Case study:

Global search feature

Role: Product designer and owner	Total duration: 4 months



Company

Virtuagym is a SaaS platform for the fitness industry providing services to fitness clubs such as member and staff management, scheduling and member engagement via a B2B2C app and portal.

Role

In my role as a product designer and product owner I was responsible for the Coach & Engage domain which includes features for member and lead management, creation of workout plans and member engagement via a community platform among others.

Brief
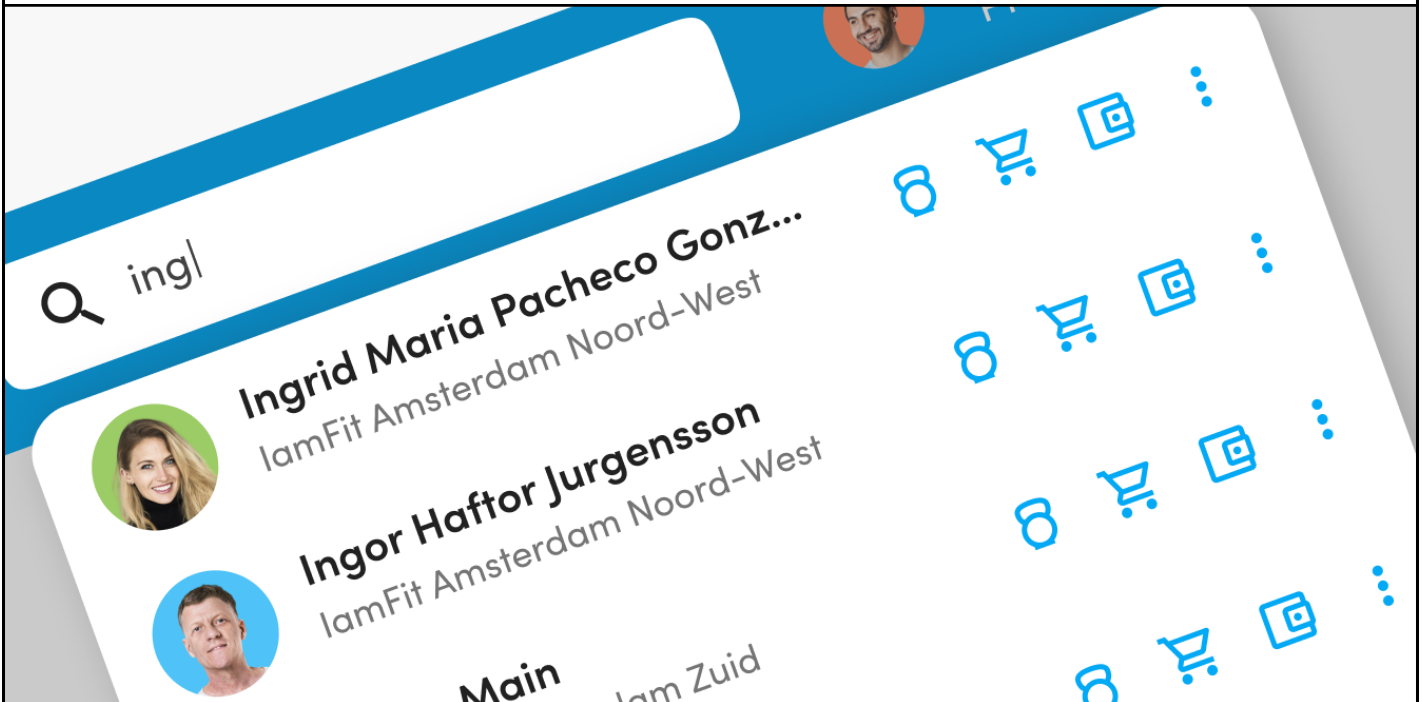
How might we design a global search feature so that professional users can quickly search for club members and perform common actions with a few clicks?

