

Automations UI/Email Editor Overhaul

Feature Summary - UX Problems, Solutions & Stories

Problem: The Automations area is built in Rails and uses old styling that is inconsistent with the new design system. The page functionality is poor, and causes preventable errors and confusion when users are editing settings and email content. In addition, the current email editor is clunky and outdated; the new, more robust editor that has been implemented for Broadcasts should be applied to this area of the app as well.

Solution: The Automations area will be re-built using React, so that the new design system components can be properly implemented. The UI/UX will be re-examined to create a clearer, more intuitive experience, while keeping the overall structure of the page similar to the original for the MVP. To accommodate the addition of the new email editor, the full Automations user flow/experience will be examined and adjusted accordingly.

A few job story examples:

- *“When using Jilt, I need to use the same editor for all emails, so I can avoid being confused about how to perform an action in one editor vs the other.”*
- *“When using Jilt, I need to see consistent styling and user experiences across the app, so I can be confident that I am investing in a professional product.”*

User Interface Design Process

Phase 1 - Preliminary user research & reviewing the pitch

I received a detailed feature pitch that included relevant UX research, MVP requirements, and acceptance criteria. This pitch was reviewed by myself (design), other product managers, and the engineering team.

In addition, I reviewed ~100 user recordings via [Hotjar](#), and compiled a report that identified key areas our users struggled with. Feedback from user interviews and feedback collected by the support team was also compiled. This information was included in the pitch discussion.

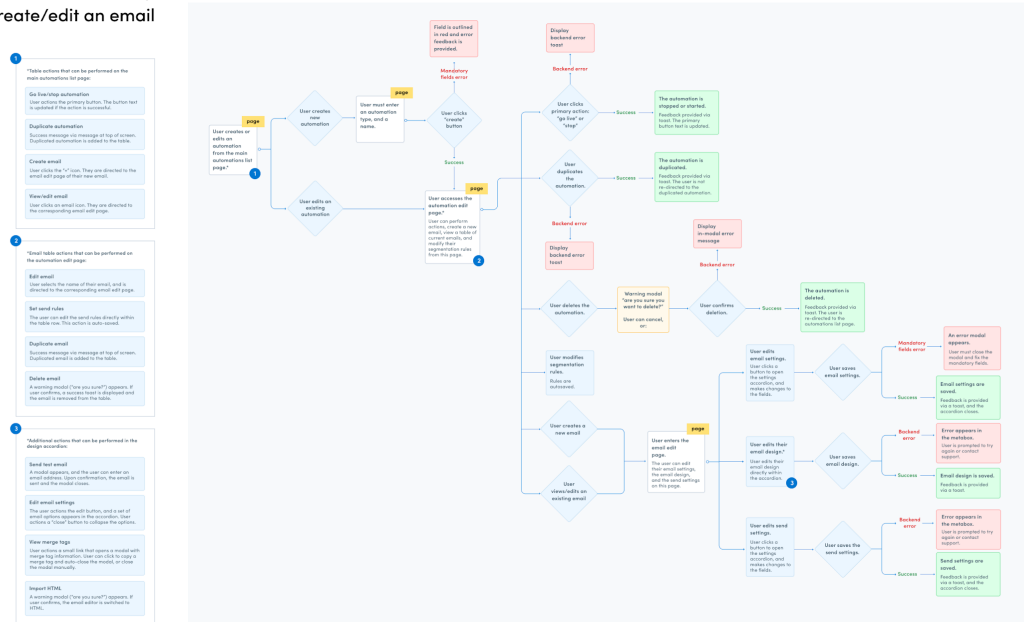
Once outstanding pitch questions were answered, I was assigned a design story in [Clubhouse](#) that included design-specific acceptance criteria so that I could begin exploring the UI/UX.

Phase 2 - User flows

The product manager had compiled a few low-fidelity mockups outlining some initial flow ideas, so the next step was to examine them and create a user flow. I created the flow below, taking into account the Automation creation process, email editing process, and actions that we were looking to surface on higher-level pages to enhance the user experience.

