

CHAPTER

2

PLANNING UX PROJECTS

PLANNING UX PROJECTS is a balancing act between getting the right amount of user input within the constraints of your project. The trick is to work out the best use of your time. How can

you get the most UX goodness for your client's budget? This book describes your armory of UX tools. This chapter explains how to choose the right mix of tools for the task at hand.

GETTING STARTED WITH UX PLANNING

The planning phase is all about understanding what you have been asked to do and working out the best combination of activities that will give you the outcome you need, within the time, budgetary, and resource constraints of the project. It is your job as a UX professional to deliver the best user experience within the time and budget available.

The planning of projects may take place when you are writing a proposal to do work that is yet to start as well as at the beginning of a “live” project. When planning work for proposal purposes, you can be faced with issues such as lack of information around budgets as well as limited access to clients to ask questions.

In many ways the planning of UX projects can become a design challenge in its own right. You have an outcome that you need to get to and it's up to you which approach you take to get you there. You need to be confident that the tools and techniques you choose will be the right ones to get you the insight you need within the constraints of the project.

The budget for the piece of work is always the key piece of information that can be really useful to help with planning, but often this is not always available. This information is useful if you charge by an daily rate, because it then determines the time you will have on a project, which in itself will determine the approach you take.

The beauty of UX projects is that there is always something you can do to add value regardless of the budget. A low budget may result in a more light touch, “guerilla” approach, whereas a larger budget may allow you to do more extensive user research. If you can, always try to get an idea of budget as it will save both you and your client time by avoiding re-cutting proposals.

Your client may not want to share their budget (as they may think you will spend it all for them) so have a few different options to present if they cannot share this information to suit different potential budgets.

The key principle for all UX projects is that you must ensure that you involve users in the design process in some way. Challenge yourself to see how you can work within the constraints of the project to involve users as much as possible. User involvement will not only improve the output of the project but will also help to inform decision making which can often delay projects.

UX projects typically consist of three main phases, a research phase, a design phase and a further research phase, designed to test and validate the designs.

- The research phase is where you immerse yourself in the project to get the background you'll need to make design decisions later in the project. During this phase you will try to learn as much about your client's business, objectives, users, and competitors as possible.
- The design phase is where you work out how what you are designing will work and how it will fit together. This phase will define its scope, its features and functionality, and how it behaves.

- The validation phase is where you identify whether what you came up with in the design phase actually works with its intended audience. This phase is typically followed by further rounds of design and testing to solve the problems you inevitably find when you test with users.

We find that using a research, design, and validation framework helps to structure your projects. We often start working out the approach we would ideally like to take and then calculate how long we would need to do that work and then adjust the methods, tools, and techniques to fit the constraints of the project. Figure 2-1 shows an early sketch of a project taking shape.



Figure 2-1: It is useful to sketch out your proposed approach within the UX project framework

Project constraints include factors such as budget, time available, delivery deadlines, resource availability, information availability, related projects, access to tools, and legal documentation. Regardless of the constraints you must be able to focus on the objectives of the project and how you can deliver the best user experience that meets those objectives. Often this is the true (and hidden) skill of a great UX professional.

Once you have defined the approach you want to take, it is much easier to talk to a client about flexing project constraints such as increasing the scope of the project or change your original plan. All clients have to start with some sort of ballpark budget and approach and, if you can justify why you might need more time and budget, you will clearly be more likely to get it!

Later in this chapter, you'll see a matrix of UX tools and techniques that you can use on your UX projects. These are all fully explained within their corresponding chapters within this book. We also share some case studies of real projects. These examine the clients' objectives and highlight the approach we took to the project. These are designed to provide you with a template approach, which you can compare and contrast with your own project challenges and proposed approach to tackle them.

SELLING USER-CENTERED DESIGN TO YOUR CLIENTS

Despite the huge growth in the awareness of the importance of user experience over the last 10 years, you may still have to sell the benefits of this approach to your clients and colleagues. Here are some of the many benefits that we have seen from adopting a user-centered design (UCD) approach:

