing documentation
- In-product messaging
- Phased rollout + Alpha/Beta/GA feedback cycles
- Managing some contractual obligations
- Feature analytics + adoption metrics + impact metrics

## Impact: Happy customers

3 months since launch. 1 of 4 contract type support built so far



### **25%** Customers have workflows setup

Paid onboarded customers Up from 10%

#### **95%** Contract coverage

Up from 7% Includes built and planned feature

### **12%** Workflows automated

Up from 4%

#### **5x** Unrealized \$ savings for customers

Relative to customers' Productiv-contract Up from 1.3x

# Case Study #2 Navigation V2 + New Pricing tier

Timeline: 2 months

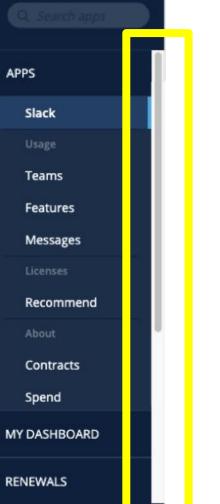
My scope

- Pixels + Spec
- Phased rollout

			Productiv <sup>®</sup>	🚏 Slack	
Productiv <sup></sup>	Slack Slack		<b>Q</b> Search apps & more	Overview Teams 🔒 Features 🔒 Messages	Recommendations
Q. Search apps	All users      30 day engagement       Data as of Apr 25, 2020	Data: Full conne	DASHBOARD	≗ All teams, All locations, All job roles ∽	🛱 30 day engagement,
APPS	Data as of Apr 25, 2020		APPS	30 DAY ENGAGED USERS	
Slack Usage	30 DAY ENGAGED USERS 6,525	74%	RENEWALS	6,525	74%
Teams	<b>0,325</b> ↓ 3% vs. 30d ago	7 4 70 of estimated tot	COMPARE APPS 🔒	↓ 3% vs. 30d ago	of estimated total users *
Features	Engaged			Engaged	

## In the beginning The product was young

<b>■</b> Productiv <sup>_</sup>	Slack Slack	Slack only shares public channel activity and does not have provisioning data.
Q. Search apps	Mall users      All users	Compare benchmarks Share -
APPS	Data as of Apr 25, 2020	
Slack Usage Teams	6,525 74%	NET CONTRACTOR CONTRACTOR
	Constitution of the Consti	- and a second se
	82817	Testing or register or re
	Change over time	
	Registry Rolly and	
Akshay Agrawal Log out	4.000	



But as we added value and features
The features became hidden

There was an actual scrollbar in the product's main navigation !

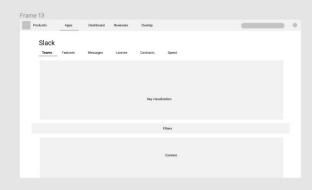
Not to mention that our core strength of slicing your data **Was poorly presented** 



#### We started exploring broad directions

#### All horizontal



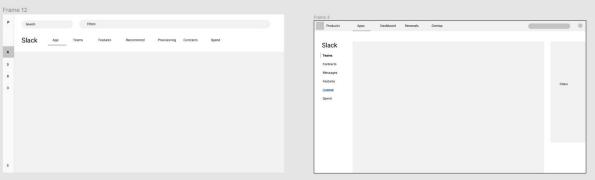


ilack Teams Feature	os Messages	License	Contracts	Spend	
				opena	

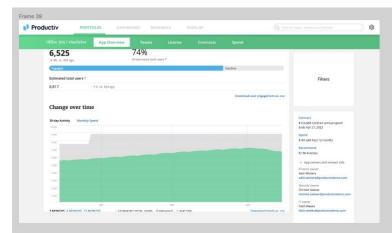
#### Horizontal pages vertical sub pages

