

# Attila Hajdu

A User-Centric Digital Transformation with Aareon

📞 (+44) 75 217 34539

🌐 <https://hajduattila.com>

📍 Portsmouth, Hampshire, UK

✉ [hello@hajduattila.com](mailto:hello@hajduattila.com)



## Project Inception: A Strategic Outlook

As the Head of Design at Dootrix Ltd, I had the opportunity to work on diverse projects including mobile apps for confused.com & Surfers Against Sewage, and an internal CRM system for Heathrow Airport. Among these, I had the privilege of driving the project from start to finish for our esteemed client, Aareon. The company is a distinguished provider of SaaS and IT solutions tailored for the property industry, with a rich expertise extending to commercial real estate, energy, and municipal sectors. Over 7,000 customers utilise their software solutions to manage more than 12 million units in total, each year. Headquartered in Mainz, Germany, and operating as a subsidiary of Aareal Bank AG, Aareon has a substantial market presence across various European countries including Austria, Germany, Finland, France, the Netherlands, Norway, Sweden, and the United Kingdom. My focal responsibility encompassed merging while simultaneously enhancing the user experience (UX) and user interface (UI) for their SaaS applications namely, 'ImmoBlue', 'Aareon QL Housing Management Software' and 'Aareon Self-Service App for Housing' desktop & mobile applications, leading a diligent team of four designers.

These applications were envisioned to encapsulate the comprehensive life-cycle of properties in the market, ranging from listing properties to recruiting, rating, and filtering tenants based on region-specific criteria, managing contracts, facilitating tenant check-ins and check-outs, invoice processing, payment handling, property maintenance requests, community management, among other functionalities. Aareon's prior approach entailed utilising a dozens of applications, tailored specifically to each region, some of which were rudimentarily designed, leveraging Excel spreadsheets to manage thousands of prospects and tenants. The overarching objective was to amalgamate these disparate solutions into a streamlined SaaS application, adaptable and usable across all regions.

Given a tight timeline of 12 months to reengineer a great number of user journeys, efficiency and expedience were of the essence. Our venture culminated in the design of over 250 distinct screens. I orchestrated regular workshops, employing a modified Google Design Sprint methodology to align with our project requisites. Our routine encompassed a weekly 'Design Jam,' during which we conceptualised wireframes, progressed to low-fidelity designs, garnered feedback from the team, iterated as necessary, and elevated these to high-fidelity designs. These were then transformed into clickable prototypes, while a member of the design team meticulously crafted scripts for ensuing user testing sessions. Following the user testing, we thoroughly analysed the feedback, making requisite amendments to enhance the design and functionality. Furthermore, we pioneered the development of design systems for the applications, ensuring a cohesive and user-friendly interface. As an additional feather in our cap, we collaborated with an external agency to create a video walkthrough from the clickable prototypes, which served as a valuable asset for Aareon's internal communications.

Navigating through this intricate process, with its manifold moving parts, required a blend of design leadership, critical thinking, and adept management to fine-tune our approach. Nonetheless, our diligent and coordinated efforts bore fruit as the project was delivered timely, much to the satisfaction of our client, Aareon. This journey not only epitomised our prowess in design thinking but also underscored the essence of teamwork, client-centric approach, and the relentless pursuit of excellence in delivering a product that stood the test of practicality and user satisfaction.



**Murat, Charles** Charles Murat@dootrix.com

to Alf, me, Jack, jimmy.spikings@dootrix.com, Rob ▾

Dear Dootrix,

The videos we presented today to the MB were acclaimed as a considerable first achievement. I would like to thank you on behalf of all the team for all your great efforts and contribution to this first success.

Thank you!