- **Better products**—A process that deliberately involves end users as well as one that understands the commercial objectives will always result in a product that works better for its intended purpose.
- **Cheaper to fix problems**—By involving users within the design process, you learn what doesn't work when it's most cost effective to fix it. An amendment to a wireframe or prototype is many times cheaper than a technical fix once a product is launched.
- **Less risk**—A UCD approach helps to ensure that design issues are discovered and fixed in the design phase and not once products have been launched. A digital product may never truly ever be “finished,” but a UCD approach will result in products with a lower risk of failure.
- **Deliver to deadline and avoid scope creep**—By identifying more of the dynamics at play and addressing these challenges earlier in the process, there will be a better chance of avoiding scope creep and delivering to meet your deadline.
- **Research brings insights**—A UCD approach provides in-depth analysis and research that uncovers opportunities to differentiate products to gain competitive advantages. A UCD approach provides a solid and robust research-led approach to design. Design decisions after all should be based on evidence and not opinions.
- **Products that are easy to use make more money**—Often this is the primary commercial reason behind adopting a UCD approach. The reality of many UCD projects is that despite being “user-centered,” the focus is really on designing something that primarily achieves a commercial objective. The UCD process provides the rigor that ensures the commercial objectives are met while still providing the best user experience—so everyone wins.
- **User led projects can get products to market more quickly**—Projects that take a pure UCD approach let the customers decide which route to follow. This can circumvent time-consuming client-side decision-making processes and politics. When you reach a point of conflicting views that stalls a project, the involvement of users can be a great way to help to make decisions and get the project moving again.
- **Ease of use is a common customer requirement**—In our user research, we often hear customers using terms such as “usability” and even “user experience” when describing what qualities they seek from products. This is often a result of products being advertised as being easy to use and as such it's a selling point that customers are seeking products that they buy.

WHAT DOES A USER EXPERIENCE PROJECT LOOK LIKE?

Planning a UX project is to some extent an art in itself. Working out how to do the best work in the time and budget available is a learned skill. There is no right answer: the optimal project will differ between clients.

The important thing when planning a user experience project is to put the user front and center of your activities. Conduct user research, design, test, and iterate. It's impossible to describe what you do as UX if you don't include users in your workflow. Equally, if you don't understand your client and their business, you will not be able to produce designs that meet their needs.

So how do you plan a successful UX project? For a design project, you need to include activities to answer each of the following questions:

- What are the business requirements?
- What are the user requirements?
- What is the best design solution that meets both the business and user requirements?

WHAT ARE THE BUSINESS REQUIREMENTS?

Why is the project going ahead? What would make your client feel that the project is a success?

Often, the process of eliciting business requirements can lead to a definition of a project vision that can be referred to throughout the design process in order to aid decision-making.

Make sure you understand the reasoning behind the project's existence by considering one or more of the following.

Project Brief

Is there a formal project brief? If so, read it and ensure you understand it by asking questions if necessary. A good brief will clarify the reasons for the project and outline expected outcomes. Sometimes a brief will expose conflicting requirements, and it always helps to know about these early!

Every project needs a brief of some sort. How can you design something if you don't know what it's for? If there isn't a brief, ask for one. Or start asking questions that allow you to write your own.

A useful brief will generally contain information on these subjects:

- **Description of the project**—What is the project to do? The must-haves and must-nots.
- **Business goals, objectives, and expected outcomes**—What the organization expects to gain from the project. For an online shop this might be to increase conversion rates, but other organizations may have less concrete goals such as improving understanding or feedback ratings.
- **Target audience**—Who does the organization want to be using their new product? The depth of this audience information can differ wildly, from everybody to detailed demographic and behavioral breakdowns.

- **Brand guidelines**—Any requirements to convey existing brand personality, such as tone of voice, logos, use of imagery, and so on.
- **Key stakeholders**—Who is your point of contact? Who must you show your findings to? Who must approve your designs?
- **Expected timings**—When must the project be completed by? Are there any deadlines you should know about?
- **Technological constraints**—Are there any technologies the project must use? For example, content management systems or merchandising software. What are the strengths and weaknesses of the technology?
- **Related activities**—Are there any other projects that intersect with this one? For example, we often find that clients run re-branding exercises alongside our UX work. Another example is implementing new technical solutions, such as changing a back-end system or search supplier. It is useful to know at the outset when the results of other projects will be available to incorporate into your project, and to flag if this causes difficulties.

Kick-Off Meetings

Schedule a kick-off meeting to get the project started. This is your chance to make sure you've fully understood the brief. If there was no formal brief, make sure you use the kick-off meeting to understand answers to the questions outlined previously.

Another key reason for scheduling a kick-off meeting is to meet the stakeholders. Your client may not be located near you, and you may work remotely much of the time. It is much easier to conduct a design review over the phone if you have previously met the people you are talking to. An opportunity to get to know your clients and understand what they want from the project will set the project off on the right foot, even if you will all be working in the same place.

A kick-off meeting is the perfect time to discuss a project plan. Which activities will you be doing when? Can everyone make the required dates for delivery and feedback?

Stakeholder Interviews

Stakeholder interviews are a structured way for you to gain insights into the reasoning behind your project, as well as its expected outcomes. You schedule time to talk to key individuals within your client's organization in order to gain a deeper understanding of the business requirements. Chapter 3 goes into detail about stakeholder interviews.

Requirements Workshops

A requirements workshop is a collaborative method for fleshing out your project brief. You gather key stakeholders together, discuss the brief, and conduct exercises designed to give you a deeper understanding of the project. A successful requirements workshop leads to a shared understanding of the problems your project aims to solve. It has the added benefit of building a sense of teamwork with your client. Chapter 4 describes requirements workshops further.

