



Mar 21, 2019

Empathy for Internal Users

Build and Train for Real Content Admins

Hosted by **Lily Berman** and **Nick Switzer**



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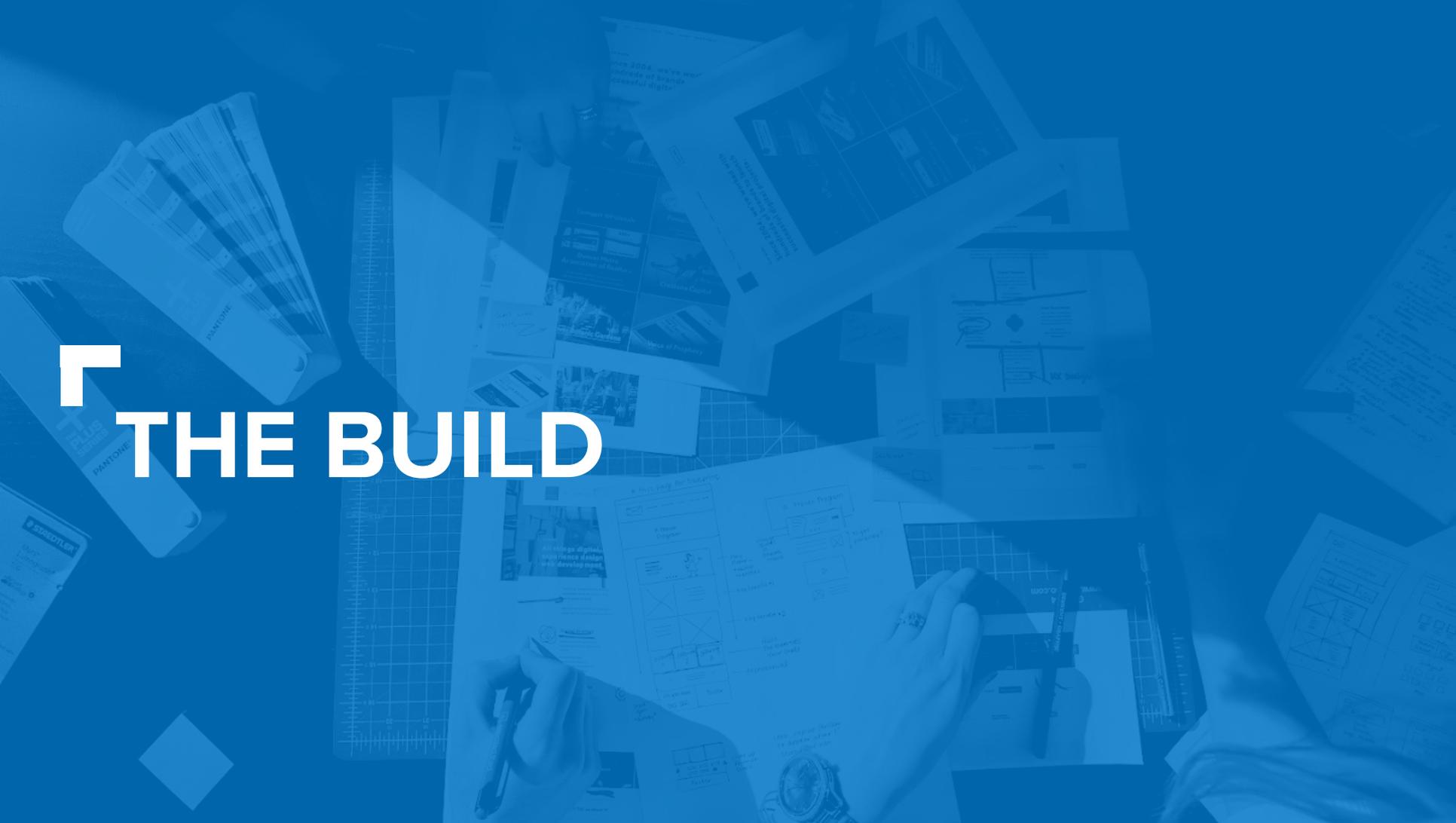
nswitzer@elevatedthird.com | d.o: switzern | @switzern



