

The UX Playbook



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Jarrod Murray / UX Lead

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What is the UX Playbook

The UX Playbook showcases the capabilities and process of the User Experience (UX) Team.

This process is highly collaborative, adaptable, and can be integrated with the Agile framework.



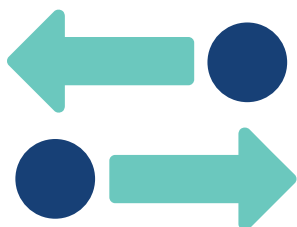
Benefits of having a Playbook

Helps educate and increase the general knowledge and understanding of UX.

Assists in socializing and solidifying our contributions within the company.

Serves as a guide to those who work alongside UX within Brooks.

Allows the UX team and business to share a common language.

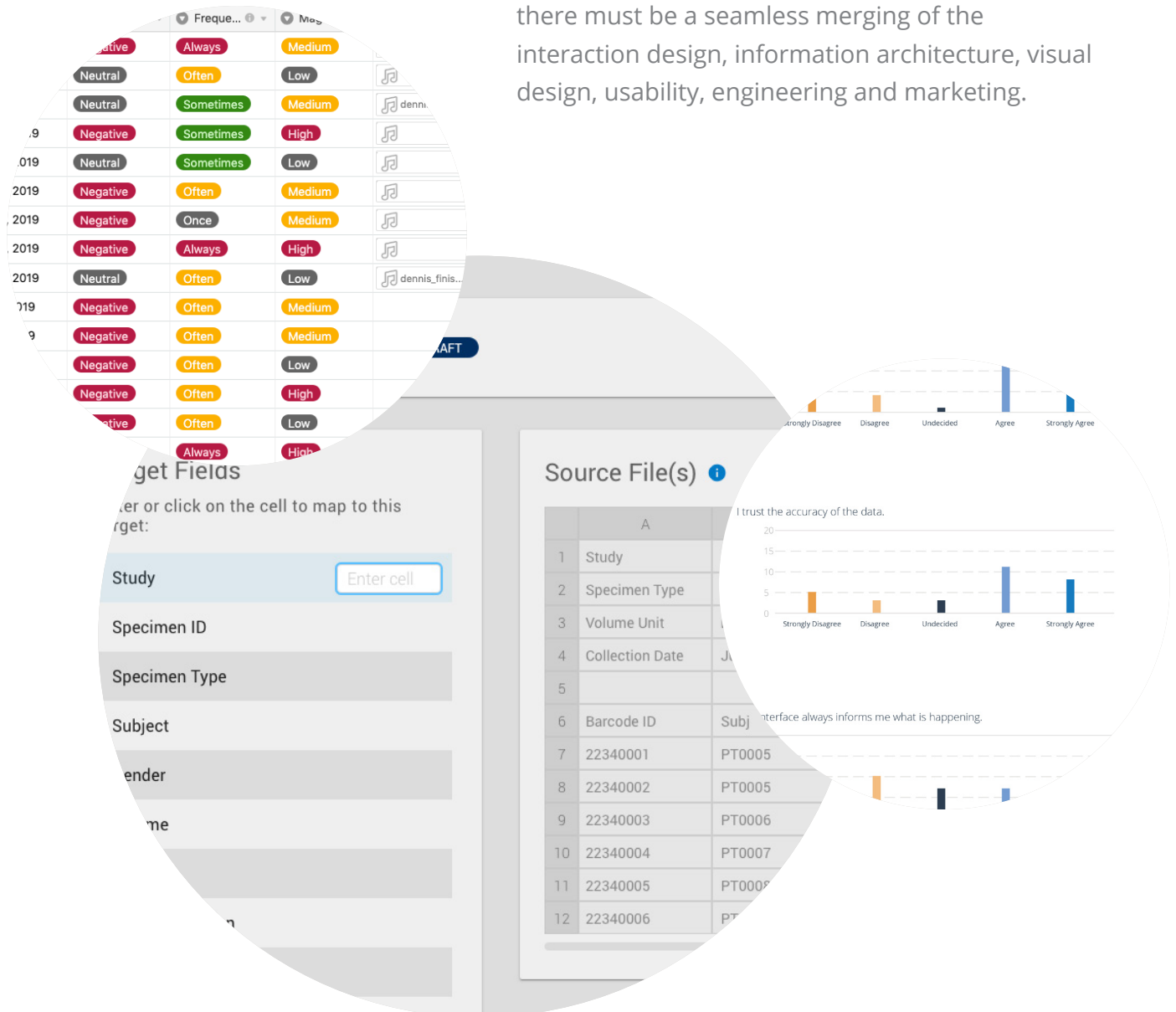


What UX is

User Experience (UX) encompasses all aspects of the end-user's interaction with our services, products, and technology.