WHAT ARE THE USER REQUIREMENTS?

For great user experiences, understand your users' needs before you design for them. Use a selection of the following techniques to understand user requirements. Try to ensure you use at least one technique that involves real users (such as usability testing or contextual research), rather than just those that involve extrapolating user needs from other research.

Usability Testing

Observe real users interacting with existing and competitor products to understand more about their needs. Use usability testing to identify problems with a product you are about to tweak, or to inform task models and customer experience maps for a new product or drastic redesign. See Chapter 5 for more on usability testing.

Competitor Benchmarking

Competitor benchmarking allows you to understand the features that are present in competitor products. This is often a good way of understanding users' expectations and needs. Chapter 6 looks at competitor benchmarking in depth.

Contextual Research

Contextual research involves going out and about and observing users in the real world. Contextual research is particularly valuable when multiple channels are involved (offline, online, and more). This type of research is also important if the end user is likely to be in an unusual or stressed context when interacting with your product, such as in an emergency situation or perhaps with poor Internet access. Common techniques include store visits, call center listening and research with users in their own environment. Chapter 7 covers how to conduct contextual research.

Analytics

Analysis of server statistics from any existing product can paint a vibrant picture of what your users are doing now. It can point you to areas of high drop out where you may want to concentrate any redesign efforts. However, analytics cannot tell you why users are behaving as they are—usability testing is best for this. Chapter 8 looks at analytics in more detail.

Surveys

You can ask a large number of users a set of questions with a survey. This can be a great way of finding out about demographics. Surveys can reach a broad audience, and are best for eliciting facts rather than a deep understanding of user behaviors. Chapter 9 looks at surveys.

Expert Reviews

An expert review is an evaluation of an existing product based on a set of usability guidelines, the target users, and their tasks. It is a low-cost method for understanding an existing product's key usability issues. There's more on expert reviews in Chapter 10.

Task Models

A task model is a description of the activities users perform in order to reach their goals. They help you understand how your product can fit into users' lives. Task models are typically generated after a round of usability testing alongside additional user research. See Chapter 12 for more on task models.

Customer Experience Maps

A customer experience map is a visualization of how users go about completing a task mapped against the way a digital product actually allows them to do it. As a designer, it is useful to map the entire the customer experience to see where user needs are not being met. Customer experience maps are typically generated from usability testing and additional user research. See Chapter 13 for more on customer experience maps.

Personas

Persona profiles are a representation of a digital product's users. A persona is a short, vivid description of a fictional character that represents a group of the product's users. Personas bring the product's users to life, in an easily understood, sharable format. They help production teams to prioritize user needs and core tasks. There's more on personas in Chapter 14.

WHAT IS THE BEST DESIGN SOLUTION?

What is the best design solution that meets both the business and user requirements? Choose a selection of techniques that allow you to design, build, test, and iterate your product.

Ideation Workshops

Ideation workshops are a collaborative design method. They help you and your client decide which design solutions are suitable for the project. For more on ideation workshops see Chapter 11.

User Journeys

The aim of producing user journeys is to ensure that users' tasks are streamlined and easy to accomplish. User journeys are useful when designing the flow of your product. How can you structure your product to ensure key journeys are smooth? See Chapter 12 for a detailed look at user journeys.

Information Architecture

The information architecture (IA) of a digital product defines the product's underlying structures. Structures include content, consistent naming, grouping, and navigation. Typical IA deliverables are content plans, process flows, and site maps. For more on IA, see Chapter 15.

Sketching, Wireframes, and Prototypes

Sketching, wireframes, and prototypes are ways of generating and iterating design ideas before they go into production. Use them to quickly and easily get designs reviewed, tested, and refined. There's more on sketching in Chapter 16, wireframes in Chapter 17, and prototyping in Chapter 18.

Usability Testing

Testing with real users is the best way of finding out if your designs work. Conducting a user test will reveal insights you could never have guessed, and suggest improvements that will make your product stand out. Usability testing is easy and need not be expensive, especially if you use light-touch “guerilla” approaches. Find out more about usability testing in Chapter 5.

HOW MUCH TIME AND BUDGET SHOULD YOU MAKE AVAILABLE FOR UX?

This is a common question that we are often asked, particularly by clients or designers who are relatively new to UX. It often comes from a full-service agency mindset where client budgets are fought over by representatives of each main discipline such as UX, visual design, and dev.

This “departmental” mindset can be detrimental, as UX can become something that is dialed up or down whereas in reality it should be a component of both the visual design and dev work as opposed to being considered as a separate work stream or cost centre.

A different way of considering this question is to think of UX as a project philosophy as opposed to a set of tools, methods, and deliverables. If your client has bought into the principles of UX then in effect their project becomes a “UX” project so all of their time and budget is dedicated to it.

