Praise for A Project Guide to UX Design

If Russ Unger and Carolyn Chandler were magicians, the Alliance would be after them for revealing their best secrets. Fortunately for you, they’re not. Russ and Carolyn have collected up sage wisdom previously only known to the most experienced UX project leaders and codified it for all to see. Now you can learn the secrets necessary to running great user experience projects.

Jared M. Spool, CEO and founding principal of User Interface Engineering

Is there one book that can tell you everything you need to know about designing user experiences? No. Is there a book that can get you most of the way there? There is now. Carolyn and Russ have laid a solid foundation for planning and managing design projects. This is an essential handbook for anyone mired in the competing methodologies, the endless meetings, and all the moving parts of user experience design.

Dan Brown, author of Communicating Design

This book is a fantastic introduction to how to design great products for real people. But it covers much more than just design—it also includes all the things around design: managing projects, working with people, and communicating ideas. A great all-rounder.

Donna Spencer, author of “Card Sorting: Designing Usable Categories”

This is a practical, accessible, and very human guide to a very human activity: working together with people to make great things for other people.

Steve Portigal, Portigal Consulting

If you’ve heard of Wil Wheaton the author, you understand why I hold Russ Unger in such high regard. Russ’s experience and guidance was fundamental to the construction and design of Monolith Press, and he’s been one of the most valuable collaborators I’ve ever worked with.

Wil Wheaton, actor and author of Dancing Barefoot, Just a Geek, and The Happiest Days of Our Lives
Acknowledgments

Russ Unger

When you agree to write a second edition of a book, it seems it should be a breeze. Then you start to review the tasks ahead of you, and you realize that it can be every bit as challenging as the first edition. Fortunately, as with the first edition, there was a lot of help in creating this.

My family allowed me to do this. Again. I’m eternally grateful. Thank you for keeping me in smiles and laughter at times when I’ve been in short supply. Thank you for laughing at jokes no one else would ever find funny.

My friends chimed in, threw in support at the last minute, and stepped up to bat to provide content and confidence, both of which were definitely needed at points during this endeavor. In no specific order, the stars of the second edition are: Brad Nunnally, Kim Nunnally, Jonathan “Yoni” Knoll, Brad Simpson, Gabby Hon, Laura Creekmore, Tim Frick, Margot Bloomstein, Dr. Arthur Doederlein, Sarah Krznarich, Matthew Grocki, Dave Gray, and Todd Zaki Warfel. I’m blessed to know such amazing people, who have offered their time and resources.

Carolyn and our counterparts at New Riders, who are always a blessing to get to work with: Michael Nolan, Jeff Riley, Tracey Croom, and Mimi Heft pulled together to help us really nail this down. It is a pleasure to get to work with you all.

Everyone who helped out with the first edition, and offered continued support: Linda Laflamme, Becca Freed, Steve “Doc” Baty, Brad Simpson, Mark Brooks, Jonathan Ashton, Jono Kane, Lou Rosenfeld, Christina Wodtke, Todd Zaki Warfel, Will Evans, David Armano, Livia Labate, Matthew Milan, Troy Lucht, Ross Kimbarovsky, Wil Wheaton, Tonia M. Bartz, Leah Buley, Dave Carlson, Christopher Fahey, Nick Finck, Jesse James Garrett, Austin Govella, Jon Hadden, Whitney Hess, Andrew Hinton, Gabby Hon, Kaleem Khan, James Melzer, Chris Miller, Maciej Piwowarczyk, Stephanie Sansoucie, Kit Seeborg, Josh Seiden, Jonathan Snook, Joe Sokohl, Samantha Soma, Jared M. Spool, Keith Tatum, Tim Bruns, Peter Ina, Jean Marc Favreau, Steve Portigal, Andrew Boyd, Dan Brown, Christian Crumlish, Alec Kalner, Hugh Forrest, and all of the UX Book Clubs (http://uxbookclub.org) across the world that continue to support the authors crazy enough to put it down in writing.
Finally, it is important to note that without organizations like the Information Architecture Institute, Interaction Design Association, and others, it would have been impossible for me to make the connections with many of the people mentioned. If you’re at all curious about the field of UX design, go explore these organizations, join them, and get involved!

Carolyn Chandler

Every worthy challenge brings its own set of lessons, and writing a book is certainly that kind of challenge. In writing the first edition, I learned how difficult it is to step away from what you do day to day, and to tell that story of a user-centered project approach from beginning to end. I kept jumping to the middle, but thankfully Linda Laflamme kept Russ and me focused on the overall flow and clarity.

In working on this edition, I finally realized how closely the book-writing process resembles the design process. You need to research, immerse, talk to users, talk to experts, generate concepts and create structure before you can really get into the details.

The experts in this edition helped me immerse in some of the most recent and relevant changes in the field. Nate Bolt shared his expertise in remote research tools, which have had an unbelievable growth in both number and effectiveness since the first edition. Jeff Gothelf brought his experience in Lean UX, an approach that has helped entrepreneurs focus on bringing user-centered products to light quickly and inexpensively. Brian Henkel, Chris Ina, and Jim Jacoby provided invaluable information on considerations when designing for mobile devices. And Brandy Taylor brought the new information on design principles to a higher level by sharing her philosophy and process in working with the visual, emotional elements of a design.

A hearty “thanks!” to these experts, and to all the folks at Manifest Digital who gave me extra time and space to write this edition, including Jennifer Conklin, Sue Hardek, and Michael Latiner. And of course, I’d like to thank Jim Jacoby for talking me off the ledge when I wasn’t sure how to balance everything. It all turned out fine, just like you said, Jim!

In addition to the people Russ has already acknowledged, I’m continually grateful for the people who contributed to the first edition, with support, expertise, and time: Steve Baty, John Geletka, Linda Laflamme, Christine
Mortensen, Brett Gilbert, Jen O’Brien, Jason Ulaszek, Haley Ebeling, Meredith Payne, Jenn Berzansky, Santiago Ruiz—and for Danyell Jones, for helping me get set up on delightside.com.

Last but not least, I want to thank my family and friends, who once again patiently dealt with my random appearances, and my occasional hermit-like retreats to the writing cave. I’m coming out now—see you in the sunlight!
# Contents

## INTRODUCTION

CONTENTS

---

**INTRODUCTION** .......................................................... xiii

**CHAPTER 1: The Tao of UXD** ........................................... 1

- What Is User Experience Design? .................................. 3
- The Broad Definition ................................................... 3
- Don’t Forget the Tangible ............................................. 4
- Our Focus ........................................................................ 5
- About UX Designers ...................................................... 6
- Where UX Designers Live ............................................ 7
- Let’s Get Started! ......................................................... 8

**CHAPTER 2: The Project Ecosystem** .................................... 9

- Identify the Type of Site ............................................... 10
  - Brand Presence ......................................................... 11
  - Marketing Campaign ................................................ 14
  - Content Source ......................................................... 16
  - Task-Based Applications ........................................... 18
  - E-Commerce Sites ....................................................... 19
  - E-Learning Applications ............................................ 20
  - Social Networking Applications ................................. 21
  - Mobile Sites and Applications .................................... 21
- Choose Your Hats ......................................................... 30
  - Information Architect ................................................ 30
  - Interaction Designer .................................................. 31
  - User Researcher ........................................................ 32
  - Other Roles You May Play or May Need ......................... 35
  - Building a Network of User Advocacy ......................... 41
- Understand the Company Culture .................................... 42
  - History ........................................................................ 43
  - Hierarchy ...................................................................... 45
  - Logistics ...................................................................... 46
  - Pulling It Together ...................................................... 47
CHAPTER 3: Proposals for Consultants and Freelancers ................................................. 49
  Proposals ................................................................. 50
  Creating the Proposal ................................................... 51
  Title Page ................................................................. 52
  Revision History .......................................................... 53
  Project Overview ........................................................ 54
  Project Approach ........................................................ 55
  Scope of Work ........................................................... 57
  Assumptions ............................................................... 57
  Deliverables .............................................................. 58
  Ownership and Rights .................................................... 59
  Additional Costs and Fees ............................................... 60
  Project Pricing ........................................................... 61
  Payment Schedule ....................................................... 62
  Acknowledgment and Sign-Off ........................................ 63
  Statements of Work ..................................................... 65