Problem:

These problem statements were mainly defined in discussion with client facing teams that would report pain points and needs of the users:

"As a staff member, I want to quickly navigate and find data from any place in the platform with as few clicks as possible"

"As a staff member, I want to be able to perform common actions for a client in a quicker way: e.g. staff member wants to assign a membership
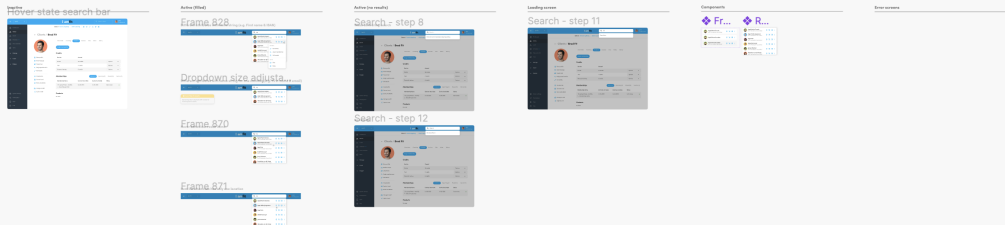
Business value:

- Search feature will improve efficiency/speed for staff members in member management
- Feature aligns with OKR to become leading club management software
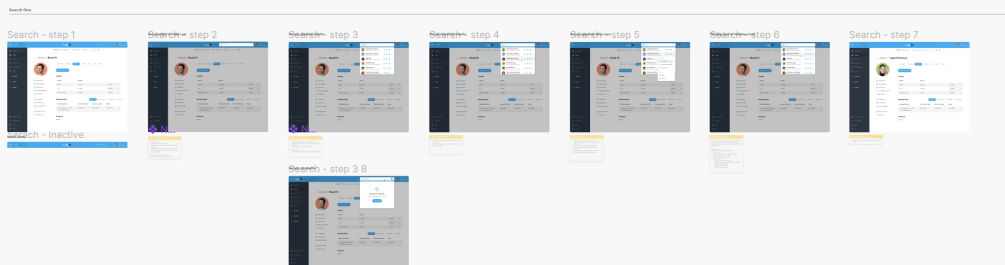- Prevent churn due to slow member management experience

Preparation

Shaping phase

During the shaping phase I created solution directions in the form of wireframes and gathered input on technical constraints and possibilities. For the UX research I facilitated sessions with one key account and received input from PM and customer success.

In a weekly "shape meeting" involving CEO, PMs, relevant stakeholders I presented solution directions and addressed open questions to align design with overall business goals and make decisions regarding the search feature.

Key decisions:

UX: Decision on which quick actions should be displayed to users

UI: Visual direction based on benchmarking and sketches by me

Versioning: With a set scope of 6 weeks V1 would only feature searching members

Roadmap: Prioritising the project on the roadmap and allocating dev resources

Outcome shaping phase:

1. High fidelity UI design and description of search behaviour
2. Product requirement document
3. Alignment on goals and priority of the search feature