Cordially,

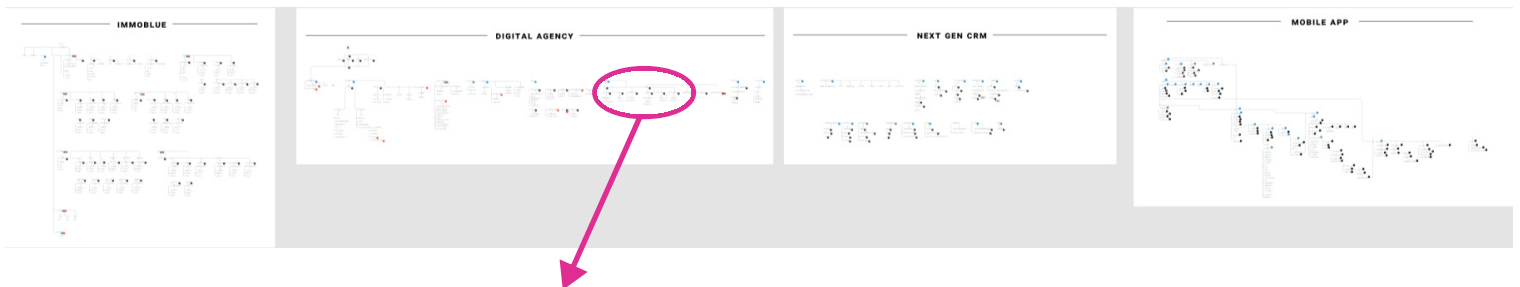
**Charles Murat**

Aareon D&V - NGC Core Team

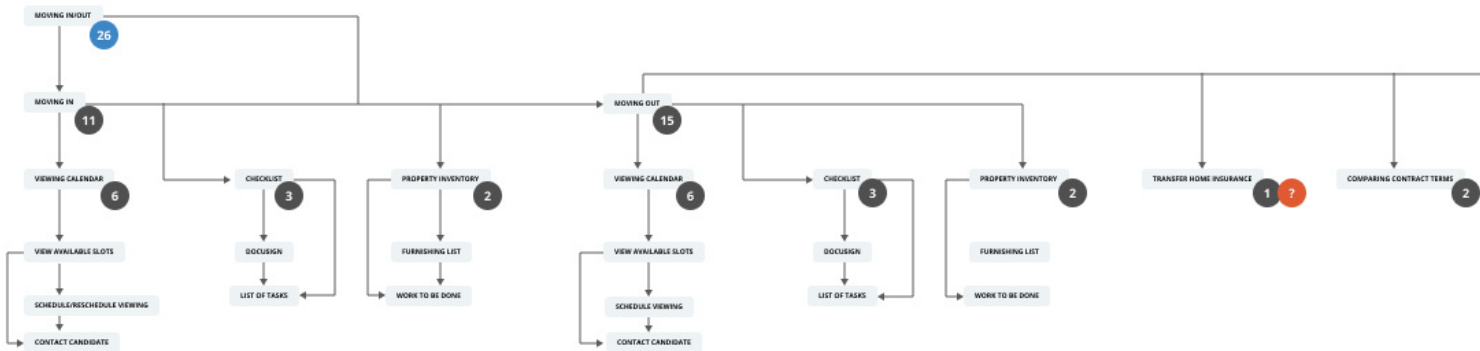
## Complete User Journey & Planning

In undertaking a project with Aareon, which operated three distinct CRM systems in the UK and France, and several others across different regions, our initial challenge was to devise a comprehensive blueprint encapsulating the entire user journey. The foremost challenge encountered was the mobilisation of resources, given the vast number of account managers, product owners, and decision-makers within the company. Fortunately, we had a dedicated 'First Point of Contact' at Aareon, who was instrumental in orchestrating workshops. These workshops were pivotal, as they necessitated the expertise of different specialists to address the diverse aspects of the project. The collaborative ethos fostered during these workshops, underpinned by design thinking and critical analysis, was instrumental in navigating the complexities of the project. The initial sessions were dedicated to delineating the user journeys and providing an approximate count of the screens envisaged for initial creation. The insights garnered from these workshops were meticulously compiled into a master reference document, serving as a cornerstone for our design trajectory.

### Master reference document



### Section detail, with screen numbers estimation



Subsequent to this, it was imperative to establish a comprehensive plan for the workshops, encompassing the aggregation of requisite specifications and participants. Additionally, the onboarding of numerous internal and external stakeholders for user testing was pivotal. Fortunately, our point of contact at Aareon (big shout out to Magdalena), continued to be an invaluable asset throughout the project's trajectory. The culmination of these efforts was a meticulously crafted spreadsheet detailing workshop topics, dates, persons of influence, stakeholders, team members, and scheduled user testing sessions, thereby facilitating a well-organised and transparent project roadmap.

