

The background is a detailed architectural floor plan of a house. The drawing includes various rooms such as a kitchen, living area, bedrooms, a bathroom, a sauna, and a spa. Dimensions and room codes are scattered throughout the plan. A person's hands are visible, one pointing at a section of the drawing. A yellow circle is superimposed in the center, containing the text. Surrounding the drawing are various tools: a laptop keyboard in the top left, a pair of glasses at the top center, a compass and a pencil in the top right, a calculator in the bottom left, and a north arrow in the bottom right.

Case Studies

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About Me



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Quantive



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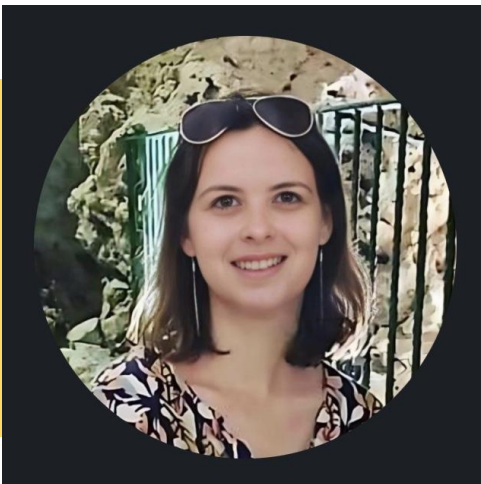
Yotpo





AUTUMN KOTSIUBA

I'm a Senior Content Designer / UX Writer with 5 years of experience. Originally from the States, I've worked with international companies in the UK, Bulgaria, Poland, and Ukraine.



I've been the sole UX writer—building design systems from scratch and training junior designers—and I've worked at large tech companies as part of a writing guild. In both cases, I knew the value of good copy.

A NOTE ON CASE STUDIES

Case studies are only somewhat useful, aren't they?

I don't want to show you an out-of-context screen with some polished copy. Let's work off the assumption that with my experience, I know how to write and clean up the end product.

What I want to focus on instead is the **process** I use to make copy decisions. Because if you know *how* to tackle a problem, you'll always stumble across the solution.



CASE STUDY 1

Content Design at Quantive



The company

Quantive monitors business performance via KPIs, OKRs, and other metrics using AI.

The Context

Quantive's admin-level permissions were inconsistent and unclear. We received many questions about how they worked, both externally and internally.

The screenshot shows a permissions configuration page for a custom role. The page title is "Set permissions to this role" with a sub-header "user-custom" and an "Edit" button. The permissions list includes:

- Access Insightboards: Users in this role can edit Insightboards. (An annotation points to this title: "allows you to edit the title and description of the custom role")
- Manage Data: Users in this role can create, edit and delete Data Sources, Insightboards, Insights, and Automation.
- Access KPIs: Users in this role can access and use (but not create, delete and edit) KPIs.
- Access Private OKRs: Users in this role can see private OKRs of other users.
- Manage OKRs: Users in this role can create, edit and delete OKRs.
- Access Setup: Users in this role can view account setup, but cannot modify it.
- Manage Setup: Users in this role can edit, create and delete insights, Entities and Data Sources.
- Manage Users: Whether the users in the role can manage (edit permissions, delete) other user profiles.
- Manage Configuration: Whether the users in the role can manage (edit permissions, delete) other user profiles.
- Manage Accounts: Whether the users in the role can create, edit and delete Accounts.
- Manage Sessions: Whether the users in the role can create, edit or delete Sessions.

Annotations on the screenshot include:

- "Edit what?" pointing to the "Edit" button.
- "Inconsistent titles that don't contain relevant info" pointing to the "Access Insightboards" title.
- "No hierarchy or grouping of settings" pointing to the "Access Private OKRs" and "Manage OKRs" items.
- "No hierarchy or grouping of settings" pointing to the "Access Setup" and "Manage Setup" items.
- "Awkward warning messages with the wrong tone" pointing to two yellow warning boxes: "Be careful, managing insightboards without permissions to view them would be impossible." and "Hey, managing KPIs without permissions to access them would be hard. Think again." (An annotation also points to the "Manage Sessions" item: "sessions are related to OKRs but are positioned way down in the list.")

A "Save permissions" button is located at the bottom of the page.

We needed to redesign and rewrite so that the permissions were more intuitive.



The company

Quantive monitors business performance via KPIs, OKRs, and other metrics using AI.

The Process

I began by mapping the existing permissions settings to make sure I understood how they worked. You can't write what you don't know.

