Quick Action Decision Framework

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1. Identify the User Need

- **Question:** Is this task done frequently enough to warrant a shortcut?
  - **Yes** → Go to Step 2.
  - **No** → Consider training, page layout improvement, or documentation instead.
- **Check:** Base this on *actual usage data* (object reports, event logs, interviews) rather than anecdotal "people want this."

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2. Evaluate the Existing Workflow

- **Question:** Is the task already *easy to find* in the current UI (≤ 3 clicks, clear labeling)?
  - **Yes** → A Quick Action may be unnecessary; consider highlighting the existing process in training.
  - **No** → Go to Step 3.
- **Check:** If the core process is slow due to poor navigation, fix the navigation first—Quick Actions shouldn't mask bad design.

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3. Assess Process Integrity

- **Question:** Does this task require *all* related context, validations, and dependencies?
  - **Yes** → Ensure the Quick Action *can* include them (e.g., pre-populated fields, validation rules).
  - **No** → Risk of bypassing steps; redesign before implementing.

- **Check:** Quick Actions should not allow skipping critical data entry or compliance steps.

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4. Determine Role Specificity

- **Question:** Is this task role-specific (only certain profiles need it quickly)?
  - **Yes** → Create a *profile-targeted Quick Action* and keep UI clean for others.
  - **No** → Go to Step 5.
- **Check:** Avoid adding actions to global layouts if they're not relevant to all users.

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5. Consider Volume & Time Savings

- **Question:** Will a Quick Action measurably reduce clicks/time for high-volume processes?
  - **Yes** → Proceed to Step 6.
  - **No** → The benefit may not justify cluttering the interface.
- **Check:** A good benchmark is **saving 2–3+ clicks for a process done 10+ times per day per user**.

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6. Validate with HCD

- **Action:** Test a prototype Quick Action with target users:
  - Do they understand what it does without training?
  - Does it behave exactly as expected?
  - Does it fit naturally into their flow without creating new confusion?
- **Check:** If testing shows confusion or misuse, refine before launch.

7. Launch & Monitor

- **Action:** After deployment:
  - Track adoption via usage metrics.
  - Gather qualitative feedback in the first 2–4 weeks.
  - Remove or redesign if it's unused or causing errors.
- **Check:** Quick Actions should earn their place—if they're not used, they shouldn't stay.

Summary: When to Create a Quick Action

✅ Frequent, high-volume task
✅ Current process is buried or too slow to navigate
✅ Doesn't bypass essential steps
✅ Role-specific or universally relevant
✅ Measurable time savings
✅ Tested successfully with real users

❌ Infrequent or low-impact task
❌ Masks deeper UI/process issues instead of fixing them
❌ Lets users skip compliance/data requirements
❌ Clutters the interface without a clear adoption plan