A PROJECT GUIDE TO

UX DESIGN

FOR USER EXPERIENCE DESIGNERS IN THE FIELD OR IN THE MAKING

THIRD EDITION

RUSS UNGER AND **CAROLYN CHANDLER**

VOICES THAT MATTER™

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New Riders

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3. **Stakeholder interviews review**

   Share the findings from the stakeholder interviews, what was learned, and/or key themes.

4. **High-level stakeholder requirements**

   Use the stakeholder research as your foundation to help identify some high-level requirements to further validate with the workshop participants.

   Activate the participants to help add or remove requirements from the list.

   Try to keep the requirements high-level; anything more than 8 to 12 may be too in the weeds.

5. **Stakeholder requirements prioritization**

   Facilitate the prioritization of the requirements.

   Consider using "dot voting" (gamestorming.com/dot-voting) or a similar activity to help engage participants.

   Be sure to discuss the prioritization outcomes and get agreement—or at least alignment and commitment.

6. **Identify risks, blockers, opportunities, and success measurements**

   Ask attendees to help identify the risks and blockers, as well as to help identify steps to resolve or bypass the blockers (or an escalation path).

   Ask attendees to help identify opportunities to improve/increase success, improve/increase efficiency, reduce burden, and so on.

   Ask participants to help identify what the successful end state of this portion of the product effort looks like.

7. **Summary & next steps**

   Review the activities of the day, as well as the outcomes and the next steps with the participants to help manage expectations.

Facilitate the Workshop

You've created your agenda, invited all the necessary parties, sent them the agenda, and gathered supplies (whiteboards, easel pads, sticky notes, markers, pens, pencils, paper, a software solution for remote or hybrid sessions). Now it's workshop time—start facilitating! Use your agenda as your guide

(with appropriately scheduled breaks) and stick to the timing in your agenda. People may not enjoy being cut off during discussions, but they *do* appreciate when a planned meeting ends on time (or even early).

For more suggestions on facilitating, check out *Designing the Conversation* (New Riders Publishing, 2013), by Russ Unger, Brad Nunnally, and Dan Willis, which has a lot of ideas to help you shape and execute your workshop.

Review Workshop Outcomes

After the workshop is over, it's a good time to check in with your team about what you've learned. Review the workshop as a group: Compare and combine anything new uncovered in the workshop, catalog and categorize your information, and confirm your shared understanding of the outcomes and next steps.

You should also seek opportunities to improve how you're planning and facilitating workshops. Take time with the team to identify what worked well and opportunities for improvement next time. Focus on the way the team worked during the workshop and what could be improved in a way that doesn't assign blame. For more advice on how to focus on continuous growth and improvement of teams, check out *Project Retrospectives: A Handbook for Team Review* (Dorset House, 2001), by Norman Kerth.

Detailed Discovery Planning

Next, you will use all the information you gathered from engagement and collaboration with stakeholders and subject matter experts, as well as any secondary research you obtained, to plan your next phase of discovery: a deep dive into the problem that has been defined. For you and your team, this deep dive will include communicating high-level goals and assumptions and planning out your next phase of research, which should include actual end users, or potential users, of the solution you will design. The goal of the research is to obtain clarity and further definition of the requirements and constraints so a solution can start to take shape.

By the end of this phase, you will be in a position to report back to your customer and stakeholders on the general direction and vision of the solution using informed high-level requirements that have been backed by

your research. This will likely culminate in the form of a formal project brief, project plan, and requirements document that will be used to align everyone around what the solution needs to accomplish and direct future decisions.

Team Roles and Responsibilities

The team performing the discovery activities often begins to grow at this point as more business, design, and engineering representatives join the effort and take part in the discovery process. Anytime new team members join a team, it's a good idea to do a bit of a soft reset to get everyone on the same page and to properly define expectations. Many roles have overlapping skills and expertise, and taking the time to map responsibilities to individuals helps define team communication, collaboration, and overall alignment.

Some of the common roles that join the team as part of the discovery effort, and either perform their own discovery activities or take part in yours, include:

▶ **Technical architect:** Focuses on the back-end architecture and overall technical nature of a solution

▶ **Solution architect:** Determines the overall system design of a solution and maps any internal or external decencies that need to be accounted for to ensure the new solution fits into the overall ecosystem of the organization

▶ **Product manager:** Begins to plan out an overall timeline, a budget, and project goals to inform future team resourcing and communication plans with the customer

▶ **Additional UX designers or product designers:** Serve as support during the discovery efforts or could potentially work in parallel focusing on areas such as service design, content design, branding, or front-end development

▶ **Data engineer or data scientist:** Investigates the data systems, environment, and needs of the future solution to explore areas of automation, reporting, and analysis

Defining Project Assumptions

Every project comes with its own set of assumptions that originate from the customer, business owner, designers, and so on. If these assumptions are not properly documented and agreed upon, risky situations can arise in which an

assumption is taken as fact and decisions are made that don't map to reality or the needs of the user. The goal isn't to get into the nitty-gritty here; rather, define areas of the discovery research that are clearly guesses or backed by limited data so they can be clarified with the research the team will perform.

