



# UX Fundamentals

## The Scope Plane

transforming performance  
through learning

## Deliverables

- **Technical Requirements**
- **Content Requirements**
- **Scenarios**
- **Task Analysis**
- **Prioritise (MoSCoW)**

## The Scope Plane

- **The Scope plane takes finding of the Strategy plane and aligns them**
  - It ensures we know what we are building
  - Aligning our expectations against the user's
- **Requirements allow us to lay out the deliverables and objectives**
  - Setting out the entire scope mapped out for the project
- **Establish what you are building – ensure everyone understands**
  - Identify requirements, ensure they match user needs
  - Not possible user needs
  - Set out a timeline and stop scope creep
- **We move from why are we making this product to:**
  - What are we going to make

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Based on evidence we now need to clearly set out our objectives for the development of the product – our evidence from the Strategy plane should provide significant evidence to support or deny early assumptions. The final product must stop being a nebulous construct in a senior stakeholders mind and reach a concrete framework to take towards development.

## Technical Requirements

- **Traditional requirement specifications can be enhanced with UX:**
  - Feature requirements can be based on information collected during the user research phase
  - User research complements market research data and other sources of product development information.
    - Basing feature requirements on actual user data
    - Reducing the risk of investing resources in unwanted features
    - Increases the likelihood of adding features that will drive sales
- UX-specific requirements can be added to the specification
  - Adding UX requirements becomes a business priority
  - Alongside other product attributes
  - Ensuring UX improvements are delivered when the product ships

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Traditional requirement specifications can be enhanced with UX information in two main ways:

Feature requirements can be based on information collected during the user research phase. Here, user research complements market research data and other sources of product development information. Basing feature requirements on actual user data collected during research reduces the risk of investing resources in unwanted features and increases the likelihood of adding features that will drive sales.

UX-specific requirements can be added to the requirement specification. By adding UX requirements, UX becomes a priority alongside other product attributes and UX improvements are delivered when the product ships.

## Content Requirements

- **Content requirements refer to text, images, audio and text**
  - These pieces of content work together to fulfil a requirement
    - e.g. a piece supporting a film may require text, image/video and links to external ratings
  - At this point we care about the content – not the format
    - Never get caught up by this – that is for the surface phase
  - As we consider data consider size and performance
    - Especially important for mobile users
  - Identify who is responsible for content
  - Identify the frequency of updates
    - Is this static, how often does it change, who changes it
  - This will be tedious but we have to do it.

## Content

- **One of the first steps to effective IA is content analysis determine:**
  - Content you have
    - Learn what you have, avoid duplication
  - Content you need
    - For each task analyse content required, who is responsible for it
    - Who will provide content
  - Communicating about content
    - Build a content spreadsheet
    - Colour code according to popularity
  - Content planning
- Classification schemes

## Content you have

- **Learning what content you have will help you:**
  - Understand the subject
    - If you're working on a new site, or a subject you don't have much experience with
  - Look at it with fresh eyes:
    - A great refresher and gives you a chance to look at your content
  - Clean up:
    - Clean up old, out-of-date and inaccurate content.
  - Migrate it:
    - You need to know what you have so you don't lose anything in the migration.
  - Manage progress:
    - Keep track of things like what content has been rewritten

## Conduct a content inventory

- **To manage content you will need to perform some form of audit:**
  - Full content inventory – which includes all
    - Page, downloadable objects e.g, PDF files, documents,
    - Embedded objects, such as video or audio other content
      - In blogging sites this may include reader comments
  - Partial content inventory
    - This collects information for a number of levels of the site
      - Though it may show some parts of the site in more detail.
    - It is a good practical approach for very large sites
  - Content audit
    - Is a sample across the site.
    - It may collect details for the first couple of levels of a site
      - Then details for different page types in each section.



## Content you Need

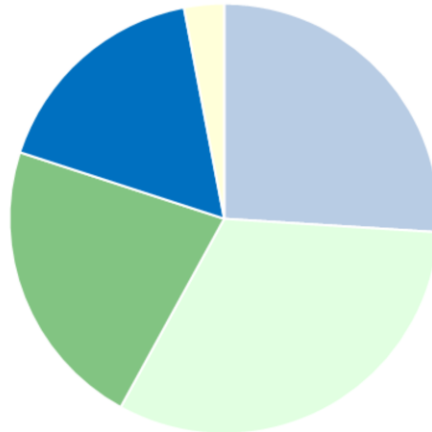
- **Whether working on a new design or launching think content**
  - The content you choose should meet
    - The needs of the people using your product
    - Help achieve your project goals
- **Consider approaching content creation in the following ways:**
  - Current behaviours
  - User research
  - Your own ideas for content