CHAPTER 4: Project Objectives and Approach ................................................................. 67
  Solidify Project Objectives ............................................... 68
  How Can a UX Designer Help? ......................................... 71
  Understand the Project Approach ...................................... 73
    Waterfall Approach .................................................... 74
    Agile Approaches ...................................................... 75
    Modified Approaches ................................................ 80
  How Does the Approach Affect Me? .................................. 81

CHAPTER 5: Business Requirements ................................................................. 83
  Understand the Current State ........................................... 86
  Heuristic Analysis ......................................................... 86
  Gather Ideas from Stakeholders ....................................... 90
    Outline Responsibilities ............................................... 91
    Gather the Right Stakeholders ....................................... 92
    Create a Plan for the Meetings ....................................... 94
    Sales: Requirements-Gathering Meeting ................................ 94
    Run the Meetings Effectively ......................................... 96
    Coalescing Requirements ............................................ 98
# CONTENTS

## CHAPTER 6: User Research  ................................................................. 101
- Basic Steps of User Research .......................................................... 102
- Define Your User Groups ................................................................. 102
- Create a List of Attributes ............................................................... 103
- Prioritize and Define ................................................................. 105
- Choosing Research Techniques ...................................................... 107
- How Many Research Activities Can I Include? .............................. 110
- User Interviews ................................................................. 111
- Contextual Inquiry ................................................................. 114
- Surveys ................................................................. 118
- Focus Groups ................................................................. 121
- Card Sorting ................................................................. 124
- Usability Testing ................................................................. 127
- After the Research ................................................................. 128

## CHAPTER 7: Personas ................................................................. 129
- What Are Personas? ................................................................. 130
- Why Create Personas? ................................................................. 130
- Finding Information for Personas .................................................. 131
- Creating Personas ................................................................. 131
- Minimum Content Requirements .................................................. 134
- Optional Content ................................................................. 137
- Advanced Personas ................................................................. 139
- Guerrilla Personas: The Empathy Map .......................................... 141
- Final Thoughts on Personas .......................................................... 143

## CHAPTER 8: Content Strategy ................................................................. 145
- Why Do You Need Content Strategy? .............................................. 146
- When Do You Need Content Strategy? .............................................. 147
- Who Does Content Strategy? .......................................................... 149
- How Long Does Content Strategy Last? ............................................ 149
- This Sounds Familiar... ................................................................. 150
- Tools of the Trade ................................................................. 152
- The Artifacts ................................................................. 152
- What is the One Artifact You Need? ................................................. 156
- Additional Resources ................................................................. 156
- Things to Look Out For ................................................................. 160
Lack of Page Numbering .................................................................................................................. 226
The Simple Site Map .......................................................................................................................... 228
Advanced Site Maps .......................................................................................................................... 228
Breaking the Site Map Mold .............................................................................................................. 230
Task Flows .......................................................................................................................................... 231
Taking Task Flows to the Next Level ................................................................................................. 234
Swimlanes ........................................................................................................................................... 234

CHAPTER 12: Wireframes and Annotations ......................................................................................... 237
What Are Annotations? ....................................................................................................................... 239
Who Uses Wireframes? ....................................................................................................................... 239
Creating Wireframes ........................................................................................................................... 240
Tools of the Trade ............................................................................................................................... 241
Start Simply:
Design a Basic Wireframe .................................................................................................................. 244
Getting Started .................................................................................................................................... 245
The Wireframes and Annotations ......................................................................................................... 246
Creating Wireframes: A Sample Process ............................................................................................ 249
What is This Sketching You Mention? ............................................................................................... 250
Into the Digital: Wireframes ................................................................................................................ 251
Into the Digital: Visual Design .......................................................................................................... 253
Hey, What About This Responsive Design Stuff I Hear About? ......................................................... 254
Wireframes Vs. Prototypes ................................................................................................................... 256
Which Design Is Right? ....................................................................................................................... 256
A Final Note on Presenting Wireframes ............................................................................................. 257

CHAPTER 13: Prototyping .................................................................................................................... 259
How Much Prototype Do I Need? ....................................................................................................... 260
Paper Prototyping ................................................................................................................................. 261
Digital Prototyping ............................................................................................................................... 262
Wireframe vs. Realistic Prototypes ...................................................................................................... 263
HTML vs. WYSIWYG Editors ............................................................................................................ 264
Additional Tools for Prototyping ........................................................................................................ 274
Working with a Developer ................................................................................................................... 275
Prototype Examples ............................................................................................................................. 276
What Happens After Prototyping? ...................................................................................................... 278
CHAPTER 14: Design Testing with Users ........................................ 279
   Exploring Visual Design Mock-Ups ....................................... 283
   Choosing a Design Testing Approach .................................. 284
   Qualitative Research vs. Quantitative Research ...................... 285
   In-Person Research vs. Remote Research ............................. 286
   Remote Research Considerations ...................................... 287
   Moderated Techniques vs. Automated Techniques .................. 288
   Usability Testing .......................................................... 292
   Planning the Research ..................................................... 295
   Recruiting and Logistics .................................................. 299
   Writing Discussion Guides ............................................... 304
   Facilitating ........................................................................ 306
   Analyzing and Presenting Results ...................................... 308
   Creating Recommendations ............................................... 310

CHAPTER 15: Transition: From Design to Development and Beyond ...... 311
   Almost Done....................................................................... 312
   Visual Design, Development, and Quality Assurance ............... 312
   Design Testing with Users (Again) ...................................... 315
   10, 9, 8, 7, 6, 5, 4, 3, 2, 1 ... Launch! .................................... 315
   Personal Advantage .......................................................... 316
   Support .............................................................................. 316
   Network Opinion .................................................................. 317
   Postlaunch Activities ......................................................... 317
   Postlaunch Analytics .......................................................... 318
   Postlaunch Design Testing with Users (Again, Again) ............... 319

CHAPTER 16: A Brief Guide to Meetings ......................................... 321
   The Agenda ......................................................................... 323
   Meeting Rules ..................................................................... 325
   After the Meeting ............................................................... 328
   Dealing with Nonconformers ............................................. 330
   A Final Note on Meetings ..................................................... 331
   All Done, Right? .................................................................. 332
   Just Like Starting Over.......................................................... 332

INDEX .................................................................................. 321
Introduction

Why We Wrote This Book

Welcome to the second edition of A Project Guide to UX Design.

Somewhere there’s a student in user experience design losing sleep because he doesn’t know what it will be like to work on a real project at his new company. Across town, there’s a visual designer with plenty of project experience who yearns to take on new responsibilities in defining her site’s user experience. These are two people at different points in their lives but with a similar need: to understand how to integrate user experience practices within the context of a living, breathing project.

Our goal with this book is to give you the basic tools and context that will help you use UX tools and techniques with working teams. As you’ll see in many of these chapters, we’re not trying to be everything to all people, but we’re trying to provide you with the core information and knowledge that you should have to perform many of the duties you’ll be assigned as a UX designer. Beyond our own examples, we provide you with examples that help you identify ways to jumpstart the basic materials and allow you to mash up the information and create something newer, better, or even more suited to your own purposes.

We hope we’ve done a decent job of articulating that this is a pretty good approach to UX design projects.

We’re nothing if not constantly trying to learn and improve (whatever we do) with each iteration. That’s why, to a degree, we’re in this field.

A Word from Russ

A lot has changed since the first edition, but fundamentals still exist. As UX roles start to expand to encompass more responsibility (content strategy, research, kick-off meetings, design, prototyping, testing with users, and so on), it is sometimes difficult to find for a good place to start. We like to think we have offered up a good place to start in UX. It will not encompass everything, and it will not go as deep as everyone needs—we have done our best to supply additional resources to help you take the deeper dives where it is important to you, while providing you a foundation that helps you get started.
I was at the Information Architecture Summit (www.iasummit.org) in 2008 when the idea for this book first began to take shape. I started planning and plotting an outline of the topics I wish someone would have covered with me when I was getting started, and luckily, I found Carolyn a willing and capable co-author who helped sand the corners off of the ideas and inject her own. That start, and the back-and-forth iterations on the content, eventually became this book.

