User Needs + Defining Success • Worksheet

Interaction Design Policies

Instructions

Block out time to get cross-functional stakeholders of your product together in a room to work through these exercises & checklists. Stakeholders to invite: UX Designers, UX Researchers, Product Managers, Software Engineers, and ML Developers. When possible, include perspectives from Privacy, Security, Legal, Public Policy, Sales & Marketing, Quality Assurance, and Trust & Safety as relevant for your product. If unavailable, consider speaking to external subject matter experts.

In this worksheet

1. Identify critical moments

Review and prioritize situations or events in your product or critical user journeys (CUJs) where your users interact with your AI system.

2. Align on your interaction design policies

Brainstorm policies for your critical moments, define the priority and specificity of your policies, and determine how you'll integrate these in your product.

3. Define UX and ML requirements

Translate the interaction design policies into actionable interventions or interactions in the user experience and requirements for the AI systems in your product.

1. Identify critical moments

Identify critical moments within the product experience when users interact with an AI system. The interaction design policy should be crafted around these critical moments. This can be in the form of a task that the user needs to perform, an objective that they need to meet, or another user journey they need to work through.

There can be multiple critical moments in your product's CUJ, so consider prioritizing critical moments that can change the course of the user journey, or where AI outcomes can be more uncertain.

Example: Plannerific, one of the Guidebook's hypothetical product examples, is an end-to-end planning app that helps plan any event, big or small. Examples of critical moments in Plannerific include:

Critical User Journey	Critical Moment
As an event host, I want to **draft an invite** to my 10 year old child's dinosaur-themed birthday party.	❏ Draft invitation content from user's input
As an event host, I want to **design an invitation** to my cousin's Mehndi or Henna ceremony for guests from a variety of cultures.	❏ Create visuals based on invitation theme

Critical Moment(s) Template

Use the table below to identify critical moments that need interaction design policies in your product:

Critical User Journey	**Critical Moment**
Write your product's CUJs	*Prioritize critical moments in the CUJ*

2. Align On Your Interaction Design Policies

Interaction design policies are the set of criteria that govern the user's experience at the point in a critical user journey (CUJ) where the user interacts with an AI system in a product. Interaction design policies are made up of four key parts centered around a critical moment:

Acceptable Actions	Given an input, what are the types of actions, use cases, or tasks that the AI system should be capable of performing? These are the range of tasks that will help people use AI or GenAI to meet their objectives.
Unacceptable Actions	Given a user input, what are the types of actions, use cases, or tasks that the AI system should not perform? These are the range of tasks that a user might unintentionally ask the model to perform.
Thresholds Of Uncertainty	What are the thresholds of uncertainty or confidence, above which a prediction can be surfaced? These are the weak predictions that can reduce performance or slow down a user, but not actively harm them.
Vulnerabilities	What are the different types of errors that the model can produce? What kinds of risks are users unwittingly vulnerable to? These are outputs that cause the system to fail, or outcomes that need to be mitigated altogether.

Example: Users interact with a generative AI system in Plannerific to draft invitations.

	Criteria	Example
Acceptable Actions	We want people to successfully useGenAI for/to ...	... Produce inviting text and imagery that is sensitive to genders, appropriate for the culture and context of the event, while inclusive for guests from different backgrounds.
Unacceptable Actions	We don't want people to intentionally or unintentionally use GenAI for/to ...	... Produce any text or imagery that may propagate a stereotype, caricature individuals, or generate inappropriate messages about cultures or religions.
Thresholds Of Uncertainty	When GenAI predictions are weak, people won't mind being asked to ...	... Correct a few words or introduce gendered language in an otherwise gender-agnostic invite as long as they don't need to rewrite the entire invitation.
Vulnerabilities	An incorrect or wrong GenAI prediction can harm individuals and groups when / if / by ...	... Important logistical details about the event are inaccurate and are not reviewed before invitations are sent out. ... Seeing culturally offensive or insensitive content in an invitation can upsets guests.

3. Define UX and ML requirements

Have a rich discussion with cross-functional stakeholders and translate the interaction design policies into actionable steps. This may look like changes to product flows or interactions in the user experience, or to the requirements of the AI systems in your product. Other steps may be privacy and security interventions, additional AI evaluations, or new data collection efforts.

Interaction Design Policy Template

Consult with engineers, designers, product counsel, and other stakeholders as needed to generate a truly comprehensive interaction design policy for your critical moment. Where possible, use concrete examples grounded in user research and expected model behaviors.

Critical Moment *Write your critical moment here*		
	Criteria List	**UX and ML requirements**
Acceptable Actions *We want people to successfully use GenAI for/to...*		
Unacceptable Actions *We don't want people to intentionally or unintentionally use GenAI for/to...*		
Thresholds Of Uncertainty *When GenAI predictions are weak, people won't mind being asked to...*		
Vulnerabilities *An incorrect or wrong GenAI prediction can harm individuals and groups when / if / by...*		