When considering client budgets, you'll get a feel, with experience, for what is the right amount of time to apportion to the different phases of the project. It isn't as simple as offering a rule of thumb such as “dedicate 20% of project budgets to UX” because each project will have its own unique priorities, challenges, and objectives that will require different levels of UX input.

The matrices shown later in this chapter will give you an idea of which different tools and techniques you can use to suit different types of projects with differing budgets. In reality there is always some form of user research you can do even on the smallest budget projects.

CHOOSING UX TOOLS AND TECHNIQUES

Table 2-1 shows all the tools and techniques described in this book. Use it as a cheat sheet to help you decide which activities best suit your project.

Table 2-1 UX Tools and Techniques

UX Activity	Good For	Bad For	Find Out More
<p>Stakeholder Interviews Talk to key individuals within your client's organization to understand business requirements.</p>	<p>Clients with lots of people who have something to say about their new project. When you need information about the goals for your project.</p>	<p>Making design decisions. Projects that are very short on time.</p>	Chapter 3
<p>Requirements Workshops Gather key stakeholders together to discuss the brief and conduct exercises to give you a deeper understanding of the project.</p>	<p>Complex design challenges. Complex clients. Disparate teams.</p>	<p>Projects with very tight deadlines and small budgets.</p>	Chapter 4
<p>Guerilla Usability Testing Very informal user involvement when little or no budget exists for usability testing.</p>	<p>Involving users when budgets prevent larger scale user research. Gaining a quick user opinion to help to progress designs.</p>	<p>Recruiting participants to a specific brief. Difficult for clients to observe.</p>	Chapter 5
<p>Lab Usability Testing Involving end users in the design process to understand their needs, find out how they do things, and see if they can use your products in a controlled environment.</p>	<p>Involving clients in user research as they can observe tests in real time. The controlled environment allows you to test what you want with the right people.</p>	<p>Projects with very tight deadlines and small budgets. An artificial environment may influence user behavior on some projects.</p>	Chapter 5
<p>Remote Usability Testing Conducting user research in a different location than where your user is situated.</p>	<p>When you need to test geographically dispersed groups of people. When people can't travel to a lab. When time is tight, as you can run tests in parallel.</p>	<p>Involving clients is difficult. You can lose a sense of empathy with people when you're not meeting them face to face.</p>	Chapter 5
<p>Competitor Benchmarking Evaluating competitor products to determine their strengths and weaknesses and opportunities to innovate with your own product.</p>	<p>Projects where lots of competitors exist. Clients who work in unfamiliar sectors: a great way to immerse yourself in a new world.</p>	<p>Some projects may not allow the time to do this activity. In sectors you are familiar with, this becomes less important.</p>	Chapter 6
<p>Contextual Research Conducting research in the environment that users are naturally within.</p>	<p>Gaining the most representative insight into how people actually behave in their own environment, and the methods they use to overcome the problems they face.</p>	<p>Projects with very tight deadlines and small budgets.</p>	Chapter 7

UX Activity	Good For	Bad For	Find Out More
<p>Analytics Evaluating quantitative data to understand what people are doing when using a product or service.</p>	Identifying interesting user behavior to focus research activities to find out why.	Projects with very tight deadlines and small budgets. Clients who have no analytics data! Analytics do not uncover the reasons behind user actions.	Chapter 8
<p>Surveys Collecting information from a dispersed set of people by asking them to respond to a predetermined set of questions.</p>	Collecting information from dispersed sets of people in a relatively short period of time. Collecting qualitative and quantitative information.	Can present issues with data accuracy. Analysis of qualitative data is notoriously time consuming.	Chapter 9
<p>Expert Reviews Evaluate an existing product based on a set of usability guidelines, the target users, and their tasks.</p>	Gathering a quick understanding of a product's key usability issues.	Acquiring a deep understanding of real user issues.	Chapter 10
<p>Ideation Workshops A collaborative design method to help you and your client decide on design solutions.</p>	Generating a shared vision for the UX design work. Getting early input from different disciplines such as visual designers and developers.	Clients who don't want to be involved in the design work—they want you to go away do the "magic."	Chapter 11
<p>Task Models Descriptions of the activities users perform in order to reach their goals.</p>	Ensuring your product matches user expectations. Providing insight into buying processes and thus helping you design transactional sites that support user needs.	Projects with very tight deadlines and small budgets.	Chapter 12
<p>Customer Experience Maps A visualization of a process that users follow before, during, and after using a product or service.</p>	Visualizing the entire customer journey and highlighting the specific areas where a product or service meets and fails to meet user needs.	Projects with very tight deadlines and small budgets that don't allow you to gather the research you'll need for this approach.	Chapter 13