**A Word from Carolyn**

For many years now, I’ve been in the lucky position of building and managing UX teams. I say “lucky” because I find that UX designers in general have a great balance of characteristics that make them plain fun to work with, mixing right-brain intuition and left-brain logic.

As I’ve conducted interviews to build these teams, one thing has really stuck out: A related educational background, like human factors or communication design, is a great indicator that someone is committed to the field of UX design, but it’s not the number one indicator of whether someone would be a good fit within the team or on a project. Just as important—if not more so—is the person’s ability to have a consultant’s mind-set. This means a positive attitude, a drive to understand and include others throughout a project, and—above all—a focus on making a real impact for users and clients.

This mind-set means taking the time to understand the perspectives of other roles on the project, making cases, and making compromises where necessary. It takes experience and effort to get this mind-set down really well, but having an open mind, a strong foundation, and a good set of questions (with the courage to ask them) can take you a long way. This book may not supply all “the answers,” but it will give you the questions to ask to help you find them.

**Who Should Read This Book**

*A Project Guide to UX Design* provides a broad, introductory overview to UX design within the context of a project. Anyone with an interest in UX design should find something useful here. We focused on the following groups in particular:
**Students** taking UX design courses (such as human-computer interaction or interaction design) who want to supplement their coursework with information on how to apply their learning to real-life situations, where communication and collaboration are vital.

**Practitioners** who would like to deepen their knowledge of the basic tools and techniques of UX design and improve team communication about the roles involved. Chapter 3 is also particularly geared toward freelancers who need to create their own proposals.

**Leaders of UX design groups** who are looking for a book that will help their teams integrate project best practices with UX design activities.

**Leaders of any project teams** who are interested in learning more about how UX design integrates into their projects, what the value is, and what to expect from UX designers.

<table>
<thead>
<tr>
<th><strong>IF YOU NEED TO...</strong></th>
<th><strong>THEN YOU SHOULD READ...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Define user experience design and understand what draws people to the field</td>
<td>Chapter 1: The Tao of UXD</td>
</tr>
<tr>
<td>Ask the questions that are important to have answered before the project begins (or at least before you start to work on it)</td>
<td>Chapter 2: The Project Ecosystem&lt;br&gt;Chapter 3: Proposals for Consultants and Freelancers</td>
</tr>
<tr>
<td>Start things off right with efficient meetings, clear objectives, and well-understood approval points</td>
<td>Chapter 16: A Brief Guide to Meetings&lt;br&gt;Chapter 4: Project Objectives and Approach</td>
</tr>
<tr>
<td>Define project requirements for content and functionality that are unambiguous and easy to prioritize, drawn from business stakeholders and users</td>
<td>Chapter 5: Business Requirements&lt;br&gt;Chapter 6: User Research&lt;br&gt;Chapter 8: Content Strategy&lt;br&gt;Chapter 9: Transition: From Defining to Designing</td>
</tr>
<tr>
<td>Learn about your users and represent their needs throughout the project</td>
<td>Chapter 6: User Research&lt;br&gt;Chapter 7: Personas&lt;br&gt;Chapter 14: Design Testing with Users</td>
</tr>
<tr>
<td>Choose and utilize the tools and techniques that enable you to bring visual ideas to your project team quickly</td>
<td>Chapter 10: Design Principles&lt;br&gt;Chapter 11: Site Maps and Task Flows&lt;br&gt;Chapter 12: Wireframes and Annotations&lt;br&gt;Chapter 13: Prototyping</td>
</tr>
<tr>
<td>Ensure your site is easily found and searched by users and by search engines</td>
<td>Online chapter: User Experience Design and Search Engine Optimization</td>
</tr>
<tr>
<td>Communicate and evolve your design with the project team once development begins</td>
<td>Chapter 15: Transition: From Design to Development and Beyond</td>
</tr>
</tbody>
</table>
Be sure to visit www.projectuxd.com to read the bonus chapter "User Experience Design and Search Engine Optimization" and to download other bonus materials such as templates.

**What’s New in the Second Edition**

Most of the information from the first edition is still relevant three years later and is still present here, refreshed with some new examples.

In addition, you’ll find updates and new chapters based on the following reader suggestions and new developments in the field.

*Mobile and gestural design considerations have been added to Chapter 2: The Project Ecosystem.* The number of mobile devices, and frequency of their use, has outpaced that of desktops. They form a crucial part of your users’ ecosystem and should be a part of any digital product strategy.

*Lean UX makes a new appearance in Chapter 4: Project Objectives and Approach.* This approach has helped entrepreneurs bring a user-centered focus to developing new businesses in the face of high uncertainty.

*Content strategy finds itself as a new topic in the book at Chapter 8.* The content strategy field is blowing up and the information is timely, relevant, and a good springboard into the topic.

*Design principles make their debut in the new Chapter 10.* In response to reader requests for additional information on the elements of design, you’ll find some of the prevalent principles in visual design, interaction design, and psychology to ground your design decisions, as well as tips on creating unique design principles for your own products.

*Prototyping got an overhaul in Chapter 13.* Jonathan “Yoni” Knoll lent a hand (and by “lent a hand,” I mean “guided the process, wrote the code, made the examples available, and was an all-around good friend”) and guided the chapter to being closer to a primer for those interested in finding out if they want to be “designers who code.”

*Chapter 12: Wireframes and Annotations was updated to include sketching* and to show more of the process of creating wireframes. The change was minor and significant at the same time.
Remote research techniques and automated research tools get a deeper
dive in Chapter 14: Design Testing with Users. You’ll find information on
balancing the choice between remote and in-person research, as well as an
overview of the types of results you might expect from some of the popular
automated tools.

A Note on Methodology
There are a variety of approaches and methodologies out there. We aren’t
proponents of one approach over another. Our goal for this book is to focus
on the steps that are common to most projects: defining the project needs,
designing the experience, and developing and deploying the solution. The
amount of overlap between these steps will vary greatly depending on the
project approach you use (see Chapter 4 for more detail). For the most part,
our framework is a loose, linear approach, where the definition step comes
first—but in each step we take advantage of facilitation and design tech-
niques where they’re most helpful.

What This Book Is Not
An encyclopedia of all techniques. The UX field has an enormous num-
ber of creative people, and they’re always trying new approaches to design
problems. Including all of those approaches here would make a much larger
book—and one that would quickly be outdated. What we’ve included here
are the most commonly used techniques, the nuts and bolts of UX design.
We’ve tried to provide enough information to both intrigue you and allow
you to communicate the activities to other project members—including the
basic process for each technique and additional references to books or sites
that will help you implement it once you choose your path.

A guide to being a project manager. Good project management (including
setting and tracking project objectives, timelines, and budgets) is key to any
project’s success. We don’t cover specifics on how to be a project manager
or how to choose a particular project methodology. We do discuss the skills
that a UX designer brings to a project that allow it to run effectively, such as
facilitation and communication, as well as the ability to clarify and maintain
focus on project objectives. These skills will help you become a partner in
project management.
The only or the perfect process or methodology for you to follow. We don’t have all the answers—no one does, today. The UX design field is relatively young, and we’re all working to improve upon where we are. You will probably find that trial and error, enhancements and improvements, and feedback from others will help you tailor a process to fit your needs. When you find something that works for you—share it! Let us know!

How to Use This Book

There are many excellent resources out there for UX designers. We cover topics broadly here but point you to references that will allow you to explore topics at a deeper level depending on how much time you want to dedicate to them. To help you understand the amount of time generally needed for each reference, we’ve split them out into three major categories:

**Surfing**
References called out with the surfboard are shorter features (usually online) that will take 5 to 30 minutes to read.

**Snorkeling**
Those called out with the snorkel are longer online articles, white papers, or short books that take anywhere from an hour to a weekend to read.

**Deep Diving**
Those called out with the diver’s helmet are longer books that will probably take more than one weekend to read; they give you in-depth coverage of the topic.
Project Objectives and Approach

Know Which Star to Navigate By

One of the keys to a good project is to start the team out with clear project objectives and a well-understood approach. Ideally, the project leadership will have this defined for you—but how do you know if they don’t?

