



Evolving the assessment tool editing experience

2023 case study by Winnie Abodo Alinga

Zipline is a retail SaaS tool that aims to simplify communications and task tracking across all levels of a retail organization and level up store operations to excellence.

The problem

At 8 years old, Zipline's **assessment tool was becoming obsolete**. Meant as a tool to boost visibility into daily store operations, its very linear experience made it **harder to create longer, more comprehensive assessments** that would simplify managers' workflows even more.

Furthermore, as Zipline started its expansion to new industries, the **rigidity of the tool's infrastructure** created technological challenges to developing new features. This rigidity **made signing new deals difficult** for the business and became a **financial priority for 2022**.

The solution

To scale the business to other industries and onboard new clients, Zipline needed to adapt the product to the new set of needs. **Reorganizing the assessment editing experience into an immersive and scalable space** that is practical and easy to navigate for a retail publisher, would help supercharge the tool with what will be the future of retail assessments.

My role

From spring 2022 to Fall 2022, **I was in charge of redesigning the assessment tool experience.**

My responsibilities involved **strategically planning the design with scalability in mind**, identifying opportunities and presenting a complete solution to stakeholders. I closely collaborated with the Content Designer, the Product Manager and the Engineering Lead throughout the design process.

Goals & expectations

- **Simplify the experience** for existing users
- **Make the new experience scalable** for upcoming growth of the tool
- **Implement conditional logic** questions into the assessment tool
- **Unlock new deals** with clients whose assessment needs are the most complex, setting Zipline apart from competitors and gaining market share.

The design process

Context

Building upon the assessment tool was not a new idea. Before joining Zipline, the product team had already started **exploring new ideas to enrich the tool**. One of them included **specifically integrating conditional logic options** into the assessment experience as **a main focus for the first half of 2022**.

The initial scope only included the development and implementation of the new assessment tool with minimal change to the current experience.

When I joined the project team, I met with the Project Manager, the Designer who was on the project before me and the Front-End Prototyper to get a clearer picture of where we were at.

- An early prototype was built with options of question logic

- The initial tech spike was validated

But despite the technological ease, the user experience in which it would all be contained was so complicated it was getting in the way of moving the project to the implementation stage and **presented many roadblocks.**

Understanding the problem

When taking a closer look at the current experience, one thing was pretty clear to me: **the box did not fit the ambitions of the tool.**

Search...

New assessment

English ▼
+ Add language

DRAFT

Assessment title*

Description

😊 **B** *I* 🔒 🔗 🔄 ☰ ☰

Settings

Frequency

Annually
▼

Auditor level

Communicator
▼

Target

- Team assessment**
One response per team
- Individual assessment**
One response per team member
- Enable scoring**
Track correct answers or assign points to answers
- Enable tasks**
Tasks can be created during the assessment
- Make assessment available**
Accept responses
- Make results confidential**
Only authorized people will have access to responses

Distribution

Which locations can see this?

Select store upload

Address book

No distribution yet.

Questions

Section 🗑

Title

+ Add question ▼

Add section

Discard changes

Publish

- 🏠 Dashboard
- 📄 Publishing
- 📚 Library
- 📊 Surveys
- 📄 Forms
- 📝 Assessments
- 📊 Reports