continued

Table 2-1 continued

UX Activity	Good For	Bad For	Find Out More
<p>Personas Short, vivid descriptions of fictional characters who represent a product's users.</p>	<p>When production teams need an easy way to understand user needs and core tasks. As a collaborative exercise to get production teams to think about their users.</p>	<p>When you can do no research with real users to generate personas from. When the personas are generated externally with no opportunity to integrate them with the teams who will go on to use them</p>	Chapter 14
<p>User Journeys Identify how users flow through your product. Design the structure of your product to ensure users can flow through it efficiently.</p>	<p>When it's important to keep steps to complete a task to a minimum. To ensure key tasks are easy to accomplish.</p>	Single step tasks.	Chapter 12
<p>Information Architecture The process of organizing information to make its retrieval as simple as possible.</p>	<p>An essential component of any project, as it provides an information structure and means of navigating that has been designed to reflect the specific user and business needs of a product or service.</p>	<p>Some small projects such as designing e-mails and campaign landing pages will require significantly less IA work than large-scale redesign projects for information-rich and complex products and services.</p>	Chapter 15
<p>Sketching Hand-drawn design ideas.</p>	<p>Quickly generate and gather feedback on lots of design ideas. Decide which ideas to pursue in higher fidelity.</p>	<p>When clients expect higher fidelity work from you as a designer. When clients can't see beyond the unfinished nature of a sketch.</p>	Chapter 16
<p>Wireframes Static diagrams that represent the framework of a product, exploring content, navigation, and interactions.</p>	<p>Explore design and interaction ideas before they move into graphic design and development. Agree on the direction with the clients. Test ideas with users. Refine ideas based on feedback and test results.</p>	<p>Highly interactive products that need to be used in order to be understood.</p>	Chapter 17
<p>Prototypes Mocking up ideas quickly in an interactive form that brings them to life to elicit feedback.</p>	<p>Producing something so that members of a project can have a shared understanding and approval of the direction it is taking. Creating a candidate design for user testing.</p>	<p>Projects with very tight deadlines and small budgets. Complicated prototypes can be time consuming to amend.</p>	Chapter 18

PLANNING UX: CASE STUDIES

The tools and techniques you select are determined by the design challenge you have been given, as well as the time and budget available. Clearly, a different approach is required for designing a campaign micro-site from scratch, compared with making large-scale usability improvements to an existing shopping website.

DOING UX ON A SHOE-STRING BUDGET

When a client or organization is unfamiliar with usability and user-centered design, it can often be difficult to get the budget you want to involve users regularly during the design process.

The joy of UX is that there are so many tools and techniques that you can use to suit the specific constraints of your project so you can still involve users in some way.

Recently we were asked to provide some UX consultancy on a new website. Our client wanted an expert opinion on how usable it was and how it could be improved.

Our client had spent a large amount of their budget on designing and building the site, and had then been told by their boss that they should do some user testing before it went live. The budget was so tight that we had a day in total to do the work.

We decided that the best approach was to run an internal workshop and invite a bunch of our consultants along to critique the site as we looked at each of the designs. This identified loads of issues in a short period of time.

We also managed some guerilla user testing. A few of us went to local cafes and asked members of the public to show us how they would use the website to complete some simple tasks. We offered to buy them coffee and cakes in return. Within a few hours we had some great user insights to add to our expert review.

All of the issues were documented as a simple bulleted list in an e-mail, which we followed up with a quick call to discuss the biggest problems that we had identified.

This demonstrates how you can always do something, no matter how restrictive the project constraints. Any user testing will result in improvements to the product or service that you are designing.

Project Outline

Constraints: tiny budget!

Activity	Timing
Internal workshop	0.25 days
Guerilla testing	0.5 days
Summarize findings and feedback to client	0.25 days

A USER-CENTERED REDESIGN PROJECT

We are lucky in that many clients come to us and ask specifically for user-centered design projects that include specific UX activities such as user research or that deliver specific outputs such as customer journey maps or persona profiles.

We were asked by a client to design an online quoting tool. Our client was fully versed in the benefits of involving users throughout the process and requested that we ran regular user testing and UX seminars within the business to educate her colleagues.

The project began with a large user research exercise that involved benchmarking competitor services. This gave us a unique insight into what the competition were doing, how well they were doing it, and also what the specific user requirements were from such a tool.

In parallel to the user research we conducted a wide range of stakeholder interviews as well as a series of workshops with some internal business analysts who had been collecting detailed functional requirements.

We presented our findings from the user research exercise to the business. The key part of this presentation involved discussion around some ideas we had had for some features we thought they should offer which would give them a significant competitive advantage.

This identifies how user research can be far more than just involving users. Often you will see opportunities for features, content, and functionality that will meet some quite unexpected user needs. Once met, these can often result in significant increases in product performance as well as huge financial returns for the service provider.

