



UX Design Playbook

For Phidiar Mobile and Web Applications

Contents

Phase One: Research.....3

Phase Two: Define.....5

Phase Three: Design.....7

Phase Four: Development.....9

Four-Phase Approach to UX

The four-phase approach to User Experience Design applies the industry standard design process but with a focus on client time management and resource allocation. Routinely, UX Design processes encompass both the Design Thinking and Lean UX models moving from Problem Validation - Customer Validation – Product Validation – Technical Validation. The four phase approach of **Research, Define, Design, and Development** echoes the application of these steps, but focuses on the breaking down of exercises and tools to a customizable level easily communicated to non-design centric clients. In this case, primarily engineers.

Each phase allows the ability to add and subtract tangible tools, enables informed behavior and decision making, and allows time constraints to be minimized or maximized on preferred phases, or exercises in general.

This document estimates an assigned value in a color code, communicates deliverables, informs needs for resources, and transparently indicates the affect each exercise has on future planning.

Phase One: Research

Estimated time of completion: Late July 2019

Project Brief **HIGH VALUE**

This project brief serves as a living document that assists the outline of the goals, mission, and fundamental features the application will need to have an effective and usable experience for the user.

Deliverables: Shared document and editable document

What it affects: The alignment of priorities and time allocation for product features, product goals, and overall branding.

Resources Needed: None

Research Proposal **MEDIUM VALUE**

This document will be utilized to give a transparent overview of the research process, time allocation, and communicates the intended results delivered from research goals and objectives.

Deliverables: Shared document

What it affects: (Primary and Secondary Research) Foundational level of research and the approved time and resources allocation for the overall research methodologies.

Resources Needed: None

Secondary Research **MEDIUM VALUE**

The secondary research phase is a two-fold process including:

A comprehensive Market research summary which includes industry, economic and social information. This document could also be paired in addition to 'SWOT' analysis.

In addition, competitive analysis will be produced. This will serve to understand any direct and non-direct competitors, industry players, and construct provisional personas that can assist in the creation of GnuMob personas as a whole, and distinguish differentiation and position of potential users.

Deliverables: Market research compilation document, competitive analysis benchmarking board

What it affects: (Empathy, IA) Uncovers important industry, social, economic, and competitive knowledge that could lead to key insights and future business, marketing and design choices.

Resources Needed: None, research will be conducted through Core or other online scholars

Primary Research **HIGH VALUE**

Both support and resource heavy, primary research is worth the time and human-power allocation as it can provide unique insights to the mindset, goals, frustrations of a user. Interviews can assist in finding empathetic and accessible touchpoints from its qualitative data.

Surveys lead the way in providing actionable quantitative data that is easily communicated and relatively simple to harvest.

Deliverables: Shared document

What it affects: (Empathy, IA, HMW, User and Task Flows) Pertinent findings, including user needs, frustrations, pains and successes. Needed to develop user personas, and establish a focused empathetic viewpoint towards the user, helping to establish a brand and an identity.

Resources Needed: People, gift cards distributed to interviewees

Empathy Analysis and Conceptualization **HIGH VALUE**

Buyer personas and empathy mapping will be produced to help evaluate and understand a user's day-to-day, their digital journey, and begin to flesh out their needs, desires, goals and pains.

Storyboards are an effective tool to help visualize where the application could logically and theoretically fit into the lives of the created personas.

Deliverables: Multiple printed persona placemats, empathy mapping exercise/placemat and multiple scenario case storyboards distributed digitally.

What it affects: (User and Task Flows, HMW, Branding) Conceptualization of user needs, desires, goals, and pains. The ability to have a foundational level of actionable and working

knowledge to make decisions based on user personas. An understanding of time and place when a user utilizes the product. How navigation could affect the usability, accessibility and delight of the target market. Logos, branding and marketing materials.

Resources Needed: Printing materials

Research Presentation **LOW VALUE**

A research presentation should be created and distributed to showcase key findings, actionable materials, and communicate broadly and efficiently any research pertinent to the team.