Week Commencing	Deliverable			Must or Nice to have?	No of W/frames estimate	Dootrix Capacity	Notes
	Category	Master Feature	Product				
12/10/2020	Common Design	Navigation	n/a	Must	3	33%	Start to build lo-fi wireframes and a ider
19/10/2020	General User Profile	Return on Value / Data Analytics / BI	Next Gen CRM (DP Widget)	Must	1		Dootrix onboarding new team members
	General User Profile	User Dashboard	Digital Agency	Must	1	66%	
	General User Profile	User Management / Account Creation / RBAC	Next Gen CRM (DP Widget)	Must	1		
	General User Profile	Workflow Customisation / Branding	Digital Agency	Must	2		
26/10/2020	Lead Management	Landlord Selection Criteria	ImmoBlue Pro	Must	1	100%	
	Lead Management	Property Media Library	ImmoBlue Pro	Must	1		
	Components	Creation of common design hi-fi components	n/a	Must	n/a		From this point forward, hi-fi prototype
02/11/2020	Hi-Fi Prototypes	Creation of first batch of hi-fi prototypes	n/a	Must	5-10	100%	Intention is to create hi-fi protos for all t
	Prospect Management	Prospect / Tenant / Property Repository	ImmoBlue Pro	Must	2		
	Prospect Management	Landlord Matching Process Settings	ImmoBlue Pro	Must	1		
09/11/2020	Prospect Management	Landlord Matching Simulation Engine	ImmoBlue Pro	Must	2	100%	Possibly show integration of third party
	Prospect Management	Applicants Profile Building (Short/Full Forms)	Digital Agency	Must	1		
	Prospect Management	Pre-Selection Process for Allocation Board (Multi-Client)	Digital Agency	Must	2		
16/11/2020	Prospect Management	Allocation Board - Virtual Voting Room (VVR)	Digital Agency	Must	2	100%	
	Prospect Management	Follow-up Process on Shortlisted Candidates	Digital Agency	Must	1		
	Tenant Management	Appointment Shared Calendar	Next Gen CRM (DP Widget)	Must	1		
23/11/2020	Tenant Management	Smart Document Generation	Next Gen CRM (DP Widget)	Must	1	100%	
	Tenant Management	E-Payment (Aareal/Gateway/DBEP)	Next Gen CRM (DP Widget)	Must	1		
	Tenant Management	Digital Move-in/out Inventory	ImmoBlue (Pro) (WRM)	Must	1		

## The Workshops

Over the span of 12 months, we conducted approximately 40 workshops, underscoring the demanding nature of this project. Despite the initial teething problems, we adeptly navigated through the challenges, ensuring a consistent delivery of value to our client. Our tech stack was pretty simple: we've used Figma, Miro, Google Hangouts and Slack. The workshops were orchestrated according to the subsequent process:

### Workshop preparation: Requirements gathering, task analysis and competitor analysis

#### Preparing the advertisements

- When I'm ready to begin listing new apartments on the marketplace, I want to have a full view of the (soon to be) available apartments coming from the ERP, So I can prepare the advertisements ahead of time
- When I'm preparing the apartment advertisements, I want to sort them into categories, So I can decide where to publish each listing (third-party, rightmove, etc) and when.
- When I'm preparing the apartment advertisements, I want to import available data from the ERP, So I can begin filling out the advertisement's fact sheet.
- When I'm preparing the apartment advertisements, I want to fill out the fact sheet for each listing (pulled from ERP & additional info added manually on DA (picture/description), So I can be ready to publish the listing
- When I'm preparing the apartment advertisements, I want to configure search settings against the advertisement, So I can improve the screening/filtering process (Banding system, best match, social benefits, amount of candidates that can apply)
- When I come to the DA portal, I want to see a list of all prepared advertisements, So I can have an overview of every advertisement ready to be published

#### Publishing the advertisements

- When I have prepared all the advertisements that I want to publish, I want to select all of my prepared advertisements, So I can publish the advertisements in one go for review
- \*Head Marketeer:** When all advertisements have been prepared and are ready to be published, I want to review and select prepared apartments, So I can authorise and publish the apartments
- When there are published apartments that I am interested in monitoring, I want to view the apartment's information in detail, So I can view the candidates engagement of the apartment
- When there are published apartments that I want to understand better, I want to view the apartment's fact sheet, So I can understand further details of the apartment
- When there are published advertisements, I want to see a list of all published advertisements, So I can monitor all published advertisements
- When I view further details of a published advertisement, I want to be able to update (select fields) of the advertisement, So I can improve the engagement level (cut expiry time short as found candidate, change the threshold, unpublish etc)

Prior to each workshop, the design team diligently engaged in gathering requirements, conducting task analysis, and performing competitor analysis. This preparatory work ensured that the upcoming workshop was poised to be as productive as possible.