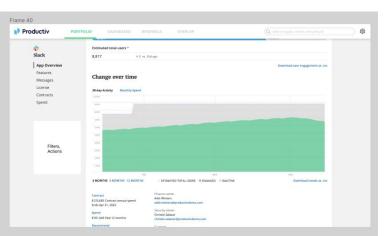
rame 8							
Productiv	Slack	Арра	Dashboard	Renewals	Overlap		
Apps	Filters						
Dashboard							
Renewals							
Overlap							

#### Vertical Pages Horizontal Sub pages



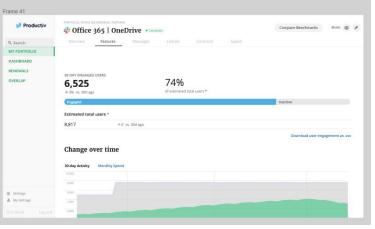
#### Narrowing it down





Frame 37

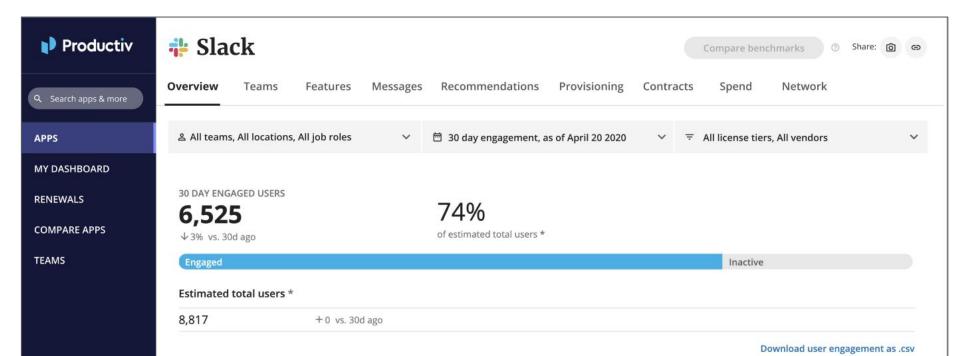




## We had a winner!

Constraints:

- 1. Make as little change as possible to achieve feature discoverability
- 2. Make a system that will scale for our future growth



#### From wireframe to final

Productiv	Slack Apps Dashboard Renewals Overlap	Productiv  Slack  Compare benchmarks  Share:  Overview  Teams  Features  Messages  Recommendations  Provisioning  Contracts  Spend  Network
	Filters	Q. Search apps & more
Apps		APPS 🕹 All teams, All locations, All job roles 🗸 🖆 30 day engagement, as of April 20 2020 🗸 🗟 All license tiers, All vendors 🗸
Dashboard		MY DASHBOARD
Renewals		RENEWALS
Overlap		COMPARE APPS
	Horizontal pages vertical sub pages	TEAMS
		<ul> <li>§) Settings</li> <li>e</li> </ul>
		د په

#### Let's create a system for this now

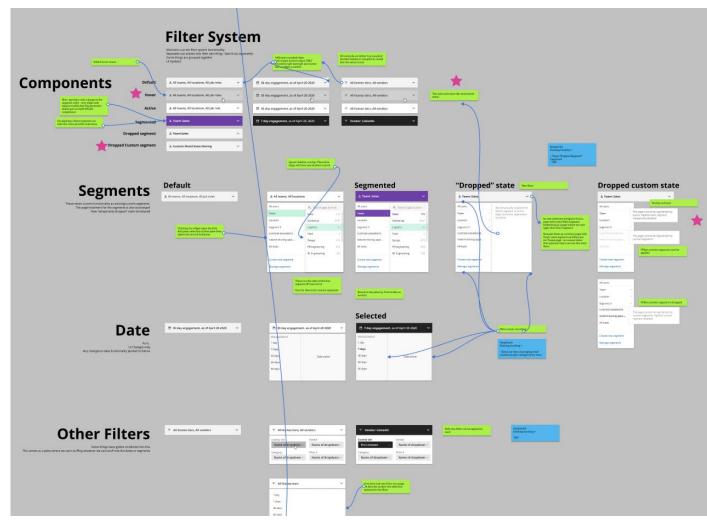
There were 4 clear components that needed coverage for all data scenarios

