CHALLENGE

Marketing staff in Toyota's North American headquarters were manually routing materials for marketing and legal approvals, and gathering feedback on a spreadsheet to send back to the agencies that created the materials. They wanted a way to streamline this process and take it online.

SOLUTION

I designed a web application to facilitate and improve the efficiency of the process of routing proofs and gathering feedback.

MY ROLE

- Project lead
- Business analysis
- System architecture
- Translated business needs into development requirements
- UX/UI design
- Technical development oversight
- Documentation and user training/support

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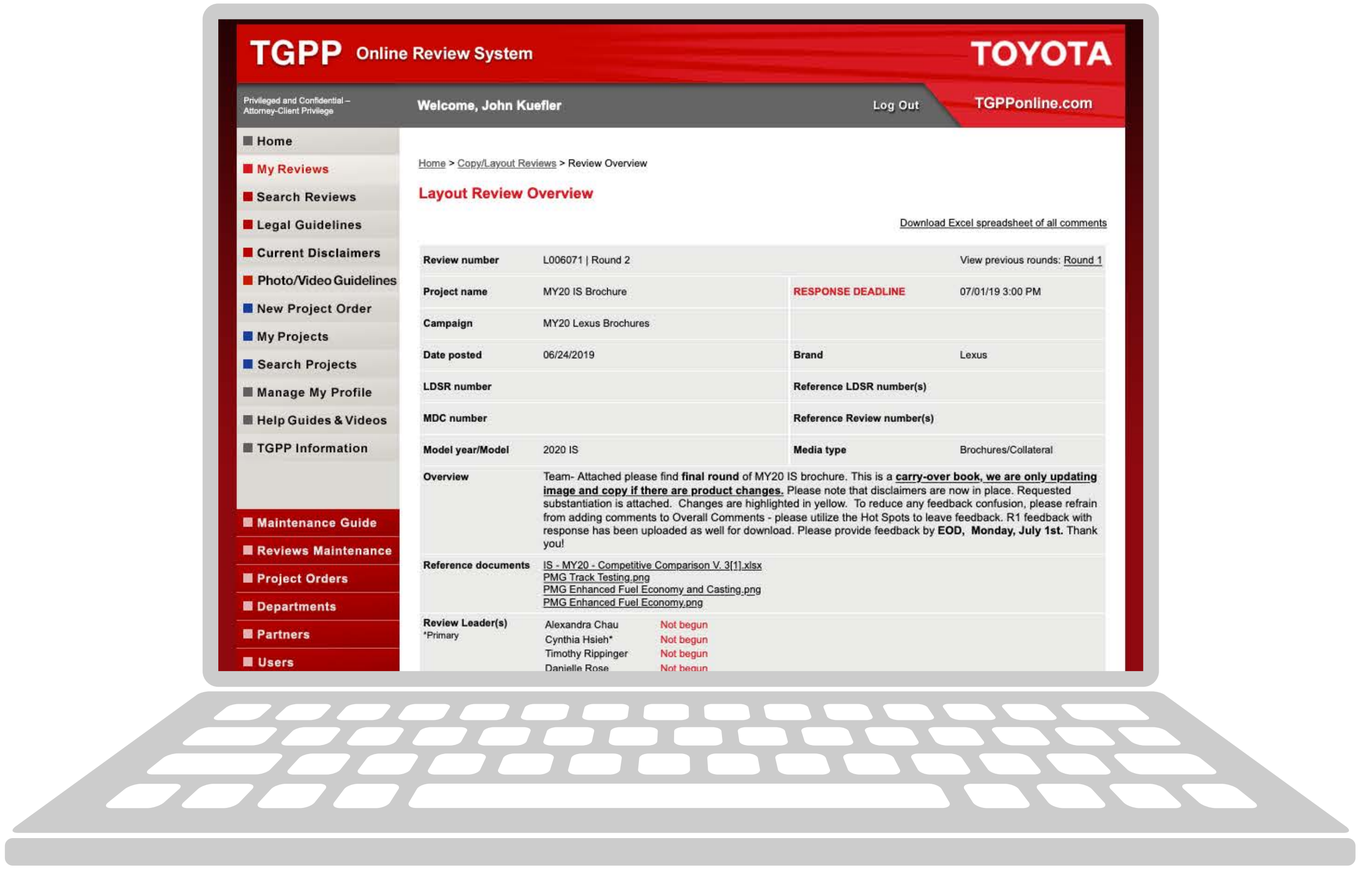
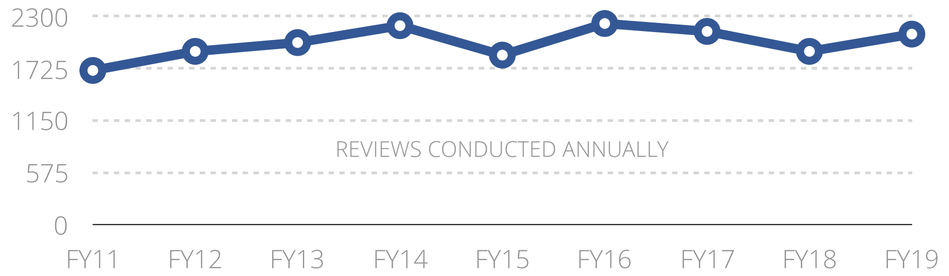
FEATURES