It's a hands-on process of research, design, development, and testing for quality results.

In order to achieve a best-in-class user experience, there must be a seamless merging of the interaction design, information architecture, visual design, usability, engineering and marketing.



What UX is NOT

Same as User Interface design

It's not uncommon to confuse "user experience" with "user interface" — but the UI is just one piece of the puzzle.

Only about usability

While usability is important, its focus on efficiency and effectiveness often overshadows UX's other important factors such as learnability, behavioral and emotional responses.



Focused on the user only

Effective UX achieves diverse results. To be successful, the overall experience must meet as many critical business and user goals and needs as possible.

One step in the process

UX is a ongoing effort of evolved learning, measurement and optimization versus a discrete activity. We make data-driven decisions based on user interactions and feedback to improve the experience.

Easy

User behavior is complex and fickle. Yet tracking it is critical to achieving positive business outcomes. There are many factors that effect user interaction.

One person's responsibility

UX employs a diverse set of skills... observation and listening are chief among them. We help evangelize the most effective process, and work across the business to enable success.

The background is a solid blue color. Overlaid on this is a complex, abstract network diagram. It consists of numerous circular nodes of varying sizes, some of which are semi-transparent. These nodes are interconnected by a web of thin, light-colored lines, creating a sense of connectivity and structure. The lines and nodes are distributed across the entire frame, with a higher density in the upper and right portions.

Our Mission

Create experiences informed by research and validated with users

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UX Principles

We will deliver an exception experience if we follow these principles...

UX Principles

User-Centered Design Methodology



- Conduct user interviews, observe user patterns and behavior. Gain empathy for the end user's experience
- Use smart and intuitive interactions to delight the end user and enhance the overall experience
- Identify smarter workflows and solutions for distinct end user needs
- Maintain consistency through a design system with reusable components that are easy to author, deploy, and manage

Data-Driven Approach

- Create or analyze existing surveys, review analytics data, and information gleaned from user interviews
- Conduct heuristic evaluations and competitive analysis for benchmarking purposes
- Produce rapid prototypes early and often to validate with end-users
- Iterate to refine the solution based on user objectives and needs



Benchmarking and Best Practices



- Demonstrate our understanding of related journeys and use cases for our industry
- Provide the means to integrate complex workflows spanning multiple technologies while aligning with the company's roadmap
- Maintain a dialog and check-in with the users as new technologies emerge and the competitive landscape evolves



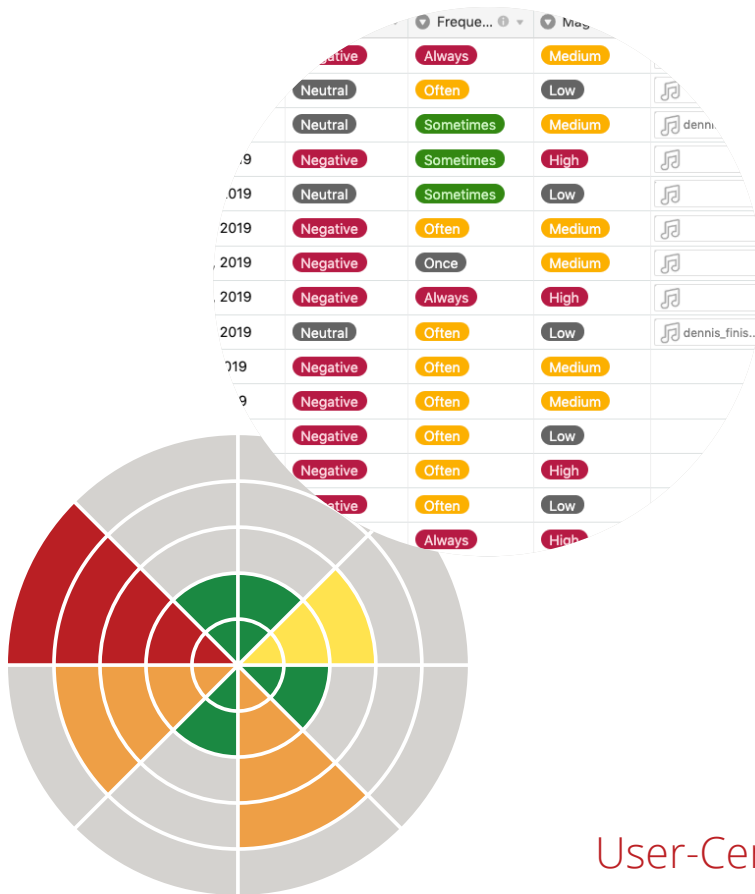
The UX Process

An iterative approach based on continuous user engagement



Discovery

Exploration of user needs and business goals



Activities

- Competitive Analysis
- Heuristic Evaluations
- Job Shadowing
- Personas
- Problem Statement Definition
- Stakeholder Interviews
- Surveys
- Task Analysis
- Usability Study
- User Interviews / Focus Groups