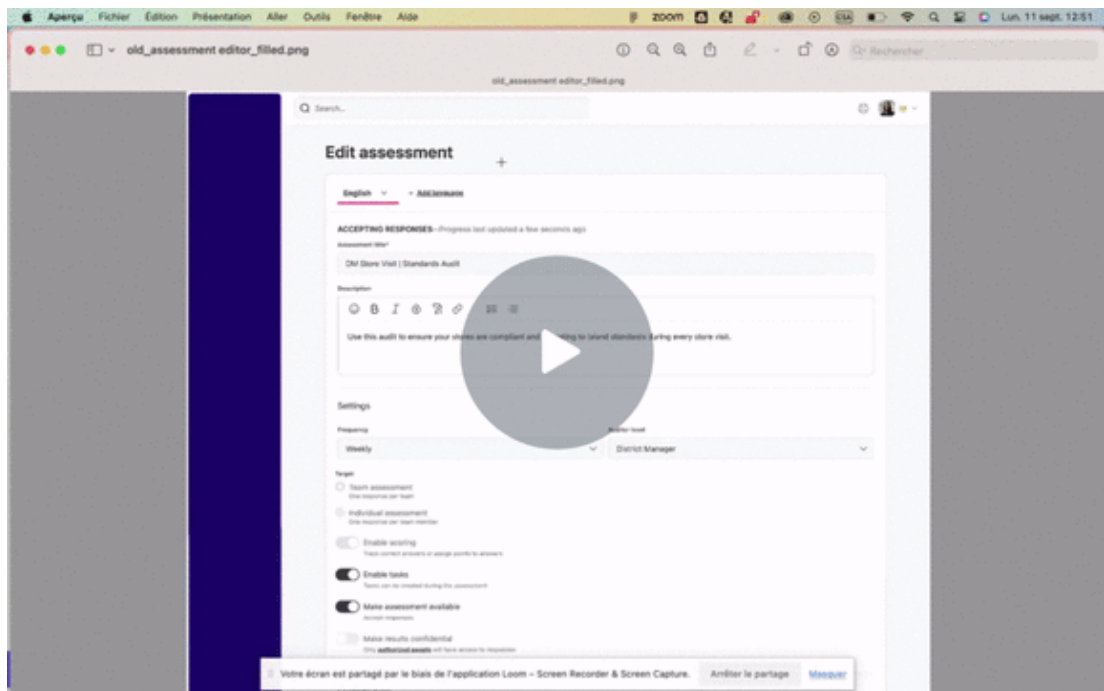
Powered by Zipline

Original assessment editor experience linear layout

After discussing with a few experienced publishers who regularly used the tool and going through their user journey, I identified two major pain points in their experience of the tool :

- **One column, linear layout makes it hard to keep a handle on any assessment structure**

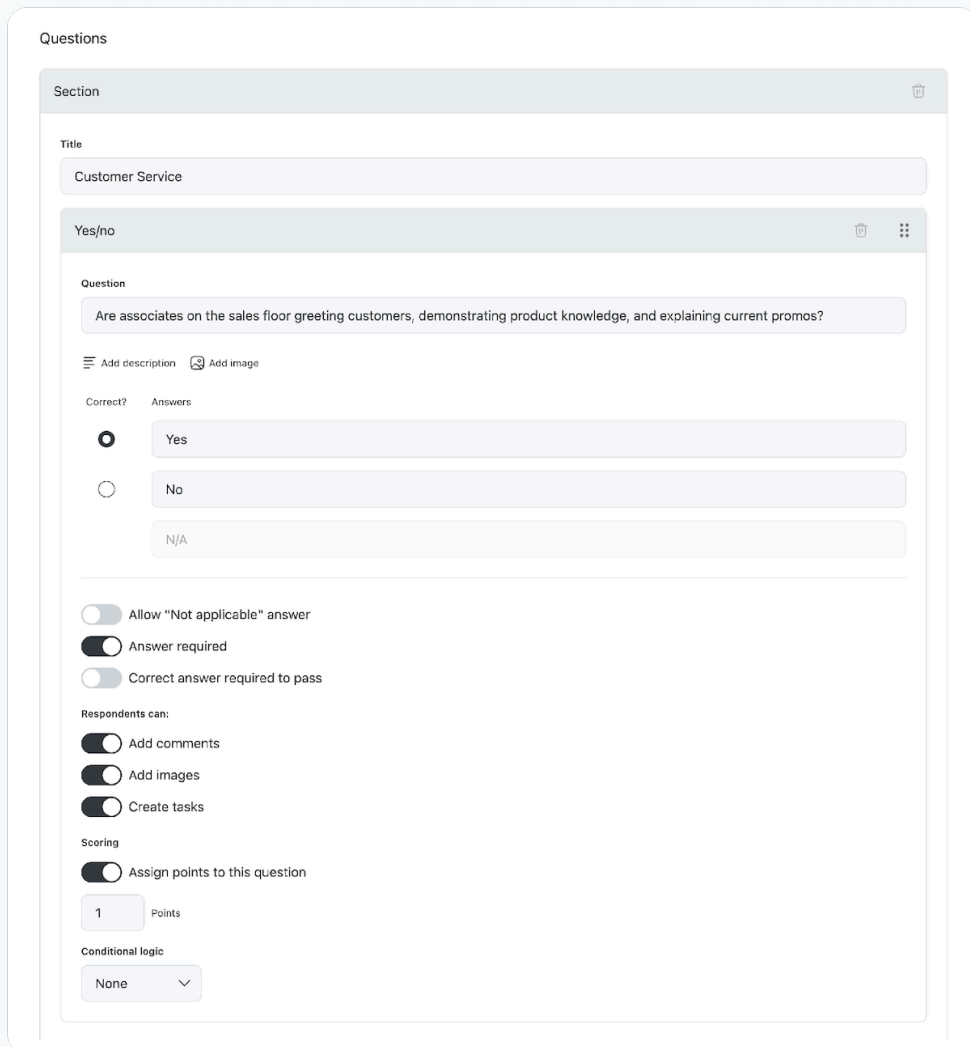
Publishers have to scroll up and down quite a lot to see the entirety of the content, and constantly see content that may stop being relevant to their task at hand once they start creating questions. It becomes distracting.