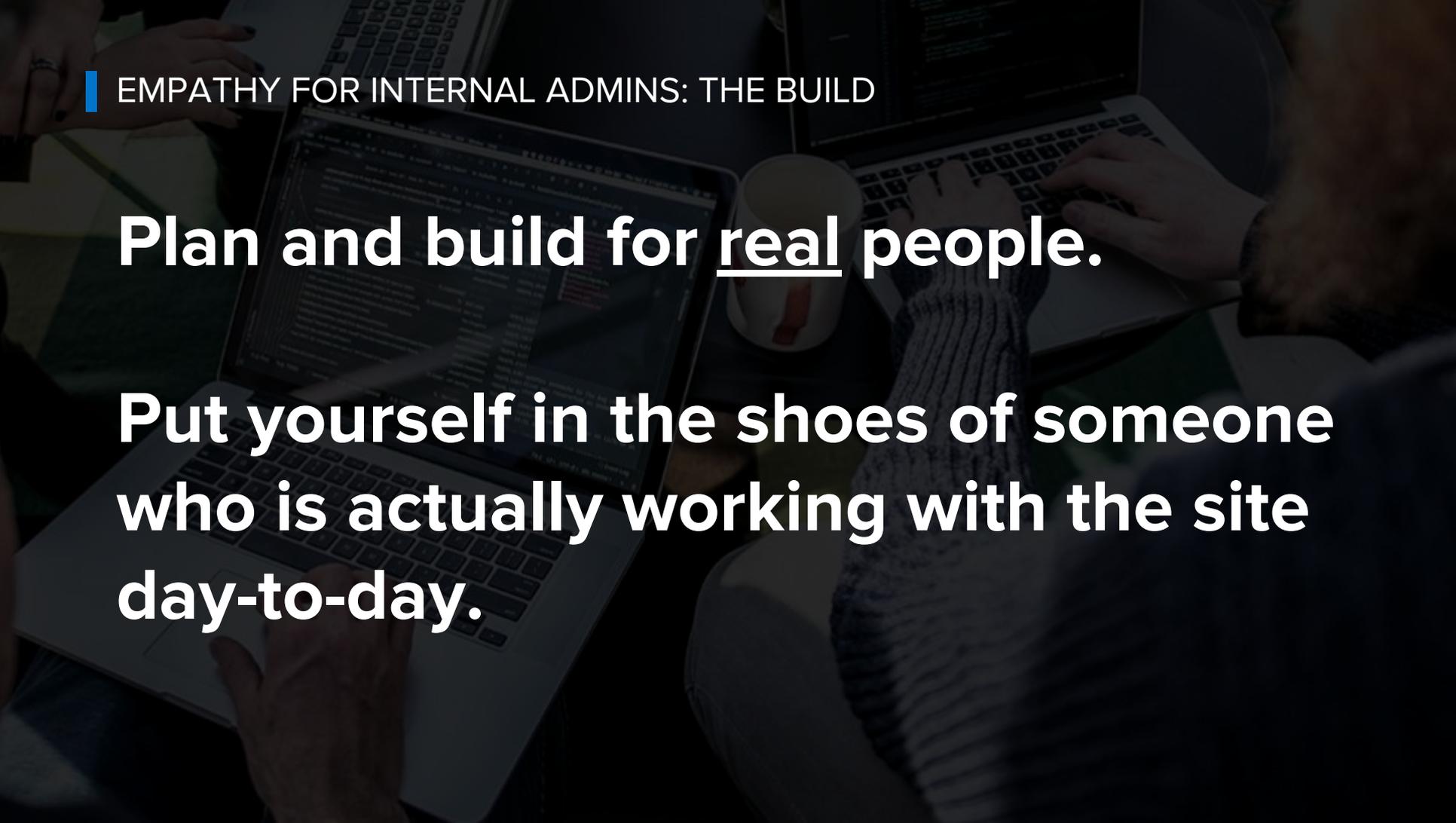
WHY ARE WE *HERE?*

WHY ARE WE HERE?

When you're building a complex digital platform, a well-architected admin experience and practical, empathetic training **are both necessary to set site owners up for success.**



THE BUILD



EMPATHY FOR INTERNAL ADMINS: THE BUILD

Plan and build for real people.

Put yourself in the shoes of someone who is actually working with the site day-to-day.

THE BUILD \ PLAN

Don't start in Drupal.
Use a document that
is easy to change to
flesh out architecture
early.

Fields				
	Label	Machine name	Req	Description
	Description	field_description	Y	
	Link	field_p_link	N	
	Description	field_description	N	
	Link	field_p_link	N	
	Background Color	field_bg_color	N	
	Featured Image	field_p_media_item	N	
	Quote	field_quote	Y	
	Attribution	field_attribution	Y	
	Attribution Description	field_attribution_description	N	
				Will have an it will remove
	Small Heading	field_small_heading	N	
	Heading	field_heading	Y	
	Link	field_p_link	Y	
			Y	
				Wrapper for t
	Label	field_label	Y	
	Content	field_p_tab_content	Y	
				Wrapper for t
	Label	field_label	Y	
	Content	field_p_tab_content	Y	
ontent				Wrapper for r
	Label	field_label	Y	
	Content	field_p_accordion_content	Y	