User-Centered

- ✓ Identify the user/roles and where they are in their journey
- ✓ Knowledge of the use cases and environment

Data-Driven

- ✓ The pain and the severity of the problem are diagnosed
- ✓ Estimate the business impact (user and internal)

Benchmarking

- ✓ Outline the metrics used to determine success

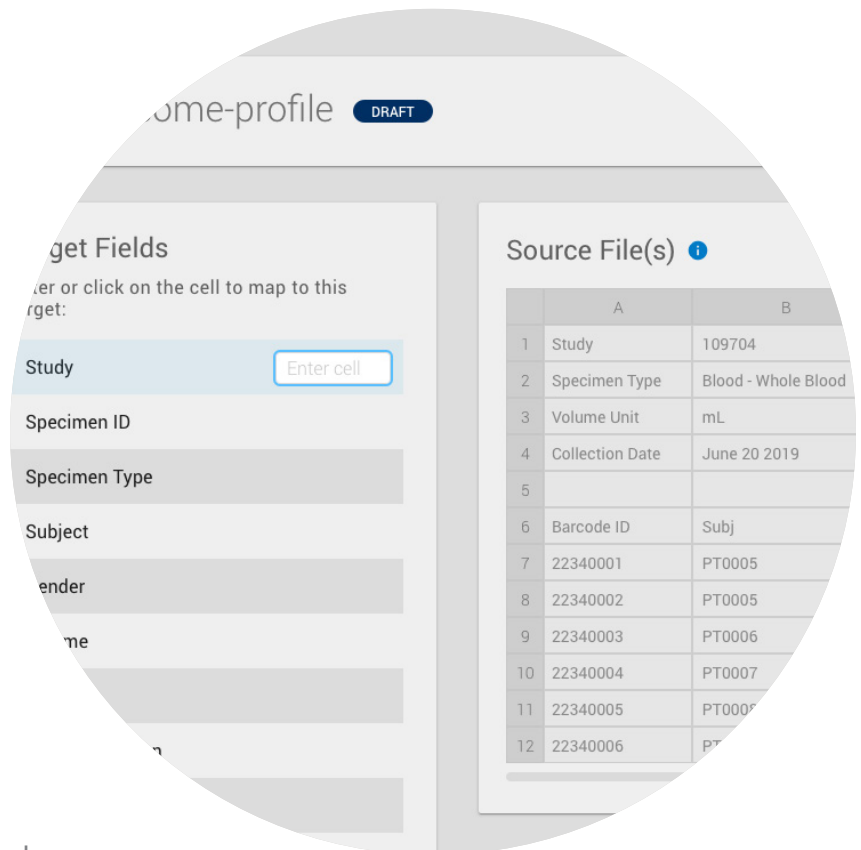


Ideation

Alignment on a direction after exploring multiple options

Activities

- Card Sorting
- Concept Value Test
- Design Sessions
- Paper Prototypes
- RITE Study
- Sketches
- User Flows / Journey
- User Interviews / Feedback
- Wireframing



User-Centered

- ✓ Rapid Iterations with user feedback

Data-Driven

- ✓ Information Architecture is defined

Benchmarking

- ✓ Stakeholders are aligned on a single, user-vetted solution



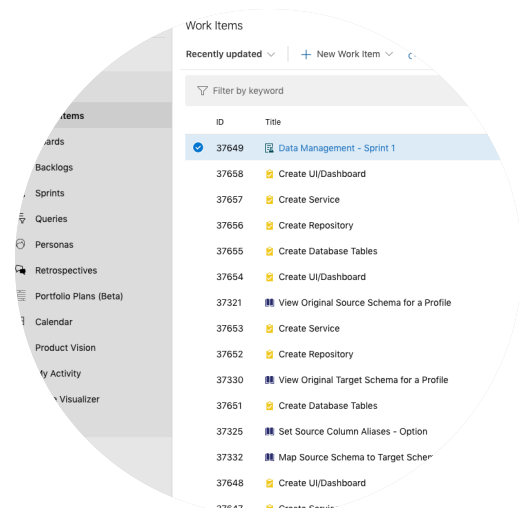
Design

The development and deployment of our solution



Activities

- Beta Testing
- Design System / Pattern Updates
- High Fidelity Designs
- Prototyping
- Sprint Team Support
- Story Development / Writing