After scrolling through a few questions, the flow becomes overwhelming and similar to the point where the users might lose track of where they are.

- **Nested questions and sections are impractical to move around**

Since questions are part of sections and have their own set of unique settings, the boxes are quite lengthy once populated. The real estate becomes saturated and as the number of sections and questions grows, moving things around gets increasingly difficult, especially in a linear layout such as this on

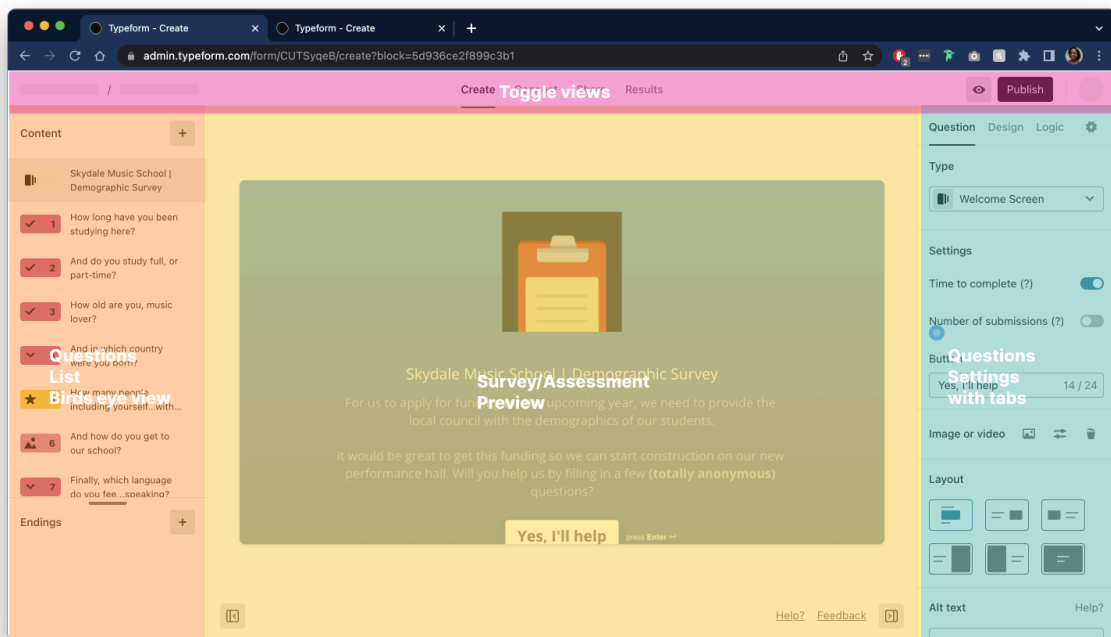


A single question within one section would take at least 500px to be displayed, adding even more visual clutter and lack of clear anchor points in the experience. Can you spot the drag handle? Neither can I.