The Build \ Three Focus Areas

1

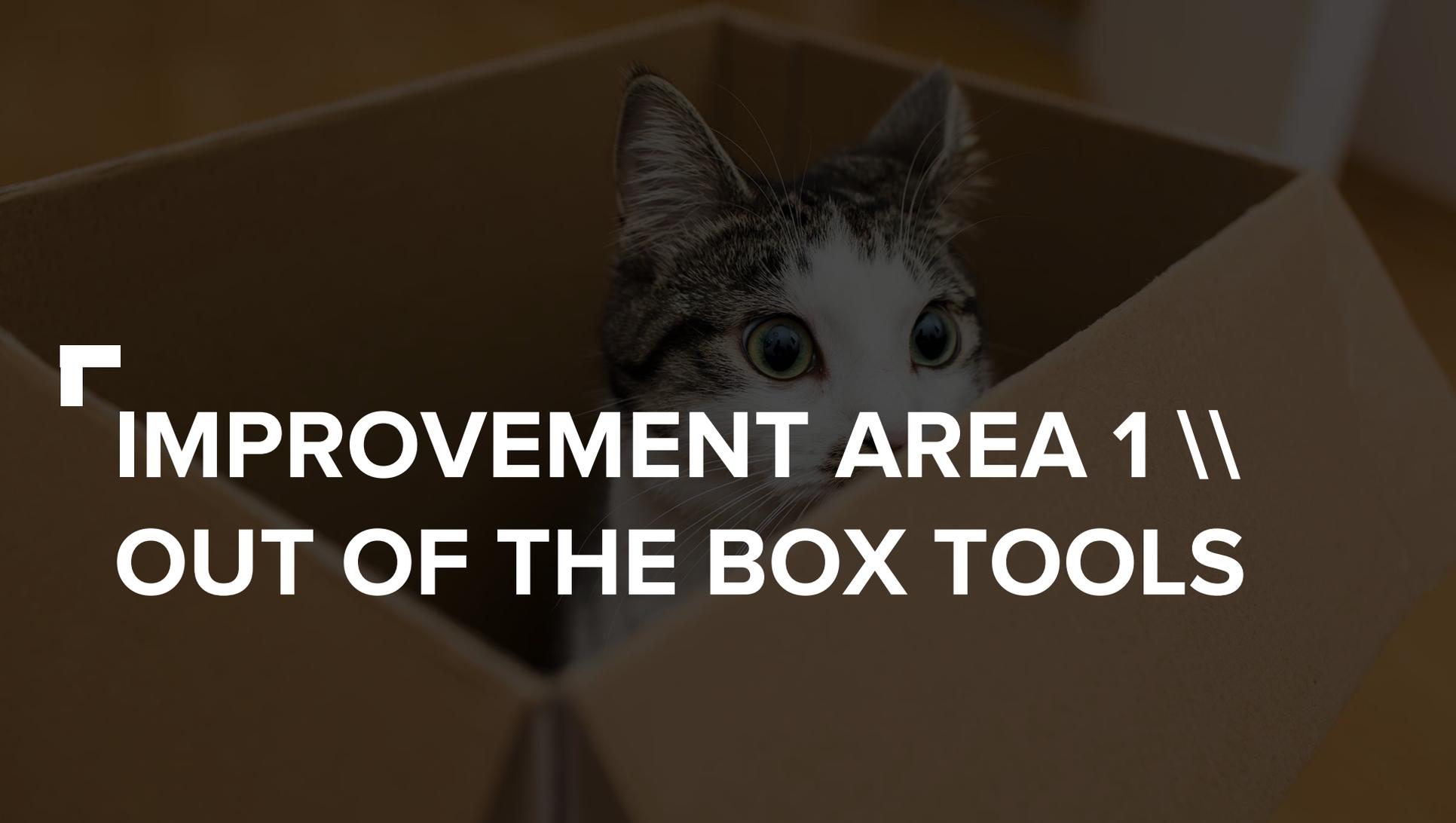
**Out of the box
tools**

2

**The contrib
ecosystem**

3

**Custom and
site-specific
improvements**

A close-up photograph of a tabby and white cat peering out from a cardboard box. The cat's face is the central focus, with its green eyes looking directly at the camera. The box's interior is visible, and the lighting is soft, highlighting the cat's fur texture.

**┌
IMPROVEMENT AREA 1 \\
OUT OF THE BOX TOOLS**

OUT OF THE BOX \ \ FIELDS

Simple, clear, focused

- Field names for real people.
- Help text that is actually helpful.
- Don't be shy about requiring fields.
- Character limits and field sizes should make sense in the editor's context.

