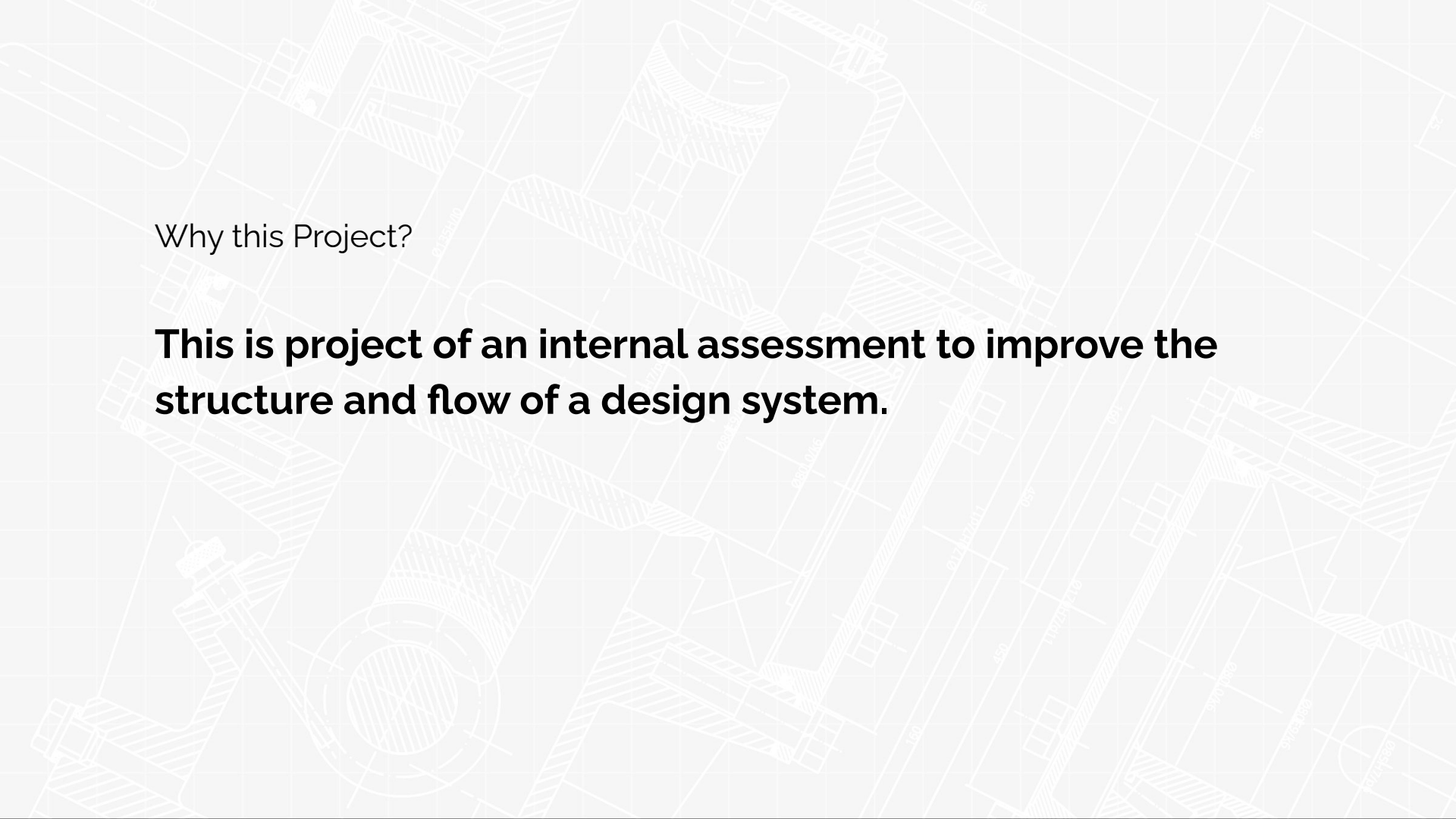




**CORE**

**DESIGN  
SYSTEM**

Design System Assessment



Why this Project?

**This is project of an internal assessment to improve the structure and flow of a design system.**

## Collaboration

**I paired with UI Manager, James Smith.** He represented the Design System UI Designers - producers of the visual assets and specifications in the design kit.



**I represented the UX/Product Designers** - consumers and contributors to the design system.



We shared responsibilities in the research, design, and strategy. I conducted more of the research, focused on the strategy, and produced and presented this work to leadership.

**Our goal** is to enable teams to efficiently design, build and deliver valuable, cohesive, reliable experiences across our web and mobile applications and to **continually elevate the global user experience.**

# Current State

of the Design System

Types of research conducted:

