

# Study Plan — *The Design of Sites* (2nd ed.)

Full User Story Set by Chapter/Pattern Group

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October 19, 2025

## How to Use This Template

### Customer-Centered Sites: End-to-End Workflow

#### Discovery & Strategy

\StoryCard with metadata and a pair of **Acceptance Criteria** scenarios (BDD) plus **Evidence Links**. Duplicate any card to expand your backlog.

#### ID-DOS-CH3-001 — Define Personas, Top Tasks, & Scenarios

<b>Epic / Feature</b>	Ch.3 — Knowing Your Customers
<b>Business Value</b>	Decisions grounded in representative users and measurable tasks
<b>Priority / Estimate</b>	Priority: High SP: 8
<b>Persona</b>	Researcher
<b>Dependencies</b>	Interview pool; survey tool
<b>Assumptions / Risks</b>	Risk: small sample; Assumption: tasks stable for 2 quarters

#### Acceptance Criteria

**Scenario:** Personas cover major segments  
Given interviews and survey data  
When personas are written  
Then there are 3-5 personas with goals, constraints, and context of use

**Scenario:** Tasks are measurable  
Given the top tasks list  
When success criteria are defined  
Then each task has a target KPI and measurement plan

#### Evidence Links

- Personas: </research/personas-v1.pdf>
- Top tasks: </research/top-tasks.csv>
- Scenarios: </research/scenarios.md>

## ID-DOS-PG-AECOM-001 — Ethical Personalization & Recommendations

<b>Epic / Feature</b>	Advanced E-Commerce
<b>Business Value</b>	Higher AOV without harming trust or relevance
<b>Priority / Estimate</b>	Priority: Medium SP: 8
<b>Persona</b>	Returning Buyer
<b>Dependencies</b>	Product catalog tags; rec engine
<b>Assumptions / Risks</b>	Risk: filter bubble; Assumption: explainable rules

### Acceptance Criteria

- Scenario:** Cross-sell placement  
Given a product detail page  
When related items are displayed  
Then no more than two modules appear and are clearly labeled "Recommended"
- Scenario:** Controls and transparency  
Given personalization is active  
When a user opens settings  
Then there are controls to mute categories and a link "Why these?"

### Evidence Links

- Merch rules: </commerce/merchandising.md>
- A/B plan: </experiments/recs-plan.md>

## Information Architecture & Content Strategy

### ID-DOS-PG-CONTENT-001 — Define Content Model & Editorial Rules

<b>Epic / Feature</b>	Writing and Managing Content
<b>Business Value</b>	Consistent, scannable content that supports reuse and SEO
<b>Priority / Estimate</b>	Priority: High SP: 8
<b>Persona</b>	Editors
<b>Dependencies</b>	Style guide base; content inventory
<b>Assumptions / Risks</b>	Risk: legacy content debt; Assumption: modular CMS

### Acceptance Criteria

- Scenario:** Content model defined  
Given page types and modules

(cont.)

When modeling content

Then templates list required fields, helper text, and governance rules

Scenario: Scannability standards

Given the editorial guide

When a page is authored

Then headings, summaries, and links conform to the guide and pass linting

## Evidence Links

- Content model: /content/model.yaml
- Editorial guide: /content/style-guide.md
- Lint rules: /content/lint-rules.yml

## ID-DOS-PG-IA-001 — Establish Global + Local Navigation

**Epic / Feature** Creating a Navigation Framework

**Business Value** Customers can reach critical tasks in <2 clicks from the homepage

**Priority / Estimate** Priority: High SP: 8

**Persona** All Users

**Dependencies** Final IA labels; search plan

**Assumptions / Risks** Risk: menu bloat; Assumption: 6–8 global items

## Acceptance Criteria

Scenario: Global nav exposes top tasks

Given the global navigation

When evaluating the first read

Then it lists 6–8 items with descriptive labels (no jargon)

Scenario: Local nav supports deep browsing

Given a second-level content page

When scanning the left rail

Then contextual links to sibling\path{/child} pages are present

## Evidence Links

- IA diagram: /ia/site-map-v3.drawio
- Copy deck: /content/nav-labels.md

## ID-DOS-PG-MOBILE-001 — Deliver Mobile-First Variants

<b>Epic / Feature</b>	The Mobile Web
<b>Business Value</b>	Parity of critical tasks with mobile-friendly inputs and layouts
<b>Priority / Estimate</b>	Priority: High SP: 8
<b>Persona</b>	Mobile Visitor
<b>Dependencies</b>	Breakpoint rules; mobile components
<b>Assumptions / Risks</b>	Risk: hidden content; Assumption: touch-first targets