Ideation

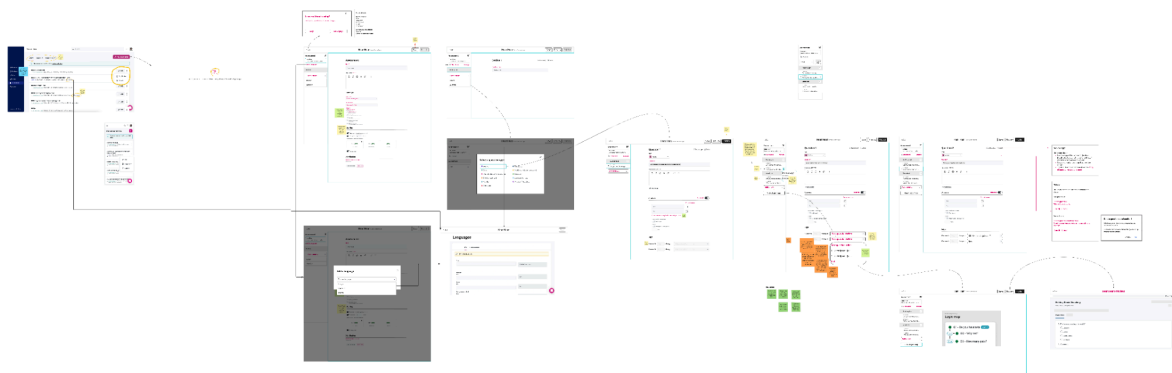
I proposed to the project team that we take a drastic turn in our approach to solving this problem by **completely reinventing the workspace into a focused interface** that would make using the current features easier for publishers, all the while setting up newer integrations for a successful adoption with a much more accessible user experience.

I took inspiration from various survey tools and how they approached similar challenges as a base from which to build.



Example of a Typeform full-screen editing experience, several panels and functions for each.

The assessment tool from Zipline is specifically geared towards the retail industry. This led me to broaden the project scope to other parts of the users' journeys using Zipline, that are complementary to this workflow and have ramifications in several other tools on the platform, such as translations and previews.