▶ THUMBNAIL IMAGE

Resource Description (Edit summary) *

B *I* | *I_x* x^2 |   |   |       | Font

 Source 

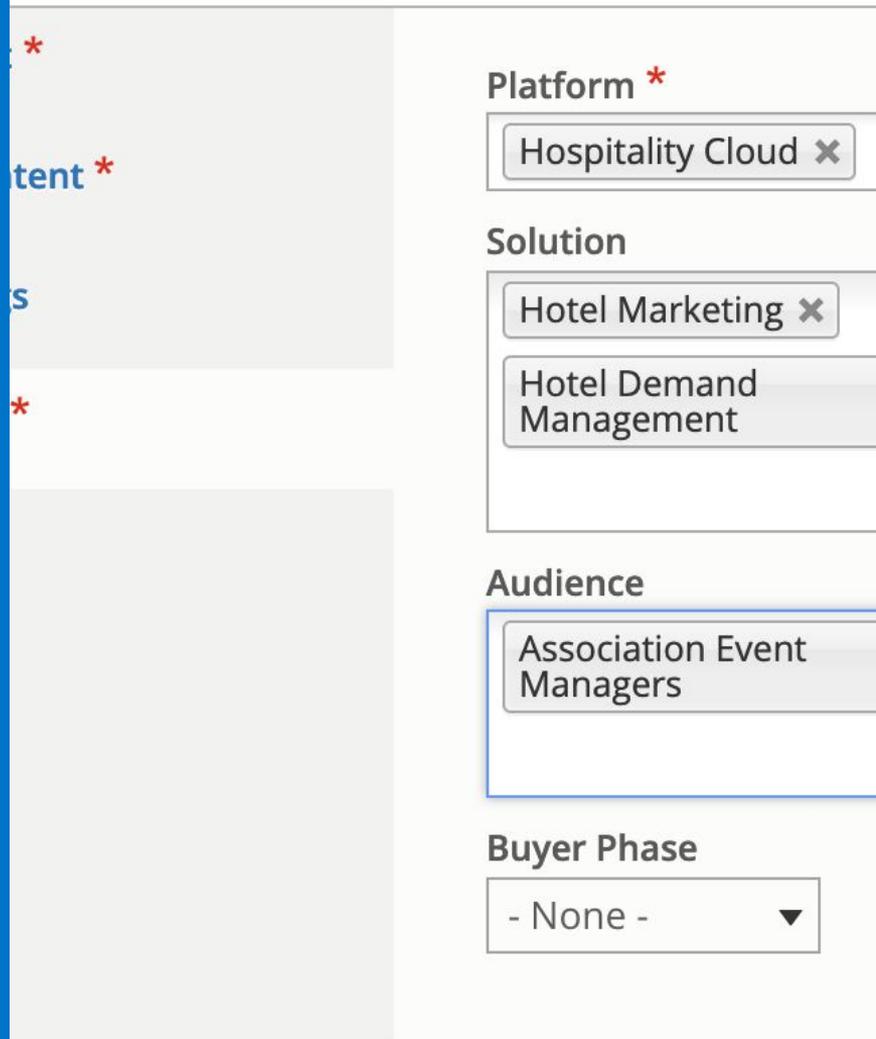
As a hospitality provider, you have three goals when it comes to connect with your customers and their employees, partners the amount of business you're getting from existing customers keep new customers.

This is the main copy field for this resource. It will be shown whether or not the generate teaser copy. If you want to manually override the teaser copy, edit the

OUT OF THE BOX \ \ REFERENCES

Great power, great responsibility

- Thoughtful limits.
- The right widget for the job.
- Views to provide focused lists of options.



The screenshot shows a user interface with a list of items on the left and a filter sidebar on the right. The list items are partially visible, showing words like "tent" and "S". The filter sidebar has four sections:

- Platform ***: A dropdown menu with "Hospitality Cloud" selected and a close button (X).
- Solution**: Two dropdown menus. The first has "Hotel Marketing" selected. The second has "Hotel Demand Management" selected.
- Audience**: A dropdown menu with "Association Event Managers" selected.
- Buyer Phase**: A dropdown menu with "- None -" selected and a downward arrow.

OUT OF THE BOX \ PERMISSIONS

Focus & security

- Provide a focused editing experience.
- Principle of least privilege for UX and security.

Administrator	Content Editor	Content Approver	Content Administrator
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



IMPROVEMENT AREA 2 \\ THE CONTRIB ECOSYSTEM



Title *

Fintech apps of the future

Content *

Gated Settings

Media and Docs

Author Info

Resource Type *

News & Insights

Choose what type of resource this content is.

Type of News, Insights, Viewpoints

Blog Posts & Articles

Body (Edit summary)

B *I* ~~S~~ A x² x₂ I_x | | | **E** **E** | Format |

Source | Styles |

When it comes to bringing innovation to the world of banking and finance, what sort of apps might we see in years to come, and what areas are potentially ripe for development? What is driving the development of new types of apps, and how will gadgets and voice-activated assistants such as Facebook Portal, Alexa and Google Home play their part?