## Current Behaviour

- **Examine what users are currently viewing and doing**
  - From site metrics
  - Competitor analysis
- **Do not just focus on immediate data**
  - Check what happens at different times of the year
  - When new content is added – does it peak and not get used again?
- **Prioritise popular content – it becomes popular because of users**
  - Provide better links to existing and related content
  - Investigate social networking trends
    - Use verbs and action from the research phase

## Content Planning

- **Build a spreadsheet of content**
  - Use analytics to investigate who is doing what
  - Categorise content
  - Understand popularity



■ General content ■ Presentation Pages ■ Speaker Details ■ Blog Posts ■ Functional pages ■

## Group Discussion – Film times at the Cinema

- **Use our User Personas to identify the following**
  - The landing page for our movie goers app
    - what should be on it and what will change
  - Consider a page showing film times at a cinema and identify
    - Content, and frequency of change
  - Consider the cinema information page, what content is needed
    - Who will use it and why

## Scenarios



- **Scenarios describe the stories and context behind why a specific user or user group comes to your site**
- **They note the goals and questions to be achieved and sometimes define the possibilities of how the user can achieve them on the site**



**Scenarios are critical both for designing an interface and for usability testing.**

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Scenarios describe the stories and context behind why a specific user or user group comes to your site. They note the goals and questions to be achieved and sometimes define the possibilities of how the user(s) can achieve them on the site.

Scenarios are critical both for designing an interface and for usability testing.

## Scenario Types



- **Goal or task based scenarios**
- **Elaborated scenarios**
- **Full scale task scenarios**

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**Goal- or Task-Based Scenarios** state only what the user wants to do. Do not include any information on how the user would complete the scenario. These scenarios are useful in helping to define your site architecture and content. You should give these types of scenarios to users in a usability test. It gives them a reason and a goal for going to the site, but it lets them show you how they would use the site to accomplish that goal.

**Example:** A parent is worried about a ten-year old refusing to drink milk and wants to know if it really makes a difference that the child is getting very little calcium.

**Example:** You are traveling to Seattle for your job next week and you want to check on the amount you can be reimbursed for meals and other expenses.

**Elaborated Scenarios** give more user story details. These details give the Web team a deeper understanding of the users and users' characteristics that may help or hinder site interaction. Knowing this information, the team is more likely to develop content, functionality, and site behaviour that users find comfortable and easy to work with. (example on next page)

## Scenario Types



- **Goal or task based scenarios**
- **Elaborated scenarios**
- **Full scale task scenarios**

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**Example:** Mr. and Mrs. Macomb are retired schoolteachers who are now in their 70s. Their Social Security checks are an important part of their income. They've just sold their big house and moved to a small apartment. They know that one of the many chores they need to do now is tell the Social Security Administration that they have moved. They don't know where the nearest Social Security office is and it's getting harder for them to do a lot of walking or driving. If it is easy and safe enough, they would like to use the computer to notify the Social Security Administration of their move. However, they are somewhat nervous about doing a task like this by computer. They never used computers in their jobs. However, their son, Steve, gave them a computer last year, set it up for them, and showed them how to use email and go to websites. They have never been to the Social Security Administration's website, so they don't know how it is organized. Also, they are reluctant to give out personal information online, so they want to know how safe it is to tell the agency about their new address this way.

**Full Scale Task Scenarios** include the steps to accomplish the task. A full-scale scenario can either report all the steps that a specific user currently takes to accomplish the task or it can describe the steps you plan to set up for users in the new site. Scenarios at this level are very similar to use cases, but they lay out the steps from the user's point of view rather than from the website's point of view. They explain how the site supports the goal-oriented scenarios that you started with.

## Using Scenarios in Website Design

- **It is impossible to write down every scenario that every user has for visiting your website**
- **Scenarios can also work together with personas by serving as the stories behind why the particular persona would come to your website**
  - What does the persona hope to accomplish by visiting the website?
  - What characteristics of the persona might help or hinder his or her site interaction?
- **You should focus on users and their tasks rather than on your site's organization and internal structure**

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### Using Scenarios in Website Design

It is impossible to write down every scenario that every user has for visiting your website. Instead, before you start to put the site together, write down 10 to 30 of the most common reasons that users have for visiting or tasks that users want to do.