- The system allows for electronic routing of materials to legal and other Toyota associates, and collecting reviewers' feedback and approvals.
- This application is the official system mandated by the Toyota legal department. All public-facing Toyota and Lexus marketing/communications materials, whether developed internally or by an agency, must be routed to the legal staff using this tool.
- About 2,000 reviews per year are sent through the system.





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USER FLOW

- Users who want to distribute proofs for review use a four-step wizard to describe the project, select reviewers, upload the proof, annotate it, and send notifications to participants.
- They set deadlines for feedback with optional reminders for reviewers who are not finished before the deadline.
- Reviewers click from the email notifications to the review detail, log in and leave comments and mark approved as is, approved with comments or not approved.
- When reviewers are finished, the system automatically gathers their feedback on a summary page as well as on a downloadable spreadsheet.

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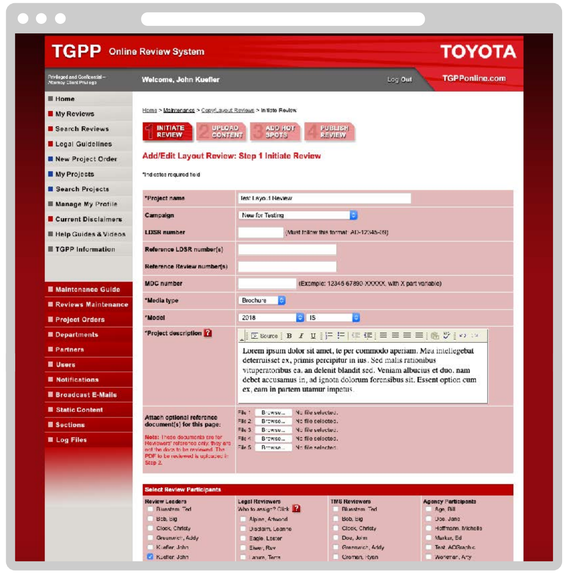
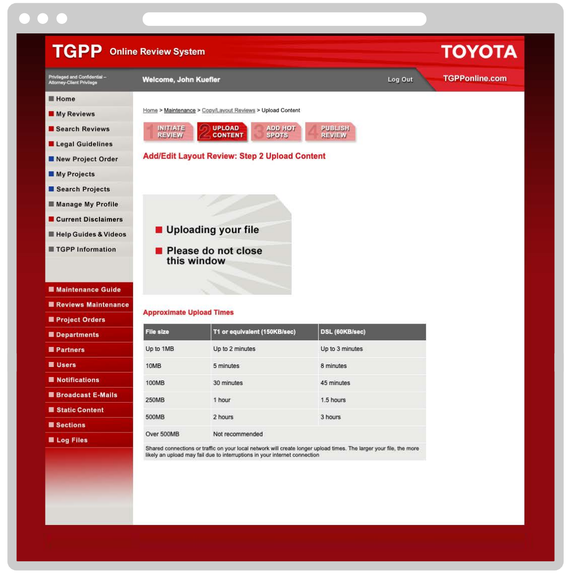
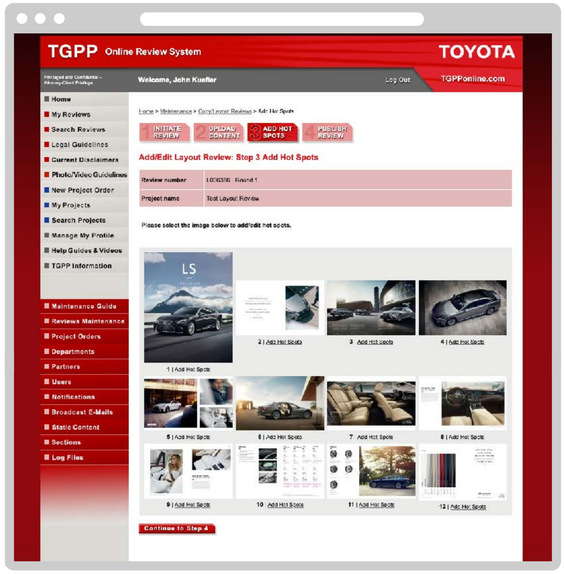
STEP-BY-STEP WIZARD