**1:1 Interviews**

**Surveys**

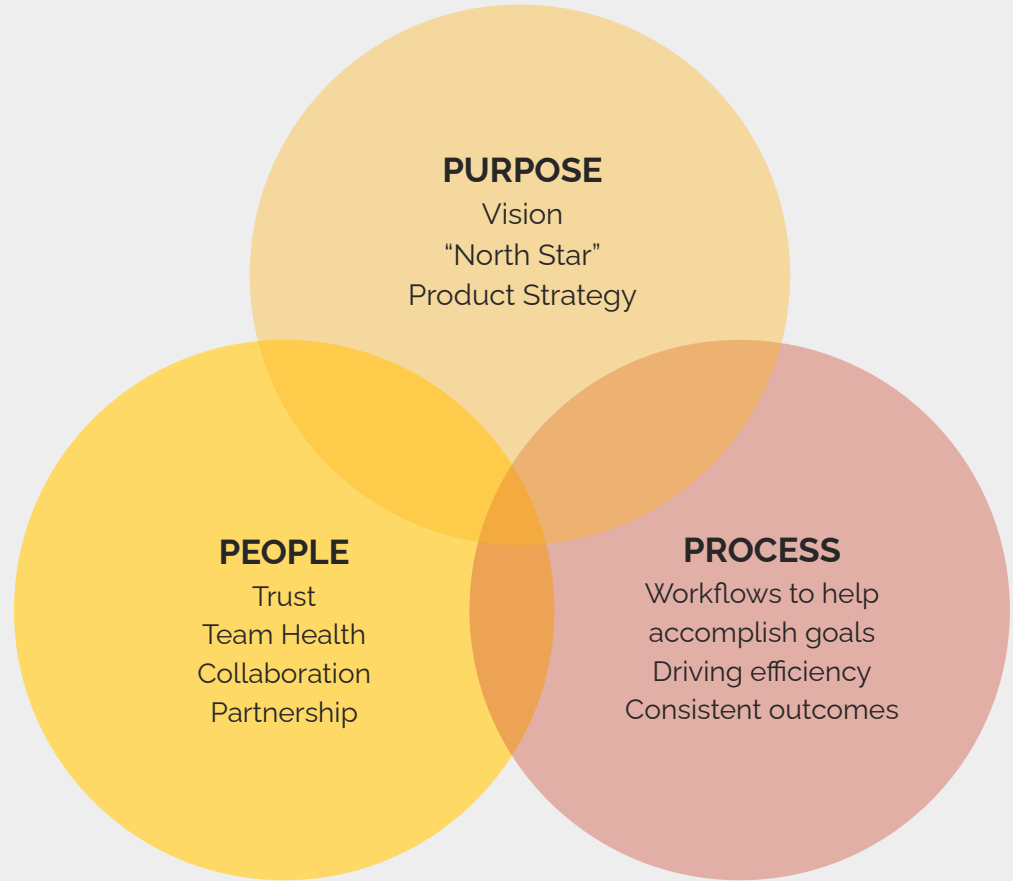
**Observational Research**

We broke into 3 categories:

**Purpose**

**Process**

**People**



# Purpose

Vision | North Star | Strategy

- 1 Team is not committed to a shared mission
- 2 There is a focus on day-to-day activities, rather than big-picture strategy
- 3 There is not a "North Star" vision of where we are headed from a design point of view
- 4 We do not have shared alignment on who our customers are



# Process

Driving Efficiency | Consistent Outcomes

- 1 Design is reactive, instead of proactive
- 2 There is no clear process for how we prioritize design work
- 3 Our current Design System is not built based on design principles (leads to subjectivity)
- 4 Designers that have the most domain knowledge of a given component are not responsible for designing it globally
- 5 There is a lot of duplication of efforts — within the DS team and across teams
- 6 The team is fundamentally split on if they believe in the contribution process

# People

Trust | Collaboration | Team Health

- 1 Team members do not clearly understand their roles (specifically within design/product)
- 2 There is a lack of openness and honest communication within the team
- 3 Designers typically play it safe, instead of pushing innovation and trying new things
- 4 There is lack of empathy for the user (internal designers) and collecting feedback from them

So what we **intend to do**

---

## We **Intend to...**

1

Define our  
**Design Language**

2

Create Directional  
**Design Vision**

3

Optimize Design  
**Processes**

1

Define our  
**Design Language**

2

Create Directional  
**Design Vision**

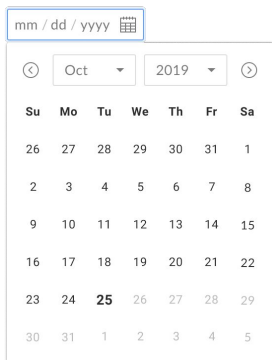
3

Optimize Design  
**Processes**

# What is a **design language**?

It allows us to communicate the "**Why**" behind our components and design decisions.

# Define our Design Language



## Design Language

### Atomic Elements



### Iconography



### Typography

Headline 1

Headline 2

Headline 3

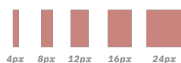
### Light and Shadows



### Color



### Layouts and Spacing



1

It's the "Foundation" that provides common language for users

2

Consists of color, type, illustrations, spacing, motion, iconography, and some basic atomic elements

3

Based on our design principles, which inherit our company principles and aligned with marketing

4

Serves as a thorough instruction manual to help designers create consistent components and experiences



## Example of Design Language

**EXPERIENCE VALUES**

- Shopify experience values

**KEY CONSIDERATIONS**

- Accessibility
- Internationalization

**CRAFTING USER INTERFACES**

- Designing apps for Shopify
- Designing onboarding flows

**PATTERNS**

- Formatting localized currency

Submit feedback or feature requests on the [Polaris GitHub page](https://polaris.shopify.com/foundations/internationalization/navigation).

### Shopify experience values

At Shopify, we empower commerce at a global scale. We build products, tools, and services for people to start, manage, and scale their businesses. We manage enormous complexity for commerce giants, and give new entrepreneurs the best chance to succeed.


These values are at the heart of how we build experiences at Shopify. They're important whether you work at Shopify or you're developing third-party apps or themes.

---


**Our approach**

The best part of this shared set of values is the conversations they enable. They are fantastic lenses through which to view, critique, and improve our work.