### Stage 1: Workshop day 1; Wireframe sketches



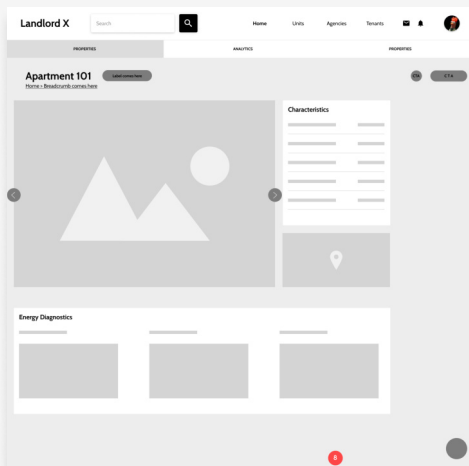
- Presenting and further discussing business/user requirements
- 'Ask the Expert' session
- Collaboratively sketching wireframes to identify optimal solution

#### Next steps

- design team creating the initial lo-fi wireframes
- Aareon gathering required/missing data

**Favourite exercises:** story boarding, journey mapping, card sorting, crazy 8's, dot voting and wireframing

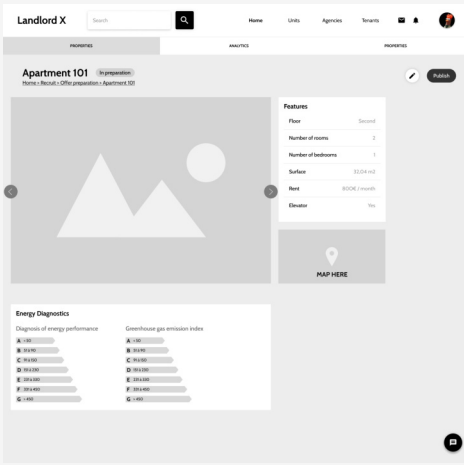
### Stage 2: Workshop day 2; From Sketch to Structure



- Initial lo-fi wireframe(s) based on sketches done on our discovery workshops
- Aareon team supplying data to fill in the details
- Iterating, should we missed something on our first session

