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The Buyer's Guide to Collaborative Design Platforms

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Introduction

When there's an issue with a digital product, the problem is almost never one thing. It's rarely just usability, the underlying technology, or the UI design.

It's almost always a combination of all of the above, which is usually the result of a larger collaboration issue.

After all, the design process isn't always structured. Different teams work on different parts of the product. And when you add multiple locations into the mix, design quickly becomes a game of telephone. Before you know it, product development loses momentum as people start sprinting down the wrong paths.

It doesn't need to be that way.

If you need to streamline workflow, simplify collaboration, or improve product quality, you're in the right place. In this guide, we offer a simple 3-step framework to help you decide if a collaborative platform is the right choice for your team:

- **First, identify the problems**
- **Then, interpret the problems**
- **Finally, evaluate the solutions**

After you've completed the steps in the guide, you'll be ready to make the most informed decision to meet the needs of your team and organization.

Identify the Problems

Let's first dive into the symptoms. Which of the below issues currently apply to your situation?

Workflow

□ 1. No standardized design process.
□ 2. We exceed budget or timeline on our projects.
□ 3. We spend too much time creating and maintaining documentation.
□ 4. Scope and requirements keep changing midway.

Collaboration:

□ 1. It's difficult to consolidate feedback from different teams and locations.
□ 2. PMs and Business Analysts can't clearly communicate requirements to design teams.
□ 3. Stakeholders misinterpret design intent.
□ 4. Painful transition from design to development.

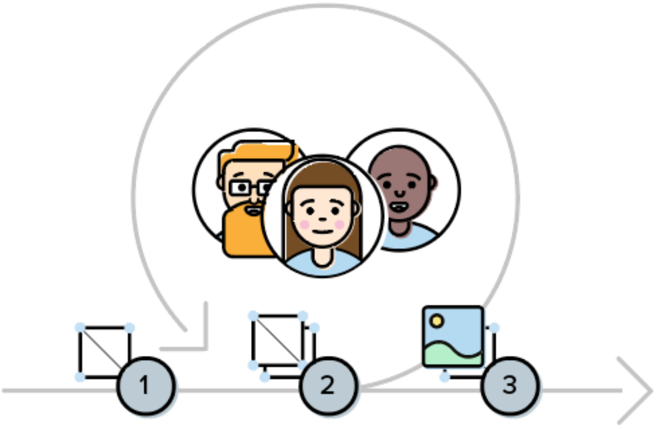
Product Quality:

□ 1. Can't prototype accurate interactions with our current tools and processes.
□ 2. What we ship doesn't match what we design.
□ 3. Inconsistent UX across products.

Now that you've identified your problems, we'll help you better understand them with a few useful tips.

Interpret the Problems

Workflow



When you lack a standardized design process, stakeholders aren't aware of all the key decisions, creating a breeding ground for scope creep. Teams then resort to more documentation in hopes of aligning everyone to a clear vision of "Done".

Of course, all that time spent on documentation kills momentum and increases the risk of exceeding budget and timeline.

In this situation, we suggest:

- After the project kickoff, conduct a handful of user interviews. Once you've quickly validated assumptions, create a lo-fi or mid-fi prototype so you can test ideas as soon as possible. Validate your user flows and interaction design first before diving into visual design.
- Instead of declining feature ideas right away, guide stakeholders through the opportunity costs (like launch delays or cutting other features). You don't offend people, and you

teach them to view every idea through the lens of feasibility vs. impact.

- Treat documentation as a knowledge hub rather than a paper trail. Outline the core product and technical guidelines, then include links to prototypes and current builds for people to see the latest iterations.

