# *Client and competitor research*

PROJECT TIMELINE

EVALUATION

DISCOVERY & RESEARCH

DESIGN

BUILD

Business Requirements
Stakeholder meetings
Competitor evaluation
User research
Task analysis
Personas and task scenarios
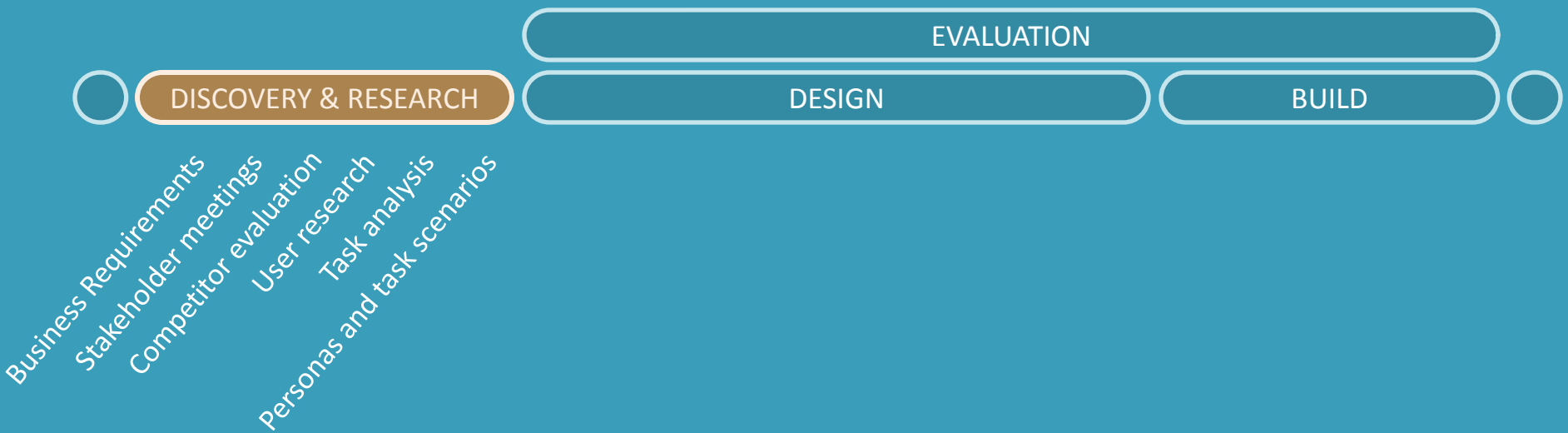
*Discuss:* *What design briefs won't tell you...*

# What client briefs rarely tell you…

- Hidden agendas & internal politics
- Unstated/undiscovered user needs & behaviours
- Where you can innovate

**Before you start, you need to understand:**
- Business needs & objectives
- Stakeholders, their involvement and agenda
- The market
- Your users, their goals, needs, and context of work

# Understanding business objectives

- UCD is **all about discovering business opportunities** through user research and improving the way users can interact with products or services.

- Often **there may some resistance** against adopting UCD

- So it's vital to understand the **business goals, success factors and politics** of the organisation you are working for.

- It's all about **bringing organisational objectives/business goals and user needs together!**

How the customer explained it
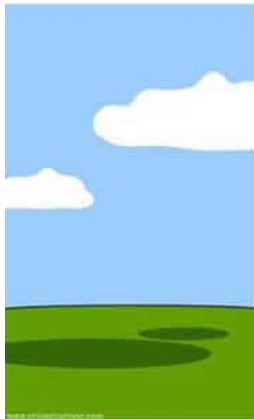
How the project leader understood it