User role permissions specifics from the UX/UI perspective				
Current title	Specifics	Permissions correlation	Specifics	Notes
Access Insightboards	Users in this role can access and use but not create, delete and edit Insightboards.	Manage Data	<ul style="list-style-type: none">Access Insightboard enables the whole module for Insightboards thus "Manage Data" will need "Access to Insightboards" to access the Insightboards module.A user can be granted full insightboard access through granular permissions - this is intentional - see the documentation for details. This is different from how we handle KPIs granular permissions for example. But Manage KPIs is separated from Manage Data.Access to individual insightboards can be restricted with granular permissions.	
Manage Data	Users in this role can create, edit and delete Data Sources, Insightboards, Insights, and Automations.	Access Insightboards Manage Configuration	<ul style="list-style-type: none">Without Access Insightboards - there is no way to access the insightboard module.Grants full access to data sources, Insights, Insightboards, Insightboard parameters.Grants access to Process, Performance and Aggregated ODR reports.Grant access to Automation.There is a correlation with Manage Configuration and Insightboard Parameters - a bug is logged here.Access to individual insightboards can be restricted with granular permissions.	
Access KPIs	Users in this role can access and use but not create, delete and edit KPIs.		<ul style="list-style-type: none">enables the KPIs module under the New Navigation.Unlike Access Insightboards - before granting granular permissions for KPIs we're looking for the "Manage KPIs" user role permissions, without them the user is not allowed to edit the KPI, even if they have been granted granular permissions.Access to individual KPIs can be restricted with granular permissions.	
Manage KPIs	Users in this role can create, edit and delete KPIs.	Access KPIs	<ul style="list-style-type: none">Full access to KPIs and ability to create and edit KPI Groups.Access to individual KPIs can be restricted with granular permissions.	
Access reports and parameters from data sources	Users will be able to access Performance and Process reports. They will also be able to apply parameters to.	Access Insightboards Manage Data	<ul style="list-style-type: none">This is a lightweight Manage Data permission - its primary purpose is to allow users who have access to insightboards with insights based on data sources - to view and filter the insight with custom visualization.	

Who managed each permission wasn't clear

Some settings were actually deprecated



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The Solution

We found that the bulk updates needed to be its own page, where merchants could view their history and make advanced actions.

Set permissions for New Role ×

Edit role

General

- Access OKRs**
Allows users to view OKRs and sessions, but not own, create, edit, or update them. Users can also view and create OKR reports. This only applies to OKRs within sessions visible to the user.
- Manage OKRs**
Allows users to own, create, edit, update, and delete OKRs. This only applies to OKRs within sessions visible to the user.
- Access private OKRs**
Allow users to view private OKRs. This only applies to OKRs within sessions visible to the user.
- Manage sessions**
Allows users to create, edit, and delete sessions.
- Manage tasks**
Allows users to own, assign, create, edit, and delete tasks.
- Manage Whiteboards**
Allows users to create, edit, and delete Whiteboards.

Account

- Manage account setup**
Allows users to view and edit settings related to the setup of the account.
- Manage account notifications**
Allows users to manage account-level notifications. Personal user notifications settings can override these settings.
- Manage users and roles**
Allows users to invite, edit, activate, deactivate, and delete users. Users will also be able to create, edit, and delete user roles.
- Manage apps**
Allows users to add, manage and build apps through the Marketplace.
[Users will also need "Manage account setup" permissions.](#)
- Manage API tokens**
Allows users to view, create, and revoke API tokens on behalf of the interacting user. Only admins can manage tokens for all users.
- Manage billing**
Allows users to manage the account subscription and billing.

Save Cancel

Clearer title and CTA

Added categories, and reordered the structure

Made entire card clickable for accessibility

Cleaned up subtitles with relevant info and mentioned dependencies



CASE STUDY 2

Content Design at Yotpo



The company

Yotpo helps small business owners manage their online stores: from offering subscriptions, managing reviews, and sending campaigns.

The Context

Many brands manage thousands of subscription contracts, but merchants could only perform bulk actions on 50 at a time. We needed to give them the option to actually make *bulk* updates, and complete more complex actions.

Subscriptions
View, manage, and update all of your customer subscriptions with easy filtering and bulk actions. [Export to CSV file](#)

Product: Variant: Next charge date: Subscription status: Active x Paused x +3

Last status update:

Show only subscriptions in dunning

Heads up! To swap a product for multiple subscriptions, you need to filter by the product and variant you want to swap first, and then make your selection. [Clear selection](#) [Swap product](#) [Set next charge date](#)

Subscription ID	Customer	Products	Billing frequency	Delivery frequency	Next charge date	Status
<input checked="" type="checkbox"/> 7995818182	Auttie K autumn.kotsluba@outl...	Coffee Ca... 2x Express... +1	1 week	1 week	July 27, 2024	Active In dunning
<input checked="" type="checkbox"/> 8975777990	Auttie K autumn.kotsluba@outl...	Product na...	1 month	1 month	July 29, 2024	Active
<input checked="" type="checkbox"/> 9707651270	Auttie K autumn.kotsluba@outl...	SKU Multi Drip Coffe... +2	1 month	1 month	July 29, 2024	Active
<input checked="" type="checkbox"/> 8804270278	Auttie K autumn.kotsluba@outl...	Espresso ... Coffee Ca...	1 month	1 month	July 30, 2024	Active
<input checked="" type="checkbox"/> 9510518982	Auttie K	Coffee Tour	1 month	1 month	August 22, 2024	Active

Awkward message that's shown only after merchants try to make a change

We'd measure success by the use of the feature, and the time saved by the brands.