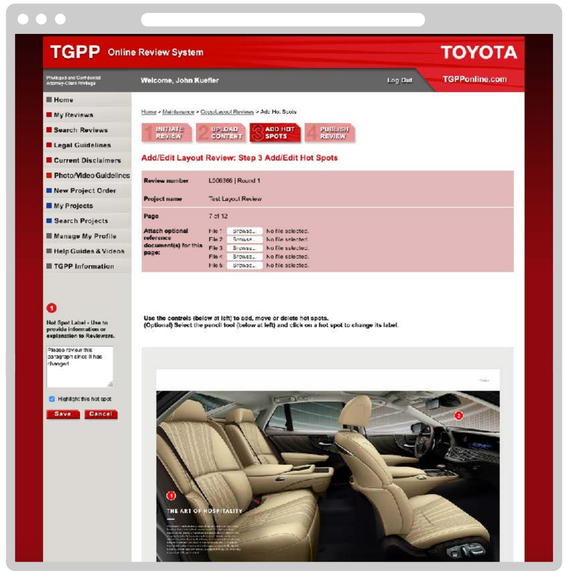
1 REVIEW INFO AND REVIEWER SELECTION



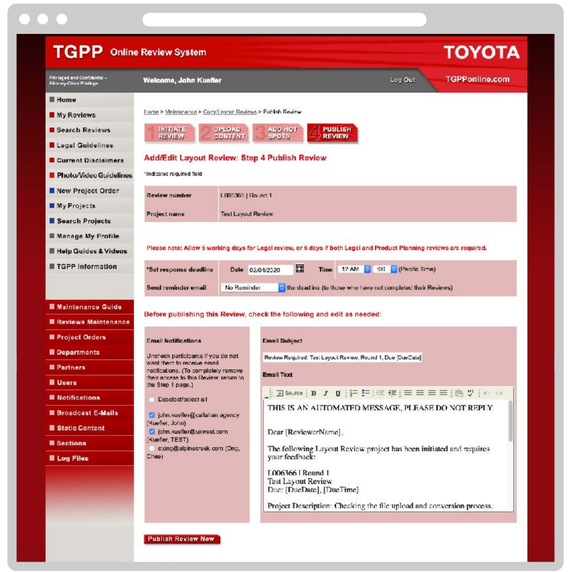
2 UPLOAD FILE TO BE REVIEWED



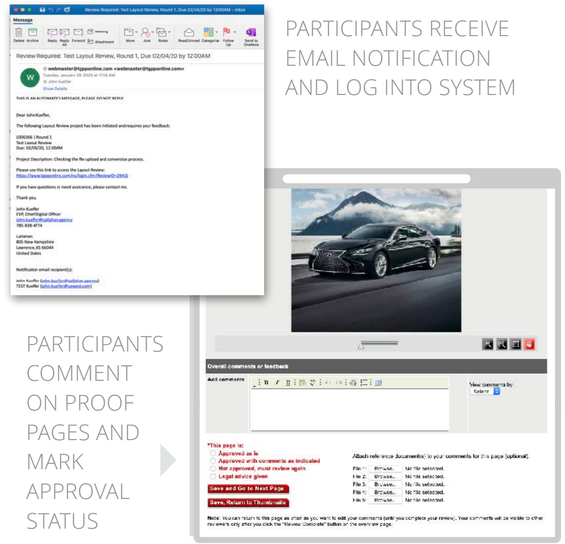
3A SYSTEM CONVERTS PDF TO THUMBAILS



3B ADD REFERENCE DOCS AND ANNOTATIONS



4 SET DEADLINE AND SEND NOTIFICATIONS