We always aspire for Shopify experiences to feel:



**CONSIDERATE**  
Above all else, we show care for the people who use



**EMPOWERING**  
We want people to feel like they can accomplish

<https://polaris.shopify.com/foundations/internationalization/navigation>

- Colors**
  - Guidelines
  - Color palette
  - Color combinations
  - Color usage
  - Accessibility
  - Resources
- Typography**
- Illustrations**
- Sounds**
- Icons**
- Interaction states**
- Spacing**
- Data visualizations**

## Colors

Shopify uses colors purposefully to communicate how things function in the interface. This helps us create visual patterns that can make interacting with our product easier and more predictable for merchants.

### Guidelines

These guidelines are the framework upon which we have built our system for how color is used in Shopify.

#### COMMUNICATION OVER DECORATION

Although we value an aesthetically pleasing use of color, we place a higher value on clear communication. Our use of color should be purposeful, rational, and should serve to support the purpose of the content.



**COLOR SHOULD BE ACCESSIBLE**

## Design Principles

## Design Language



## Example of Design Language



### Personality

Our personality establishes the foundation of the Atlassian brand. It is a product of our mission, and a reflection of our culture, values, and promise to customers. We make sure that these traits come through in all of our customer-facing communications and content.

#### Bold



We take a stand. Not everyone will agree with everything we say—and that's ok. We state our position and back it up. We are clear and direct, acknowledge the hard truths... but are not cocky.

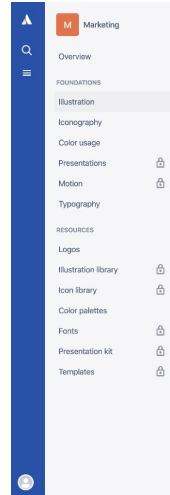
We have our point of view, but don't belittle our competitors or people who don't share it.

We are humble. We know we're a team that makes awesome software, but we're balanced. We acknowledge when we fail, admit it, embrace it, and grow from it.

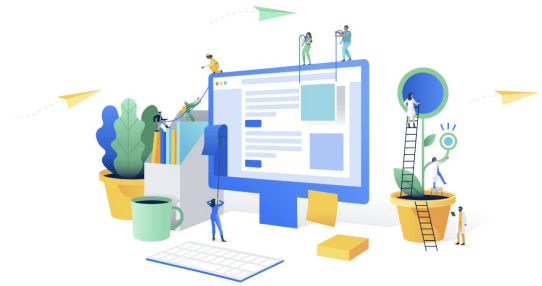
#### Optimistic



## Design Principles



### Illustration



#### The role of illustrations

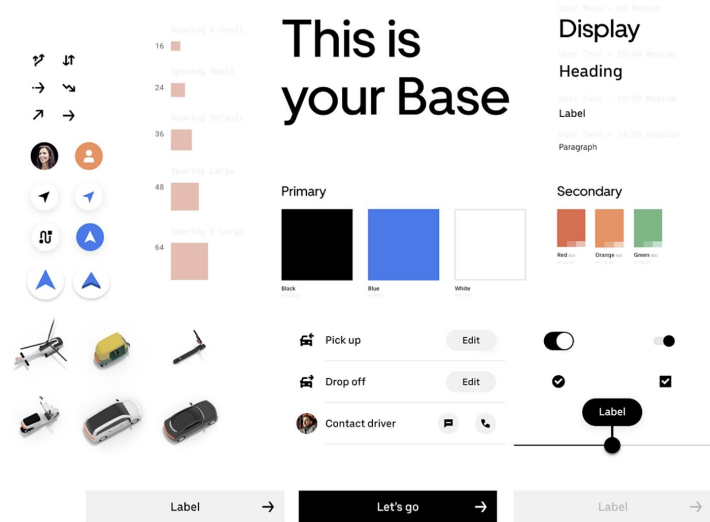
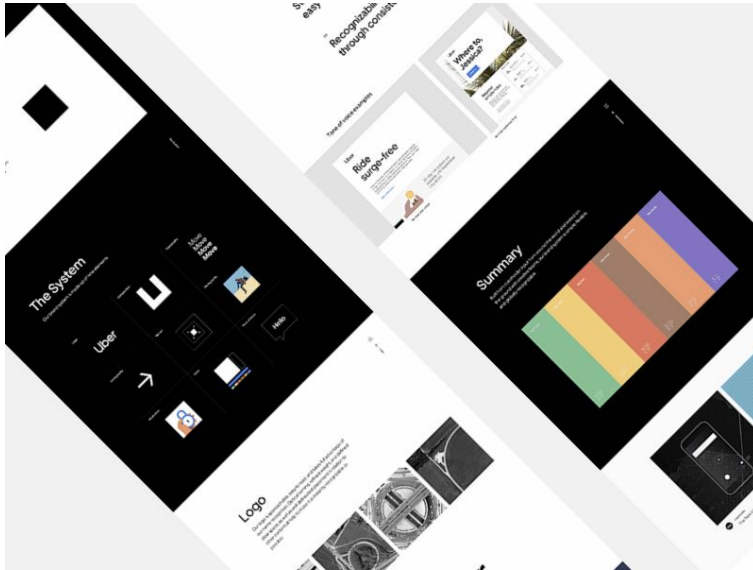
Illustration is a key element of the brand system.

- It makes complex ideas more accessible.
- It represents our brand - personality, voice, and platform - in an efficient and clear way.
- It can scale up or down depending on the context.