## The Workshops

### Stage 3: Detailing Phase

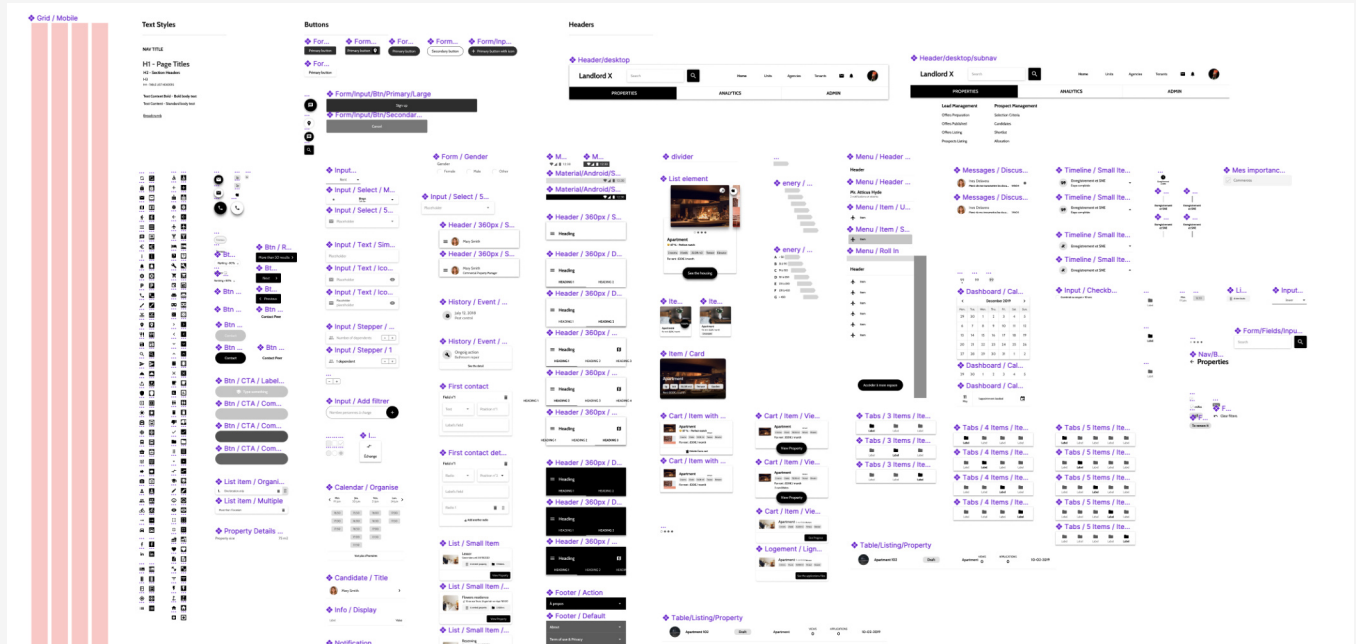


- Enrichment of lo-fi design: Infusing additional details to enhance the wireframes.
- Feedback and Iteration Cycle: Engaging in succinct feedback sessions, followed by iterations as necessitated to ensure design alignment and accuracy.

## Simultaneous Design System Build

As the workshops unfolded, a parallel effort was embarked upon to design and build a coherent, white label design system. This concurrent journey was meticulously organised to ensure a seamless alignment between the evolving design insights from the workshops and the foundational elements of the newly developed framework. The collaborative synergy between the workshop discourse and the design framework construction fostered a dynamic ecosystem where ideas could be rapidly prototyped, evaluated, and refined. This duality not only expedited the design process but also engendered a robust design system that resonated with the user requirements and business objectives. The iterative nature of this phase bolstered a culture of continuous improvement, where feedback from the workshops was integrally woven into the evolving design framework, thereby progressively enhancing the fidelity and utility of the design assets. This orchestrated approach significantly contributed to a holistic and well-structured design ecosystem that underpinned the succeeding phases of the project.

### Design system, detail





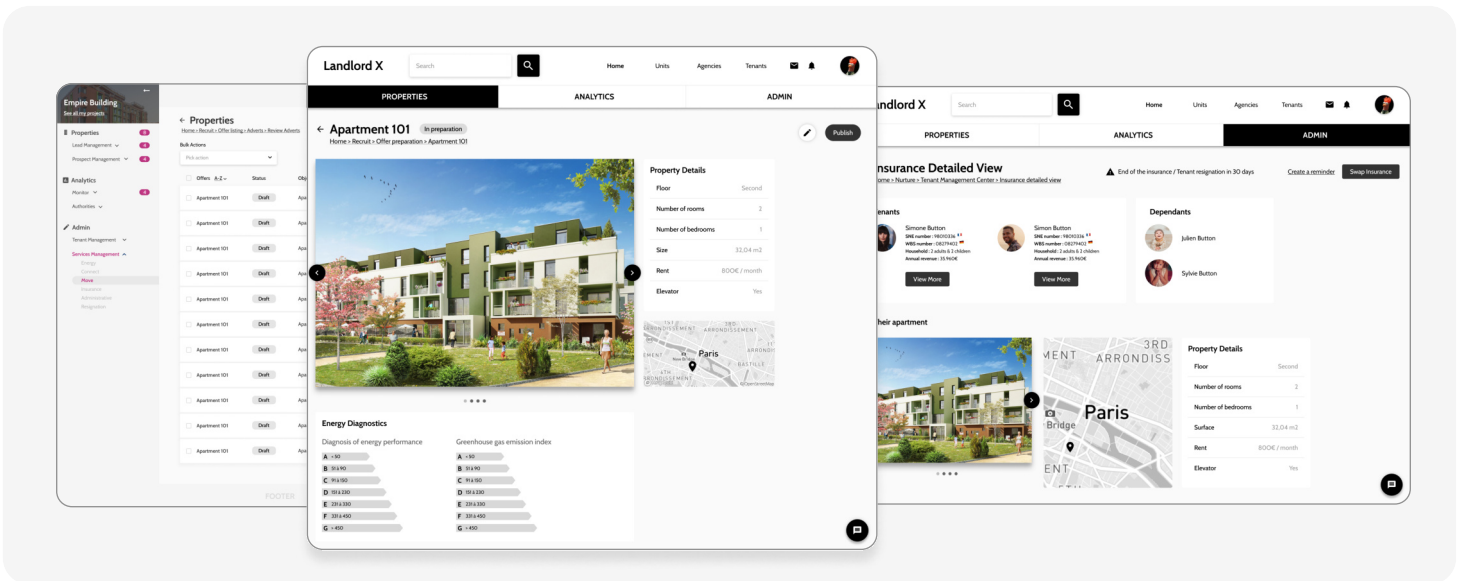
## Hi-Fi Designs, Prototyping & User Testing Sessions