This chapter talks about forming project objectives and offers some questions that will help you solidify those goals. We’ll also discuss some common project approaches (or methodologies) and how they may influence the way you work.

Carolyn Chandler
You’re in the project kickoff, with the full team for the first time. The project manager hands out some materials and gives you an overview of the project. By the end of the meeting, ideally, you should have the following information:

- Why is the project important to the company?
- How will stakeholders determine if the project was a success?
- What approach or methodology will the project follow?
- What are the major dates or milestones for key points, such as getting approval from business stakeholders?

All of these questions concern the expectations that stakeholders have for the project: what the project will accomplish and how they will be involved in it. The first two questions pertain to the project’s objectives and the last two to the project’s approach.

A project objective is a statement of a measurable goal for the project. Let’s talk about objectives in more detail.

**Solidify Project Objectives**

Objectives are an important focusing lens that you’ll use throughout the project. They should spring from the client company’s overall business strategy, so the project objectives should be in line with the strategic initiatives within the company. For example, if there is a strategic initiative to appeal to a new group of prospective customers (called a market), the site or application you’re creating may be an effort to provide that market with online access to products and services relevant to them. The objective for that project would then be focused on reaching and engaging that market.

A clear objective resonates throughout a project. It helps you:

- Ask the right questions as you gather ideas from business stakeholders
- Plan research with users and focus your analysis of the results
- Detail the ideas gathered from stakeholders and users and convert them into a consolidated list of project requirements
- Prioritize those project requirements based on their value to the company
Create effective interaction designs
- Manage requests for changes to the design once development begins
- Focus efforts during deployment activities (such as training and communications to users about the new site or application before and during its launch)
- Determine whether you’ve met the needs of the client company, once the project is launched

When you start a new project, you probably have project objectives from the project’s sponsor (the business stakeholder who has direct responsibility for the success of the project), as well as a set of project-related requests coming from business stakeholders and from customers, but they all may be a bit fuzzy (Figure 4.1). Your goal is to clarify these into solid statements that you can use as a yardstick for the project’s success.

A solid objective has the following characteristics:

- **Easy to understand.** Avoid insider terminology
- **Distinct.** Avoid vague statements; instead, use wording that seems like it will be useful when you’re prioritizing requirements
- **Measurable.** Make concrete statements that you can set an independent measurement against to determine your success

As you define a fuzzy objective, making it clear and measurable, it becomes a solid objective that you can base decisions on (Figure 4.2 on the next page).
You’ll hear many statements that could be considered objectives. Analyzing fuzzy ones such as those below will help you solidify your objectives and communicate more effectively within the project team.

**“Our objective is to become the market leader in industry x.”**

This is an objective for the entire company, but is too broad for a specific project. Multiple initiatives at the company need to come together to make this happen; any one site or application may help with this but will be very unlikely to be able to handle the entire burden—unless the entire company is about this one site or application and it ends up being wildly successful.

**“Our objective is to generate excitement among our customer base.”**

This one is better, because a site or application could have an impact on this, but it’s still too vague. Why is it important to generate excitement? How does that excitement translate into meeting a business need? And how can you tell if you’ve been successful?

**“Our objective is to increase the amount of traffic on our website.”**

Now we’re getting there. This one is easy to measure, but it’s too focused on an intermediate step. Suppose you do generate more traffic: It may not help you if people don’t perform the actions you want once they get there.
Fuzzy objectives can give you a sense of a client’s desires and larger goals. From these you can craft more solid project objectives, such as

- Increase the revenue from online sales by 10 percent
- Increase the revenue from online advertising by 20 percent
- Increase the number of current and potential customers in our customer database to at least 20,000
- Deliver highly rated and highly referenced content to our primary users
  (Note that this one requires some work to decide how to measure “highly rated” and “highly referenced,” but the elements are there to build from)

Each of these can be measured and affected by your project. They can also map pretty closely to your designs and the features offered. For example, it’s very common to offer an online newsletter as a way to meet an objective of growing the customer database: To deliver the newsletter you’ll need to capture customer e-mail addresses, which will be added to the database. Objectives may also bring out new requirements. For example, if you’re measuring success by the average rating given to articles on your site, you’ll need a feature that allows users to give ratings. In these ways, objectives help you focus as you gather ideas for the site, and these may later become project requirements.

If there are multiple objectives, be sure to create a prioritized list with your business sponsor and project team. Objectives sometimes conflict with each other during design, and the team will need to know what takes precedence. The final prioritized list of objectives should come from your project sponsor, but you can be a key part of the discussion. Let’s talk about how.

How Can a UX Designer Help?

If you find the project objectives are unclear at the beginning of a project, you can bring your facilitation skills to bear. Help the project team understand the business-related context of the project by holding a workshop with key stakeholders (see the next chapter for more on identifying the right stakeholders). Your goal in this session, which usually lasts two to four
hours, is to bring out information on the company’s strengths, weaknesses, opportunities, and threats. Called a SWOT analysis, this is a common business analysis technique and one way to discuss a company’s position in the market. You can also use this time to discuss the company’s competition.

**Understand Strengths and Weaknesses**

The SW in a SWOT analysis are the company’s current strengths and weaknesses as they pertain to the project. Strengths and weaknesses could include internal processes as well as external perceptions—and often they influence each other. For example, a company with a large research and development (R&D) department could have access to a large source of original research that is published (a strength), but there may be no one to help make that content more accessible to the average user, leading to the perception that the company is “too academic” (a weakness).

**Identify Opportunities and Threats**

The OT is the future-facing half of the SWOT. Considering the things that differentiate the company from its competitors, what future initiatives could it pursue that will open up a new niche or strengthen a current one? What situations could threaten those plans?

For example, our R&D company may decide to hire writers to publish more accessible feature articles around its original research (an opportunity), but if the current site toolset doesn’t have robust content-management features, the publishing process may be prohibitively slow. That could give competitors a chance to respond more quickly (a threat).

**Compare Competitors**

What is the company’s main competition? Who are the competitors for the site being developed? They can be different, especially for large companies or brand new sites.

Are there sites that aren’t necessarily direct competitors but that represent interesting models to consider? You can learn a lot from reviewing other e-commerce sites to see whether and how they sell what you’re selling.
SWOT and competitors are good topics to discuss at the same time because they interact with each other. It’s hard to talk about future threats without knowing who your competitors are—and once you start talking about future opportunities, new competitors may come to mind.

Once you have a full picture here of the company’s competitors and SWOT, your project objectives—as well as the overall fit of your project within the company strategy—should become easier to define, and the priorities among them should become clear.

Solidifying project objectives helps you understand expectations of what the project is going to accomplish. Next, let’s talk about expectations concerning how the project will be run. Understanding the project approach will help you collaborate effectively and involve the right people at the right time.

### Understand the Project Approach

Knowing the overall approach, or methodology, of a project is an important part of understanding when and how you’ll be involved and how you should be involving others, such as your project team and business stakeholders.

Sometimes there seem to be as many project approaches as there are projects. How to choose the right approach for a project is a large topic in itself. The methodology you choose can depend on many things, including the structure and location of the project team, the technologies being used on the project, and the degree to which collaboration is a part of the company’s culture. For the purposes of this book, we’re assuming that you’ve joined a project where the approach has largely been determined by those responsible for the project’s success, such as the project sponsor and project manager. In this situation, your main goal will be to understand the approach and help make it effective for the business stakeholders and your users.

Here we’ll focus on two of the most common types of approach, as well as a third that shows a possible variation you might encounter on a project. The important thing to note is that most approaches involve the same steps:

- **Plan** the overall strategy, approach, and team structure
- **Define** the project requirements
Design interaction and visual concepts and evolve them into detailed specifications

Develop, test, and refine the solution

Deploy the solution via messaging, training, and a planned launch

Extend the project by making recommendations for improvements

The names for these steps may vary, as may the degree to which they overlap and the way information is documented. But the general activities in each step are common to most projects and to all three models presented here.

Waterfall Approach

A waterfall approach (Figure 4.3) involves treating the steps of a project as separate, distinct phases, where approval of one phase is needed before the next phase begins. For example, the Design phase does not begin in earnest until requirements have been approved by business stakeholders, who sign off on one or more requirements documents at the end of the Define phase.