PARTICIPANTS RECEIVE EMAIL NOTIFICATION AND LOG INTO SYSTEM

PARTICIPANTS COMMENT ON PROOF PAGES AND MARK APPROVAL STATUS

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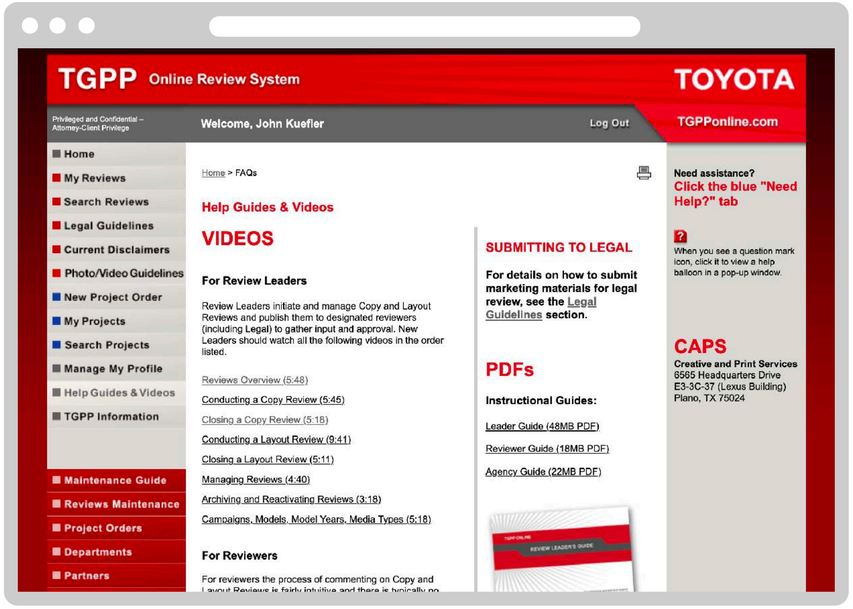
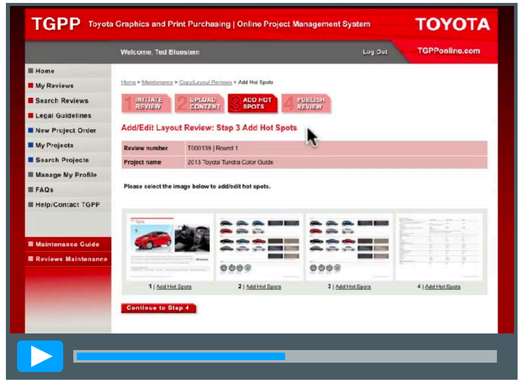
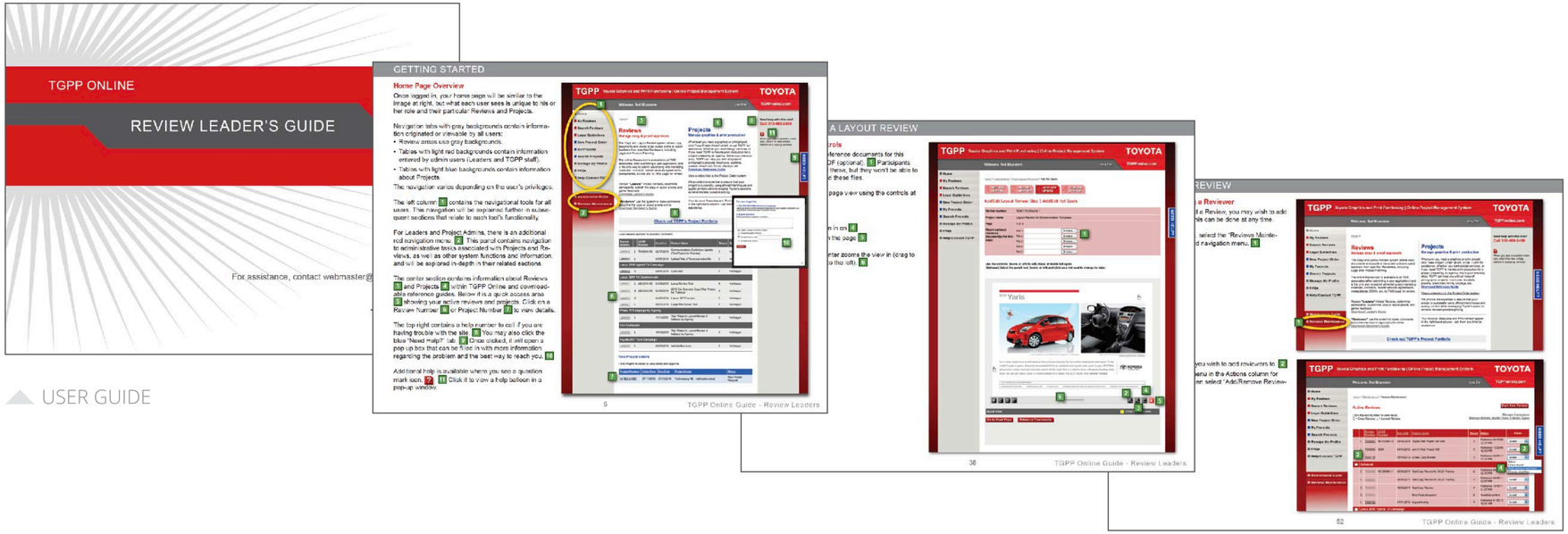
USER TRAINING