Full automations flow: 4 pages

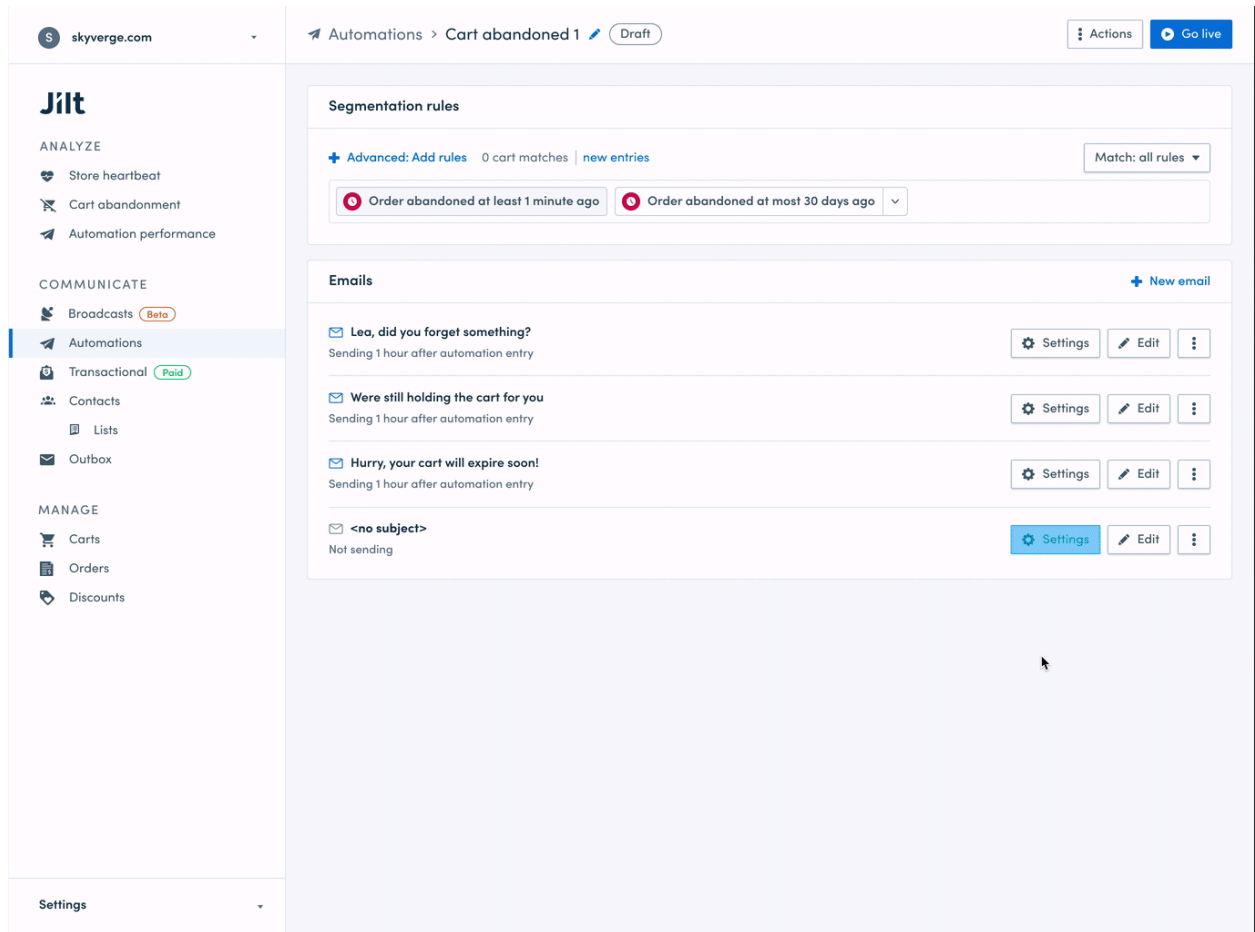
Create/edit an automation,
create/edit an email



A detailed user flow outlining the updated Automations and email editor experience.