Questions for the team to work through, both internally and externally with the customers, include:

▶ What should the final product provide to the end users?

▶ What does the solution add to or remove from the user's experience to make it more effective and efficient?

▶ How does the organization benefit from the final product?

▶ What would make the solution be considered reliable or trusted by end users?

▶ How would the solution reduce the user's burden and make it easier for them to accomplish their goals?

▶ What is considered the biggest risk to the solution being a success for the organization or for end users?

▶ How can the team mitigate those risks early on and avoid them later on in development?

The goal of documenting and defining the assumptions around your project is to identify blind spots and to challenge the thinking of everyone involved. You don't want the sins of the past to be carried forward, because that could derail or impede the team's success.

Drafting a Project Brief

The one or two pages of a project brief can have an outsized impact on a team's ability to properly communicate the goal of the discovery effort: to find focus when collaborating to reach future milestones. The best project briefs are living documents that are updated and refined as the team learns more throughout the discovery process, and they can serve as a historical record as previously defined assumptions evolve into formal project goals, risks, or requirements.

The structure of a project brief is simple on purpose, as it's meant to be the external understanding of what the individual members of the team understand internally about the project. Project briefs commonly contain the following sections and address the associated questions:

▶ **Primary objective:** Why did this project need to happen? What is the project's overall objective? What is the definition of "done" for the initial phases of the project?

▶ **Target users:** Who are the primary users? Who are the secondary users, if any? What are the prioritized high-level requirements for the project coming out of the first part of the discovery process?

▶ **Define project success:** What needs to be demonstrated by the end of the project to determine whether the effort has been successful? What milestones should the team be aware of and potentially align its delivery around?

Crafting a User Research Plan

The final artifact of this phase of the discovery effort is thinking through and writing your user research plan. This document lays out why the team needs to perform user research, the users that need to be recruited, the methods that will be performed, and any scripts, tasks, or questions that need to be used during the research sessions. This plan can be a lengthy document, which is appropriate given the amount of thought and care that needs to take place when performing user research. A general outline for any research plan should include, but is not limited to, the following sections:

▶ **Project overview:** Using the information from the project brief, describe the research that needs to be performed and how it will impact the project's outcome.

▶ **Research goals and assumptions:** Describe the goals of the research, which may or may not directly align with the overall goals of the project. Introduce any new assumptions related to user expectations and behaviors.

▶ **Target user profiles:** Briefly or at length, describe each user profile (primary and secondary users) representing end users who need to be part of the research efforts.

- ▶ **Recruitment method and screener:** Describe the recruitment method that will be used to find participants that match the defined user profiles, as well as the internal or external screener who will validate that research participants exhibit the necessary behaviors or represent the target demographics of the user profiles.

- ▶ **Research logistics:** List needs and considerations that need to be accounted for to ensure that each research session is a success and that provides each research participant with the same experience from session to session.

- ▶ **Research method(s) scripts and guides:** Provide a scripted opening for each research session and a breakdown of the topics, questions, tasks to observe, and activities for the user to perform to gather the necessary data from each research session. For example, research methods might include user interviews, usability studies, card sorting, and more.

- ▶ **Target research outputs:** Briefly describe the plan for how the research synthesis will be performed and the output of the research to ensure expectations are being met for the team and customer.

To kick-start your user research activities, check out usability.gov, a popular resource for templates and tutorials for conducting user research.

Delivering the Project Brief and Research Plan

An important check-in to perform with the whole team prior to moving into user research is presenting and reviewing the final drafts of both the project brief and research plan. This final review serves to foster consensus on the current state of the project and the overall strategy as it moves into the next phase of research. Plus, it reassures customers and stakeholders that progress is being made on a project, a fact that isn't always obvious during this phase of the discovery process.

Following this review, you will commonly need to make revisions to the documents, as some team members or stakeholders may not have been as involved as you wanted during the previous steps. The best-case scenario is relatively minor revisions that simply sharpen the focus of the definition of the project and the purpose of the research. If major concerns are brought