Once we received approval for the design system components, we progressed to transform the initial low-fidelity wireframes into high-fidelity designs, and then into interactive prototypes. It was crucial to keep the Head of Engineering in the loop at all stages to ensure that our proposed solutions were technically feasible.

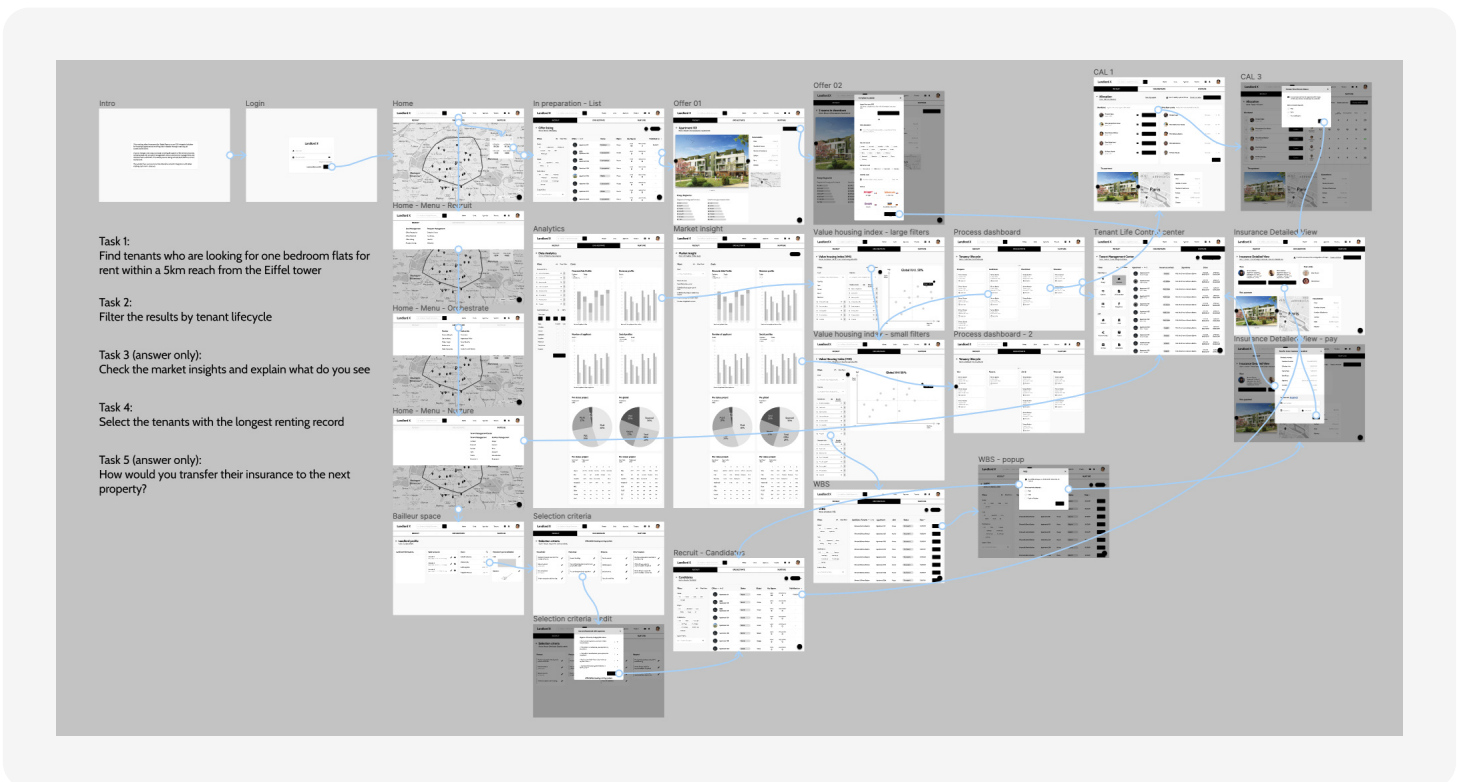
In the meantime we introduced an incentive programme approved by Aareon, where participation in our user testing sessions was rewarded with points that could be redeemed for Amazon vouchers. This programme encouraged more engagement during testing, providing us with valuable feedback.