Execution
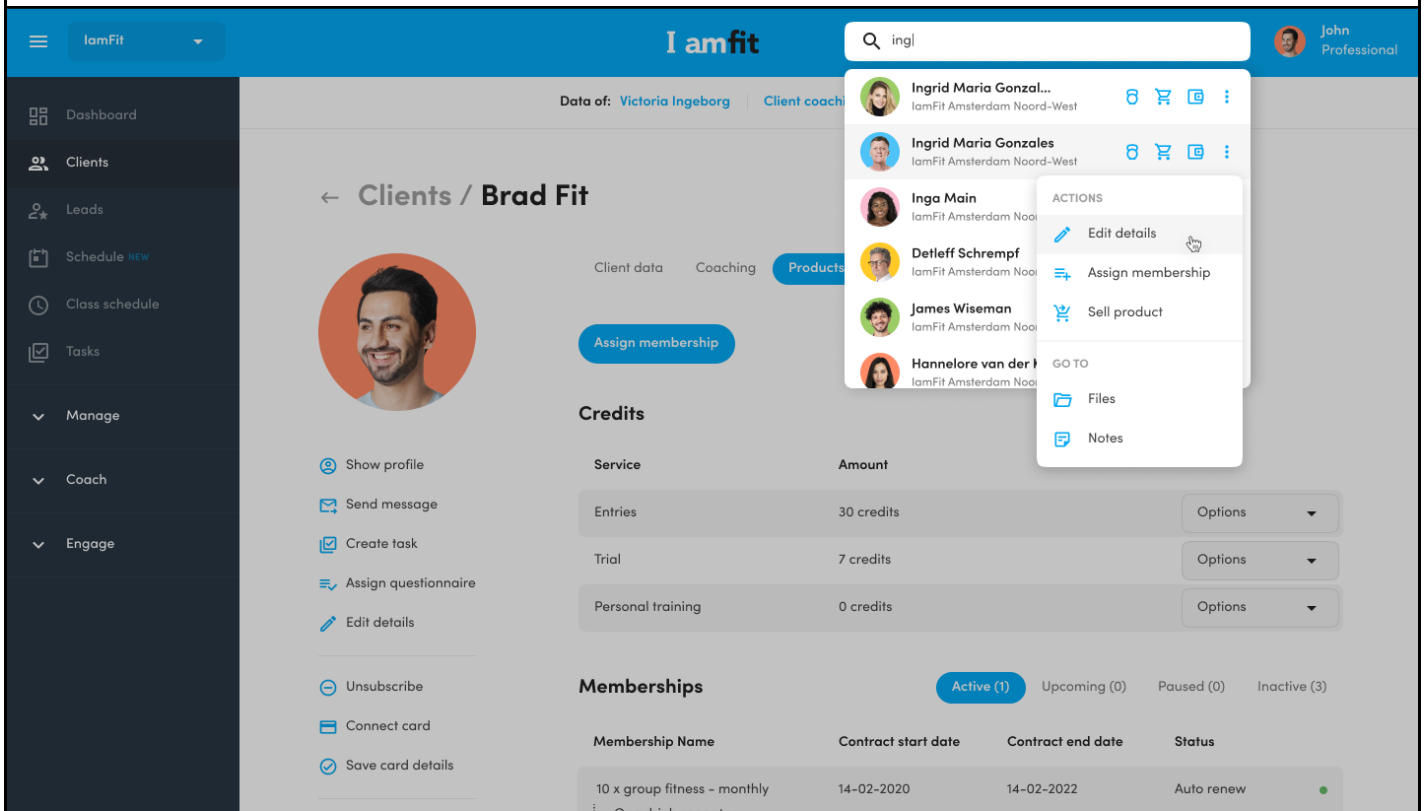
Kick-off

I facilitated a kick-off meeting where PD and PM present the requirements and designs to the development team and QA.

Insights

- Feedback on required modifications to design system components
- Input on technical constrains regarding specific behaviour
- Estimate on complexity and workload

Refinement and ticket creation

For the creation of tickets I collaborated with our QA expert on defining relevant user stories and adding more technical detail to the requirements. Next I led weekly refinement sessions with the team where story points were allocated. From here I planned the following sprints with the team and adjusted the roadmap accordingly.

Testing

During the implementation I led daily stand ups with the development team to resolve questions and shared progress and blockers to stakeholders. Direct feedback from the developers also enabled some quick adjustments due to technical constraints.
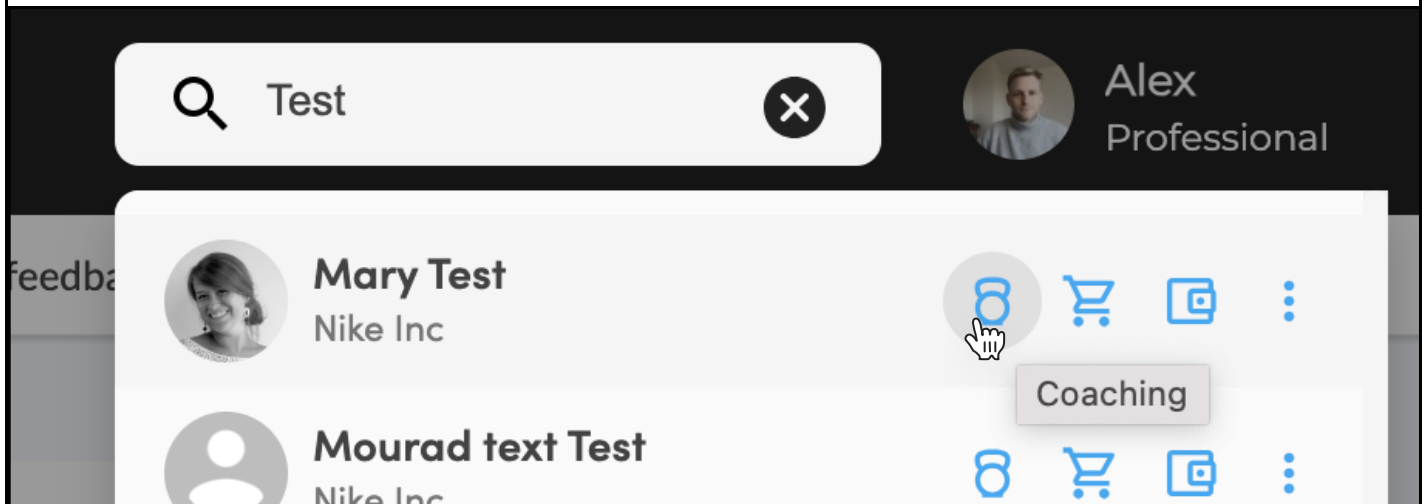
Testing