What it affects: Agreement and approval on findings, and the ability to have informed decision-making information readily available.

Deliverables: PowerPoint presentation, key research summaries

Resources Needed: Meeting

Phase Two: Define

Estimated time of completion: Early September 2019

How Might We Exercise **AVERAGE VALUE**

After research materials are presented to the team. A group exercise is conducted to stir all empathetic responses to the personas and stories built around the potential users. The group exercise of “How Might We?” helps ideate and formulate potential solutions necessary for the needs of the users developed from the previous research.

Deliverables: Notes and definitive 1-3 How Might We statements

What it affects: Team excitement on meeting the needs of the user, finding issues with the navigation and information architecture importance, finding delightful feature knowledge.

Resources Needed: Team meeting

Project Forecast **HIGH VALUE**

These three documents establish a path moving forward and all requirements for setting the information architecture and navigation building stages.

Project Goals help establish the convergence of User Goals, Business Goals and Technical requirements in a Venn-Diagram formed document.

A Feature Roadmap is developed for the foundational level of navigation and information architecture.

Product Requirements documents will also be created with an emphasis on UI and navigational concerns.

Deliverables: Digital documents distributed with editing enabled for approval

What it affects: (Site map, Navigation, IA) Blueprint of moving forward, having all tangible pieces together, a statement of requirements and approved features.

Resources: None

Card Sorting and Information Architecture Research **MEDIUM VALUE**

Card sorting is an exercise to produce actionable navigation and information architecture insights. This exercise involves users sorting information into individually created categories and developing proprietary pathways.

Deliverables: Summary of information and research

What it affects: (Sitemap, Navigation, IA) Insight on information architecture needs, ability to have informed navigation choices.

Resources: People and possible incentive for interview and card sort exercise

Sitemap **HIGH VALUE**

A sitemap will be developed to inform and build a concrete foundation for the approach to the information architecture and navigation structure of both the mobile and web application. For GnuMob it is likely that it has already been created, so former exercises like Card-Sorting and IA research will run as a supplementary diagnostic.

Deliverables: Digital and printed Sitemap and distributed for approval

What it affects: (Information Architecture, Wireframes, User and Task Flows) The ability to have a foundational level of wireframes and inability to create task and user flows properly.

Resources: None

User and Task Flows **HIGH VALUE**

Creation of both task flows and user flows will assist in visualizing the developed personas utilization of navigation and information architecture of the Sitemap.

The task flow will visualize the intended outcome of any user's journey through the application. This will also show the decision making and thought process that leads to actions of any intended user.

The user flow will utilize the personas to show user journey's through the sitemap, visualizing all paths and also, in differentiation to the task flow, will include undesired paths that can help formulate actionable tweaks to the sitemap and navigation of the web and mobile application.

Deliverables: Digital documents for approval

What it affects: (Information Architecture) Ability to visualize paths informed by buyer personas and figure out incomplete goals or tasks.

Resources: None

Debrief Team Meeting **LOW VALUE**

This debrief could be in the form of a meeting and presentation and hold a discussion around the indications built from the previous conceptualization.

Deliverables: Notes, discussion

What it affects: Agreement on next steps and a foundation for rapid prototyping.

Resources: People/meeting room

Rapid Prototyping **AVERAGE VALUE**

The Rapid Prototyping group exercise is conducted to ideate solutions in wireframe and modular form quickly. These prototypes, wireframes, sketches and conversations will be voted on based on solution-centric aesthetics and will help inform design patterns, and wireframe creation. The real value in this exercise is getting input from non-designers and understanding others' solutions in short form, without negative evaluation.

Deliverables: Fun group activities, individual wireframe ideas

What it affects: (Wireframes, Design Patterns) The enablement of all voices in the wireframing stage.

