

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.

JOHN KUEFLER

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





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.



2300

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TGPP Online	Review System				ΤΟΥΟΤΑ
vileged and Confidential – tomey-Client Privilege	Welcome, John Ku	efler		Log Out	TGPPonline.com
Home					
My Reviews	Home > Copy/Layout Rev	<u>iews</u> > Review Overvie	w		
Search Reviews	Layout Review C	verview			
Legal Guidelines				Downloa	d Excel spreadsheet of all comments
Current Disclaimers	Review number	L006071 Round 2			View previous rounds: Round 1
Photo/Video Guidelines	Project news	MY20 IS Brochure	RESPONSE		
New Project Order	Project name	MIY20 IS Brochure	RESPONSE	DEADLINE	07/01/19 3:00 PM
My Projects	Campaign	MY20 Lexus Brochur	es		
Search Projects	Date posted	06/24/2019	Brand		Lexus
Manage My Profile	LDSR number		Reference L	DSR number(s)	
Help Guides & Videos	MDC number		Reference R	eview number(s)	
TGPP Information	Model year/Model	2020 IS	Media type		Brochures/Collateral
	Overview	image and copy if substantiation is atta	ase find final round of MY20 IS brochure. There are product changes. Please note the ached. Changes are highlighted in yellow. The state of the overall Comments - please utilize the state of the state	hat disclaimers ar To reduce any fe	e now in place. Requested edback confusion, please refrain
Maintenance Guide		response has been	uploaded as well for download. Please prov		
Reviews Maintenance	Reference documents	you! IS - MY20 - Competit	ive Comparison V. 3[1].xlsx		
Project Orders		PMG Track Testing.pr			
Departments		PMG Enhanced Fuel	Economy.png		
Partners	Review Leader(s) *Primary	Alexandra Chau Cynthia Hsieh*	Not begun Not begun		
Users		Timothy Rippinger	Not begun Not begun		



ΤΟΥΟΤΑ

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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4 SET DEADLINE AND SEND NOTIFICATIONS





USER TRAINING

JOHN KUEFLER

- ► 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.

UXWEST

	Review System
Privileged and Confidential – Attomey-Client Privilege	Welcome, John Kuefler
Home	
My Reviews	Home > FAQs
Search Reviews	Help Guides & Videos
Legal Guidelines	MDEOO
Current Disclaimers	VIDEOS
Photo/Video Guidelines	For Review Leaders
New Project Order	
My Projects	Review Leaders initiate and manage Copy and Layout Reviews and publish them to designated reviewers (including Legal) to gather input and approval. New
Search Projects	Leaders should watch all the following videos in the orde listed
Manage My Profile	
Help Guides & Videos	Reviews Overview (5:48) Conducting a Copy Review (5:45)
TGPP Information	Closing a Copy Review (5:18)
	Conducting a Layout Review (9:41)
	Closing a Layout Review (5:11)
Maintenance Guide	Managing Reviews (4:40)
Reviews Maintenance	Archiving and Reactivating Reviews (3:18)
Project Orders	Campaigns, Models, Model Years, Media Types (5:18)
Departments	For Reviewers
Partners	For reviewers the process of commenting on Copy and



	ΤΟΥΟΤΑ
Log Out	TGPPonline.com
Ē	Need assistance? Click the blue "Need Help?" tab
SUBMITTING TO LEGAL For details on how to submit marketing materials for legal review, see the <u>Legal</u> <u>Guidelines</u> section.	When you see a question mark icon, click it to view a help balloon in a pop-up window.
PDFS Instructional Guides: Leader Guide (48MB PDF) Reviewer Guide (18MB PDF)	CAPS Creative and Print Services 6565 Headquarters Drive E3-3C-37 (Lexus Building) Plano, TX 75024
Agency Guide (22MB PDF)	

3

USER TRAINING VIDEOS

	Welcome, Ted Bl	uestern		Log Out	TGPPonline.com
II Home					
My Reviews	Home > Maintenance >	CopylLeyout Rev	iews > Add Hot Spots		
Search Reviews	INITIATE REVIEW	2 UPLOAD	S ADD HOT SPOTS	UBLISH	
Legal Guidelines	and the stand	10000 200			
New Project Order	Add/Edit Layou	t Review: S	tep 3 Add Hot Spots	•	
My Projects	Review number	T000139 R	ound 1	1.	
Search Projects	Project name	2013 Toyota	Tundra Color Guide		
II Manage My Profile					
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Home Page Overview

Once logged in, your home page will be similar to the image at right, but what each user sees is unique to his her role and their particular Reviews and Projects.

Navigation tabs with gray backgrounds contain informa-tion originated or viewable by all users: • Review areas use gray backgrounds. • Tables with light red backgrounds contain information entered by admin users (Leaders and TOPP staff).

 Tables with light blue backgrounds contain information about Projects. The navigation varies depending on the user's privileges.

The left column contains the navigational tools for all users. This navigation will be explained further in subsequent sections that relate to each tool's functionality

For Leaders and Project Admins, there is an additional red navigation menu. 2 This panel contains navigation to administrative tasks associated with Projects and Re-views, as well as other system functions and information, and will be explored in-depth in their related sections.

The center section contains information about Reviews and Projects within TGPP Online and download-able reference guides. Below it is a guick access area showing your active reviews and projects. Click on a Review Number of or Project Number to view details.