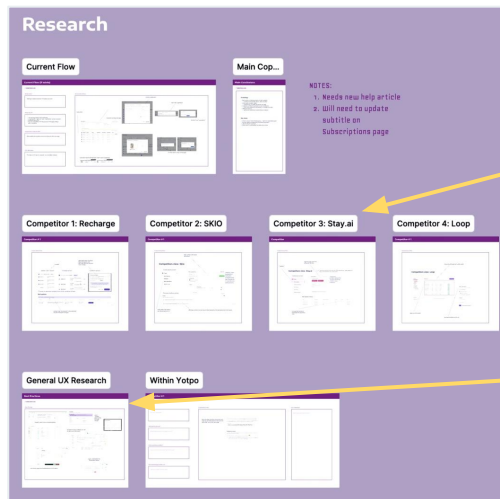


The company

Yotpo helps small business owners manage their online stores: from offering subscriptions, managing reviews, and sending campaigns.

The Process

Before writing, I always devote time to research. This includes understanding the current flow and needs, identifying the main questions, running competitive analysis, and applying general UX principles.



Competitors used complex terminology and wonky hierarchy

Resources like NNG and Yotpo's style guide provided insights into bulk action expectations

I also ran a card sorting exercise, aligned with stakeholders, and understood the main requirements from user interviews.

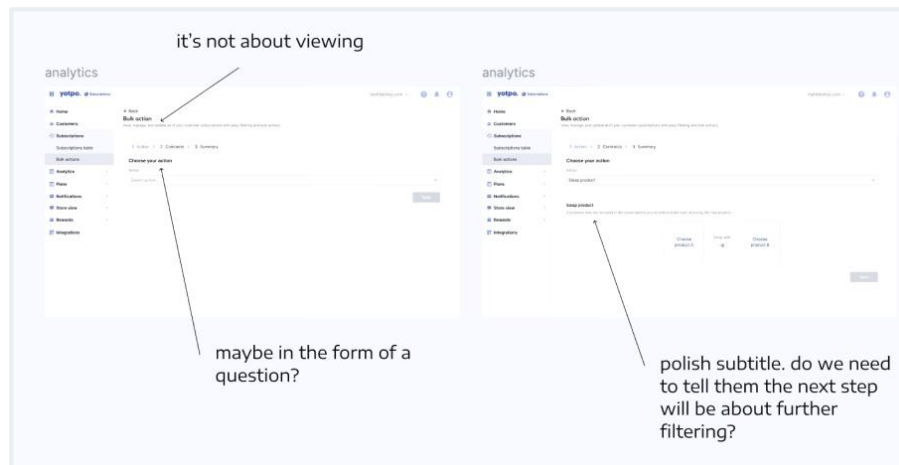


The company

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The Process

After running my own research and syncing with other stakeholders, I tried different solutions. This doesn't start with polishing the copy; it's about making sure the information architecture and flow is correct and intuitive, then fine-tuning.



This feature went through multiple iterations. We tried three options before landing on one that performed well in testing. Some considerations included vocabulary, hierarchy, and feature placement.

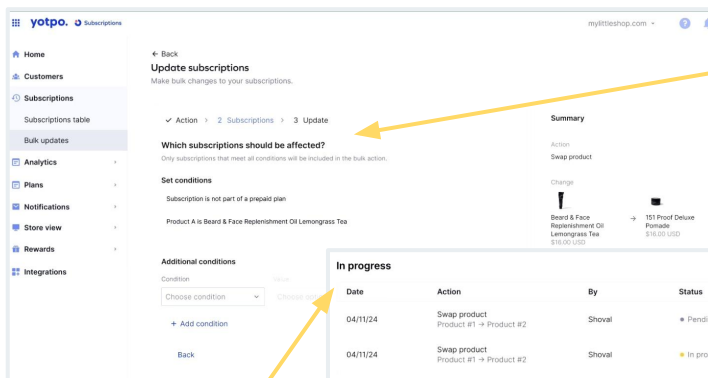


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The Solution

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Using conversational questions instead of jargony labels

Being clear about status and what actions (if any) need to take place

In progress					
Date	Action	By	Status	Affected contracts	Actions
04/11/24	Swap product Product #1 → Product #2	Shoval	⚪ Pending	0 / 4,534	<button>Stop</button>
04/11/24	Swap product Product #1 → Product #2	Shoval	⚪ In progress	1,323 / 5,634	<button>Stop</button>

Bulk action history					
Date	Action	By	Status	Affected contracts	Actions
04/11/24	Swap product Product #1 → Product #2	Shoval	⚪ Done	231	<button>Export to CSV</button>

What worked? Communicating the feature conversationally; working alongside devs to map and prevent errors; providing a summary of settings; and giving the feature its own page.



Thanks for reading

Like what you see? Reach me at autumn.kotsiuba@outlook.com.