Collaboration:

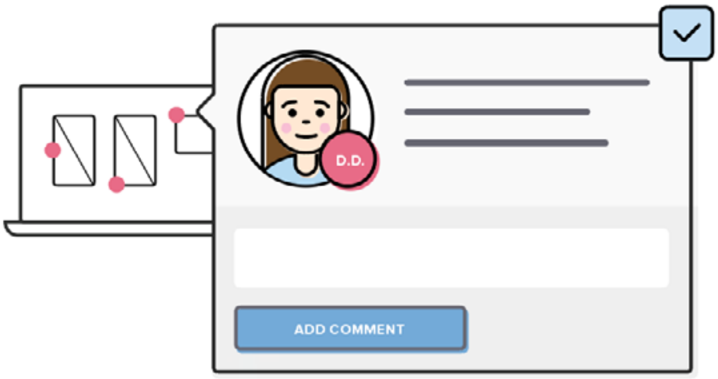
When different teams in different locations rely on email for feedback, ideas aren't always explained clearly. Unless PMs and business analysts can quickly visualize their thoughts on requirements, designers can easily misinterpret their intent.

The misunderstanding works both ways – if designers can't prototype how the design actually works, others can't truly understand the intricacy of the system. As a result, developers don't see the true scale of technical requirements, which leads to unforeseen build time and cost.

In this situation, we suggest:

- Instead of sending annotated wireframes, create and share a prototype with others. Start in low fidelity and clearly explain where you seek feedback and which features are still pending. You reduce misinterpretation by letting others use the design. They'll also offer feedback within clear parameters.

- Break free from the culture of handoffs. Design should work one sprint ahead of development. Invite developers to the kickoff meeting, feedback sessions, and usability testing sessions. If they can't attend, meet with them informally to summarize key learnings.
- For remote teams, hold your daily standups in a collaborative platform like Slack. You can also create a specific channel for each project so people don't waste time digging through email chains. If you use a collaborative design platform, invite everyone to the project and set comment notifications to a comfortable interval (we prefer daily).



Product Quality:

If you aren't currently prototyping (or using tools that don't support your desired functionality), developers end up working off inaccurate assumptions.

In that case, it's only inevitable that build quality doesn't match the final design. Multiply the issue across a whole product suite and the inconsistency can cripple a company.

In this situation, we suggest:

- Create a pattern library and share with the entire product team. The more your team follows component-based design, the less time you'll waste answering questions about interface minutiae.

- To inform developers, include technical notes as annotations on key elements and interactions in your prototype. A 20-30 page specs document is a chore, but a thoroughly annotated prototype better reflects reality and is easier to digest.

- Just like developers should comment on design iterations, designers should also review each build. Check for visual and interactive consistency against the final prototype. As the build enters QA, use the final prototype as acceptance criteria.

Takeaways

Remember that all three of the above categories are closely connected. A lack of collaboration usually leads to workflow issues, which then results in poor product quality.

Like we mentioned in the introduction, we can rarely pinpoint just one problem when products don't meet user and business needs.

Evaluate the Solutions

For each problem area you identified, here are some key criteria and questions to ask when reviewing vendors:

Workflow

1. Does the platform support lo-fi static and hi-fi interactive design?
2. If we create static designs in Photoshop or Sketch, can we import them for prototyping?
3. What does the learning curve look like?
4. How do we create and track iterations?
5. Can we add technical notes for developers?
6. Will this platform reduce our documentation?
7. Can we see the current phase of projects (design, development, etc.)?
8. Can we store outside assets in the platform (JPG, PDF, etc.)?
9. Are all files and versions backed up?

Collaboration

1. Can multiple people design at the same time?
2. How do we share designs?
3. How will people know when projects require their feedback?
4. Can we manage user permissions?
5. Do people need an account to comment on designs?
6. How do we hold presentations for clients and stakeholders?
7. Will PMs and BAs understand how to use the platform?
8. What security measures exist to protect everyone's files?

Prototyping

1. Can we create responsive and mobile app prototypes?
2. What popular element libraries are available?
3. Can we import our own image files?
4. Can we create advanced interactions and animations?
5. Can we create our own reusable pattern libraries?
6. Will we need another tool to test prototypes?

By now, you should have a pretty clear idea of which solutions meet or exceed your expectations. The 3-step exercise we've described in this guide will help you pinpoint the right platform for your needs.

Remember that it's not about finding the best solution – it's about finding the right solution.

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ENTERPRISE

✓ **Create and Collaborate.**
Translate requirements into product features that resonate with customers.

✓ **Simplify your Process.**
Centralize projects and people into one clear workflow.

✓ **Empower your Team.**
Guide creativity with a common design language.

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