## Design Language



Example of Design Language



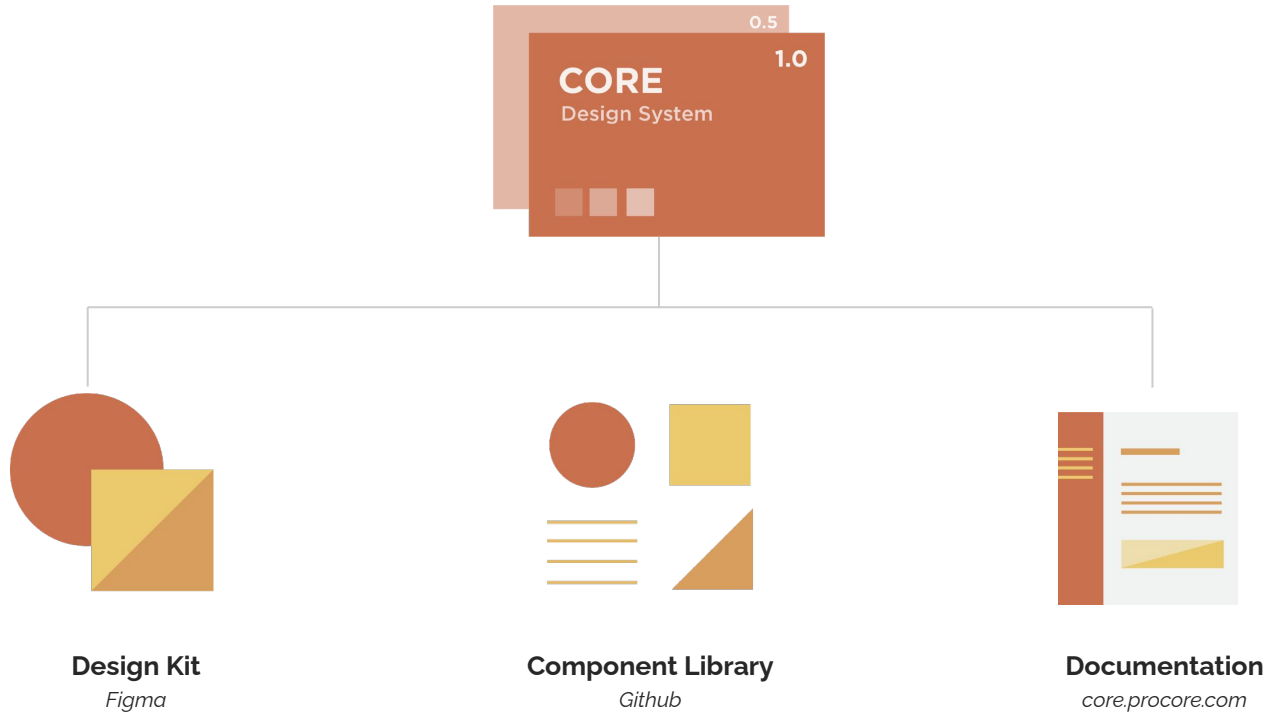
Design Language

Define our **Design Language**

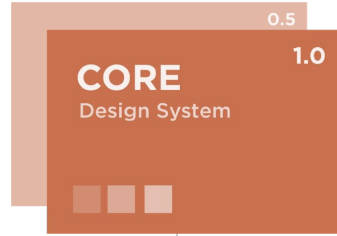
So let's define

**PROCORE<sup>®</sup> Design Language**

# What we have **today**

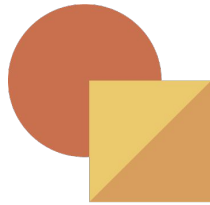


# What we **want to have**



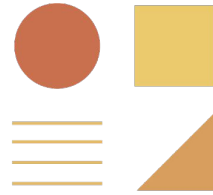
**Design Language**

**NEW**



**Design Kit**

*Figma*



**Component Library**

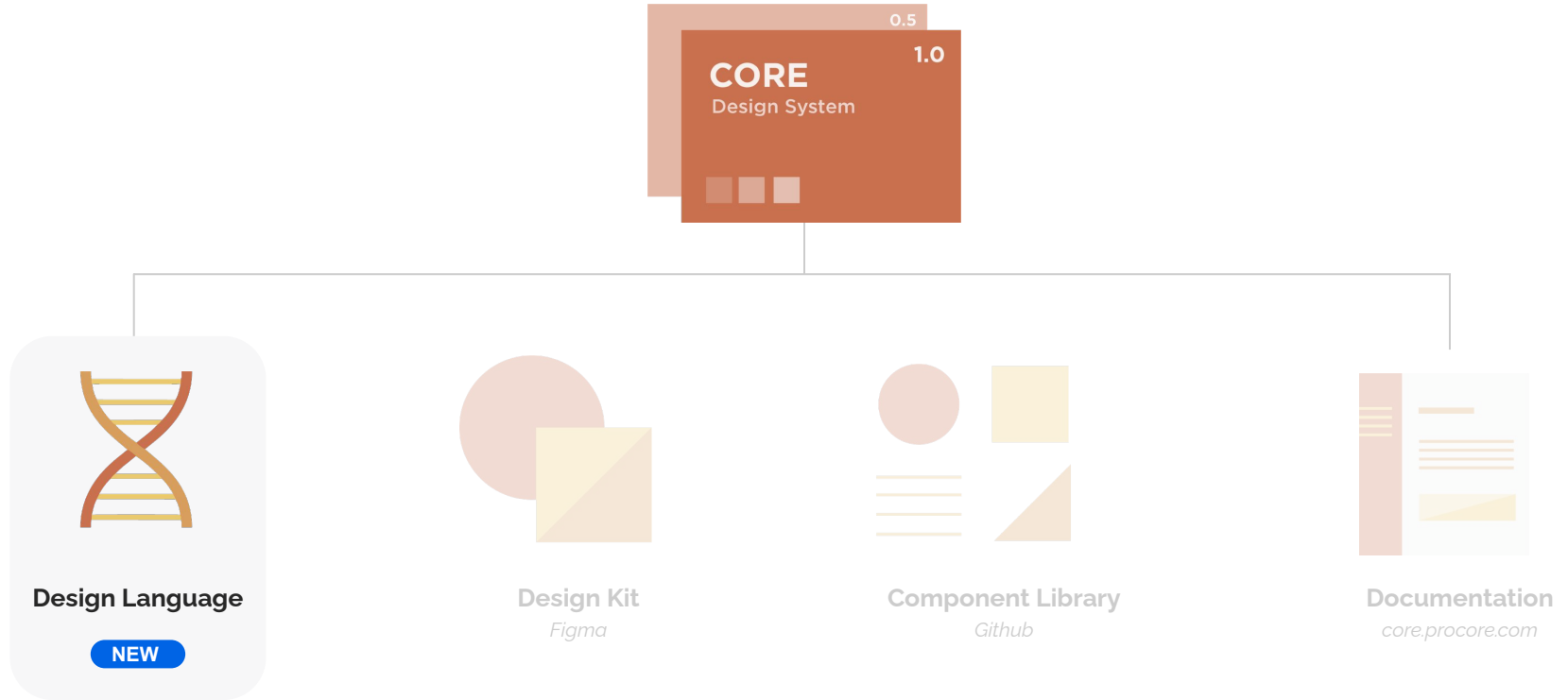
*Github*



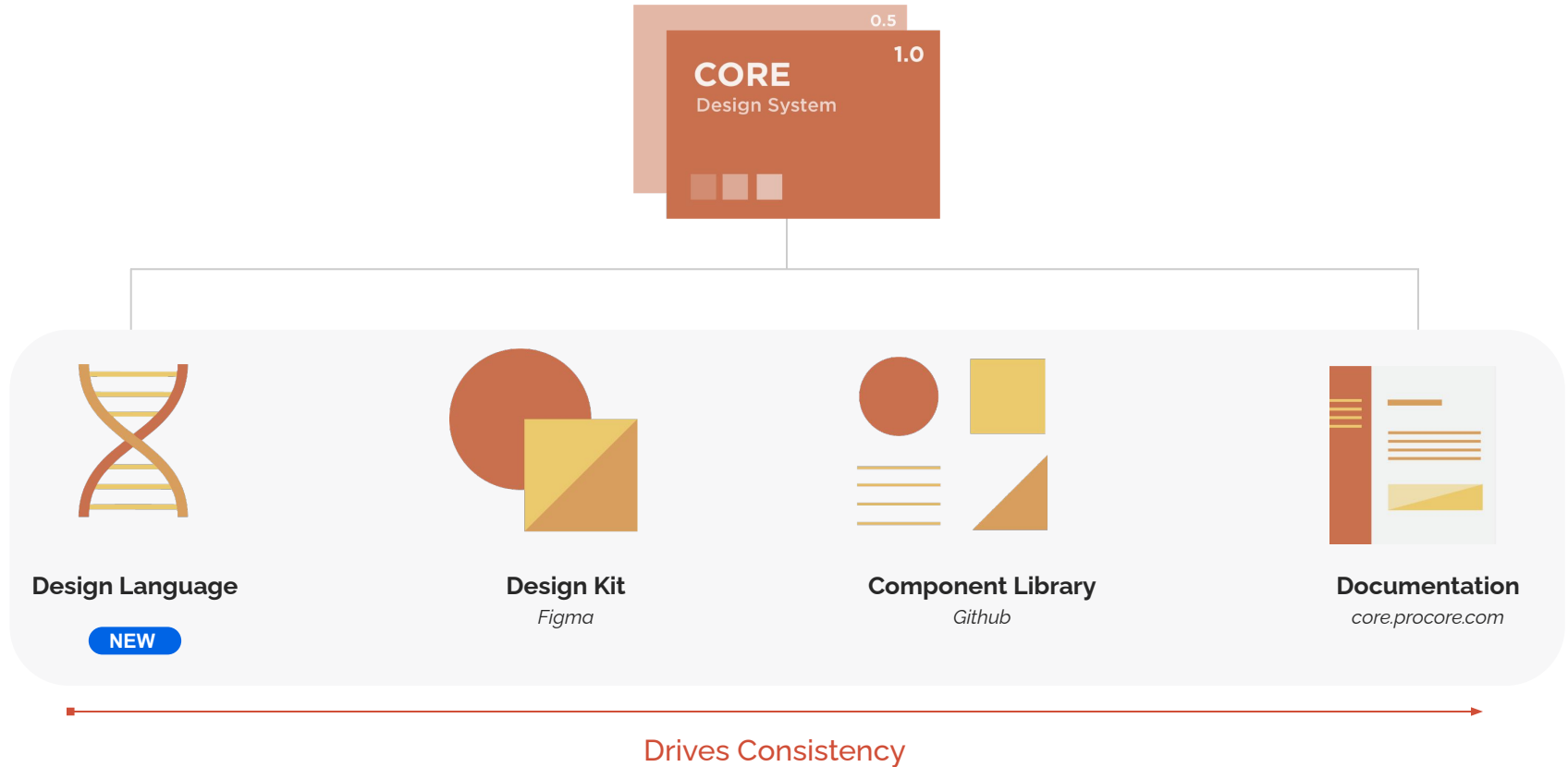
**Documentation**

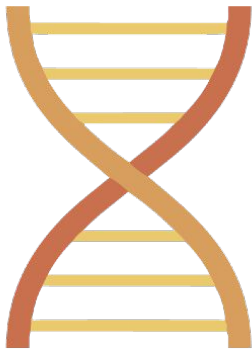
*core.procore.com*

# What we **want to have**



# What we **want to have**





## Design Language

- 1 Define our design principles based on **company vision, research, and best practices**
- 2 Design language will **empower designers to more easily contribute** to the system due to a shared “language”
- 3 Use the design language to help **create a vision** for what we want the system/UI to be



1

Define our  
**Design Language**

2

Create Directional  
**Design Vision**

3

Optimize Design  
**Processes**

Why do we need a directional **design vision**?

# Why do we need a directional design vision?

Envisioning the next-generation customer experience is **key to unifying, integrating and visualizing what our design will be in the future.**

