Blend

Design Systems Process

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What is this process?
Types of involvement
Adding a new component
Updating an existing component
Resources (docs, figma, etc)

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Our goal with this process is to empower EPD to maintain a design system as a source of truth for what we have in product.

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What does this process achieve?

- Involving the right people at the right time
- Proper information gathering and communication
- Providing a platform to provide feedback
- Identify key milestones
- Identify action items and responsibilities

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How can I get involved?

Who can contribute to this effort and how can they contribute?

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Types of involvement

- You need to add a **new component** to the design system
- You have an **improvement** for a component in the design system
- You are interested in **contributing or reviewing** a component
- You just **want to learn**

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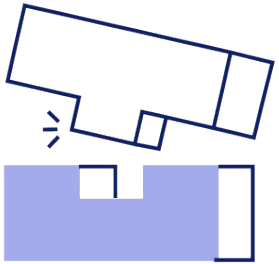
You need to add a new component to the design system



Who's involved: Designers

"I'd like to make an accordion so that we can show and hide content better while still making it available to the user"

Types of involvement

You have an improvement for a component in the design system

Who's involved: Engineers, Product Managers, or Designers

"We need a new grey because we don't have one for modal/overlays."

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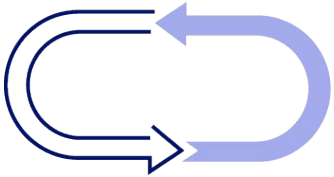
Types of involvement

You are interested in contributing or reviewing a component



Who's involved: Engineers or Designers

"We need a new grey because we don't have one for modal/overlays."

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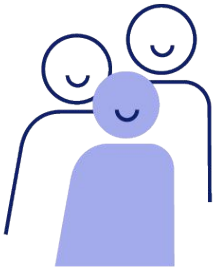
Types of involvement

You just want to learn



Who's involved: Engineers, Product Managers, or Designers

"I'm very much interested to learn and get involved, but I don't know where to start."

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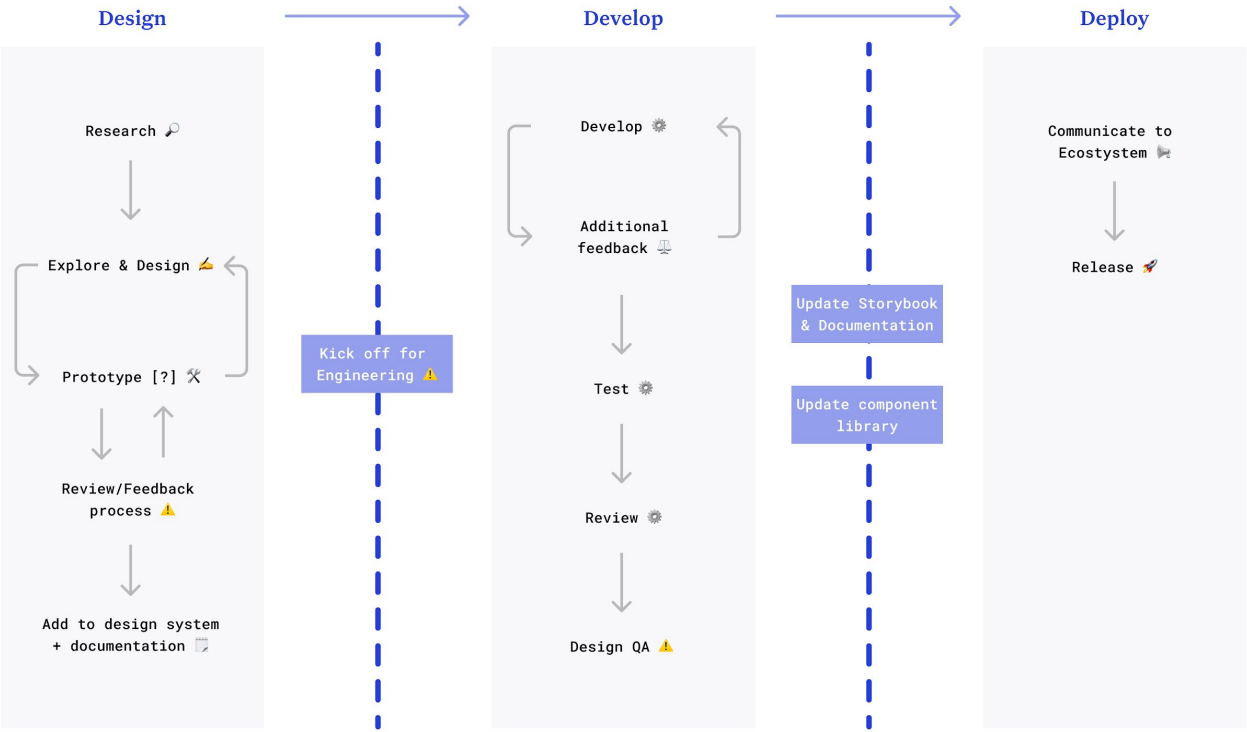
New component or pattern