During testing more bugs and conflicts with existing features were identified than anticipated. As the feature would be visible and impacting every site of the platform there was a high risk of potential conflicts after launching on production.

Adjustment

In discussion with the PM we decided to launch the feature internally first to mitigate the risk. At Virtuagym all employees have a test portal and customer facing colleagues are well aware user needs so they could provide valuable feedback before launching it to clients.

Feedback & iterations

I am fit 🔍 |Search... 👤 John Professional

Enter at least 3 characters to start searching

I am fit 🔍 123| 👤 John Professional

Searching...

I am fit 🔍 123gvcs| 👤 John Professional

No results found

Receiving internal feedback first allowed us to further iterate before launching. It also helped in promoting the feature internally and gave customer service a chance to get familiar with the feature.

Internal feedback

Conflict was found where the search was disabling another site
> Decision to disable search on that particular page to avoid additional development work and keep the site functioning

Some testers reported that the destination of the quick action icons was not clear to them
> Tooltips were added to the quick action icons to explain where they lead to

The search took significantly longer in the live environment than in test
> I designed additional states for "initiating the search" and "searching" while development worked to optimise speed and performance of of the feature

Go to market

We would like to gather your feedback on Virtuagym's new client search feature. Your answers will help us to understand how the feature is being used and how we can improve it to better meet your needs.

Start press **Enter** ↵

🕐 Takes 5 minutes

To prepare the launch of the search feature to clients I prepared visuals to present the new feature for several marketing channels and internal communication. For the go to market plan I collaborated with the PM in creating a survey where I could especially help by defining metrics for a "successful" user interaction.

Go to market steps

- Release as beta feature communicated through marketing channels
- Interested key accounts will have it enabled and will actively asked for feedback
- Users have to chance to enable/disable the feature themselves
- Survey is directly linked with the setting and automatically opens when disabling

In the survey we use a mix of qualitative (open text) and quantitative (scale) questions to investigate wether the search feature is ready for a global release or wether there are further areas of improvement to be addressed. As we already underwent an extensive internal testing period I expect that the feature can be released to all clients shortly.

Success metrics tracked via survey

- Ease of use of the search feature (scales)
- Quantity and severity of reported bugs (free text)
- Satisfaction with search results (scales)

Release

System settings

My Business

Business Info

Opening Hours

Facilities

Essentials

Client Settings

Portal Design

Mobile App Design

Schedule Settings

QuickSearch

Try out Virtuagym's new QuickSearch feature! This feature allows you to search for clients from any place in the platform, using different search terms such as first/last name, date of birth, email, member ID, or external ID. The search results provided in a dropdown box include shortcuts to frequently used actions such as assigning memberships or editing client details.

Note: The search will only be available for staff members that have access to the client module.

Enable client search

Give feedback

Impact

- Improved UX by improving navigation and speed
- customers can bypass the slow loading by using search feature
- Potentially prevent churn with key accounts that reported slow loading times of member table

Learnings

My biggest learning from this project that a "global" feature can create unforeseen impact on other parts of the software. Reducing the overall scope of the first version could have been considered in this case to receive early "live" feedback and reduce the complexity in resolving issues. Company wide Internal testing helped a lot in catching unforeseen bugs and conflicts and have them resolved without pressure from clients. Early feedback loops contributed to valuable adjustments in the design that improved the user experience and helped us sharpen our success metrics for the release.