The problem with a pure waterfall approach is that it assumes that each phase can be completed with minimal changes to the phase before it. So if you come up with new requirements in the Design phase, which is common, you must suggest changes to documents that were approved at the end of the Define phase, which can throw off the plan and the schedule.
Agile Approaches

Because change is constant, project teams are continually looking for more flexible approaches than the waterfall model. Many methodologies follow a more fluid approach, with some steps happening alongside each other; for example, versions of the website could be released on a rapid, iterative schedule using an agile or rapid development approach (Figure 4.4). An agile approach generally has a greater focus on rapid collaboration and a reduced focus on detailed documentation and formal sign-off.

A true agile approach (following the best practices developed by members of the Agile Alliance, for example) calls for small teams whose members are located next to each other physically, with little focus on defining formal roles between team members. Working this way allows a very high degree of collaboration, which reduces the need for heavy documentation between the stages of design, development, and testing. A team member can pose a question, come to the answer together with other team members during a quick whiteboarding session, and implement a solution without the delay of detailed documentation and approval. Stakeholder reviews occur with a fully functioning system when one of the many iterations is released, and the resulting input is taken into account as the next iteration is planned. (Iterations are draft versions of a particular site or application and may also be called sprints.)

Designers moving to an agile approach for the first time often face a conundrum. How do you go from a waterfall approach (which favors detailed documentation and sign off, taking weeks or months per phase), to an agile

Figure 4.4 Example of an agile approach
approach (which favors conversations and quick decision making over the course of days or weeks) and still make time for design thinking and user research? To see how some designers have made the transition, let’s dive deeper into a particular kind of approach called Lean UX.

**Lean UX**

Lean UX is an agile project approach that’s well-suited to products being developed in the face of great uncertainty (as most products for startups are). It reduces waste in the project’s process by removing effort spent on features that don’t really matter at the time of each iteration. For example, spending time designing an entire set of categories and subcategories of products may be wasteful if the team has not yet proven that they’re offering products that their target users are willing to purchase.

Some of the principles of Lean UX include:

- **A focus on validated learning.** Iterations of the product are not seen as simply working versions of the product, but as the presentation of a hypothesis that can be tested with users. The goal is to *learn* as quickly as possible, by validating design decisions with customers and incorporating the subsequent changes that will help the team learn the next important lesson.

**The Origins of Lean UX**

Eric Ries developed an approach called the Lean Startup after studying Toyota’s lean manufacturing processes, and Steve Blank’s Customer Development model, which emphasizes the need for startups to have an early focus on customers. A Lean UX approach builds on this direction with its customer inclusion, its reduction of waste in the process, and its definition of product iterations as experiments.

Entrepreneurs can find out how experimentation and a focus on learning can help startup teams in the face of uncertainty, in *The Lean Startup* by Eric Ries (Crown Business, 2011).
A continuous loop of Build—Measure—Learn. Lean processes prioritize the building of a testable iteration of the product as quickly as possible, in order to test assumptions that the team is making about how users will react to the product. Tests fail or succeed based on qualitative user feedback during research, and on quantitative measures that are put in place to track success. These measures should pull from actual user behavior—for example, the number of registrations for a site, the number of products purchased, and so on. Care should be taken that the measures put in place really test the assumptions of that iteration. For example, if people are registering for your site, but not taking any important actions in it afterwards, you’ve just learned that your post-registration experience needs to be more compelling! Incorporate that learning into your decisions on what goes into the next build, and complete the loop (Figure 4.5).

The importance of developing the Minimum Viable Product (MVP) at each iteration. In a lean process, the focus is on testing a hypothesis about user behavior, rather than building a fully functioning product at each iteration. Teams don’t need to create a fully functioning digital version of their product to test a hypothesis (although a more robust digital version will eventually exist after several cycles, if things are going well on the validation front). Especially in beginning stages teams can focus on developing a Minimum Viable Product, which Eric Ries defines as “that version of product that enables a full turn of the Build—Measure—Learn
A move away from formal deliverables and detailed documentation.

This is consistent with the overall agile approach. Deliverables like detailed wireframes and use cases, which may become replacements for direct communication and fast implementation of ideas, are removed from the process in favor of faster methods like sketching. Conceptual wireframes loop with a minimum amount of effort and the least amount of development time.” For example, elements of the experience that should eventually become automated—like confirmation emails when a purchase has been made—may be completed more manually by a team member while the test is being run in an earlier iteration.

Ask the Experts: Jeff Gothelf

Jeff Gothelf is the founder of Proof, a product innovation and design studio, and is the author of Lean UX: Getting Out of the Deliverables Business (O’Reilly, 2012.)

You’ve said that Lean UX is an approach that gets designers out of the deliverables business. But many UX designers use deliverables—documentation like detailed wireframes—in order to communicate design recommendations to their teams. Does Lean UX skip this step?

Deliverables aren’t skipped in Lean UX. They’re still used, to the extent necessary, to communicate to target audiences like stakeholders, developers, and customers. But they’re not the focus of the project, and they don’t create the bottleneck they would in waterfall where the team sits back and waits for the design to be “done” and then signed off before anyone else begins working. Also, there’s still a large amount of work that you’re doing as a designer outside of the actual documentation, because the goal is to validate your design hypotheses as soon as possible—so the more tests you’re running with customers, the more right you’ll be in the product you’re building. The trick to getting to a level of efficiency with it is to build a shared understanding across your entire cross-functional team. The more you’re out there with your team having conversations with them, discussing what you’re seeing and why you think that is, the more they get a clear sense of why you’re making the design decisions you’re making and what direction the design is heading in. When they have a clear sense of that, they need less documentation in order
to start building those experiences because they have the foundation and shared understanding from which to work.

**How does a Lean UX approach affect the role of a UX designer on the project?**

It assumes a leadership quality to the UX role on the team. The Lean UX process forces you to constantly communicate out to the team and solicit feedback from them. But it’s not design by committee, either. Yes, you’re out there soliciting feedback from your team early and often, but it isn’t your job to take all their feedback and make sure it all makes it into the next iteration of the design. It’s your job to prioritize the feedback based on what’s needed to get to the next level of learning with your customers. Then you incorporate that and communicate the result out to the team so they’re aware of what design decisions are being made, and why.

**Is there anything the team should have from the beginning to ensure a Lean UX approach is successful?**

There needs to be a freedom to fail in the organization. If people feel they have to get it right the first time, right out of the gate, than the whole process fails. This is a hypothesis validation process, and by the very nature of it you’re going to come up with some wrong answers. The idea is to figure out what those wrong answers are as quickly as possible and minimize the wasted effort going down those paths. If you don’t have the freedom to be wrong in your organization, then you will not be able to execute this process with any kind of success.

are often still used, but are meant to illustrate quickly as an aid to communication, and do not “live on” as records of design decisions.

When an agile approach is working as it’s designed to, it’s a beautiful thing. At most companies and within most consulting engagements, however, teams rarely follow a pure agile approach. In part, this is because companies often have distributed teams and remote workers, which makes it difficult to maintain the high degree of collaboration needed to take best advantage of the pure agile approach. However, a greater prevalence of virtual collaboration tools and digital sketching tools makes this distributed agile approach increasingly possible, as long as teams commit to clear communication, high availability, and effective decision-making.
**Surfing**

LUXr is a company founded on Lean UX practices. You can see an introduction to Lean UX and more detail on its principles on their site at http://luxr.co/lean-ux/9-principles-for-lean-ux/.

All UX designers should be focused on reducing waste in the process, and prioritizing communication over documentation regardless of the specific approach of the team, as Whitney Hess points out here: http://whitneyhess.com/blog/2011/02/27/why-i-detest-the-term-lean-ux/

**Modified Approaches**

Many projects try to follow an approach that marries elements of waterfall and agile approaches, with enough structure and documentation to reduce the risks posed by distributed teams and turnover of team members, but enough collaboration and iteration to respond to changes in a relatively nimble way. For example, a project may follow a waterfall model but include an overlap in phases so that there are key collaboration points from team to team. This allows potential changes to surface earlier in each phase. This may also include an early release (such as a beta release to a particular user group) with a shorter iteration cycle. Feedback from that release can then be incorporated before the full deployment of the new site. (Figure 4.6)

![Figure 4.6 Modified waterfall with beta release](image-url)
Notice the smaller iterations within the Design phase in Figure 4.5. That’s one of the greatest values you bring to your team as a UX designer. Tools such as wireframes (Chapter 12) and prototypes (Chapter 13) can allow you to gather feedback on quick iterations of ideas, before a lot of development time has been put in.

