



## Module 9

# Workflows

### Introduction

By the end of this module, you'll be able to define effective workflows, which allows users to complete common tasks. You'll learn how to design effective registration and onboarding workflows which allow users to access products in a smooth fashion. You'll also learn how to design effective sign-in processes for repeat users.

You'll understand the concept of complex forms and how to design them effectively. You'll also be introduced to the importance of payment flows and will learn techniques to allow you to increase the flow and the level of trust from users. You'll also learn about micro tasks and the common components that you need in order to design them effectively. Finally, you'll understand the concept of mobile notifications and how to use them effectively.

There are two projects in this module:

- Interaction design for desktop
- Interaction design for mobile

Complete the project for your chosen path. Review the **Project Paths** document which is available to download in the 'Introduction to the Diploma' section of the course.

### Topics covered include:

- Registration
- Onboarding
- Onboarding styles
- Sign in
- Complex forms
- Structuring complex forms
- Minimising workload on forms
- Payment
- Payment flow
- Auto-formatting
- Increased perception of security

- Microtasks (or modes)

## Recommended reading

Web Form Design

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## Additional resources

- A road map to building a delightful onboarding experience for mobile app users
- Mobile onboarding: Interact, don't tell
- The 4 best mobile user onboarding flows we've seen so far
- UX case study: Forms and workflows (mobile and desktop)
- In-app gestures and mobile app user experience

## Note taking

### Workflows

Sequence of interactivity  
Optional flow through process.

- Collection / sequence of activities
- Define an overall task
- Process of screens / screen states.

### Registration

- Don't force registration
- Don't force social registration
- Flag why you ask for personal details
- Inline validation.

Onboarding The process of increasing the likelihood that new users become successful when adopting your product.

- Don't waste user's time with unnecessary onboarding
- Consider onboarding
  - new mental model
  - complicated
  - users need to enter data immediately
  - Redesigned interface.
- Get people to engage
- Answer questions.

Onboarding styles

- Static walk through → images!
    - make it quick and succinct.
    - skippable.
  - Interactive walk through.
    - learn by doing
    - address dealbreakers as they register
  - Tutor overlays. (coach marks)
    - contextual hints
- ★ define key messages and features.

### Sign in

- Keep users logged in
- Show passwords
- fingerprint / face ID.

### Complex forms

- Choose and structure appropriate flow
- Adhere to best practice
- minimise inputs
- use smart defaults.

## Making complex forms conversational

Ask the user → Tell user something  
Back and forth.  
Give info when asking for info.

## Structuring complex forms

- Label above field
- All fields in single columns
- Use field length as affordance.
- Indicate optional - rather don't ask optional info.
- Use descriptive labels.
- Show progress.

Minimise workload on complex forms

Payment

Follow conventional flow

Minimise questions and inputs

Use auto-formatting

Increase perception of security.

Conventional payment flow

Purchase Summary → Payment form → Confirmation.

Minimise questions

What is actually required.

Remove dropdowns/pickers

Less work = fewer questions.



### Auto-formatting

Make user info easier to input  
and check

↳ chunking of numbers

↳ better keyboard.

### Increased perception of security

Trusted brand logos.

Confirm amounts.

Security related icons.

Indicate payment provider.

Microtasks (or modes)

Specific task → focus on task.