Scenarios can also work together with personas by serving as the stories behind why the particular persona would come to your website. What does the persona hope to accomplish by visiting the website? What characteristics of the persona might help or hinder his or her site interaction?

You should focus on users and their tasks rather than on your site's organization and internal structure. As a result, you will know what content the site must have and how it should be organized.



## Scenario Mapping

- **A UX scenario is a story about a user carrying out a specific task**
  - Scenarios can be very detailed, all the way to very high level
  - As a minimum they should at least outline the usages:
    - who
    - what
    - when
    - where
    - why
    - how



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As Victorinus, a student of Plato, postulated in the first century BC the basis of information gathering questions follow the five W (plus a H). Scenarios can be very detailed, all the way to very high level but should at least outline the 'who', 'what', 'when', 'where', 'why', and 'how' of the usage. They typically outline a user journey (usually a quantified persona) through an activity or feature.

## How to perform Scenario Mapping

- **We are attempting to analyse the steps the user will take to complete a task. To achieve it we follow the below approach:**
  - Outline the Scenario and user(s)
  - Discuss and work out the steps the user would take and identify
    - What the User Does
    - Resolve questions, queries and assumptions
    - Follow through on flaws and issues with suggestion
    - Revisit
- Repeat for each user task

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As a group you'll want to walk through all the steps that you envisage a user taking to carry out their task identify:

What the user does. Remember to focus on what happens, not necessarily how it happens. For example, Paul brings up a larger image of a bouquet of flowers that he thinks his Mum would like.

Any comments or information that you feel is important at this step. For example, you might want to make a note that there might be alternative images available for a bouquet of flowers, such as a front and side shot.

Any questions or assumptions that arise are this step that you'll want to resolve. For example, will the images for flowers all be the same size and aspect ratio?

Any ideas or good suggestions that people have. For example, it would be good to allow Paul to zoom in on an image so that he can see the bouquet of flowers in more detail.

## Create your Own Scenarios



In groups, write as many scenarios as you can think of in 15 minutes for the cinema app that you worked on previously

## Task Modelling

- **A task models are an important design deliverable**
  - It shows what users do
  - The behaviour it adopts
  - Requirement specification at each stage
- **Building a product around these findings is more successful**
  - We try to ensure that we do what the user wants when they want is
  - Matching user expectation against proposed system behaviour
  - Giving focus and direction to the experience you need to create
- **This can be applied to a single task and/or the whole experience**
- **Persona and task models sit side by side in achieving success**

## What makes a good task model?

- **Task models show what a user needs and expects to do**
  - They are goal based
    - Focusing the team on how the user behaves
  - They enhance a process with rich information:
    - Behaviour Patterns
    - Content requirements
    - Persona involved
    - Users emotions
    - Content strategy

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Personas and task models sit alongside each other and feed off the same types of research, so for efficiency the two can be developed side by side, which also allows you to consider different task models based on the personas. Competitor benchmarking, personas, and task models are often covered in the same workshop because they usefully feed off each other.

## How to Perform Task Analysis

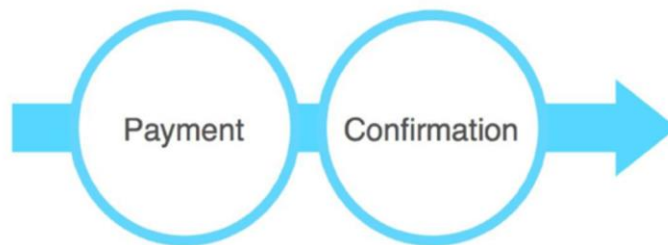
- **To perform task analysis we need to identify the following:**
  - The Goal
    - What is the user ultimately trying to do?
  - The order of the tasks
    - The flow of tasks to reach the goal
    - For longer tasks this can be grouped into phases or sub tasks
  - User Behaviour
    - User behaviour shows a users movement between tasks
      - Identify:
        - Direct connections
        - Controlled evaluations
        - Complex evaluations
  - Emotional Needs
    - What is driving the users behaviour?

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**Complex evaluation:** Complex evaluations can be found in almost every project. This is where a user requires several different, and often unrelated, needs to be fulfilled to complete a goal. When booking a vacation, for example, users evaluate dates, locations, activities, and cost. It is likely that they will have some specific requirements (such as it must have a swimming pool or it must not be too close to a main road). Their ultimate emotional goals might be to have a relaxing break. Uncovering and understanding this information gives guidance to how information is displayed, the feel you want to convey, and the deeper content that needs to be available.

