Jan Gundtofte-Bruun
jan@g-b.dk
2639 7565

WHAT DID I DO?

This story starts with the onboarding team at the company I was working for at the time. As a financial business, regulation mandated we "know your customer" and so our onboarding process involved a lot of information. The team's web-based window into our CRM system was centred around a directory of all customers, essentially a giant spreadsheet with links into further details. This page was terribly slow to load so team members would keep the browser tab open all day but frequently missed "open in new tab" which was a frustrating user experience and a waste of time.

This was brought to my attention by pure chance and I took it upon myself to improve the quality of my colleagues work tool and day-to-day experience.

WHY WAS IT NECESSARY?

Technically there was no problem with server, network, or database load, but it's just silly to have a whole team rely on a service that is clearly cumbersome and invites "ugh, I shouldn't have done that, again" moments.

The page listed every customer in the database, with by far too many data fields – and yet, not the pertinent ones like contact names and phone numbers, for those you still had to go to a sub page.

The entire team was clearly unhappy with it, but nobody had thought to ask about fixing it.

HOW DID I DO IT?

I performed an informal user test to learn how they were, and wanted to be, using the system.

I transformed the user interface in a number of ways:

- the layout of the sub pages was adjusted to bring the most used information to the forefront;

- instead of the main listing including every field ever, I narrowed it down to only the four columns that the team used for lookups;

- instead of a tiny "Details" link in the far-right column, I made the entire row clickable (and provided a visual affordance);

- at the top of the page, I added a search box that instantly filtered the list down to only matching entries (and made sure the field had keyboard focus on page load);

- hitting Enter in the search box navigated to the topmost (filtered) entry.

The outcome was that you could usually find any customer within seconds and just a few keystrokes.

The front-end work was all done by a small handful of standard JQuery commands, along with some CSS for visual feedback.

WHAT'S SO COOL ABOUT THAT?

Technically speaking, this was nothing fancy at all. But this was one of those issues where a tiny bit of volunteer work had a tremendous effect on the quality of daily work for my coworkers, and implementing it took only a few hours -- certainly worth the time.

The points I feel most proud about are:

- Making my colleagues happy! Transforming a (needless) irritation into a sleek, speedy tool was a relief for the entire team, and was for me personally also quite a fun side project.

- Culling the data on the index page sped up page load from "a minute" to instant", removing the stress of remembering to not ever close or navigate away from that very special browser tab.

- I'm quite pleased with how the users reacted to the keyboard-driven instant search and navigation.

- As mostly a back-end developer, it was a pleasure to implement a UI that was both effective and visually pleasant.