Phase 3 - Creating high-fidelity mockups and prototypes

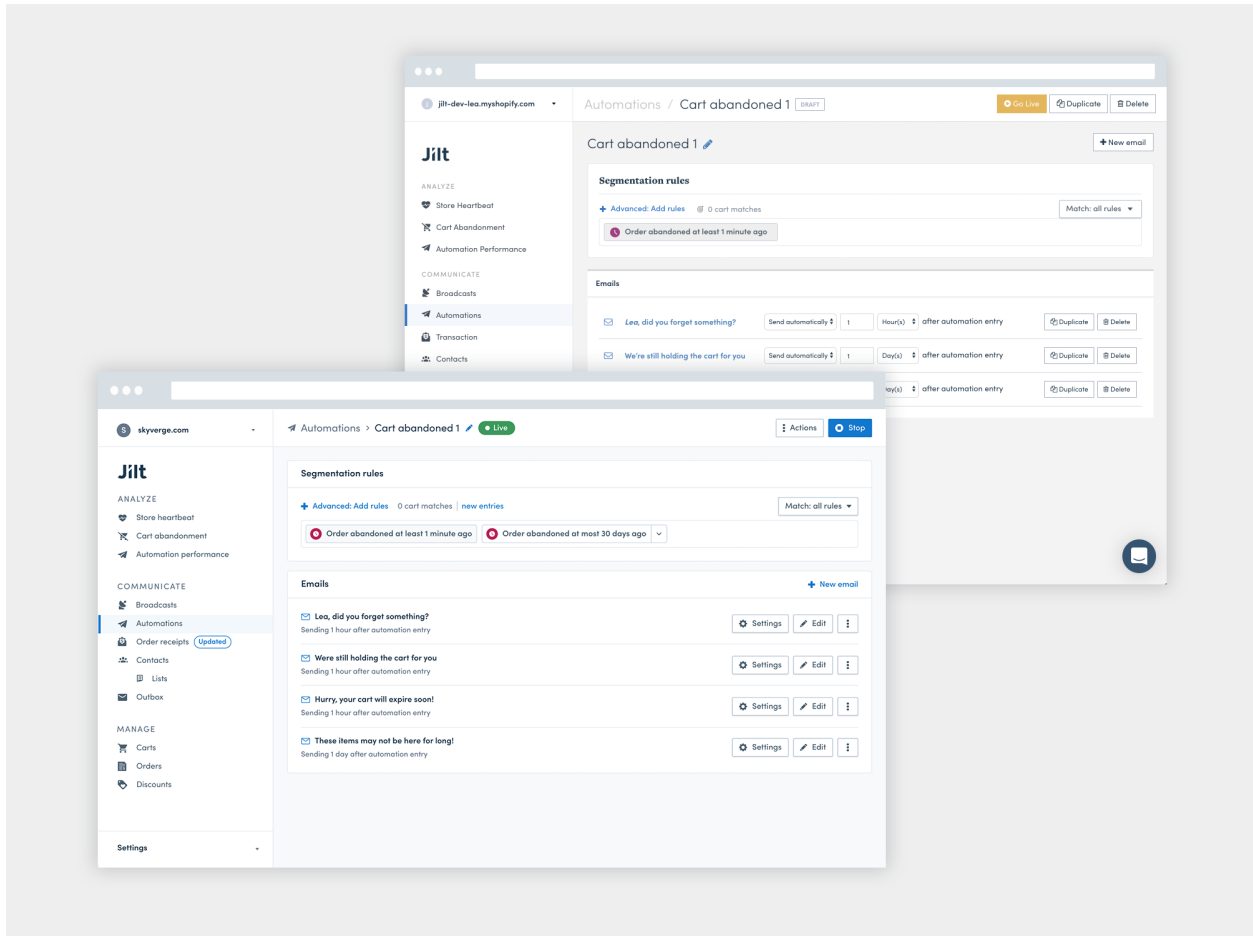
Once the user flow was reviewed by the team, high-fidelity mockups and a prototype were created in Figma so that we could begin testing the flow internally. It was decided that the prototypes would not be tested with users before release for the MVP, both to increase time-to-value and due to the fact that a similar UI/UX had been previously tested and implemented for another area of the app.



A short demonstration of one area within the high-fidelity Automations prototype in Figma.

Phase 4 - Releasing the feature

After the prototype was reviewed by the team and updates were implemented per feedback, the designs were handed off to the engineering team. I collaborated closely with them throughout this process to test the feature and make additional design updates. The updates were then released. A post-release design review was conducted, and I created tickets to have engineering fix up overlooked styling issues.



Before (back) and after (front) screens of the updated UI. For the MVP, the general structure of the page remained the same, but with the addition of newly surfaced actions and a much more intuitive email editor/email creation flow. Among other things, a dedicated area for editing settings was also added, actions (such as previewing and sending test emails) were surfaced on the email table, and the UI was updated to utilize components from the new Kodiak design system.

Click [here](#) to see a short video outlining some features of the updated UI/UX.

Phase 5 - Measuring success

Post-release, I reviewed an additional ~100 Hotjar recordings to measure our user's success with the new UI and email editor experience. The results were generally positive - users were able to navigate the new UI successfully, and found the newly surfaced actions very helpful (previously the actions were only available within the email editor). During support conversations, many users expressed their appreciation about having access to the new email editor within this area of the app.

We did discover that new users were less likely to set their Automations live, and that they were more likely to experience errors when attempting to do so. This was primarily due to a separate

new feature that involved validating From addresses; these concerns were addressed further and subsequently resolved as part of a new epic.