### Acceptance Criteria

**Scenario:** Viewport and sizing  
Given a mobile device  
When a page loads  
Then viewport meta is correct and tap targets meet 44px guidelines

**Scenario:** Task parity  
Given the list of critical tasks  
When testing on mobile  
Then each task is possible without desktop-only steps

### Evidence Links

- Mobile guide: /design-system/mobile.md
- Component variants: /design-system/components/mobile-variants.md

## Blank Story Card

### ID-DOS-PG-NAV-001 — Standardize Link Labels & Error Handling

<b>Epic / Feature</b>	Making Navigation Easy
<b>Business Value</b>	Predictable navigation with clear labels and resilient 404s
<b>Priority / Estimate</b>	Priority: Medium SP: 5
<b>Persona</b>	All Users
<b>Dependencies</b>	Link inventory; 404 design
<b>Assumptions / Risks</b>	Risk: jargon; Assumption: descriptive labels allowed

### Acceptance Criteria

**Scenario:** Descriptive links  
Given menus and inline links  
When labels are audited  
Then vague terms are replaced with descriptive phrases

(cont.)

**Scenario:** Useful 404  
Given a broken link  
When a 404 page is served  
Then it presents search, top paths, and a reporting link

## Evidence Links

- Link language guide: /content/link-language.md
- 404 spec: /ux/errors/404-spec.pdf

## Interaction Design & Prototyping

### ID-DOS-CH2-001 — Create Pattern Shortlist & Composition Map

<b>Epic / Feature</b>	Ch.2 — Using Design Patterns
<b>Business Value</b>	Faster, consistent design with a vetted pattern set and page/flow mapping
<b>Priority / Estimate</b>	Priority: High SP: 8
<b>Persona</b>	UX Lead
<b>Dependencies</b>	Access to component library; page inventory
<b>Assumptions / Risks</b>	Risk: overfitting; Assumption: cross-team adoption

## Acceptance Criteria

**Scenario:** Shortlist approved  
Given a review with design and engineering  
When the shortlist is presented  
Then 8-12 patterns are approved with rationale and examples

**Scenario:** Composition map covers top flows  
Given the top 5 user journeys  
When patterns are mapped to pages and states  
Then each step references a chosen pattern and fallback

## Evidence Links

- Pattern shortlist: /patterns/shortlist.md
- Composition map: /patterns/composition-map.pdf

## ID-DOS-CH4-001 — Establish Iterative Prototype & Usability Cadence

<b>Epic / Feature</b>	Ch.4 — Involving Customers Iteratively
<b>Business Value</b>	Regular feedback reduces risk before build
<b>Priority / Estimate</b>	Priority: High SP: 5
<b>Persona</b>	Design & PM
<b>Dependencies</b>	Prototype tool; recruiting panel
<b>Assumptions / Risks</b>	Risk: low participation; Assumption: 5-users-per-iteration

### Acceptance Criteria

**Scenario:** Cadence defined

Given the roadmap for the next 6 weeks

When scheduling evaluation sessions

Then there is a 2-week cadence with goals for each session and roles assigned

**Scenario:** Actionable findings

Given a completed test session

When insights are logged

Then issues are prioritized with owners and deadlines

### Evidence Links

- Test protocol: /ux/tests/protocol-iter1.md
- Insight log: /ux/tests/findings.csv

## ID-DOS-PG-GEN-001 — Identify Site Genre & Benchmarks

<b>Epic / Feature</b>	Pattern Group — Site Genres
<b>Business Value</b>	Clarity on conventions and constraints per genre with 2-3 benchmarks
<b>Priority / Estimate</b>	Priority: Medium SP: 3
<b>Persona</b>	UX Lead
<b>Dependencies</b>	Competitor list
<b>Assumptions / Risks</b>	Risk: copying without fit; Assumption: mixed-genre site

### Acceptance Criteria

**Scenario:** Genre classified

Given the product vision

When evaluating common genres

Then the site is tagged with one primary and up to two secondary genres

(cont.)