## Direct Connections

- **Direct connection:** One task leads on to the next
  - For example, a user has completed their holiday booking



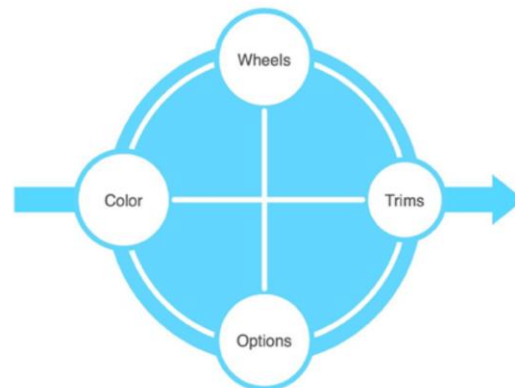
- Only provide direct flows and connections when appropriate
  - Using where users don't want them will lead to a poor experience
  - They will feel that they are being forced down blind alleys

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**Direct connection:** One task leads on to the next. For example, a user has completed their holiday booking, clicked the submit button, and a confirmation page appears.

## Controlled Evaluation

- If the user explores a well defined product or service it is controlled



- The interface and navigation focus on allowing a user to perform the task

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**Controlled evaluation:** A user wants to explore aspects of a well-defined product or service. For example, let's say you are buying a car and want to evaluate combinations of different wheels, engines, trims, and options. The interface and navigation can focus just on allowing you to do these things in a controlled environment until you reach an outcome.

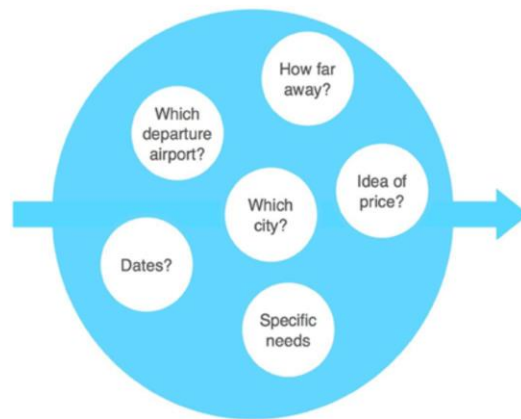


## Complex Evaluation

- **Complex evaluations occur when users have unrelated needs**

- For example when booking a holiday the user may evaluate:

- Dates
- Locations
- Activities
- Cost



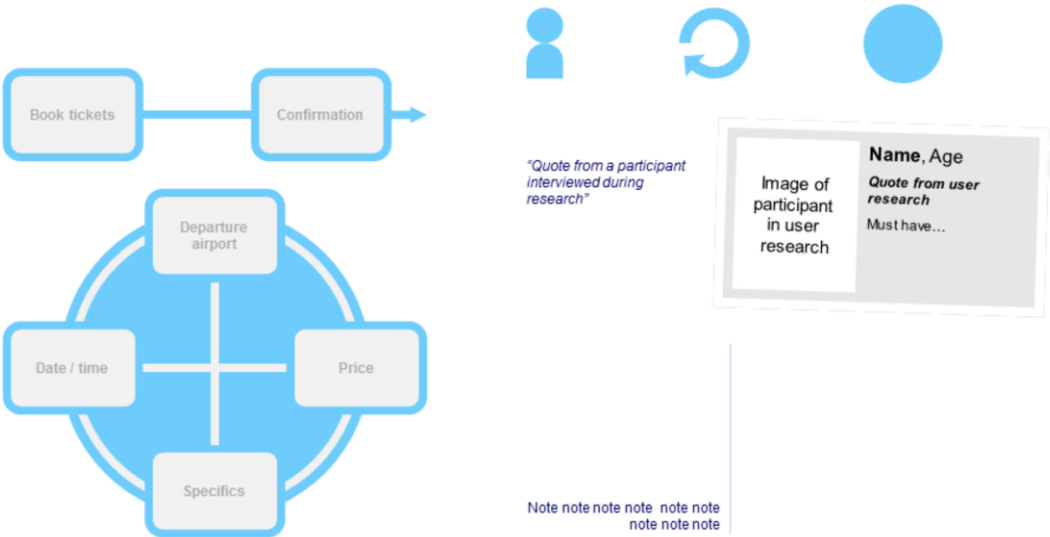
- Understanding the emotional goal is key