This book loosely follows a modified waterfall approach like the one shown in Figure 4.6. However, many of the topics covered here will apply to your project regardless of the specifics of your approach, because the basic activities behind them—defining and designing, for example—are still necessary.

**Deep Diving**

If your project is using an agile approach, you’ll have unique needs during requirements gathering, such as the writing of “user stories” as a way to capture requirements. We recommend *User Stories Applied: For Agile Software Development* by Mike Cohn (Addison-Wesley Professional, 2004).

**How Does the Approach Affect Me?**

Knowing your approach helps you understand a number of things:

- **What questions you should be asking, and when.** For example, if you’re working with a pure waterfall approach, you’ll need to put in extra effort to make sure the requirements captured in the Define phase contain all the information you need for the Design phase. (We’ll be discussing requirements in the next chapter.)

- **Expectations on how project team members will collaborate and how close that collaboration will be.** For example, an agile approach requires very close collaboration. A waterfall approach may involve individual work most of the time, with touchpoints once or several times per week.

- **The level of detail needed in your documentation and the level of formality.** Documents submitted at sign-off points need to be formal, almost like legal contracts. Typically, you’ll need more formal documents...
in a waterfall approach, where sign-off is required before you move on to the next phase. However, you may also have some formal sign-off documents when using an agile approach—for example, to capture information at major decision points, such as when a particular iteration is prepared for full release and deployment.

- **Important milestones that involve approval from stakeholders and deployment to different groups.** The approach will determine what different audiences need to provide at various points in the project, including approvals from stakeholders at sign-off points and feedback from potential users during a beta release.

Now that you’ve solidified your project objectives and gained an understanding of the project approach, in the next chapter we’ll start with the primary work in the Define phase: gathering requirements.
INDEX

A
accessibility 187
acknowledgement for projects 63–64
action
   economy of motion and user 200–202
   elicited by marketing campaigns 15–16
   object’s properties communicating 198
   responses to user 202–204
   understanding site’s potential for 196–197
active observation 115
activities in project 164, 181–183
additional project costs and fees 60–61
advanced site maps 228–230
affinity diagramming
   applying to card sorting 116–117
   solving design conflicts with 179–180
affordance 198
age of personas 136
agendas for meetings 323–325, 327
agile approaches 75–80
AIGA 61
Amazon.com 197–198, 202
American Customer Satisfaction Index (ACSI) 119
analytics tools 33
analyzing usability test results 308–310
Anderson, Stephan P. 215
Angeles, Michael 221
annotations
   defined 239
   uses for 237, 246–248
Aquent 61
arrows 223–224
Art of Game Design, The (Schell) 209
associations 197–198
assumptions in proposals 57–58
audience
   developing persona for target 140–141
   knowing site’s 189
   testing sites for 300
   wireframe 239–240
audits
   qualitative 153
   quantitative 152–153
B
baby-naming websites 135
Bainbridge, Mike 281
balancing
   advocate input 173–175
   design elements 6–7, 193–196
Baty, Steve 111
Beecher, Fred 247
Beyer, Hugh 117
biographies 136
Bloomstein, Margot 147
body language 123
Bolt, Nate 287
Boston Globe, The website 194–195
brand presence websites
   common types of 13
   defined 11
   design goals for 13–14
   focus of 11–12
brands
   about 12
   role of brand strategists and stewards 35–36, 41
Brown, Dan 249
Brown, Sunni 142
Build-Measure-Learn loop 77–78
Buley, Leah 242–243
business advocates
   balancing input of 173, 175
   clarifying objectives of 70
   listening to 97
   role of 169
business analysts 36–37
business requirements 83–100
   adding user requirements to 102
   coalescing 98–100
   developing 83–86
   developing wireframes and 238
   gathering with heuristic analysis 89
   meeting to gather 94–95
   site type and development of 11
   stakeholder input on 90–97
   taking time to visualize 165–166
   turning objectives into 83–86
business stakeholders. See stakeholders
Buxton, Bill 250, 296
C
card sorting
   applying affinity diagramming to 116–117
   defined 109, 124–125
   process of 125–126
   variations on 126–127
Carpendale, Sheelagh 250
chartjunk 192
Cialdini, Robert B. 215
Cipov, Matt M. 193
Cisco 25
clients
   presenting wireframes to 257–258
   providing contracts and proposals for 50–51
closed sorts 127

INDEX 333
collaboration 183
  coordinating work among designers 183
devveloping custom design principles with 216
effect of project approach on 81
planning project 181
Communicating Design (Brown) 249
communication problems 178–179
companies. See also business requirements
  assessing competition 72
  building brands 12
  clarifying project objectives 68–71
  contracts and proposals for 50–51
  examining history of 43–44
  hierarchy within 45–46
  network building within 41–42
  quality assurance technical within 313–314
competition 72
concept exploration 280–283
conditions 224
conflicts
  with business requirements 99–100
  managing during prioritization 177–180
connectors 223–224, 225
consensus 178–179
consumers. See users
content. See also content source websites:
  content strategy
    adhering to content strategy 149
    developing 37–38
    minimum required for personas 134–136
    optional persona 137–138
    role of copywriter in 38–39
    scope of 146
content audit 152–153
content flow 156
content matrix 154, 227
content source websites
  card sorting for 124–125
  common uses for 16
  defined 11
  design goals of 17–18
  focus of 16–17
  further information on 17–18
content strategists
  finding 149
  Laura Creekmore 64–65, 146–147, 160
  Matthew Grocki 146–147, 148, 149
  role of 37–38, 41
  Sarah Krznarich 151, 161
  Tim Frick 158–159, 162
  tools used by 152–156
content strategy 145–182.
  See also content strategists
  about 145–146
  adhering to 149
  copywriting vs. 150–151
  defining role of 150–152
developing 162
  finding artifact needed for 156
  finding content strategists 149
  further information on 156–157
  information architecture vs. 150
  need for 146–147
  tools for 152–156
  when needed 147–148
Content Strategy at Work (Bloomstein) 147
Content Strategy for the Web (Halvorson) 146
content templates 154–155
context for mobile devices 27
contextual inquiry 108, 114–117
continuing education in UX design 7
conversion 16
copywriters 38–39
copywriting 150–151
Coroflot 61
corporate culture
  examining project history and 43–44
  hierarchy in 45–46
  logistics within 46
  power distance in 45–46
  understanding 42
costs
  additional project 60–61
  estimating project 61–62
  meeting 322
Creekmore, Laura 64–65, 146–147, 160
cross-over projects 11
Csikszentmihalyi, Mihaly 207–208, 212
Cunningham, Christopher 212
customers. See user groups; users

data-driven personas 139
data from usability testing 109, 127, 297–298
decision points 223
Define phase 73–74, 164
deliverables 58–59
demographics 104, 136
design goals
  brand presence websites 13–14
  content source websites 17–18
  e-commerce websites 20
  e-learning application 20
  marketing campaign websites 15–16
  site type and 10
  social networking application 21
  task-based application websites 19
  using prototyping for 278
Design of Everyday Things, The (Norman) 198
design principles 185–218
  about 186
  benefit of 185
  creating own 215–218
  interaction 196–204
  Lean UX 76–77
  mobile site and application 26–27
INDEX

psychology 205–215
visual design 186–196
design testing 279–310.