Following the research phase we developed some early prototypes of the different elements of the quoting process. This involved breaking the required set of data into logical chunks and working out how a user would move between them. Once worked up into rough wireframes we shared this with the project team, amended it following their feedback, and then tested it with users to improve it further before entering the wireframe production phase of the project.

Once a set of complete wireframes was produced these were tested again to further refine them. During the process we met with designers and developers to share our vision for how

we should work to ensure that when it was built it retained the features that we deliberately added to meet specific user needs.

Later in the project we were involved as a point of sign-off for the final designs that were produced by a third-party agency. Users were also involved at this stage, as we wanted to ensure that the execution of the quoting form was suitable for the target audience. This was also critical once some front-end elements were available to test, as it was important that interactive elements such as error-handling worked as well as possible.

Finally, we were asked to conduct a review of the live site six months after launch. This was to evaluate how well the form was working and also to evaluate how users were responding to the new product features that we had helped to identify.

Project Outline

Constraints: Huge complexity, high-profile project but good budget, and excellent client buy-in for a UX approach.

Activity	Timing
Kick-off meeting	1 day
Desk research and document review	2 days
User research	10 days
Stakeholder interviews	3 days
Presentation of findings to board	1 day
Stakeholder interviews	3 days
Prototype development	10 days
Validation testing	5 days
Wireframes, stakeholder reviews, and amends	10 days
Validation testing	3 days
Wireframe amends	2 days
Handover to design and development	0.5 day
Sign-off workshops	2 days
Post live usability review	10 days

A NEW WEBSITE NOT CONVERTING AS EXPECTED

Recently, we were approached by an organization that had just launched a shiny new website. Unfortunately, they had not seen an improvement in conversion when compared to the old website. This was surprising, given that the old website was difficult to use and the new one appeared to offer significant improvements.

The client wanted to keep their budget to a minimum, both for investigating the problem and for fixing it.

We came to the conclusion that the most cost-effective use of our time would be to run an analytics workshop. This involved key client team members—the boss, plus a developer and a visual designer.

We used a day of our time to prepare for the workshop—understanding the server statistics and key user journeys.

Two UX consultants attended the workshop—to fuel debate and ensure that there was a depth and breadth of knowledge present. We printed out the screens for the key user journeys onto large paper and put them on the wall in order. This gave everyone present a shared, unambiguous understanding of the task at hand.

We began the day by documenting the drop-out rate at each particular stage in the user journey—using sticky notes right onto the screen printouts. This gave us a clear indication of which screens to concentrate on for the rest of the day.

We stepped through the screens that showed a worryingly high drop-off rate and discussed what was happening from the user's point of view. For example, “this is the first time they've seen the full price for their order,” “they were expecting to see a summary here, not a different product,” or “this confirmation is reassuring.” We documented these comments, again with sticky notes on the printouts.

For each screen where we identified a possible negative user reaction, we discussed possible remedies. It was particularly useful to have a developer present, as they were able to comment on the development resource required for suggested improvements. Collectively, we agreed what should be changed, for example changing the order of a list of products for the user to choose from. Where possible, we drew these changes directly onto the screen printouts.

“Quick-wins” are changes to a digital product that are fast and simple for the development team to implement.

The workshop outcome was a list of *quick-wins*: tweaks to the website that would be fast and simple for the development team to implement. These quick-wins aimed to improve the overall UX and hence conversion. Improvements that required a large amount of development rework were documented, but not classified as quick-wins. Everything was documented by taking photographs of the whiteboard and printouts as we worked. This obviated the need for write-up time.

The simple act of collectively stepping through a user journey with the site's users in mind produced a detailed list of improvements. Essentially, this was a hybrid of server analytics (see Chapter 8) and an expert review (see Chapter 10). Running these activities as a workshop

ensured that the client participated in uncovering the findings and designing the solutions. Thus, they were able to go away and work with the outcomes, utilizing their deep understanding of the underlying rationale.

Project Outline

Constraints: very small budget for research, design, and development

Activity	Timing
Server analytics and workshop preparation	1 day
Analytics workshop	1 day

NEW PRODUCT LAUNCH

A new product launch calls for a deep understanding of user needs and hence some up-front user research. For a recent project with a modest budget, we were asked to design a wholly new website for an organization. The website itself would not be transactional, but needed to convey complex technical information to the general public.

The key here was to uncover what lay people typically understood of the technical information. What terminology did they use? What process did they go through when researching the field? How could a website support that research?

So we planned a project that spent time at the beginning on understanding user's tasks. First, we ran stakeholder interviews to build a picture of the organization and its needs from the new website. This particular organization had a large number of vociferous stakeholders and we were able to make them all feel heard. We ran user testing and developed a task model. We ensured that we verified the task model with the client, before we began wireframing work. In contrast to lots of our projects, the wireframing aspect of this project was relatively light. Once we had a strong understanding of the user needs, the UX design work was relatively simple. During the design process, we ran a wireframing workshop with the client's subject matter specialists. This ensured we had a common understanding of the user needs, the design solutions required to meet them and, importantly, that the proposed designs were technically accurate. It is often the job of a UX specialist to come into an organization and understand the organization's world in order to translate it into something the layperson can understand.