Resources: People/meeting room

Phase Three: Design

Estimated time of completion: Late October 2019

Design Patterns **AVERAGE VALUE**

True to the Atomic model of modular pattern creation, design patterns will be researched, ideated and developed to help establish reusable patterns helpful for handoff to developers in the future.

Deliverables: Design library to development ahead of wireframes to see possibilities of coding

What it affects: (Wireframing, UI Design) Ability to have building blocks and reusable designs for components for both the web and mobile applications, and subsequent future designs.

Resources: None

Responsive Wireframes HIGH VALUE

The basic blueprint of all websites and application. After design patterns, a sitemap, and information architecture is fully resolved, wireframes are created with the main goal of allowing all task and user flows to be completed. In the case of pre-built wireframes, as in GnuMob, the wireframes can be updated or changed based on data, or kept as is, with the goal in mind of enabling the “painting on” of UI design.

Deliverables: Sketches, and design files accessible by PDF, Adobe XD and development team

What it affects: This will affect the completion of the project

Resources: None

Low Fidelity Prototype AVERAGE VALUE

If time and resources necessitate, a low fidelity prototype can be completed and possibly tested by users to see complete or incomplete task and user flows. The low fidelity prototype is a way of establishing correct wireframe patterns, and solidify user experience prior to branding and UI design.

Deliverables: Prototype shared file on Invision or Marvel prototyping websites

What it affects: (Usability Testing) This could either take the place, or be an additional testing instrument and will have an affect on the overall action taken after testing with users.

Resources: People/meeting room

Logo, Branding and Style Guide HIGH VALUE

The value of branding speaks for itself in most cases. Developing a brand based on user research, and the intended goals of the application adds to the delight of a user’s experience. A logo will be necessary for App Stores, as well as any marketing materials needed. A style guide will be developed to showcase the branding journey, as well as keep team members aligned to one overall style, look and feel.

Deliverables: Ideation notes, moodboards, style guide documentation, image files and design files

What it affects: The completion of the project, marketing assets.

Resources: None

User Interface Design HIGH VALUE

UI designs are created once both the wireframes/lofi prototypes and branding are created. Although, not as simple as combining both, elements from each of these processes are converged into each other and developed to make aesthetic and usable design elements. This includes all levels of visual design, UI elemental design, and the significant graphic design pieces.

Deliverables: Full and shareable design files in PDF and Adobe XD

What it affects: The completion of the project.

Resources: None

Phase Four: Development

Estimated time of completion: December 2019

Hi-Fidelity Prototype HIGH VALUE

A high-fidelity prototype is created to nail down any incomplete tasks with a user base when close to ship-date. This can help iron out any second-thoughts or discussions and develop an idea of the fully designed application and website without the necessity to code. This also helps inform the development team of any needs and wants for the final designs.

Deliverables: Full prototype on InVision

What this affects: The proper handoff between design team and development team.

Resources: InVision subscription

Usability Testing HIGH VALUE

Maybe the most pertinent of the development phase, testing will be conducted with users. This will inform any incomplete task flows, help with any last-minute changes and nail down the viability of the platform before launch date, or if needed, before going to development at all.

Deliverables: Testing proposal, testing debrief

What this affects: Awareness of any issues or bugs prior to launch.

Resources: People, meetings, possible testing platform subscription

Affinity Mapping MEDIUM VALUE

The affinity map is a way to communicate the pains, frustrations, wins and failures of users during the usability testing exercise. This is a quick glance at priority revisions and can help group problems, bugs, or issues in a visual way.

Deliverables: Affinity map document

What this affects: Final handoff, bugs and issues.

Resources: None

Development Handoff HIGH VALUE

Adding the development handoff here to establish the task itself. This could also be happening all of phase 4, or could be dealt with after usability testing.

Debrief and Future Planning LOW VALUE

Final wrap meeting where after project organizational strategies and product revisions can be discussed.

Deliverables: Priority revision document

What this affects: Communication successes and failures, revisions and opportunities.

Resources: Meeting