If it's done right, it integrates values, goals and language from different stakeholders across the organization, making the vision feel like a natural extension of the product.

## The values of a **design vision**

- 1 Using design is a core thread to unify the product and drive alignment
- 2 It helps create a common vision so we are all rowing in the same direction
- 3 Taking a “North Star” approach will inspire our designs and should empower the team to build the best customer experience
- 4 As the market becomes more competitive, design and innovation will become a key competitive advantage

## What a **design vision** is not

1

This is not a roadmap — it's meant to start where things are now and work towards the future

2

This is not simply a redesign — it's a holistic approach to improving our product

3

It's not siloed to the design organization — this will be in partnership with other key stakeholders

Let's **show how** this could work

---

## Create a **Design Vision**

Design Kit built in Figma with documentation on how to use components

### DESIGN



Design Kit



Documentation

Library of components built in React to allow teams to build faster

### ENGINEERING



Component Library



Documentation

---

**Today**

## Create a **Design Vision**

### DESIGN



Designed the majority of components **without starting off with design guidelines and principles**



Design Kit



Documentation

### ENGINEERING



Component Library



Documentation

---

**Today**



# Create a **Design Vision**

## DESIGN



Design Kit



Documentation



Design Kit



Documentation

Retrofitting our current system into design guidelines and principles **(Not recommended)**

## ENGINEERING



Component Library



Documentation

Today

End Q3 2020

## Create a **Design Vision**

### DESIGN



Design Kit



Documentation



Design Kit



Documentation



Design Language



Design Kit



Documentation

Build a **design system based off a universal design language and principles**. Inspire and unifies our design team.

### ENGINEERING



Component Library



Documentation

Today

End Q3 2020

Q1 2021

# Create a Design Vision

## DESIGN

**1.0**  
**CORE**  
Design System



Design Kit



Documentation

**1.5**  
**CORE**  
Design System



Design Kit



Documentation

**2.0**  
**CORE**  
Design System



Design Language



Design Kit



Documentation

## ENGINEERING

**1.0**  
**CORE**  
Design System



Component Library



Documentation

Once the design of 2.0 is complete, the **engineering can develop 2.0.**

**2.0**  
**CORE**  
Design System



Component Library



Documentation

Today

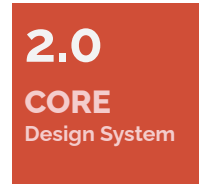
End Q3 2020

Q1 2021



**Defining**  
a system

**vs**



**Designing**  
a system

We have to do the **SAME** amount of work regardless of the version  
(And, one is more inspiring than the other)