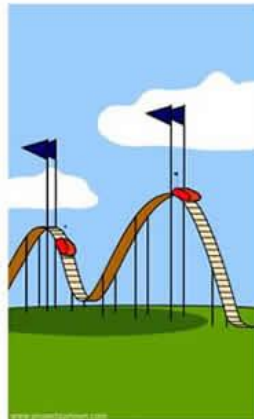How the analyst designed it

How the programmer wrote it
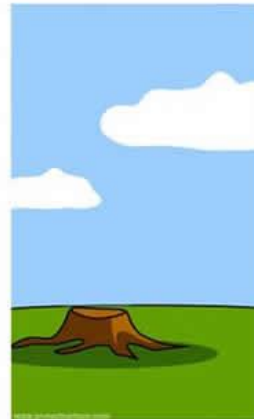
How the business consultant described it

How the project was documented

What operations installed

How the customer was billed

How it was supported

What the customer really needed

# Understanding business objectives

- **Scope & definitions:** WHAT is the product/service supposed to do?

- **Primary purpose/goal of project:** WHY are you doing it? (what are the business benefits?)

- **What's the Business model?**
  - Revenue generating (for example Commerce, Advertising, Subscription)?
  - Non-revenue generating (for example promotional or cost saving)?

- **What is considered a successful outcome and how will you assess it?**

# Planning the UCD process

- Formulate SMART **objectives** for the website

- Formulate **strategies**

- What **resources** are available? (people, equipment etc…)

- What **methods/processes** will you adopt?

- What is your **schedule?**

- What is your **budget?**

…UCD gives you a rich [toolkit of methods](#), from informal low cost "guerilla" methods to thorough research.

# Understanding the organisation

- **What are the politics of project?** (Don't underestimate the importance of politics!)

- **What decision structures are there?** (WHERE does the power lie?)

- **Who are the stakeholders?** (WHO has a vested interest in this project?)

- **A good Project Initiation Process** helps to clarify some of those things.

# Understanding stakeholders & their objectives

- **Get to know people.**

- Have **one-to-one** meetings.

- **Listen to them.** Don't spend the time telling them about all your great ideas!

- When you need to, communicate your ideas clearly and effectively.

- Establish **common frames of reference between** stakeholders.

- **Identify conflicts.**

- **Get buy-in.**

# Some things to ask stakeholders...

- What's your **involvement?**
- **Why do you want to do this** project?
- How do you think this could **benefit the business/organisation?**
- What would be the **best possible outcome?**
- What do you fear **could go wrong?**
- How would you like to be **involved/informed?**
- What are your **key objectives?**
- What is your (departments) **strategy** for the next year/five years?
- What **motivates** you to do this?
- Etc...

More on stakeholder workshops

# Types of Stakeholders

- Decision makers
- Gatekeepers
- Beneficiaries
- Workers

**Think how, why and when to involve them in the design process:**

- Direct involvement at defined points/throughout?
- Highlights and snapshots only?
- Reports and recommendations?
- Setting priorities?

This has to be part of your **communication plan…**

PROJECT TIMELINE

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DISCOVERY & RESEARCH    DESIGN & CONTENT CREATION    BUILD

*Regular touch points with relevant stakeholders prevent unwanted surprises further down the road.*

# *Task:* Client survey

- Open this client survey and **apply it to your project**

- If you have a client, then you can use this and the workshop link to be the basis of client interviews

- If you don't have a client, then the survey will help you identify what your goals for the website are

# Competitor evaluation

- Looking at other companies products is a great source of inspiration…

- Get lots of **photos/screenshots**

- **Compare** features and functionality

- Pick out the **stuff that works well**

- There is **no point in re-inventing the wheel**

- Design is **evolutionary** process; no one designs everything from scratch

- Competitor evaluation lets you **identify what the state-of-the-market is**

- **Your business goals will tell you whether you can match them or whether you need to set a new standard**

# Competitor evaluation



If you can, print out screenshots and put them on the wall. Identify trends and common themes, unusual ideas and things that do or don't work well.

# *Task:* *Conduct competitor evaluation*

- Identify some competitors for your website, or failing that for Ocado.com

- Use the 6 layer model of user experience as headings for a competitor review
  - Proposition
  - Concept
  - Structure
  - Information
  - Interaction
  - Appearance