Field Group

But the next wave of Fintech apps

While 2007 to 2013 was the era of business to consumer (B2C) financial services apps, the next wave of apps is likely to be more suitable for B2B processes and will harness the power of

Add media

Publishing status

Provider

Media name

Language

- Any -

- Any -

- Any -

Apply

Thumbnail

Media name

Provider



EventBanner_Seattle

Image



EventBanner_Seattle ABM

Image



DrupalCon Banner 2019

Image

Media

Select Video



[View Videos](#)

[Add Video](#)

[Manage all Videos](#)

Title



Video Type

- Any -

Tags

Choose some options

Apply



Kia Commercial



M&M Commercial



Burger King Commercial



Bumble Commercial

Entity Browser



2019 Amazon Sales & Advertising Acceleration Round-Table



Today's Logistics

Image *



Alternative text *

Volunteer with DCCO

Short description of the image used by screen readers and displayed when the image

 [volunteer-banner.jpg](#) (74.08 KB)

Remove

Focal Point Preview

[Home](#) » [Administration](#)

Click an image to see a larger preview. You may need to scroll horizontally for more image

1920x300

A large banner image with a blue overlay. The text "Focal Point" is written in large white letters. The background shows a group of people working at computers.

Focal Point

1920x750

A smaller version of the banner image, showing the blue overlay and the text "Focal Point" in white.

Browse

Filter

Layout

Search

simple paragraph ...

Layout

LAYOUT - RESOURCE COLUMNS

This screenshot shows a website layout with three columns of content. The main heading is "Your Open Community" with a sub-heading "Share Knowledge with 400 Beta Members (& Counting) from Over 300+ Institutions". The columns contain: 1) "DEVELOPMENT FORUM" with a sub-heading "Connect and Share Knowledge with an Open Community of Developers" and a button "Explore the Community >"; 2) "GET STARTED GUIDES" with a sub-heading "Consectetur Etur elit Sed do Eiusmod lorem ipsum Dolor" and a button "View Resources"; 3) "DEVELOPMENT RESOURCES" with a sub-heading "10.1 Development Deploy Process for FusionFabric.cloud Lorem Ipsum" and a button "View Resources".

Add

LAYOUT - TWO COLUMN

This screenshot shows a website layout with two columns of content. The main heading is "An Integrated Development Environment with Comprehensive Applications". The left column features a large image of a laptop displaying a code editor. The right column contains a sub-heading "Code Editor" and a paragraph of text. Below this, there are two more sub-headings: "Build Automation" and "Debugger", each followed by a paragraph of text.

Add

Paragraphs Browser

The Contrib Ecosystem: Honorable Mentions

- 1 Chosen
- 2 Linkit
- 3 Entity Embed
- 4 Metatag
- 5 Acquia Purge



**IMPROVEMENT AREA 3 \\
CUSTOM AND SITE-SPECIFIC**

CUSTOM IMPROVEMENTS \ THEME

Focus your
custom dev time
on what provides
the most value for
site admins - and
make it reusable.

SIMPLE - CTA BLOCK

Heading *

Get in touch to learn how we can help you see more clearly.

Link

LINK - DEFAULT

Link

Get in Touch

COMPOUND - FORM BAR

Daily Data Updates

Numerator's data updates daily, so you can monitor changing behaviors and sentiments in real-time, with or without consultant guidance.

Omnichannel and Omniproduct

COMPOUND - CALLOUT

People, Not Panelists

We know more about shoppers and what they buy. If you're looking for real-time, true omnichannel purchase data across all retailers, we've got you covered.

InfoScout OmniPanel™

COMPOUND - STAT BAR

Strength in (Our) Numbers

400K
panelists uploading receipts
500
+

COMPOUND - MEDIA BAR

Content Item

Heading

Fast

Description

Get rapid consumer and shopper insights. Incoming receipts and triggered surveys are processed around the clock, making your

CUSTOM IMPROVEMENTS \ \ VIEWS

Views isn't just for the frontend!

- More focused content overview pages.
- Content moderation dashboards.
- Custom reports and data exports.

Manage Resources

Home » Administration » Content

Title Content Access Resource Type Topic

Apply

Title	Content Access	Resource Type
Policy Brief - State Authorization Across State Borders	Public	Re
ED Negotiated Rulemaking: Thoughts, Updates, and New Position Papers from OLC, UPCEA, & WCET	Public	An
February 26, 2019 Coordinator Call	Private	Co Ca
SOS! SOS! Secretary of State Compliance Demystified	Public	Ta Po
Don't Wait Out the Federal Rulemaking: These State Authorization Related Federal Regulations are Currently Enforceable!	Public	An
Data Protection & Privacy - What Institution Staff Needs to Know!	Public	Pa W
February 2019 eNewsletter	Private	eN
2019 Special Interest Teams	Public	Re
ED Negotiated Rulemaking: Issue Summary and Seeking Your Input	Public	An
January 22, 2019 Coordinator Call	Public	Co Ca



TRAINING



BACKSTORY

**I did a lot of other things
before I started doing
this**

- **Maker of sandwiches**
- **Research assistant**
- **Professional baker (mostly pie)**
- **Photographer of graduating college students**
- **Door-to-door organizer (both knocking doors and managing canvass offices)**
- **Leader of traveling sustainability nonprofit**
- **Marketer and fundraiser for a French nonprofit**