The top right contains a help number to call if you are having trouble with the site. 10 You may also click the blue "Need Help?" tab. 10 Once clicked, it will open a pop up box that can be filled in with more information regarding the problem and the best way to reach you.

Additional help is available where you see a question mark icon. 👔 🔟 Click it to view a help balloon in a





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.



TGPP Online // User survey results



TGPP Online // Potential improvement ratings

A number of improvements have been requested by system users i suggested by Callahan Creek, based on system usage observations. All potential improvements were rated "Important" by more respondents than were rated "Not important."



JOHN KUEFLER



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Executive Summary

Separate the Two Sys

As explained in the histo good rationale for having the system use and Toyot Currently, there are no co nnecessarily complicate evaluation of the current users accessing TGPP On overlap between them. Sp This recommendation is (see Appendices A and B)

Review System To accomplish moderniz

software can be updated with an off-the-shelf solu cloud-based digital proof (see page 15).

Project System

The TGPP Online Proje management system, as v partners. Workamajig des creative industry. Callaha Workamajig (see page 1) using Workamajig direc separate tool, WeTransfe

Recommendation The following two pages

possible options, along we believe the benefits out we

TGPP ONLINE

www.tgpponline.com

BUISINESS CASE AND RECOMMENDATIONS

Executive Summary

- 2 Situation 3 Recommendations
- 4 Option A / Pros and Cons / Budget 5 Option B / Pros and Cons / Budge

Detailed Report

- 6 System Background
 6 History of TGPP Online, Portal Concept, Legal Department Involvement
- Current System Use Data 11 Budget Ownership
- 12 Why TGPP Online Requires Modernization 15 Off-the-Shelf Cloud-Based Digital Proofing Systems
- Workamajig and Integration with TGPP Online
 Data Servers, Going Paperless and WeTransfer

- Appendices A June 2017 TGPP Online Focus Groups
- B March 2017 TGPP Online User Survey
- C Legal Department Docur D 32-Bit to 64-Bit Update E Links to System User Guides
- F System Milestones
- G June 2012 TGPP Digital Solutions Recommendation

V1.277.26.177 JOHN KUEFLER

• We conducted an online survey of registered system users between March 9-21, 2017. 789 active registered users received the survey invitation · 136 responded (17%), providing a statistically valid dataset that represents a cross section of users. Q1 How often do you use TGPP Online? 10 25 30 40 50 80 70







TGPP Online // Business case for modernization

©9 Thinking of the potential impact on the tasks you perform using TGPP Online how important is it to modernize and improve the system?



80% of survey respondents and 88% of frequent users said it was somewhat or very important to modernize the system.

This confirms our belief that in order for TGPP Online to continue to be a valuable tool for the hundreds of TMNA associates and vendors who rely on it for proof approvals and workflow management, it must be brought up to date to modern software standards

TGPP Online // System usage

The volume of jobs going through the Review system is higher than the Projects side. This is expected since the Project system is used only for jobs managed by the TGPP staff, while the Review system is used more broadly by TMNA marketing associates, legal staff and agencies.



TGPP Online // Select respondent's comments

Comments on simplifying the user interface and improving the user experience

Rosalie (TMNA Brand Marketing): It has to be something that is much easier to use

Ginger (TMNA Legal):

e system seems confusing for many review leaders because people often use the wrong type of review for their project. Also, the fact that our clients try to avoid using it - even though most are comfortable with technology - is a sign that it is not as user-friendly as we would like.

Thomas (Saatchi)

It's a fine system, its just old and needs some tweaks/improvement.

Ryan (TeamOne):

Needs to be much simpler and quicker to use...the user interference is not straight forward, sending in one document for review is very arduous.

Jeffrey (Saatchi):

Ultimately the system is a bit dated which can hinder the review/upload process.







UX/UI UPDATE

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





CURRENT SEARCH PAGE

Privileged and Confidential – Attorney-Client Privilege	Welcome, John Kuefler	
Home		
My Reviews	Home > Search Reviews	
Search Reviews	Search Reviews	
Legal Guidelines	Select any combination of crite	ria and click "Search."
Current Disclaimers	Include	All Reviews Active Reviews Archive
Photo/Video Guidelines		All Copy and Layout Reviews
New Project Order	Search	Only Copy Reviews Only Layout Reviews
My Projects		Only Campaigns
Search Projects	Review number	(e.g.: T123456)
Manage My Profile	Review published	Between mm/dd/yyyy and mm/dd/yyyy
Help Guides & Videos	Review or Campaign name	Enter keyword(s)
TGPP Information	LDSR number	(Enter all or part of number)
	MDC number	(Enter all or part of number)
Maintenance Guide	Media type	Select
Reviews Maintenance	Brand(s)	🛛 Lexus 🛛 Toyota
Project Orders	Model	Select Model Year 💿 Select Model 💿
Departments	Review Leader	Select
Partners		Select

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?" tab	Review type	All Only Copy Reviews Only Layout Reviews Only Video/Audio Reviews Only Campaigns
rou see a question mark ck it to view a help in a pop-up window.	Brand(s)	Toyota Lexus
PS ve and Print Services	Review number	e.g. T123456 LDSR number e.g. AB-12345-19 MDC number e.g. 12345-67890-XXXXX
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	Review or campaign name	Keywords
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