1

Define our  
**Design Language**

2

Create Directional  
**Design Vision**

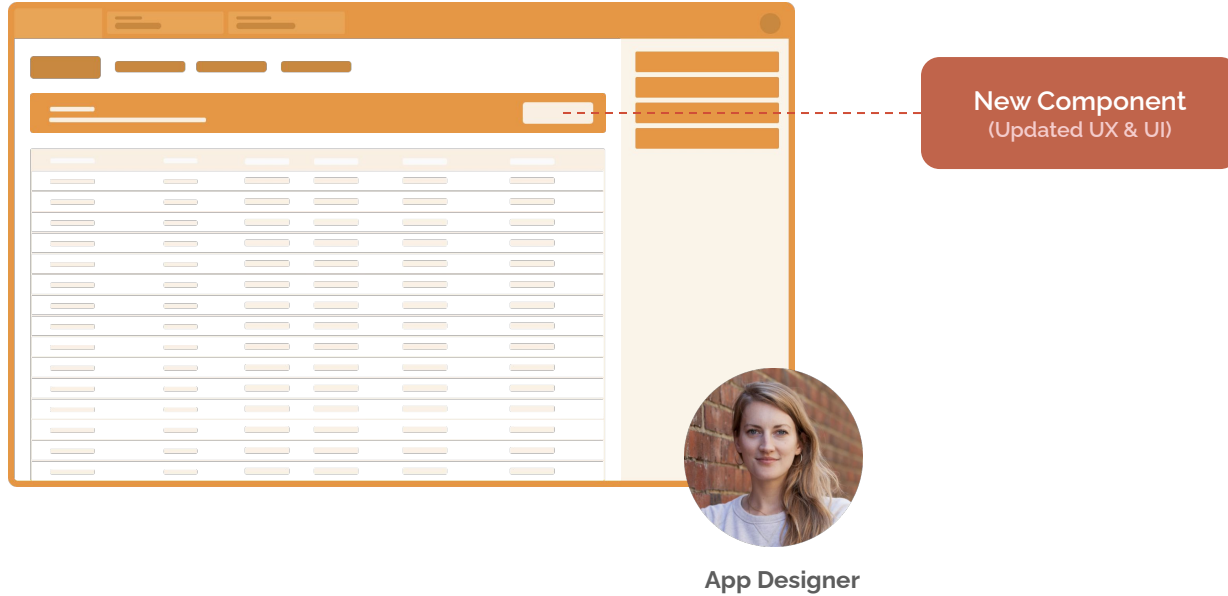
3

Optimize Design  
**Processes**

# Optimizing design team process

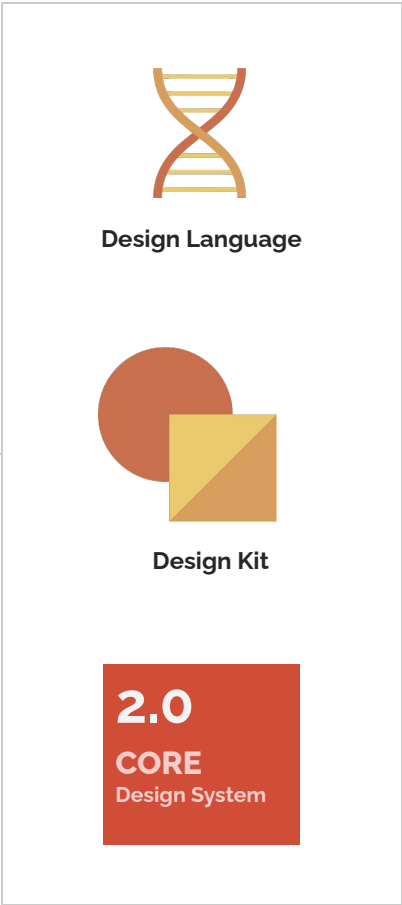
- 1 Create a simple way to leverage other designers work if it is not “built” or “in the system”
- 2 Continue to communicate and set expectations for the contribution model
- 3 Define the process between the DS designers and app designers, and what belongs in CORE
- 4 Enable app designers to create components based on the tools the DST provides — design language, design kit, documentation, design vision, etc

## Concept to Optimizing the **design process**





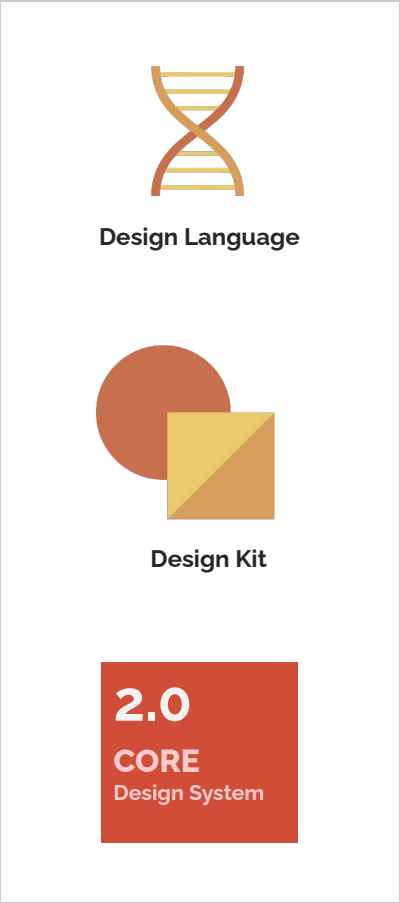
New Component  
(Updated UX & UI)



App Designers document:  
**Problem being solved**  
**Research**  
**Design Iterations**  
**Partnerships**



Component  
(UX & UI)



App Designers document:  
**Problem it's solving**  
**Research**  
**Iterations**  
**Partnerships**



App Designer wants it  
to be in the system

**Meet with Design  
System Team**



DS Designer



App Designer wants it to be in the system

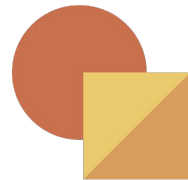
Meet with Design System Team



DS Designer

Component APPROVED

Component NEEDS MORE WORK



Component goes into **Design-Approved**  
**CORE Labs**  
**(Design Kit)**

NEW

App Designers document:

**Problem being solved**

**Research**

**Iterations**

**Partnerships**

How will this help?

# How this helps **our customers**?

## Internal Customers

- Empower design and dev to create the right customer experience
- Does not hinder creativity
- Allows designers to move faster -- increases design velocity
- Aligns design on a unified experience

## External Customers

- Unifies an experience across all products in Procore
- Potentially provides new features faster
- Improves the look and feel of the experience
- We can focus efforts on solving customer problems

# How this helps **Procore**

- Builds a better design culture of ownership
- Modernizes the application
- Allows apps teams to build tailored experiences for our customers
- Potentially helps with product retention and customer satisfaction
- Aligns marketing and product
- Will help us be more agile in future versions/iterations of the app

The background of the slide is a light gray technical drawing or blueprint. It features a grid pattern and various mechanical components, including what appears to be a cylindrical part with a flange and a smaller component with a circular face. The drawing uses fine lines and hatching to represent different materials and features. The text "Next Steps and Progress" is centered over this background.