**Scenario:** Benchmarks extracted  
Given 2-3 exemplar sites per genre  
When patterns are analyzed  
Then a list of reusable patterns with pros\path{/cons} is published

### Evidence Links

- Benchmark deck: /competitive/genre-benchmarks.pdf

## ID-DOS-PG-HP-001 — State the Value Proposition on Home-page

<b>Epic / Feature</b>	Creating a Powerful Homepage
<b>Business Value</b>	Visitors immediately understand what the site does and why it matters
<b>Priority / Estimate</b>	Priority: High SP: 5
<b>Persona</b>	New Visitor
<b>Dependencies</b>	Brand messaging finalized; IA primary paths
<b>Assumptions / Risks</b>	Assumption: 1-2 CTAs; Risk: overcrowded hero

### Acceptance Criteria

**Scenario:** Above-the-fold communicates key value  
Given a new visitor lands on the homepage  
When the page loads on a standard laptop viewport  
Then the primary value proposition, one primary CTA, and 2-3 key paths are visible without scrolling

**Scenario:** Mobile first-read is clear  
Given a mobile visitor on 375px width  
When the hero content renders  
Then the value proposition is readable and the primary CTA is tappable without zoom

### Evidence Links

- Wireframe: /design/homepage/hero-v2.fig
- Prototype: <https://example.com/proto/homepage-v2>
- Analytics goal: Time-to-first-CTA, scroll depth dashboard

## ID-DOS-PG-LAYOUT-001 — Publish Grid & Layout Specification

<b>Epic / Feature</b>	Designing Effective Page Layouts
<b>Business Value</b>	Consistent, readable pages across breakpoints
<b>Priority / Estimate</b>	Priority: High SP: 5
<b>Persona</b>	Design System Team
<b>Dependencies</b>	Token system; breakpoint guidelines
<b>Assumptions / Risks</b>	Risk: component drift; Assumption: responsive-first

### Acceptance Criteria

**Scenario:** Grid tokens

Given the design system

When layout tokens are published

Then grid columns, gutters, and margins are defined for mobile\path{/tablet/desktop}

**Scenario:** Above-the-fold guidance

Given content-heavy pages

When layout templates are used

Then critical content appears within the first read band

### Evidence Links

- Layout spec: </design-system/layout.md>
- Templates: </design-system/templates/>

## ID-DOS-PG-PERF-001 — Adopt a Performance Budget

<b>Epic / Feature</b>	Speeding Up Your Site
<b>Business Value</b>	Faster loads that improve conversion and SEO
<b>Priority / Estimate</b>	Priority: High SP: 5
<b>Persona</b>	Engineering
<b>Dependencies</b>	RUM tooling; asset pipeline
<b>Assumptions / Risks</b>	Risk: third-party bloat; Assumption: budgets enforced in CI

### Acceptance Criteria

**Scenario:** Budget defined

Given target device classes and network profiles

When budgets are set

Then page weight, LCP, and requests limits are defined per template

(cont.)

**Scenario:** Budget enforced  
Given the CI pipeline  
When a PR increases bundle size beyond budget  
Then the build fails with guidance to remediate

### Evidence Links

- Perf budget: /perf/budgets.yml
- CI checks: /ci/perf-checks.md
- RUM dashboard: /dashboards/web-vitals

## ID-DOS-PG-SEARCH-001 — Design Effective Site Search

<b>Epic / Feature</b>	Making Site Search Fast and Relevant
<b>Business Value</b>	Search is a first-class navigation path with relevant, fast results
<b>Priority / Estimate</b>	Priority: Medium SP: 8
<b>Persona</b>	Information Seeker
<b>Dependencies</b>	Indices seeded; content model complete
<b>Assumptions / Risks</b>	Risk: noisy synonyms; Assumption: facetable content

### Acceptance Criteria

**Scenario:** Search interaction  
Given the site header on any page  
When the user focuses the search input and types a query  
Then recent queries and typeahead suggestions appear within 150ms

**Scenario:** Results quality and resilience  
Given a query with zero exact matches  
When results render  
Then show helpful fallbacks (did-you-mean, popular content) and no dead ends

### Evidence Links

- Relevance tests: /search/eval/queries.csv
- Telemetry: /dashboards/search-latency

## ID-DOS-PG-TASKS-001 — Reduce Friction in Forms & Help

<b>Epic / Feature</b>	Helping Customers Complete Tasks
<b>Business Value</b>	Higher task completion with clear forms, errors, and assistance
<b>Priority / Estimate</b>	Priority: High SP: 8
<b>Persona</b>	All Users
<b>Dependencies</b>	Form library; help center CMS
<b>Assumptions / Risks</b>	Risk: long forms; Assumption: progressive disclosure

### Acceptance Criteria

**Scenario:** Form clarity  
Given a multi-field form  
When validation fails  
Then errors are inline, specific, and focus returns to the first invalid field

**Scenario:** Assistive help  
Given a complex task page  
When a user hesitates  
Then contextual help or a "Need help?" module is available

### Evidence Links

- Form standards: /ux/forms/standards.md
- Help patterns: /help/patterns.md

## ID-ID-XXXX — Short, Action-Oriented Title

<b>Epic / Feature</b>	Epic/Feature or Chapter/Pattern
<b>Business Value</b>	Outcome for the customer / metric to move
<b>Priority / Estimate</b>	Priority: Priority SP: SP
<b>Persona</b>	Persona
<b>Dependencies</b>	Dependencies
<b>Assumptions / Risks</b>	Assumptions / Risks

### Acceptance Criteria

**Scenario:** Happy path  
Given ...  
When ...  
Then ...

**Scenario:** Edge case  
Given ...

(cont.)