- I was responsible for the development of user training materials.
- These were produced as a series of tutorial videos and downloadable PDF guides, all available on the site.
- I've conducted numerous in-person and online user training sessions.



USER TRAINING VIDEOS





USER GUIDE

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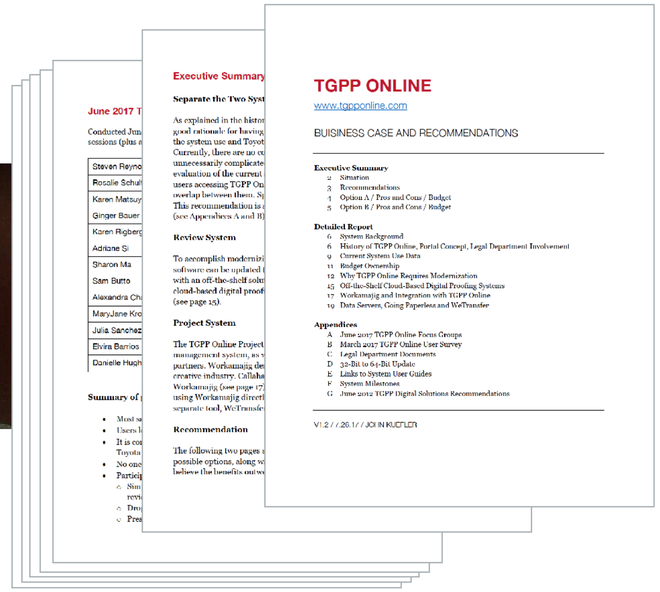
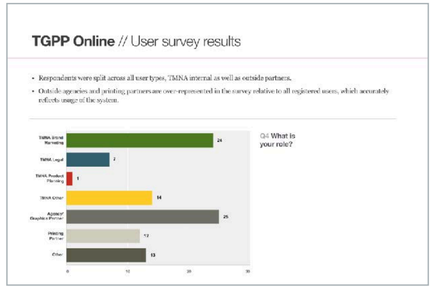
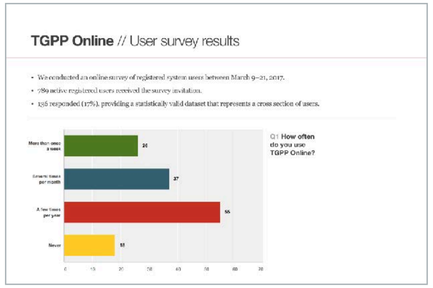
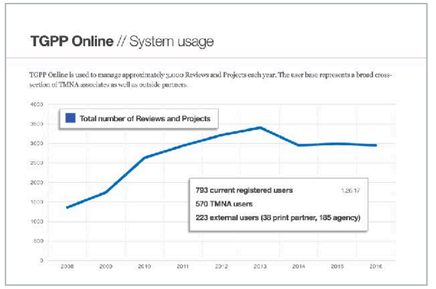
USER RESEARCH