Before the training

BEFORE THE TRAINING

Strategically choose who will lead the training



BEFORE THE TRAINING

Clearly define client roles for QA and content entry



BEFORE THE TRAINING

**Intentionally create a training outline
(with ‘whys’!)**



Here's what a training outline might look like

Basic Page

- Drupal 101
 - Content type
 - Field
- What is a basic page and when would you use it?
- View basic page
- Edit sample basic page (learn things that will apply sitewide)
 - How to use a WYSIWYG
 - Go through formatting options side-by-side with page
 - Image imbed - value of tagging content
 - Dropdown under "normal"
 - Source for pasting content
 - Relationships
 - Department - determines who can edit (locked down for most users)
 - Topic - helps admins find these pages
 - Options at the bottom
 - Url path settings
- Create simple basic page (to reference later in training, teach internal linking)

Structured Content

What is structured content and why would I choose to use it?

News (Basic page+)

- What is a news page and why would you use it
- Edit sample news page
- Placing news content - manually added to everywhere it appears (referencing news item you created)

A young girl with blonde hair, wearing a white dress with a colorful floral pattern, is captured in the middle of swinging a bright yellow baseball bat. She is standing on a green lawn. In the background, three people are watching her: a woman in a blue dress on the left, a man in a light blue shirt holding a phone in the center, and another woman in a teal shirt on the right. The setting is outdoors, with a brick building and various plants and flowers in the background. A white base is visible on the grass in front of the girl. A white ball is in the air to the right of the girl. A pair of sandals is on the ground near the girl's feet. The sky is overcast.