When ...  
Then ...

### Evidence Links

- Designs: ...
- Prototype/PR: ...
- Dashboards/Reports: ...

## Accessibility & Usability

## Content Production

## Implementation

## Testing & QA

## Launch

## Post-Launch & Optimization

### ID-DOS-CH1-001 — Establish Customer-Centered Design Principles

<b>Epic / Feature</b>	Ch.1 — Customer-Centered Web Design
<b>Business Value</b>	Team aligns on principles that tie design choices to customer outcomes and metrics
<b>Priority / Estimate</b>	Priority: High SP: 5
<b>Persona</b>	Product Team
<b>Dependencies</b>	Stakeholder availability; access to analytics
<b>Assumptions / Risks</b>	Risk: principles too generic; Assumption: leadership buy-in

### Acceptance Criteria

**Scenario:** Principles are documented and actionable  
Given a cross-functional workshop was conducted  
When the team finalizes the principles  
Then there are 5-7 principles, each mapped to a customer task and KPI

**Scenario:** Principles drive decisions  
Given a design review for a new flow  
When a tradeoff is discussed  
Then the decision cites at least one agreed principle and expected KPI impact

## Evidence Links

- Principles doc: /docs/design-principles.md
- Workshop notes: /meetings/ccwd/notes.pdf
- KPI mapping: /analytics/kpi-map.xlsx

## ID-DOS-CH5-001 — Publish Process Playbook & Phase Gates

<b>Epic / Feature</b>	Ch.5 — Development Processes
<b>Business Value</b>	Predictable delivery with clear entry/exit criteria
<b>Priority / Estimate</b>	Priority: Medium SP: 5
<b>Persona</b>	PMO
<b>Dependencies</b>	SDLC references; RACI templates
<b>Assumptions / Risks</b>	Risk: heavy process; Assumption: lightweight gates

## Acceptance Criteria

**Scenario:** Gates defined

Given discovery, design, build, and launch phases

When defining gates

Then each phase has entry\path{/exit} criteria and required artifacts

**Scenario:** Rollback readiness

Given a launch plan

When risk is assessed

Then rollback criteria and owner are documented

## Evidence Links

- Playbook: /process/playbook.pdf
- Gate checklist: /process/gates.md
- Rollback plan: /release/rollback.md

## ID-DOS-PG-BECOM-001 — Implement Cart & Streamlined Checkout

<b>Epic / Feature</b>	Basic E-Commerce
<b>Business Value</b>	Frictionless purchase flow that minimizes drop-off
<b>Priority / Estimate</b>	Priority: High SP: 13
<b>Persona</b>	Buyer
<b>Dependencies</b>	Payment gateway; tax/shipping rules
<b>Assumptions / Risks</b>	Risk: address validation; Assumption: guest checkout enabled

## Acceptance Criteria

**Scenario:** Cart preserves state

Given an anonymous session

When an item is added to cart

Then cart state persists across pages and refreshes

**Scenario:** Checkout flow

Given a filled cart

When proceeding to checkout

Then a single-page or guided multi-step checkout completes within 2 minutes

## Evidence Links

- Checkout wireflow: /commerce/checkout-flow.pdf
- Drop-off dashboard: /dashboards/checkout-funnel

## ID-DOS-PG-TRUST-001 — Expose Trust & Credibility Signals

**Epic / Feature** Building Trust and Credibility

**Business Value** Lower perceived risk to improve conversion and retention

**Priority / Estimate** Priority: High SP: 5

**Persona** Privacy-Conscious Visitor

**Dependencies** Policy docs; security text

**Assumptions / Risks** Risk: dark-pattern suspicion; Assumption: transparent wording

## Acceptance Criteria

**Scenario:** Key trust pages present

Given an about, privacy, and security overview

When a visitor scans the footer and main nav

Then links to these pages are clearly visible and crawlable

**Scenario:** Consent clarity

Given a cookie and data consent prompt

When the prompt is shown

Then options are clear, non-coercive, and stored for audit

## Evidence Links

- Policies: /legal/
- Consent spec: /privacy/consent-spec.md