See also usability testing
choosing approach for 284–290
concept exploration 280–283
exploring visual design mock-ups 283–284
final round of 315
in-person vs. remote research 286–287
moderated vs. automated techniques for 288–290
postlaunch 319
qualitative vs. quantitative research 285
role of usability testing in 292–294
usability recommendations from 310
designers
balancing designs 6–7
brand strategists and stewards 35–36, 41
building support network for 40–42
business analysts 36–37
coalescing business requirements 98–100
conducting heuristic analysis 88–89
content strategists 37–38, 41
copywriters 38–39
developing contextual inquiry 108, 114–117
effect of Lean UX on 79
front-end developer 40
gaging prototype needs 260–261
information architects 30–31, 34
interaction designer 31–32, 34
interviewing users 107, 111–114, 304
involving focus groups 109, 121–124
managing meetings 330–331
presenting wireframes to clients 257–258
priority setting by 170
roles for UX 30–42, 92
sharing work between 183
understanding company culture 42–46
user researcher 32–34
using surveys 108, 118–120
visual designers 39–41
where to find 7–8

Develop phase 74, 164
development advocates
balancing input of 173–175
priorities of 175–177
role of 169
digital prototypes
creating in WSIWYG editor 264–265
development factors for 263–264
HTML 264–274

Discipline of Content Strategy, The (Halvorson) 146
documentation
agile approach to 78–79
detail and formality in 81–82
planning project 164, 181–183

DOM Scripting (Keith) 271
dominance in visual design 189–191

E
e-commerce websites 19–20
e-learning applications 20
economy of motion 200–202
ecosystem of projects 10
editorial calendars 155
editorial workflow 156
elements
adding competitive 211
aligning site map 225–226
arrows 223–224
balancing design 6–7, 193–196
conditions 224
connectors 223–224, 225
decision points 223
economy in 191–192
hierarchy and dominance of 189–191
page 222
pagestack 222–223
site map and task flow 222–224
emotional design 206–207

Emotional Design (Norman) 206
Empathy Map 141–143
Epinions 213
error messages 203–204
estimates
project cost 61–62
time for documentation 182

Evans, Poppy 196
Exploring the Elements of Design (Evans and Thomas) 196

F
FaceOff 210
facilitating usability testing 306–308
Fahey, Christopher 313
Favreau, Jean Marc 50
features. See ideating and visualizing features;
prioritizing features
Feeding America website 188
Fitts’ Law 200
flow and game design 207–212
Flow (Csikszentmihalyi) 207–208, 212
focus groups 109, 121–124
Frick, Tim 147, 158–159, 162
front-end developer 40

G
games 207–212
Gamestorming (Gray, Brown, and Macanufo) 142
gamification 210–211
Gamification by Design (Zichermann and Cunningham) 212
Garrett, Jesse James 222–224
gestures 28–29
Gmail 204
goals. See design goals
Google analytics tools 33
Gothelf, Jeff 78–79
governance plan 155
Gray, Dave 142
Greenburg, Saul 250
groups sorts 127

H
Hadden, Jon 276
Halvorson, Kristina 146, 153
hardware
remote research 287–288
usability testing 304
Health Month 211
healthychildren.org website 190
Hess, Whitney 80, 217
heuristic analysis
benefits of 87
conducting 88–89
defined 86
gathering requirements with 89
heuristics 86, 87
hierarchy
corporate 45–46
page element 189–191, 199
Hinton, Andrew 230–231
Hoekman, Robert, Jr. 7
Hofstede, Geert 45
Holtzblatt, Karen 117
home page
created 248
designing 246
wireframe and annotations for 246
HTML prototypes 264–274
breaking down code for 267–270
coding log-in process for 266–267
sketching in jQuery 270–274
testing forms with 274
ways to build 264–265

I
ideating and visualizing features
importance of 165
skills and techniques for 165–166
storyboarding for 166–169
image maps 270
in-person design testing 286–287
Influence (Cialdini) 215
information architects 30–31, 34
information architecture 150
Information Architecture Institute 61
Ingram, Richard 156
interaction design principles 196–204
associations and affordance in 197–200
core of 196–197
economy of motion 200–202
further information on 198
responses to actions 202–204
interaction designer 31–32, 34
iterations
defined 75
developing MVP with each 77
frequency of UX 244
in modified approaches 80–81
needed for prototyping 259–260
planning project 181
wireframe 256–257

J
jQuery 271

K
Keith, Jeremy 271
Knemeyer, Dirk 12
Knoll, Jonathan 271
Koster, Raph 210
Krznarich, Sarah 151, 161

L
Lean Startup, The (Ries) 76
Lean UX
deliverables in 78–79
further information on 80
origins of 76
principles of 76–77
licensed work 59–60
location of personas 136
log-in process
coding HTML prototype for 266–267
prototyping views for 271–273
LUXr 80

M
Macanufo, James 142
maintaining websites 59, 319–332
Marcotte, Ethan 23–24, 254
marketing campaign websites
common features of 14
defined 11
design goals for 15–16
focus of 14–15
further information on 16
Marquardt, Nicolai 250
meetings
agendas for 323–325, 327
approaches to 331
cost of holding 322
managing 330–331
notes from 328–329
requirement-gathering 94–95
rules for 325–327
running effectively 90, 96–97
scheduling 323
Melzer, James 234–235
mental models 117
message architecture 154
Messagefirst 132, 139–141
methodologies 73–82
agile approaches 75–80
defined 73
further information on 81
impact on project design 81–82
milestones for stakeholders 82
modified waterfall approach 80–81, 164
steps in common 73–74
waterfall approach 74
microsites 14, 15
Millman, Debbie 281
Minimum Viable Product (MVP) 77
mobile sites and applications 21–29
advantages of 26
characteristics of 24–26
design principles for 26–27
examples of Cisco’s 25
further information on 24, 27–28
proportion for 194–195
responsive design of 23–24, 254–255
smartphone gestures 28–29
when to use 22–23
modified waterfall approach about 80–81
overlapping phases in 164
names for personas 135
nested menus 202
New York Times, The 214
Nielsen, Jakob 87
Norman, Don 198, 206
notes from meetings 328–329
numbering site maps 226–228

occupation of personas 136
OmniGraffle templates 221
OmniMarkdown tools 33
100 Things Every Designer Needs to Know About People (Weinschenk) 215
Ordering Disorder (Vinh) 196
organizations for UX design 7–8

page elements 222
page inventory 152–153
page templates 154–155
pages
alignment and spacing on site maps 225
numbering on site maps 226–228
pagestack element 222–223
paper prototypes 261–262, 276–277

Paper Prototyping (Snyder) 296
passive observation 115
performance
expectations of site 202–203
flow states and site 208–209
personas 129–144
benefits of 129–131
content for 131, 134–136, 137–138
creating 131, 133, 143–144
data-driven defined 130
developing 128, 141–143
element of 132
target audience group 140–141
types of 130
photos for personas 134–135
planning
project’s activities and documentation 164, 181–183
remote research 287–288
space and equipment for usability testing 304
usability testing 295–299
user research 110
postlaunch activities 317–319
power distance 45–46
principles. See design principles
prioritizing features
balancing input from advocates 173–175
considerations for 178
further information on 180
managing conflict while 177–180
prioritization worksheet 172
team’s roles in 169–173
UX designer’s role in 170
Pro JavaScript Techniques (Resig) 271
project glossary 96–97
project manager 44, 170
Project Manager prototype 276–277
project objectives 68–73
developing into business requirements 83–86
prioritizing 71
site type and project 11
solidifying 68–71
SWOT sessions defining 71–73
project overviews 54
project sponsor 91
project teams. See teams
projects. See also prioritizing features; project objectives; proposals
about 10, 47
acknowledgement and sign-off for 63–64
additional costs of 60–61
building networks within company 41–42
common site map mistakes 224–228
conflict over features in 179–180
corporate history of 43–44
cost estimates of 61–62
projects (continued)
  creating design principles for 215–218
  cross-over 11, 19–21
  designer’s roles on 30–42
  developing common language for 96–97
  e-commerce websites 19–20
  ecosystem of 10
  gathering requirements for 83–86
  heuristic analysis of 86–89
  identifying site type for 10–11
  lack of alignment on 178–179
  making wireframes for 249
  methodologies for 73–82
  mobile site and application 21–29
  payment schedules for 62–63
  prioritizing requirements for 164
  proposals defining approach of 55–56
  solidifying objectives of 68–71
  statement of work for 49, 65–66
  working within corporate hierarchy 45–46

proportion and balance 193–196

proposals 49–66
  acknowledgement and sign-off 63–64
  additional costs and fees 60–61
  assumptions in 57–58
  challenges of 49
  components of 51–52
  defining project approach 55–56
  enumerating deliverables for 58–59
  outlining scope of work 57
  ownership and rights 59–60
  payment schedules 62–63
  project estimates 61–62
  project overview for 54
  revision history for 53–54
  statement of work 49, 65–66
  title page for 52–53
  writing 50–51

prototype developers 275–276
  See also digital prototypes;
  HTML prototypes
  digital 262–274
  examples of 276–278
  gaging needs for 260–261
  iterative process for 259–260
  log-in process 271–273
  paper 261–262, 276–277
  tools for 274–275
  using for design goals 278
  wireframes vs. 238, 256
  working with developers 275–276

psychology design principles 205–215
  about 186
  attractive design 205–207
  flow and game design 207–212
  focusing on positive responses 204
  further information on 215
  providing social proof 212–214