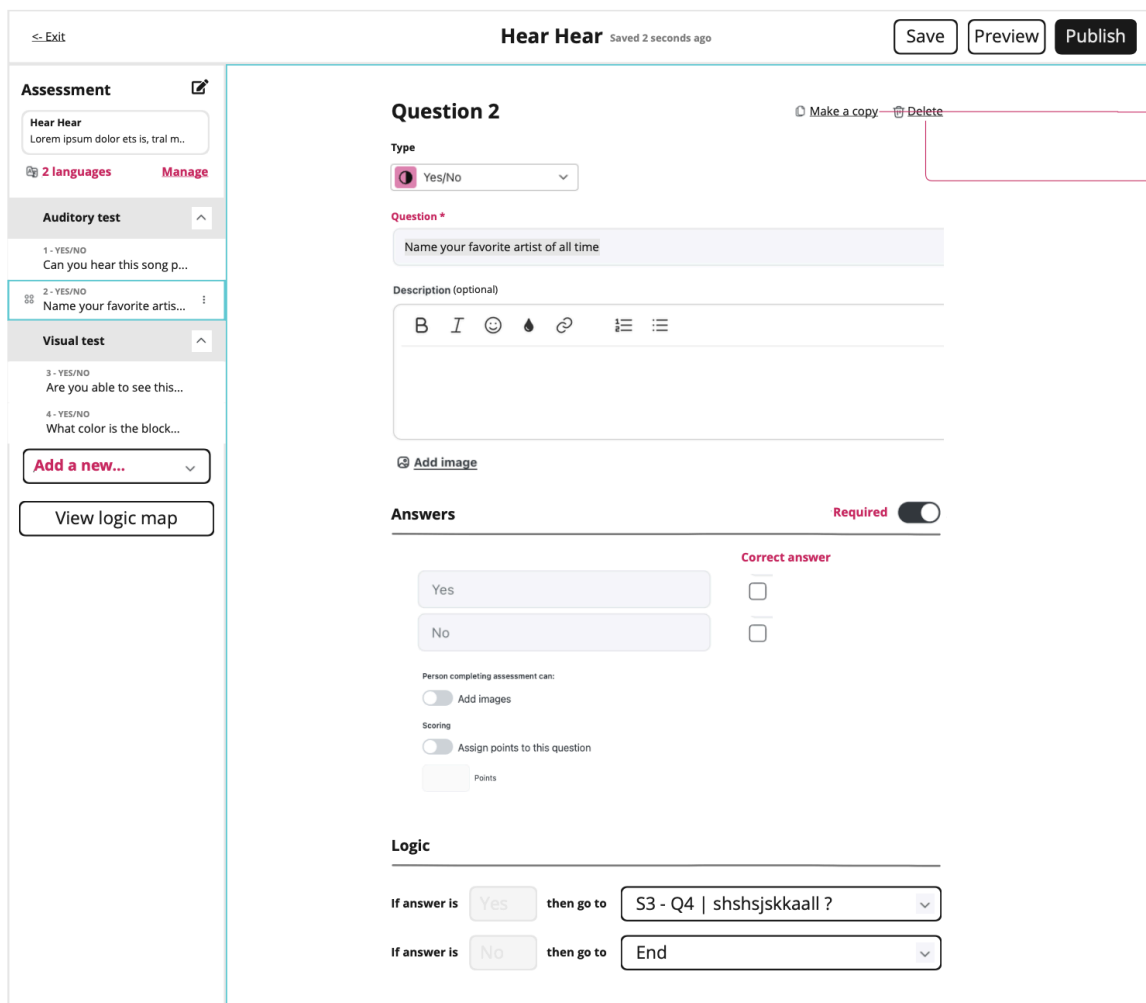


End-to-end bird's eye view of the flow map for the new assessment experience, from list view to the editing

view.

Flow also includes translations flow, assessment preview draft and logic map draft.

For me, addressing the problems the interface already presented meant **designing the editor as a modular space** that would easily be responsive on both desktop and mobile. I break it down into 4 key elements:



Overview of the first draft of the new assessment editor.

1. The fullscreen takeover

Since distraction was one of the main issues, building a full-screen space meant that the entire space was dedicated to creating and editing and not navigating. This idea opened the door to applying this concept to other content creation tools

on the platform that need a similar focus like messages, library resources or forms.

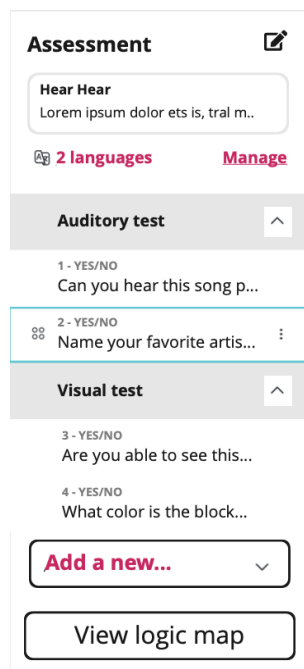
2. The actionable header

Everpresent key action buttons that always come in handy and apply to the entirety of the assessment. It also serves as an explicit visual representation of the fullscreen takeover frame of work.



3. The summary left panel

This new navigation pattern is truly at the core of the new interactive experience as it allows publishers to jump in and out of focus from a question or a section with ease. This gives a bird's eye view of the entire assessment and facilitates moving questions and sections around, collapsed or not. This section also contains information about the general settings of the assessment as a whole and could house upcoming features like a logic map.



4. The main view

As a complement to the left panel, the main view truly brings focus to the content

and detailed settings of each question type in a way that does not sacrifice the real estate it needs. This implementation also helped plan a soft migration without completely disrupting the familiarity that publishers have with the current structure before further extensive research.

The screenshot shows a question editor for 'Question 2'. At the top right, there are 'Make a copy' and 'Delete' buttons. The 'Type' is set to 'Yes/No'. The question text is 'Name your favorite artist of all time'. Below this is a rich text editor with icons for bold, italic, smiley, link, unlink, bulleted list, and numbered list. There is an 'Add image' button. The 'Answers' section has a 'Required' toggle switch. Two answer options are listed: 'Yes' and 'No', each with a 'Correct answer' checkbox. Below the answers are settings for 'Person completing assessment can:' (Add images toggle), 'Scoring' (Assign points to this question toggle), and a 'Points' input field.

It is in this main view that I explored incorporating the conditional logic component, now that each question had the space to truly lay out all possible content