User-Centered

- ✓ A testable solution is deployed

Data-Driven

- ✓ A method for feedback is provided

Benchmarking

- ✓ Success metrics are implemented

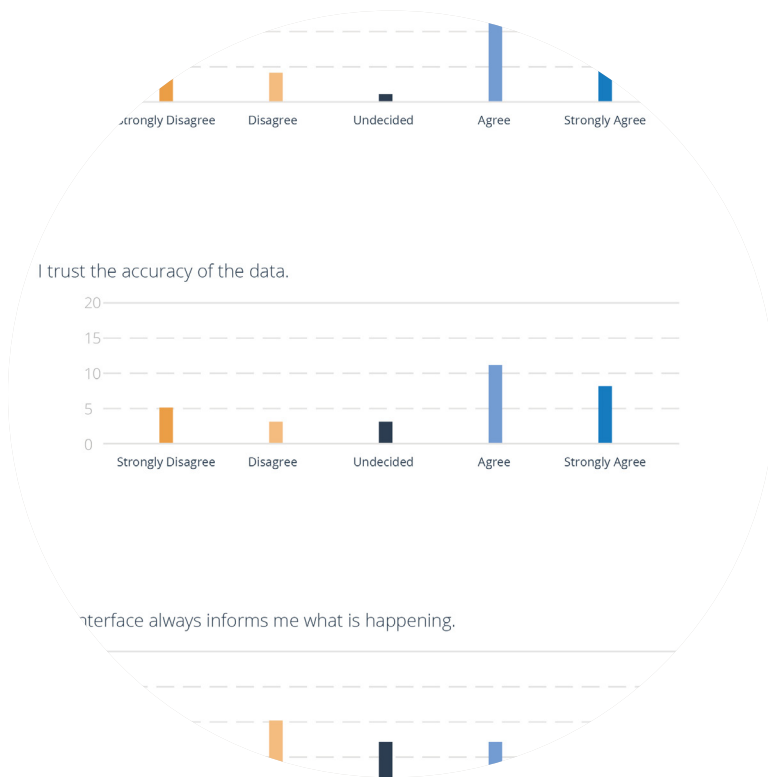


Validation

Monitor and optimize the UX from data captured

Activities

- Adoption Rates
- Analytics Report
- Benchmarking
- Clickstream Analysis
- Metrics Monitoring
- Surveys
- Unmoderated Remote Usability Testing



User-Centered

- ✓ Adoption is analyzed

Data-Driven

- ✓ Data collected helps diagnose opportunities for improvement

Benchmarking

- ✓ Metrics are monitored and trends documented

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User Research

How to leverage UX and things to consider when building a test plan

What questions can research answer?



Who is the target audience for this feature/module?

Not all people are your target customer... do you know your user?



Do people want to use this feature?

Understand the problem space and whether this solution is something people would use.



How will people use it?

Know the use cases and user's environment.



Do people know HOW to use it?

Is this solution usable? Is it logical and easy to use... or require training?



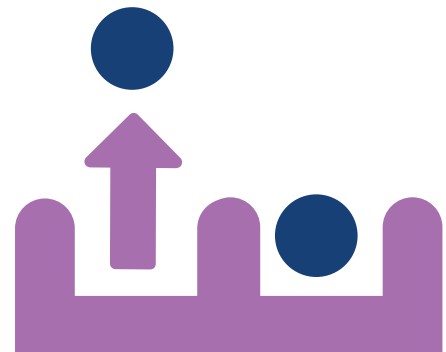
Does my feature work?

Does this function as expected? Does it solve the intended problem?



What enhancements should we make?

How can this experience be better for our users?



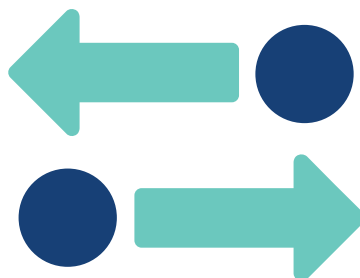
What kind of data are we collecting?