## Next Steps and Progress

## Next Steps

- 1 Continue research with the design & engineering organizations
- 2 Lead a working group to define our design vision and design language
- 3 Seek alignment and buy-in from Product and Engineering Leadership
- 4 Seek alignment and buy-in from key Platform stakeholders

# Progress

- 1 Continue research with the design & engineering organizations (**ongoing**)
- 2 Lead a working group to define our design vision and design language
- 3 Seek alignment and buy-in from Product and Engineering Leadership
- 4 Seek alignment and buy-in from key Platform stakeholders



# Progress

- 1 Continue research with the design & engineering organizations (**ongoing**)
- 2 Lead a working group to define our design vision and design language (**done**)
- 3 Seek alignment and buy-in from Product and Engineering Leadership
- 4 Seek alignment and buy-in from key Platform stakeholders

# Progress

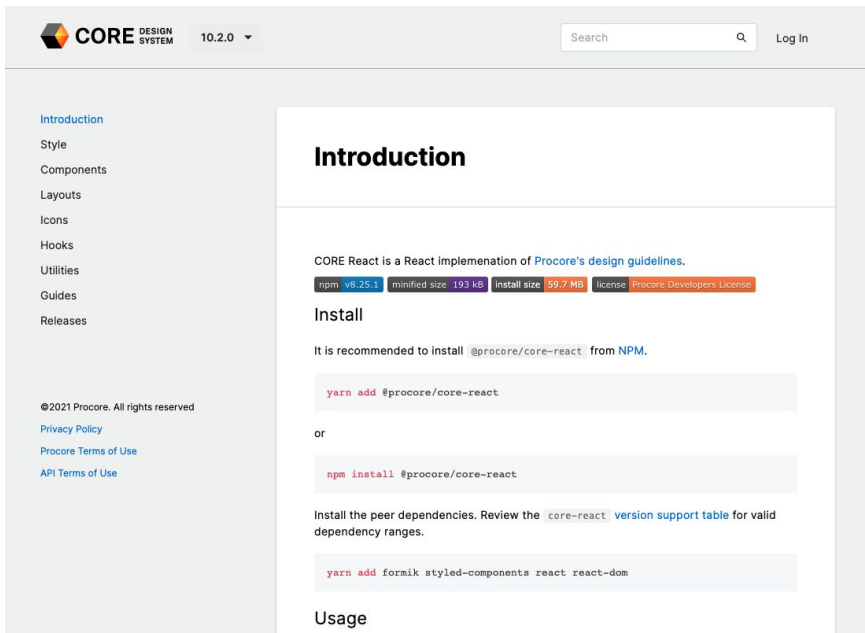
- 1 Continue research with the design & engineering organizations (**ongoing**)
- 2 Lead a working group to define our design vision and design language (**done**)
- 3 Seek alignment and buy-in from Product and Engineering Leadership (**done**)
- 4 Seek alignment and buy-in from key Platform stakeholders

## Progress

- 1 Continue research with the design & engineering organizations (**ongoing**)
- 2 Lead a working group to define our design vision and design language (**done**)
- 3 Seek alignment and buy-in from Product and Engineering Leadership (**done**)
- 4 Seek alignment and buy-in from key Platform stakeholders (**done**)

# Alignment = Acceleration

Alignment and support from the Senior Product and Engineering Leadership resulted in adding **3 additional front end developers** to the design system team to help accelerate building the CORE 2.0 React components.



The screenshot shows the documentation page for CORE React. The header includes the CORE Design System logo, version 10.2.0, a search bar, and a Log In link. The left sidebar contains a navigation menu with links for Introduction, Style, Components, Layouts, Icons, Hooks, Utilities, Guides, and Releases. The main content area is titled "Introduction" and contains the following text:

CORE React is a React implementation of [Procore's design guidelines](#).

`npm v0.25.1` `minified size: 193 kB` `install size: 59.7 MB` `license: Procore Developers License`

### Install

It is recommended to install `@procore/core-react` from NPM.

```
yarn add @procore/core-react
```

or

```
npm install @procore/core-react
```

Install the peer dependencies. Review the [core-react version support table](#) for valid dependency ranges.

```
yarn add formik styled-components react react-dom
```

### Usage

## Results

We made significant progress in crafting and publishing our Design Language. In December 2020, we launched our **Design Guidelines** the foundation of our Design Language. <https://design.procore.com/>

### Design Guidelines

Start Designing



The background of the slide is a technical drawing, likely a mechanical part or assembly, rendered in a light gray color. The drawing features various hatching patterns to indicate different materials or cross-sections. It includes numerous dimension lines with numerical values such as 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, 260, 270, 280, 290, 300, 310, 320, 330, 340, 350, 360, 370, 380, 390, 400, 410, 420, 430, 440, 450, 460, 470, 480, 490, 500, 510, 520, 530, 540, 550, 560, 570, 580, 590, 600, 610, 620, 630, 640, 650, 660, 670, 680, 690, 700, 710, 720, 730, 740, 750, 760, 770, 780, 790, 800, 810, 820, 830, 840, 850, 860, 870, 880, 890, 900, 910, 920, 930, 940, 950, 960, 970, 980, 990, and 1000. The drawing is oriented diagonally, with the main part of the object running from the top-left towards the bottom-right. The overall style is that of a professional engineering or architectural drawing.

**QUESTIONS?**