The user testing sessions were conducted remotely, using screen sharing, with the interviewer, a note-taker, and the user participating. Following the scripts, we asked the users to complete various tasks while we observed if they followed the intended (happy) path, found a workaround, or encountered issues. Each session ended with a few additional questions to discuss overlooked pain points, if any.

### Stage 4: High fidelity design



### Stage 5: Prototyping & User Testing



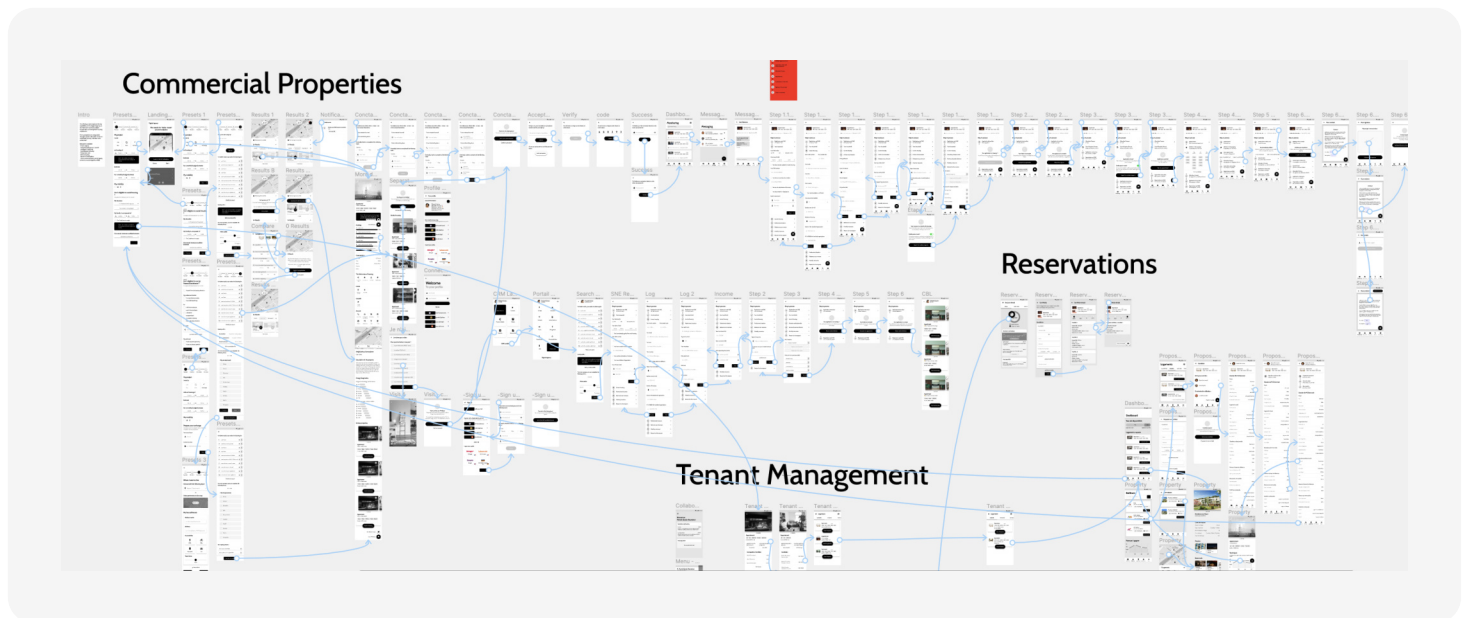
## Rinse And Repeat

While each workshop presented its own unique blend of topics, teams, decision makers, and facilitators (a strategy I employed to enhance the design team's skillset), a consistent structure was maintained throughout the entire process. After every set of four workshops, a pause of a week was instituted. During this 'break', the team engaged in retrospectives, honed the processes, checked for inconsistencies or unnecessary steps in the user journeys, and took a step back to assess the progress from a bird's-eye view.

## Mobile Journeys, Designs & Prototypes

As the project neared its end, we collaborated very closely with Aareon's mobile team, joining forces with key decision-makers to discern the critical user journeys and functionalities for the mobile applications. Initially, the design framework was expanded to encompass components suitable for mobile designs. Upon securing approval from our client, we proceeded to develop the designs and craft the prototypes. User testing sessions were scheduled and conducted, with iterations made as and when necessary to refine the user experience and meet the project objectives.

### Stage 6: Creating designs for the mobile app



## Conclusion

After the designs have been signed off, Aareon's external creative agency crafted demo videos from our designs which were then showcased to the senior leadership, including members of the company's C-Suite. The feedback received was overwhelmingly positive, instilling a sense of satisfaction and fulfillment among us at Dootrix.

This journey was a meticulous expedition into strategic design, underpinned by thorough preparation and collaborative workshops. Commencing with a blueprint of user journeys, the project developed through phases of initial ideas, sketches, low to high-fidelity designs, all fortified by a robust, white label design system. Continuous engagement with Aareon's teams and iterative refinements, driven by user testing, were instrumental in aligning the designs with user needs and business objectives. This venture not only culminated in a robust and user-centric suite of applications but also engendered a culture of continuous learning and improvement, exemplifying the potent synergy of collaborative design and informed decision-making.