At the training

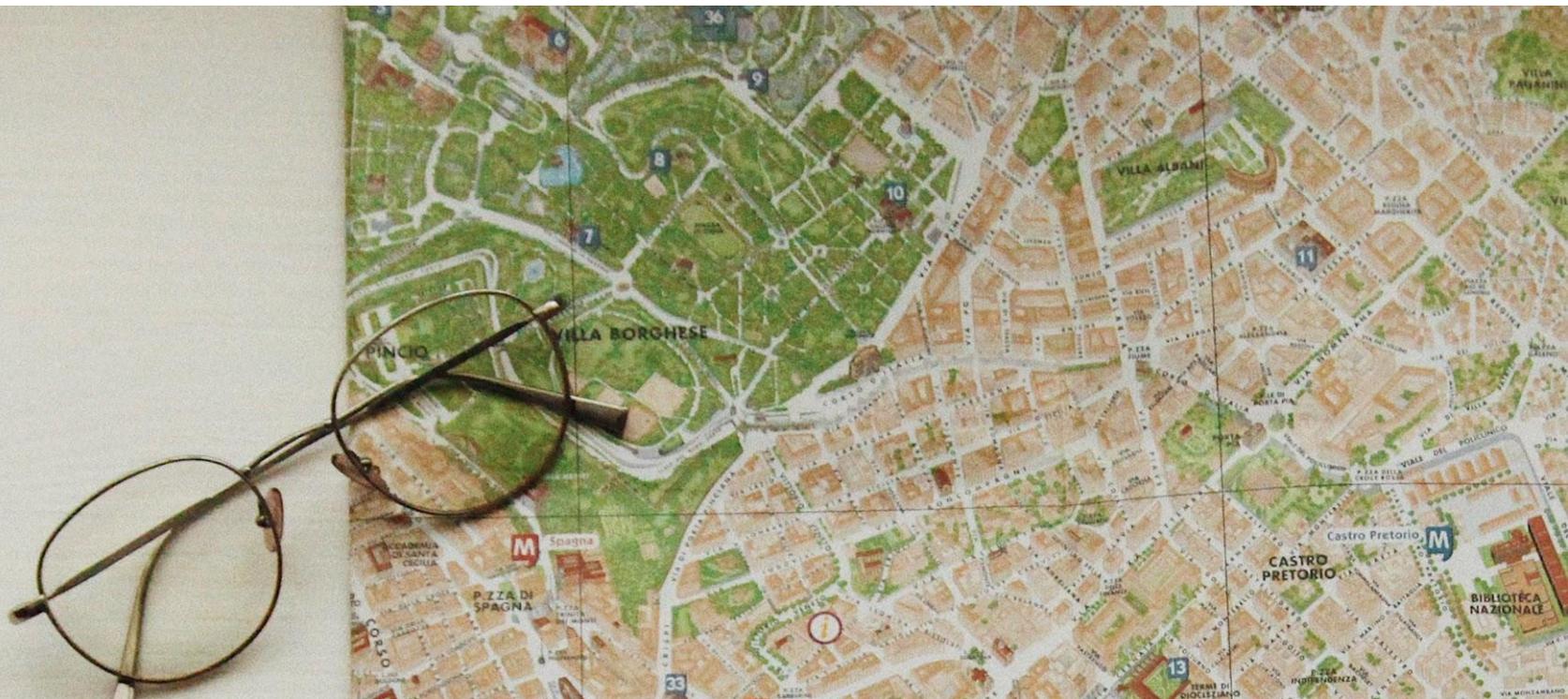
AT THE TRAINING

Know your audience



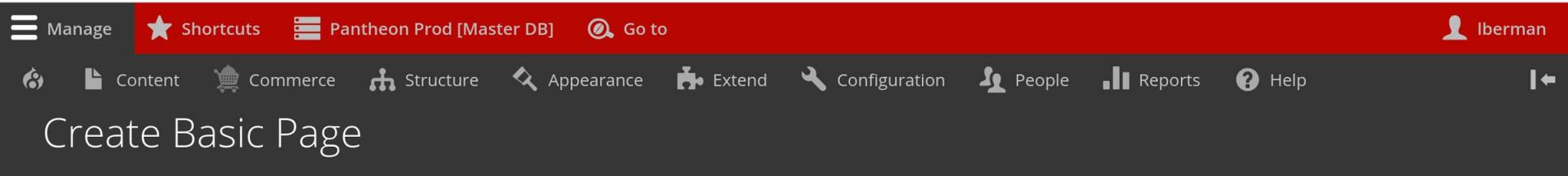
AT THE TRAINING

Roadmap and signpost



AT THE TRAINING

Start simple



The image shows the top navigation bar of a Drupal 8 administration interface. It features a red top bar with 'Manage', 'Shortcuts', 'Pantheon Prod [Master DB]', and 'Go to' (with a magnifying glass icon). On the right side of the red bar is the user profile 'Iberman'. Below the red bar is a dark grey navigation bar with icons and labels for 'Content', 'Commerce', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', 'Reports', and 'Help'. A large white button labeled 'Create Basic Page' is positioned below the navigation bar.

[Home](#) » [Add content](#)

Title *

Banner *

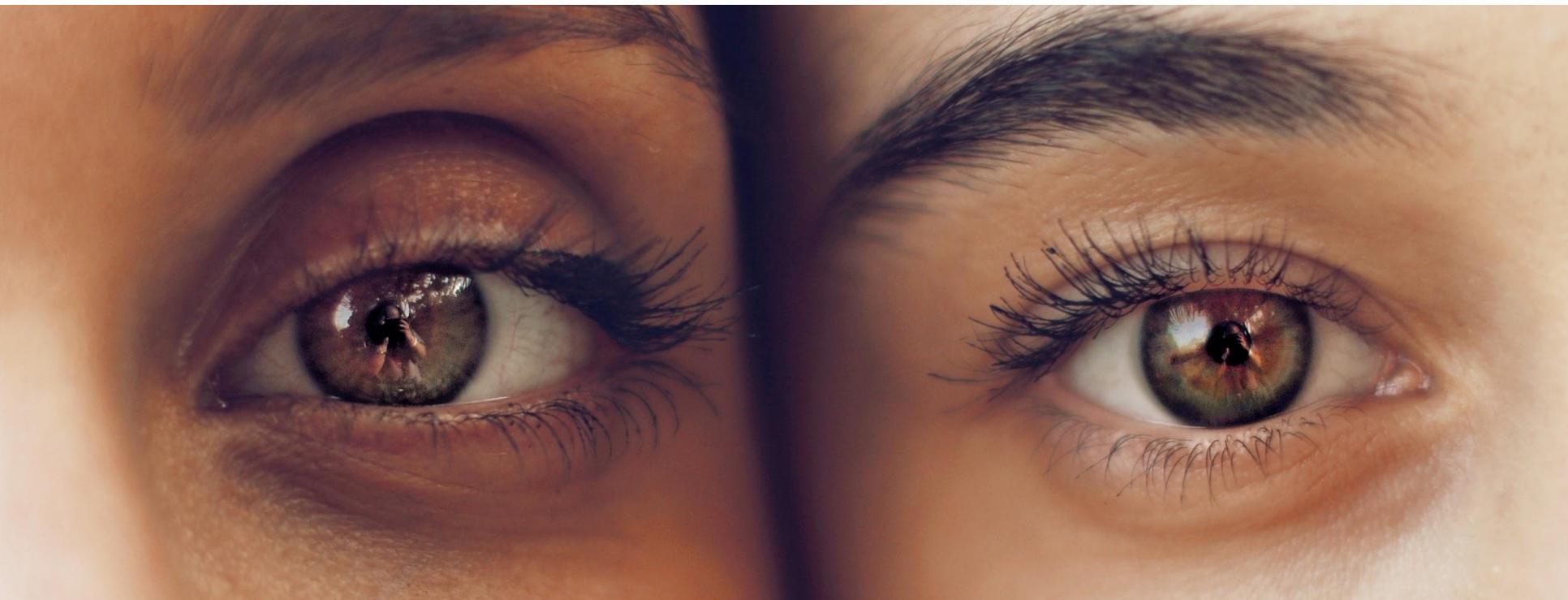
Content

Body ([Edit summary](#))

B **S** **I**          Source  **E**

AT THE TRAINING

Show complex content side by side





Why Attend

Learn

Summits, trainings, sessions and sprints provide opportunities to engage with thought leaders from the Drupal community and beyond.