Logic

If answer is then go to

If answer is then go to

First draft exploration of the conditional logic settings

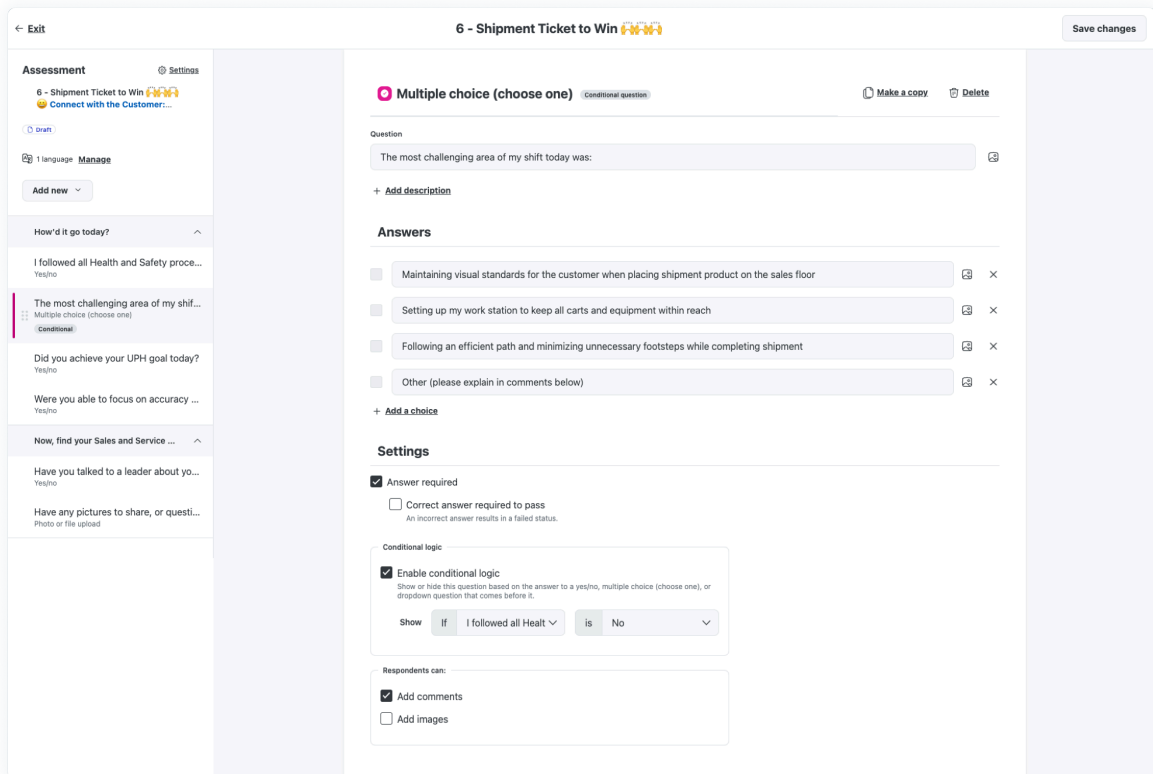
As the design process went on, I was faced with **challenges regarding the resources** in time and engineering available to complete this project within the 16 weeks allotted for its implementation. This meant that engineering would **develop the prototype and test the flow before the final UI** was to be conceived.

More complex flows emerged as a result and I decided to prioritize design efforts only the core features we would need for launch and put the others on ice. The revised scope only included:

- Full-screen editor experience with a translation module integration into the new code base
- Planning for conditional logic question implementation (4 most used question types)
- Adjustments to settings and saving flow

Landing the final design

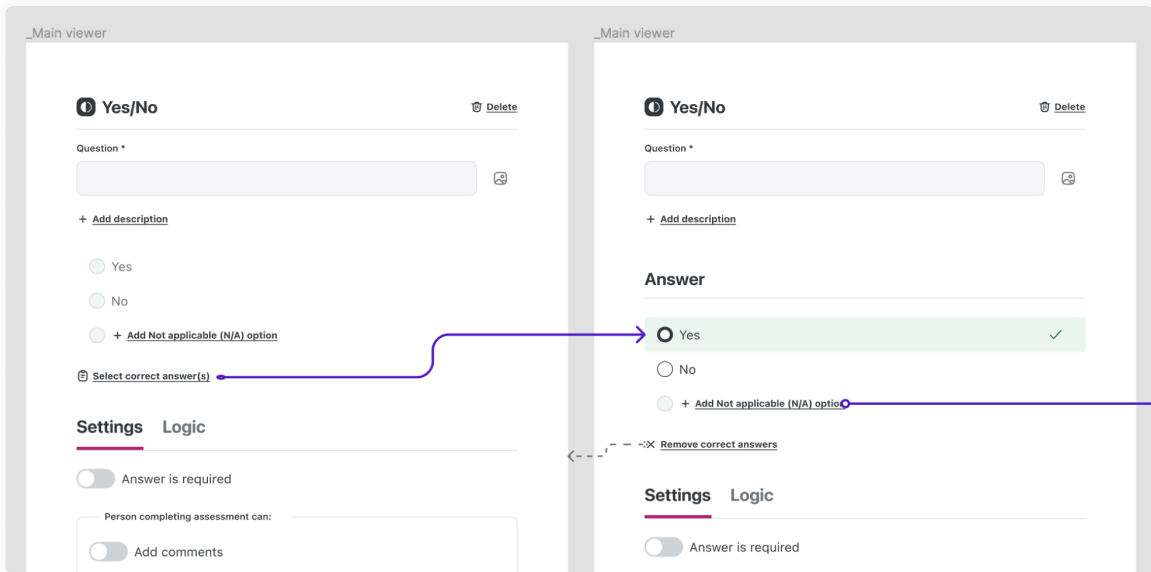
After multiple iterations with the engineering team and the design team, we landed on a solution that keeps access to logic directly embedded in the settings of the questions themselves, offering the most clarity and keeping users in context as much as possible.