Qualitative Data

Information that seeks to describe a topic more than measure it. Think of impressions, opinions, and views. Qualitative research is less structured: It seeks to delve deep into the topic at hand to gain information about user's motivations, thinking, and attitudes.

Insights Gained

- Words
- Themes and Patterns
- Good way to gather general or broad information
- Rule of thumb: fewer participants



Insights Gained

- Numbers
- Statistical analyses
- Good way to gather specific or targeted information
- Rule of thumb: more participants

Quantitative Data

Designed to collect cold, hard facts. Numbers. Quantitative data is structured and statistical. It provides support when you need to draw general conclusions from your research.



Test Plan Best Practices

User testing should occur during every phase as an integral part of a User-Centered Design Process. It's important to establish a structured framework for user testing. Consider the following factors in regards to a Test Plan:



Sample Size

The number of test participants is important because it impacts learning and decision-making. While testing a single user can be helpful... five users is the target goal.



Compensation

Compensating appropriately is a great first step to encourage your participants to take part in your study. Compensation plays an influential role in if they show up or not. When sample size and budget allow for it, we should compensate our users with a gift card.



Fidelity

Prototyping is the cornerstone of the design process, requiring a blend of creativity and practicality. Testing can be performed more quickly at a lower fidelity (paper prototype)... more precise findings can be achieved at a higher level of fidelity. Clickable Prototypes are a nice middle ground to blend time and insights.



Recruiting Participants

Finding Potential participants can be challenging, time consuming, and expensive. Potential participants are everywhere, if you know where to look and have dedicated resources.

Guerilla testing can be conducted if no prior knowledge of the business/ system are needed. Finding internal participants offers prior knowledge but limits the number of possible participants. For more targeted studies, we may need to pay an external recruiting service to find the right participants.

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UX Glossary

Allows the business to share a common language with UX

Accessibility

The attributes and characteristics of a system that allow people with limited vision, hearing, dexterity, cognition or physical mobility to interact effectively with the system.

Affinity Diagramming

A business tool used to organize a large number of ideas, sorting them into groups based on their natural relationships, for review and analysis.

Benchmarking

Measures your baseline and track how well your design and functional changes affect the user experience.

Card Sorting

A technique using either actual cards or software, whereby users generate an information hierarchy that can then form the basis of an information architecture or navigation menu.

Clickstream Analysis

Is the process of collecting, analyzing and reporting aggregate data about which pages a website visitor visits and in what order.

Competitor Analysis

Performing an audit or conducting user testing of competing websites and apps; writing a report that summarizes the competitive landscape.

Concept Development

The initial concept development process is important because a better design process leads to a better design outcome. Decisions made during the early stages of design tightly constrain future options.

Contextual Enquiry

Interviewing users in the location that they use the website or product, in order to understand their tasks and challenges.

Customer Scenario Mapping

A scenario is a workflow for one or more personas. Scenarios are minimally captured in written text form, but can also be conveyed orally, as a storyboard, or as a video.

Data Analysis

Interpreting data trends in conversions, page views, and other user actions to identify opportunities and guide UX design.

Empathy Map

An empathy map is a collaborative tool teams can use to gain a deeper insight into their customers.

Funnel Analysis Report

Lets you define report query parameters to show how an audience moves through complex workflows.

High-fidelity screen design

A design which is quite close to the final product, with lots of detail and a good indication of the final proposed aesthetics and functionality.

Information Architecture

The art and science of organizing and labeling websites, intranets, online communities and software to support usability.

Interaction Design

Defines the structure and behavior of interactive systems to create meaningful relationships between people and the products and services that they use.

Lean UX

Lean UX speeds up the UX process by putting less emphasis on deliverables and greater focus on the actual experience being designed.

Paper prototype

A quick and easy translation of high-level design concepts into tangible and testable artifacts, giving an indication of the direction that the product is heading.

Mental Modeling Map

Is what users are trying to accomplish, and then create solutions that match.

Paper prototype

A rough, often hand-sketched, drawing of a user interface, used in a usability test to gather feedback.

Persona

A fictitious identity that reflects one of the user groups for who you are designing.

Product Roadmap

Is a powerful tool to describe how a product is likely to grow, to align the stakeholders, and to acquire a budget for developing the product.

Prototype

A rough guide for the layout of a product, giving an indication of the direction that the product is heading.

RITE Study

Rapid Iterative Testing and Evaluation (RITE) advocates that designs be updated as problems are identified and a solution is clear.

User Journey Map

An holistic, visual representation of your users' interactions with your organization.

Wireframe

A rough guide for the layout of a website or app, either done with pen and paper or with wireframing software.