Productiv <sup>.</sup>	Slack © Share: (2) (2)
<b>Q</b> Search apps & more	Overview Teams Features Messages Recommendations Provisioning Contracts Spend Network
DASHBOARD	≗ All teams, All locations, All job roles ∨ 自 30 day engagement, as of April 20 2020 ∨ 로 All license tiers, All vendors ∨
APPS	
RENEWALS	🕹 All users V 🛱 30 day engagement, as of April 20, 2020 V 🗧 🙆 🖙
COMPARE APPS 🔒	
VENDORS	
TEAMS 🔒	
Ø Explore demo	
⑦ Help center	
鑗 Settings	
옾 Jamie	

#### Building the system

Ensuring coverage over all data scenarios, zero states, error states

Designing for flexibility to allow to scale in the future. With minimal design intervention



#### Continuing...

Mini Filter bar		→Page header
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Right before wrap up: Company decides to add a freemium pricing tier...

# Extending the Nav Architecture to accommodate the freemium states

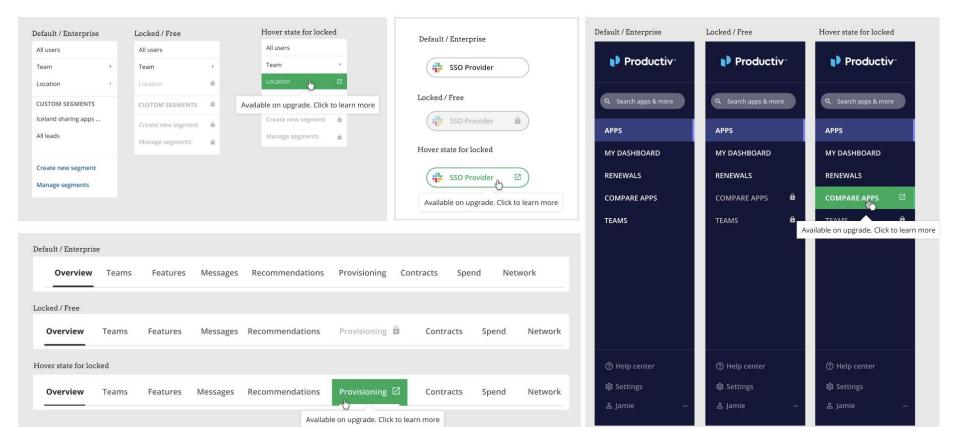
### Blocking off access to premium features

The navigation needed to communicate to users what was vs what wasn't in their package

Default / Enterpr	ise								
Overview	Teams	Features	Messages	Recommendations	Provisioning	Contracts	Spend	Network	
Locked / Free									
Overview	Teams	Features	Messages	Recommendations	Provisioning I	Contra	acts Sp	end Ne	etwork
Hover state for lo	ocked								
Overview	Teams	Features	Messages	Recommendations	Provisioning (	Contra	acts Sp	end Ne	etwork
				Availab	le on upgrade. Click	to learn more			

## Applying to the rest of the design system

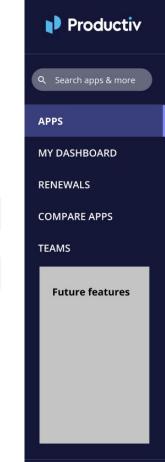
Extending it to the rest of the design system was a separate project, but sharing some relevant subsections here



## And finally, **Project impact**

- Easier to discover product features → more value delivered to customers
- Built-in flexibility for future extensions
- Tonnes of small visual improvements

# 3 groups ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ▲ All teams, All locations, All job roles ✓ ④ → ▲ All teams, All locations, All job roles ✓ ④ →



## My overall impact



Since Feb 2020 (in ~18 months)

## Cumulative / Overall impact

**8x** Customer count

Org wide shared metric

**5.3x Revenue** Org wide shared metric



+55% Base license price



+34% Add-on product \$ upsell during beta