Q
  qualitative approaches
    qualitative audits 153
    research 285
    usability testing 293–294
  quantitative approaches
    quantitative audits 152–153
    research 285
    testing 293–294

R
  rapid development approach 75–80
  recording usability test results 304
  Reisg, John 271
  remote research
    automated tools and 288–290
    benefits of 287
    design testing as 286–287
    planning for 287–288
    tools for 287, 291
  Remote Research (Bolt and Talthimutte) 287
  remote sorts 127
  requirements-gathering meetings 94–97
  research. See user research
  responsive design 23–24, 254–255
  Responsive Web Design (Marcotte) 23–24, 254
  revision history for proposals 53–54
  Ries, Eric 76–77
  roles
    outlining project 90–92
    screeners 302–303
  rules for meetings 325–327

S
  Saffer, Dan 28, 217
  Schell, Jesse 209
  scope of work 57
  Seductive Interaction Design (Anderson) 215
  Seiden, Josh 130
  sign-off for projects 63–64
  simple site maps 228
  Simpson, Brad 254
  site maps
    aligning elements of 225–226
    basic elements in 222–224
    common mistakes in 224–228
    creative 230–231
    defined 219–220
    developing advanced 228–230
    illustrated 220
    numbering on 226–228
    simple 228
    text on 226
  sketching
    converting to digital wireframe 251–253
    responsive design 255
    sketchboard templates 249
    user experience 250–251
INDEX

Sketching User Experiences (Greenburg, Carpendale, Marquardt, and Buxton) 250, 296
Slavin, Tim 155
smartphones. See also mobile sites and applications
   gestures for 28–29
   sales of 21
Snyder, Carolyn 296
social interaction 5
social networking applications 21
social proof 212–214
software
   required for remote research 287–288
   site map and task flow 221–224
   wireframe design 241–242
Software Usability Measurement Inventory (SUMI) 119
Soucy, Kyle 288
space and equipment for usability testing 304
Spool, Jared 144, 180, 217
sprints. See iterations
staffing usability tests 304
stakeholders
   defined 91
   developing project requirements with
      84–86
   finding right 92–93
   gathering ideas from 90–97
   listening to 97
   milestone approval from 82
   prioritizing user group attributes 105–107
statement of work (SOW) 49, 65–66
status icons 192
stencils 242
storyboarding 166–169
   brainstorming team for 166–167
   developing storyboard 167–169
   preparing for 166
   questions for 167
structuring websites. See also prototypes;
   wireframes
   site maps 219–220, 222–231
   task flows 219–220, 222–224, 227, 232–236
support for users
   software for 316
   surveys
      software for 119, 291
      using 108, 118–120
swimlanes 234–236
SWOT analysis 71–73

tables
   developing mobile-optimized 25
   portrait and landscape mode for 193–194
tags in HTML documents 268–269
target audience personas 140–141
task-based application websites
   common uses of 18
   defined 11
   design goals for 19
task flows
   basic elements for 222–224
   defined 219–220
   examples of 232–233
   illustrated 220, 232–233
   numbering 227
   swimlanes 234–236
   uses for 231, 234
Tatum, Keith 276
teams
   collaboration among 81
   common terminology among 96–97
   conflict in 177–180
   design principles focusing 216
   developing storyboards 166–169
   kickoff meetings for 68
   lack of alignment in 178–179
   positive tension among 173–175
   prioritization by 170–173
   prioritizing features 164, 169–173
   project roles for 170–173
   responsibilities and roles of 90–92
   sketching user experience 250
   using Lean UX approach 79
   working with prototype developers 275–276
templates
   content 154–155
   Empathy Map 142
   OmniGraffle 221
   sketchboard 249
   wireframe 242–243
test participants
   compensating 110, 300–301
   interviewing 107, 111–114, 304
   number of 294
   screening 302–303
testing. See design testing; remote research;
   usability testing
Texas Instruments microsite 15
text on site maps 226
Theory of Fun, A (Koster) 210
Thomas, Mark A. 196
time
   documentation 182
   required for digital prototypes 263
   visualizing business requirements 165–166
title page for proposals 52–53
Tognazzini, Bruce 88
tools
   analytics 33
   body language as 123
   prototyping 274–275
   remote research 287, 291
tools (continued)
  software for UX design  221
  surveying  119–120
  used by content strategists  152–156
  wireframe  241–243
  touch gestures  28–29
  troubleshooting remote research sessions  288
  trust  206
  Tufte, Edward  192, 193
  Tulathimutte, Tony  287

U
  unified design  187–188
  usability testing
    analyzing results of  308–310
    attractive products and  206
    compensation for  110, 300–301
    data gathered in  109, 127, 297–298
    discussion guides for  304–306
    facilitating  306–308
    focus groups and  121
    further information on  296
    number of participants in  294
    planning research for  295–299
    prototypes for  278
    qualitative vs. quantitative methods in  293–294
    recommendations from  310
    recruiting users for  299–300
    screening participants in  302–303
    space and equipment for  304
    steps in  293
    terminating interviews for  304
    tools for  291
    user acceptance testing vs.  292
    visual design  190
  Usability.gov website  305
  user acceptance testing  292
  user advocates  169, 173–175
  user experiences. See also UX design
    importance of tangible and online  4–5
    sketching  250–251
  user groups
    defining  102–107
    example user model  106–107
    listing attributes of  103–105
    prioritizing attributes of  105–107
  user interviews  107, 111–114, 304
  user models  106, 107
  user requirements
    adding to business requirements  102
    prioritizing for project  164
    visualizing features for  166–169
  user research. See also usability testing
    about 101
    card sorting  109, 116–117, 124–127
    choosing techniques for  102, 107–109
    contextual inquiry  108, 114–117
    defining groups for  102–107
    designing from user models  107
    developing persona from  131
    focus groups  109, 121–124
    further information on  111
    incorporating in site design  11
    listing group attributes  103–105
    planning  110
    prioritizing group attributes for  105–107
    reviewing  128
    selecting types of  110–111
    steps in  102
    surveys  108 118–120
    tools for surveying  119–120
    usability testing  109, 127
    user interviews  107, 111–114, 304
  user research plan  295–298
  user researcher  32–34
  user stories  81
  userglue website  247
  compensating for usability testing  110, 300–301
  conflicts between requirements and needs of  99–100
  customer experience of brand  12
  defining documentation’s  182
  economy of motion and action by  200–202
  flow states of  207–208
  knowing audience  189
  listing advantages for  316
  number in usability testing  294
  recruiting for usability testing  299–300
  screening usability testing  302–303
  site responses to action  202–204
  surveying satisfaction of  298–299
  tailoring microsites to experience of  15

UX design. See also design goals; design principles; software
  basing only on user models  107
  building support network for  40–42
  conducting heuristic analysis of  86–89
  continuing education in  7
  defined  3, 6
  ensuring production of quality  312–314
  evaluating user adoption of  315–317
  final design testing in  315
  focusing on digital experience design  5
  importance of tangible experiences  4
  making case for  33
  methodology’s impact on project  81–82
  organizations for  7–8
  planning mobile-optimized sites  23–26, 317–319
  postlaunch activities in  317–319
  steps in design launch  315–317
  storyboarding for  166–169
  SWOT analysis in  71–73