Finally, it was important to be sure that our interpretation of the user needs and underlying data into wireframes was successful. We ran user testing to validate our wireframes. The user testing was successful in that users were able to easily complete their tasks. As always with user testing, we learned several lessons that allowed us to tweak the designs to fine-tune them further.

Project Outline

Constraints: complex information to portray, lots of interested parties

Activity	Timing
Kick-off meeting	1 day
Stakeholder interviews	1 day
User testing to gather requirements	Half a day test prep Half a day recruitment screener 2 weeks recruitment 1 day testing
Task model development	3 days
Information architecture	2 days
Wireframe workshop	1 day
Wireframes (eight templates)	5 days
Wireframe user testing	1 day wireframe deck prep 2 weeks recruitment 1 day testing
Wireframe amends	1 day

TIPS FOR WORKING WITH...

One of the joys of being UX consultants is getting to work with lots of different disciplines on a daily basis. We get to hear different perspectives, and our designs are critiqued from lots of different angles. Each new view tests our approach and helps us to strengthen the design.

The key to a successful multi-disciplinary design and development project is to include as many different skills as possible early on in the project. There's more on how to work well with clients in Chapter 30.

PRODUCT MANAGERS

In many organizations, a product manager may well have commissioned your work. They could be your main point of contact for your project.

So, what is a product manager? They are responsible for one or more products within a business, such as a specific piece of software, or perhaps a set of related features on a large website. They gather requirements for their product and gain strategic sign-off. They own the product within the business: planning and execution throughout the lifecycle from design and development to deployment, new releases, and perhaps withdrawal. They are the company expert on the product and its competition in the marketplace.

Product managers can come from very different backgrounds. Some are UX and design focused whereas others are business orientated and others again are much more technical.

Here are some tips on working smoothly with product managers:

- Make sure you understand the brief, meet any deadlines, and keep in touch with status reports. Product managers are very busy. They have a lot of plates to spin and need to know that things are going to plan.
- Make sure you ask questions early. Your product manager may have to consult other team members to answer your questions and this could be difficult on short notice.
- Share your work with them as often as possible. Involve them in user research. If they share your understanding of their users, they can go away and build on your work.
- Ask what your work will be used for. Is it to gain sign-off, prove to the wider business that their product is successful, gather user requirements, or inform a product's redesign? This will inform the scope and tone of your work.

PROJECT MANAGERS

It is the project manager's job to keep a project on time and on budget. They often coordinate disparate teams working to different processes and timeframes. They need to see clear signs of progress being made. Any change in UX scope will impact other teams' budget and timelines, so you need to keep your project manager up to date.

Here are some tips on working with project managers:

- At the beginning of the project, explain what you will be delivering and when. Be flexible and try to fit in with their required timings.
- Be honest. If you don't know how long something will take, let your project manager know. If you don't tell them, it may be set in stone in the project plan.
- Work with your project manager to involve different team members in your work, so that the overall UX vision is shared from conception to deployment.
- Explain when you need feedback. Project managers can be useful in getting key stakeholders together to critique your work in time for you to meet your deadlines.
- Meet agreed deadlines. It sounds obvious, but doesn't always happen.
- Communicate any problems as soon as they occur. The sooner you let your project manager know that you'll be unable to meet a deadline, the easier it is for them to alert others and find a workaround.

VISUAL DESIGNERS

Visual designers have to work very closely with many UX outputs. The visual designs can determine whether a user experience succeeds or fails, so it makes sense to work closely with the visual design team throughout the lifecycle of your project. If the visual designers are in-house, they will be experts on the brand you need to embody in your product.

It is the visual designer's job to bring the final look and feel to a product. This will encompass subtle layers of brand identity and emotion on top of IA and wireframe work. This will be achieved by creating a visual language of styles (including typography, colors, layout schemes,

spacing, imagery, and texture) that work together to communicate the appropriate tone and emotion to bring the user experience to life.

Here are our tips for working with visual designers:

- Involve visual designers from the start of the project. Invite them to participate in the requirements gathering and ideation process.
- Share your work with the visual designer as often as possible. Elicit their feedback and aim to act on it. Ask if there's anything you can include in your deliverables that will help with their tasks.
- Involve visual designers in user research. They will get a feel for priority and design rationale, which will help with visual design. If they share your understanding of users, they can build on your work long after you have stopped contributing to the project.
- The visual designer brings invaluable expertise to a product's overall user experience. Make sure they don't feel that all they can do is "color in" the wireframes. When visual designers are not involved in the UX process, they can feel constrained rather than empowered by UX deliverables, leading to dull, lifeless designs, or designs that ignore your UX goodness.