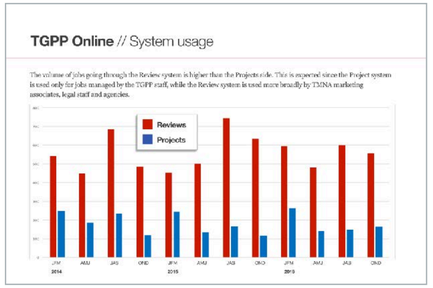
- Over time since its launch in 2009, the review system had many features added which made it more and more complex for users.
- I conduct user focus groups and online surveys in 2017-18 to assess usage and gather suggestions for improvements.
- I wrote a summary of the findings and made recommendations for improvements, including updating the UI and user flow for a more intuitive experience and removing obsolete features to simplify the system.

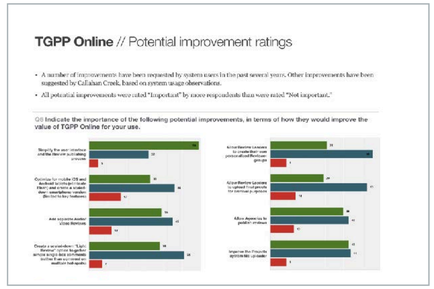


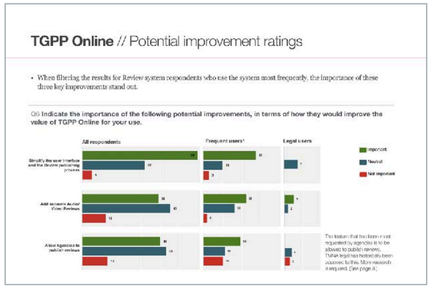


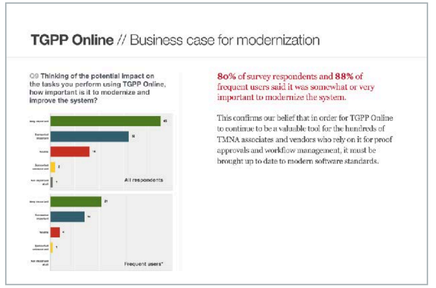


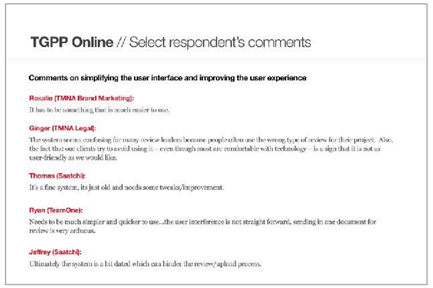












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UX/UI UPDATE

- Based on the user feedback and my own heuristic evaluations, a new UI design is in progress.

