A PROJECT GUIDE TO UX DESIGN

FOR USER EXPERIENCE DESIGNERS IN THE FIELD OR IN THE MAKING

SECOND EDITION

RUSS UNGER AND CAROLYN CHANDLER

New Riders VOICES THAT MATTER™

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

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

CHAPTER 9: Transition: From Defining to Designing 163
Ideate and Visualize Features 165
The Basic Process of Storyboarding 166
Facilitate the Prioritization Process. 169
Maintain a Good Tension 173
The Development Advocate 175
Managing Conflict During Prioritization 177
Plan Your Activities and Documentation 181

CHAPTER 10: Design Principles 185
Visual Design 186
Unity and Variety. 187
Hierarchy and Dominance 189
Economy of Elements 191
Proportion and Balance. 193
Interaction 196
Associations and Affordance 197
Economy of Motion. 200
Response 202
Psychology 205
The Effect of Attractive Design. 205
Flow & Game Design 207
Social Proof 212
Creating Your Own Guiding Principles 215

CHAPTER 11: Site Maps and Task Flows 219
Tools of the Trade 221
Basic Elements of Site Maps and Task Flows. 222
Page 222
Pagestack 222
Decision Point. 223
Connectors and Arrows 223
Conditions. 224
Common Mistakes 224
Sloppy Connections. 225
Misaligned and Unevenly Spaced Objects 225
Poorly Placed Text 226

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