Assessment editor as implemented by the engineering team at Zipline.

Integrated scoring

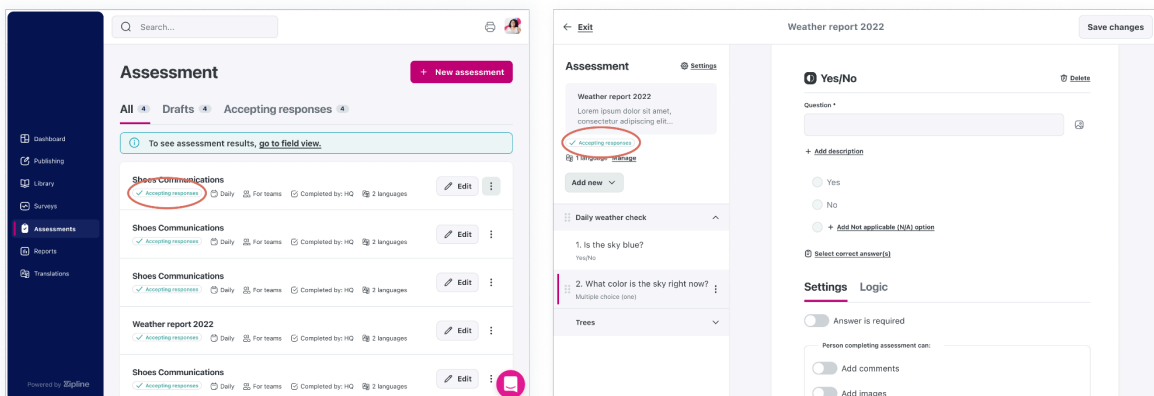
A new design layout meant revisiting how scoring an assessment was experienced in the tool. This option was only available for assessments that would be set up as scored.



Initial scoring experience within the main view of the assessment editor.

Publishing the assessment

It was imperative to explicit the flow of “making the assessment available” for managers to fill out. I landed on echoing the status tag from the view list into the assessment editor to explicit its status to the publisher while they are setting up the availability of the assessment.



Putting the editor to the test

The bêta version of the new Assessment editor was launched in fall of 2022 and released to a few clients. The feedback was overwhelmingly positive as we reached our objectives for ease of use and workflow adoption.

“I absolutely love the left side panel! Makes it very easy to drag and drop questions easily”

– Direct quote from a very satisfied confidential client representative, following the launch of the bêta program

I had moved on to another project around that time and handed the project off to another designer on the team who worked on implementing the conditional logic component into the newly adopted editor. The feature was rolled out progressively in early 2023.

I am extremely proud of having contributed to making this project come to life as it was and seeing my teammates build on that foundation.

Impact

As a result of the completion of this project, Zipline went on to be better equipped on the sales side to **close deals with new clients** looking for flexible assessment solutions, and significantly improve workflows for an entire user segment.

Next steps

Now that the foundation for creating a powerful assessment has been set, it will have an impact on the **experience of managers filling out the assessments** in their routine store visits, as well as the subsequent **analysis of the results by managers and leadership**, to

truly keep their operations running smoothly. This is work I had started exploring in parallel with this project that may or may not have been continued by the project teams since my departure.



CREDITS

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All information in this case study is my own and does not necessarily reflect the views of Zipline.