## Emotional Needs

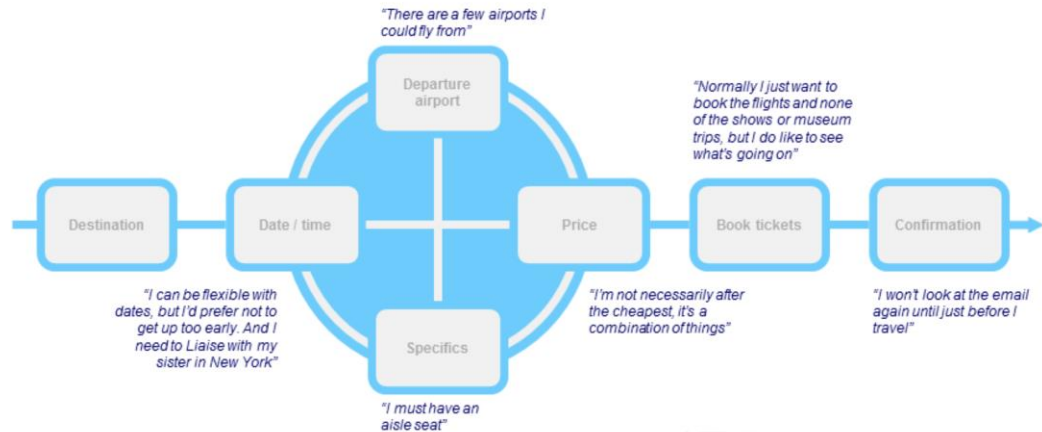
- **What behaviour is driving the user?**
  - e.g. When buying a new car the response from friends may top the specification
- **Who or what are their influences?**
  - Are there other users involved and what other factors influence?
- **Content requirements?**
  - Through research identify what media is needed at different points in the journey
- **Existing barriers**
  - Have you identified other reasons users may not complete tasks?

# What do Task Models Communicate?

- **Task models tell a story about your users**
  - Becoming a reference point throughout project design & development



## Example - Book a cheap flight to New York in July



Other people are often involved in the date / time discussion.

Users need to easily move between these different options in order to make an informed and confident decision.

Image of participant in user research

**Katharine, 29**

*I want a hassle free trip to New York to spend time with my sister and go shopping.*

Must have an aisle seat, must not get up to early.

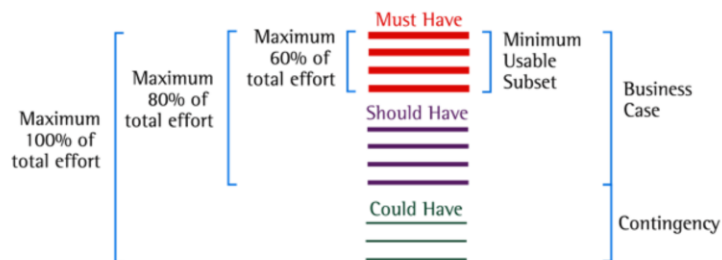
## Exercise – Task Analysis



In groups, take two of the scenarios you built earlier in this module and use task models in conjunction with the User Personas you created earlier in this course.

## Prioritise - MoSCoW

- You will have many tasks – it will be necessary to prioritise them
  - The MoSCoW method can help with this:
    - Must Have
    - Should Have
    - Could Have
    - Won't Have this time



- Apply prioritisation based around mapped scenarios and user personas

## MoSCoW(2)

- Must Have - these provide the Minimum Usable Subset of requirements:
  - This may be defined using some of the following:
    - Cannot deliver on target date without this
    - No point in delivering on target date without this
    - Not legal without it
    - Cannot deliver the Business Case without it
- Should Have - Important but not vital
  - May be painful to leave out, but the solution is still viable
  - May need some kind of workaround
    - e.g. management of expectations, some inefficiency

## MoSCoW(3)

- Nice to Have
  - Wanted or desirable but less important
  - Less impact if left out (compared with a Should Have)
- Will not have this time:
  - Requirements which the project team has agreed it will not deliver.
  - Ensure they are recorded in the Prioritised Requirements List
  - This helps clarify the scope of the project
  - This helps to manage expectations
    - that some requirements will simply not make it



## Exercise – Prioritisation



Take the scenarios you outlined earlier in the exercise and align them through MOSCOW prioritisation.

## Review

- **The scope planes takes the findings from the strategy plane**
- **Then applies some more formal analysis to the data**  
Setting deliverables, ensuring processes are understood