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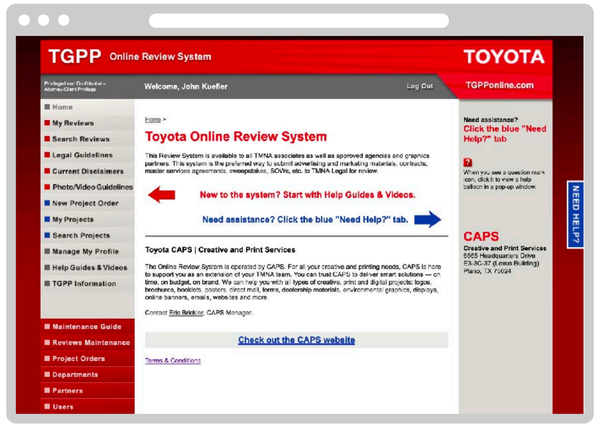
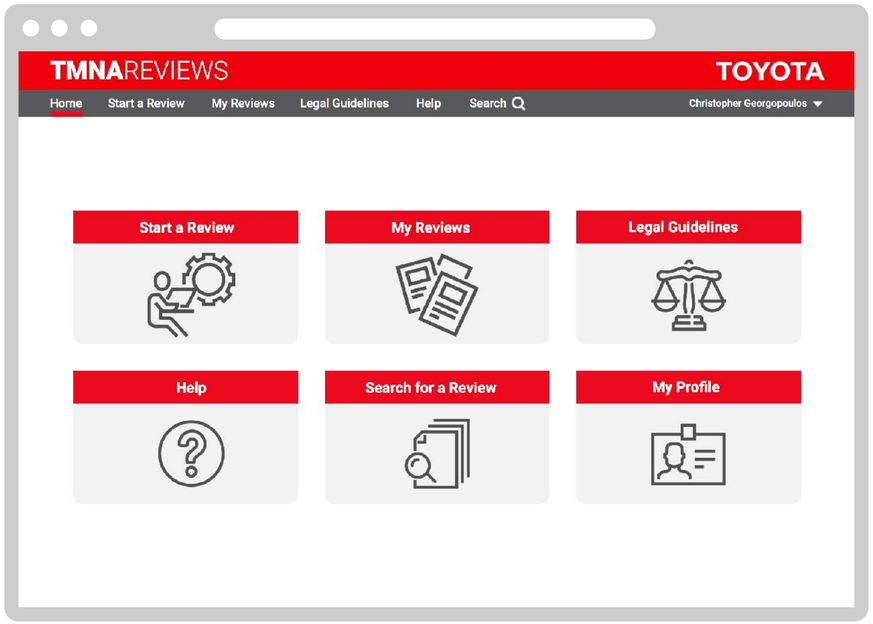
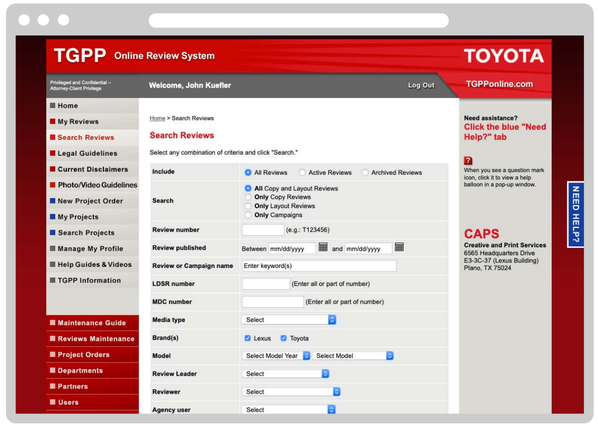
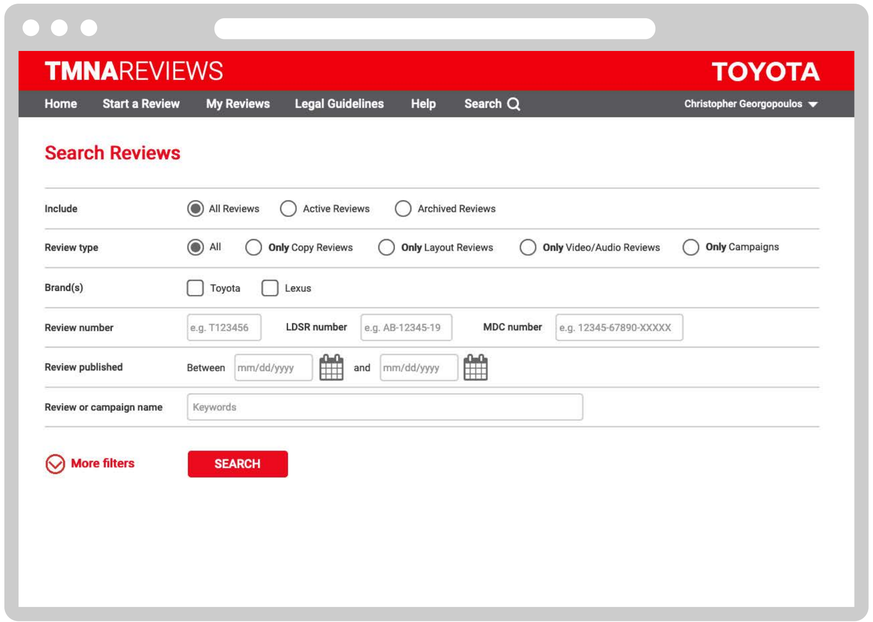
UI UPDATE

CURRENT HOME PAGE





AXURE PROTOTYPE OF UI UPDATE

UI UPDATE

CURRENT SEARCH PAGE