## Bonus: Key Learnings

This project was a treasure trove of learnings, here are some pivotal takeaways:

1. **Collaborative Synergy:** The vitality of collaborative synergy between different teams and stakeholders was markedly evident. It underscored that a unified vision and open communication channels are the bedrock of navigating complex projects to success.
2. **Continuous Improvement:** The iterative nature of design was not just a methodology, but a culture that propelled continuous improvement. It accentuated that feedback is a goldmine of insights that fuels refinement and innovation.
3. **Preparedness and Adaptability:** The importance of meticulous preparation before each workshop, balanced with the agility to adapt to new insights, was a key lesson. It's a delicate dance between being well-prepared and staying open to emergent insights.
4. **User-Centricity:** The user testing phases reiterated the importance of maintaining a user-centric lens throughout the design process. It's the users' experiences and interactions that ultimately measure the design's efficacy.
5. **Expanding Design Systems:** Extending the design framework to accommodate mobile designs showcased the fluidity and scalability of well-structured design systems. It's an embodiment of forward-thinking and adaptability.
6. **Skill Development:** Rotating facilitators to enhance the design team's skillset turned out to be a great approach to fostering a culture of learning and skill diversification within the team.
7. **Value of Incentives:** The incentive programme for user testing participants highlighted a great approach to garnering engagement and valuable feedback.

These learnings have not only enriched my professional acumen but have also left a permanent imprint on how I approach collaborative design projects and user-centric methodologies.

## Thank You

This project stands as a testament to the impact well-structured design methodologies, coupled with a culture of continuous improvement and collaboration can have on delivering not just a product, but an experience that resonates with users and aligns with business objectives.

As I reflect on this venture, the enduring relationships fostered, the skills honed, and the knowledge garnered, form a cherished chapter in my professional career, fuelling the aspiration for many more collaborative and impactful design journeys ahead.

Should you wish to explore more about my design journey, feel free to check out my website at <https://hajduattila.com> or reach out at [hello@hajduattila.com](mailto:hello@hajduattila.com). I welcome the opportunity to share and engage in insightful dialogues that propel the design discourse forward.

I sincerely appreciate the time you've taken to go through this case study. Thank you.

Attila