Mountains 02
Image Type
Background

Remove
Replace

Callout Content *

Simple - Call Out

Contribute your knowledge and skills to DrupalCamp Colorado

[Become a Volunteer](#)

Subheading
Volunteer With Us

Add Content

▶ SETTINGS *

Simple - Reason

Sub-heading

Why Attend

Set the small text above the large text

Heading

Learn

Set the large text

Description

B S I [List Icons] [Source] **E**

Summits, trainings, sessions and sprints provide opportunities to engage with thought leaders from the Drupal community and beyond.

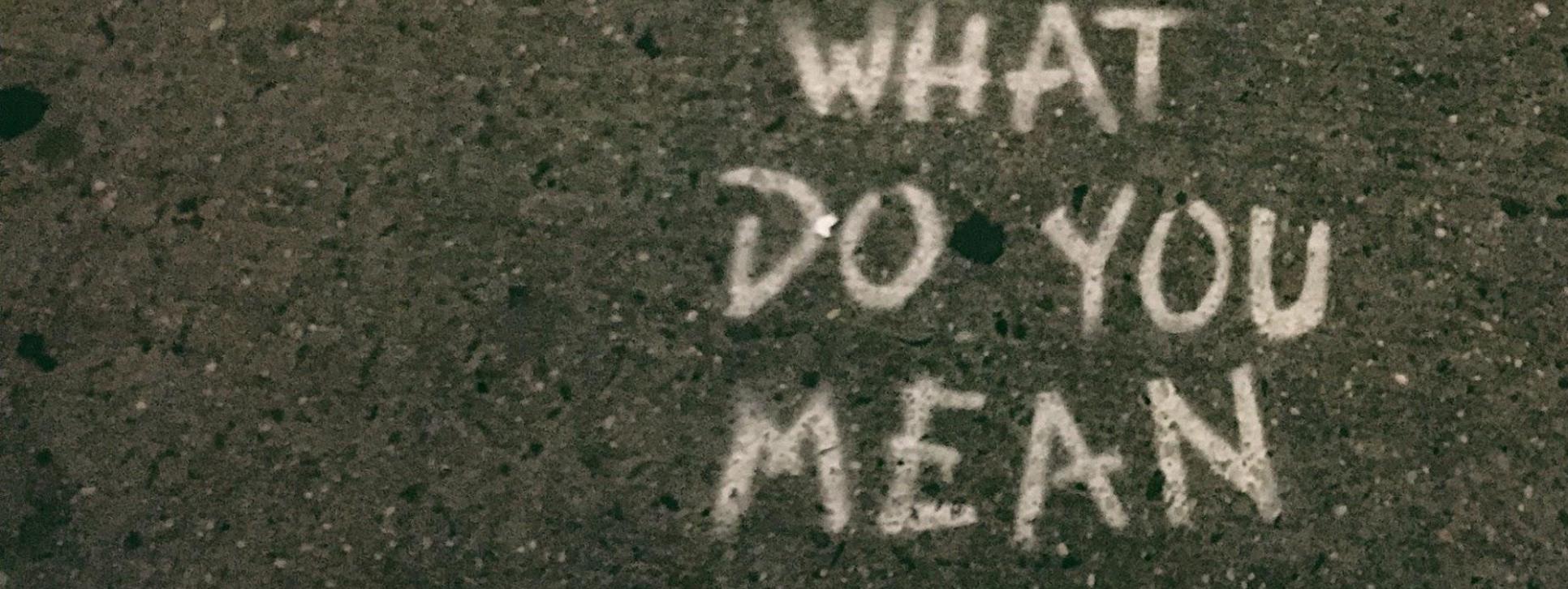
AT THE TRAINING

Check your jargon at the door



AT THE TRAINING

Ask the right questions



WHAT
DO YOU
MEAN



After the training



AFTER THE TRAINING

Send training documentation



AFTER THE TRAINING

**Build touch points for questions into
your scope and timeline**



Please provide your feedback!

Empathy for Internal Users Session Node

The top-rated sessions will be captioned,
courtesy of Clarity Partners

Join Us for **Contribution Day**

Saturday, March 23, 2019

You don't have to know code to give back!

New Contributor training 10am to Noon
with **AmyJune Hiline** of Kanopi Studios



elevatedthird.com

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