Figure 2-2 shows visual design work in progress.



Figure 2-2: Visual design work in progress

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DEVELOPERS

Developers have to work very closely with many UX outputs, so it makes sense to work closely with them throughout the project. It is the developer's job to build UX and visual designs into a fully functional product.

- Involve developers early on in the project. This will help you to understand technical constraints, build relationships, and gain their support.
- Share designs often and early, and elicit feedback. They will be able to advise on the capabilities of the technologies to be used for the project (for example, can you use the

latest HTML widget, or is it not yet widely supported?). They will be able to advise on programmatically tricky interactions before stakeholders become wedded to them.

- Ask if there's anything you can include in your deliverables that will help with their tasks.
- Invite developers to user testing. During requirements gathering, so they understand the reasoning behind the work in the first place. During validation testing, so they understand design rationale and priorities. If developers share your understanding of user needs, they can build on your work when you are no longer there.
- Speak the developer's language and understand their constraints. Be prepared to work with them to overcome problems in a pragmatic fashion—don't stamp your feet and say "but it only works my way."
- If you're out of house, be available to talk through your designs after you've delivered them. It will build good will (think about the next project!). A simple five-minute conversation with a developer struggling with a tricky interaction can mean the difference between a great UX and a broken one. Something that you know to be important to usability may not be obvious to others, and you can't specify everything. They may have found that they cannot exactly implement your recommendations—help them find a user-friendly workaround.
- If you're in-house, make sure you're available to the developers as they work. Find out from them the best way for you to do this. This may involve sitting with them throughout the development process, or attending daily or weekly meetings.

Figure 2-3 shows coding in progress.



Figure 2-3: Development work in progress

UX EXPERTS

UX experts in large organizations often hire external UX expertise for a number of reasons. It may be that they do not have enough staff to cover a particular project. They may want a fresh approach to a new project. They may wish to outsource specific tasks such as user testing or customer experience mapping. They can be extremely fruitful and stimulating clients. They can also sometimes be tricky clients, as they will have a really clear picture of how they expect the work to be done, and may not see the need to express it precisely.

Here are our tips for working with UX experts:

- Find out exactly what they want and how it fits into their program of work. If possible, ask for examples of previous work that they like. Where required, use their templates and house style.
- Don't be afraid to challenge their ideas during discussions. They've hired you because they value your opinion. However, don't forget they are the client—your deliverables need to match their expectations.
- Share your work with the UX team as often as possible. Elicit their feedback and act on it.
- Don't tread on their toes. If you are engaged for a specific task, stick to it. For example, if you are running user testing, you may be tempted to add recommendations for fixing usability problems to your report. Make sure you're sure this is what they want before you do it: in-house UX experts may well be better placed to decide on appropriate usability fixes and would prefer you to concentrate on the detail of the problem.
- Remember you can learn a lot from their experience—be open to new ideas. Their practices just might be better than yours.

SEO EXPERTS

Search engine optimization experts are an integral part of web design projects. As with other experts, the key is to involve them early so that incorporating their feedback into your work is straightforward.

- Ask about any natural search analytics they have. Natural search will give you information on the vocabulary users are using to get to any existing site.
- Ask for information on any planned paid search activity—knowing what traffic the marketing department is hoping to drive to your new site may help you to prioritize your design work.
- Involve SEO experts early in your process. That way, you will have time to negotiate mutually acceptable solutions and include their recommendations in your design work. In particular, they will be interested in your information architecture and sitemap. They will be able to comment on the terminology, site hierarchy, and likely content.

CONTENT SPECIALISTS

Content specialists write and commission the copy and other media users will come to your digital product to view. A brilliant user interface is pointless if it does not relay content that is of interest to users. Involving content specialists in the research and design process will allow them to begin their work at an early stage.

- Ask to see any content plans and inventories that may already exist.
- Collaborate with content specialists to draw up content requirements.

- Involve content specialists as early as possible—remember that it will take time to generate the required content, so you want to be sure that everyone has a shared understanding of what that content should be.
- Invite content specialists to user testing so they can see for themselves user reactions to their work.

RESOURCES

A Project Guide to UX Design: For User Experience Designers in the Field or in the Making (2009) by Russ Unger and Carolyn Chandler

Undercover User Experience Design (2011) by Cennydd Bowles and James Box

Alan Colville's slides on A Shared Vision—the coordinating force behind great UX:
www.slideshare.net/alancolville/a-shared-vision-the-coordinating-force-behind-great-ux

Jesmond Allen on working with product managers on the cxpartners blog:
www.cpartners.co.uk/cxblog/what_does_a_product_manager_do_a_brief_primer_for_uxers/