[?] = optional

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Design phase

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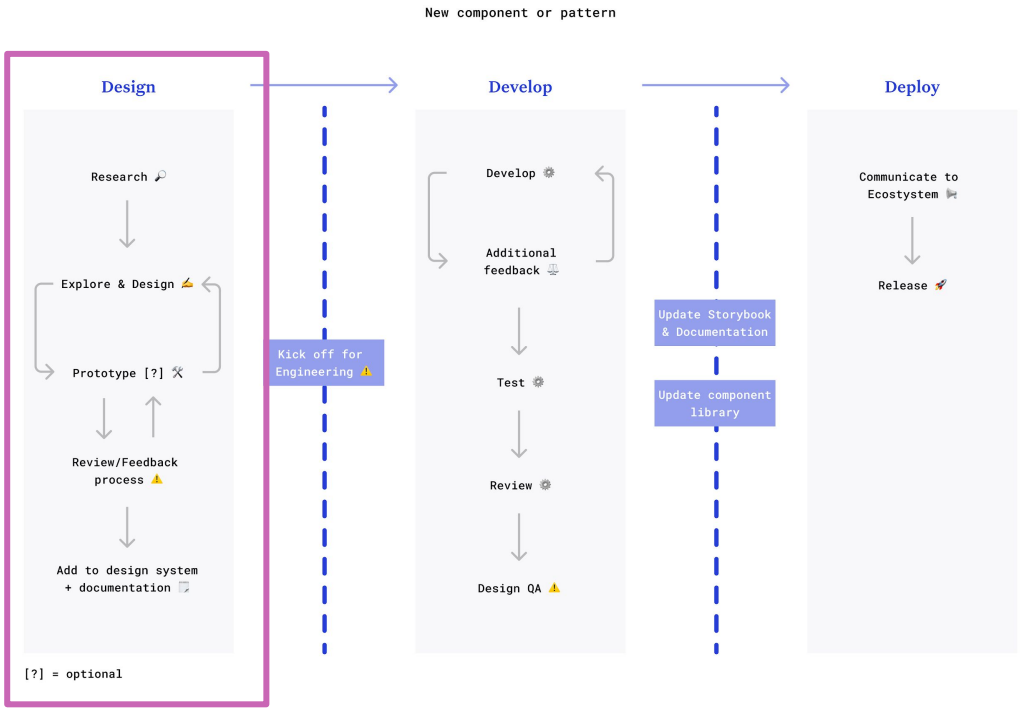
Design phase

1. Research 🔎
2. Explore & design ✍️
3. Prototype [?] 🛠️
4. Review / Feedback ⚠️
5. Adding design to Figma 📄
6. Kickoff for engineering ⚠️



⚠️ = major milestone
[?] = optional

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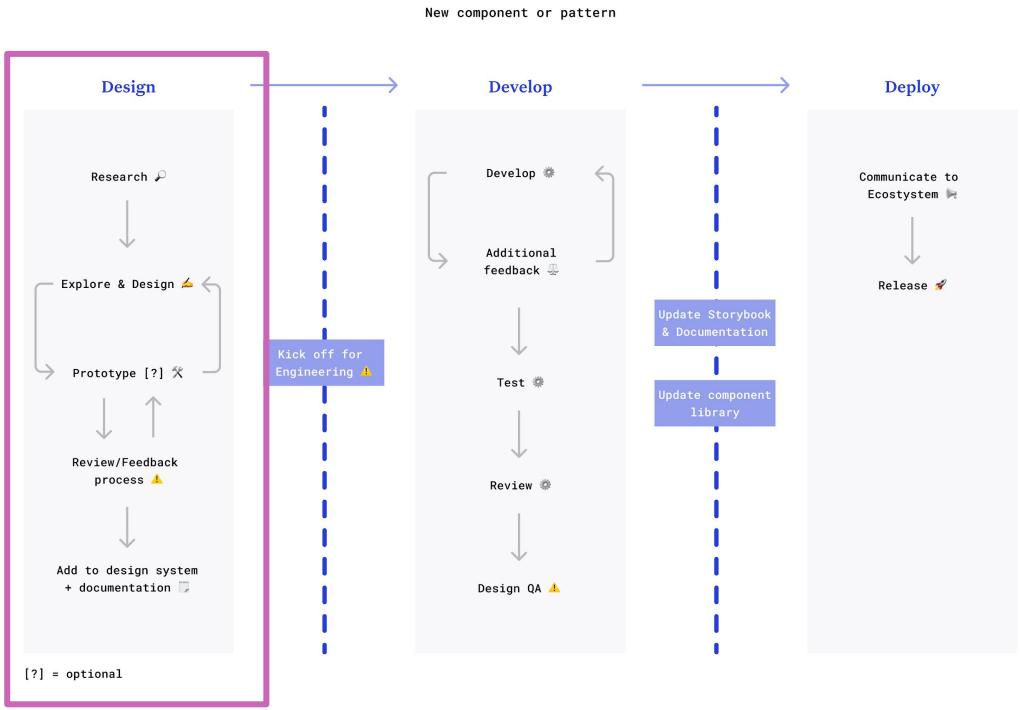
Design phase

Research 🔍

Figure out what the use case is and try to narrow down the scope as much as possible.

Reference inspiration or patterns from other products.



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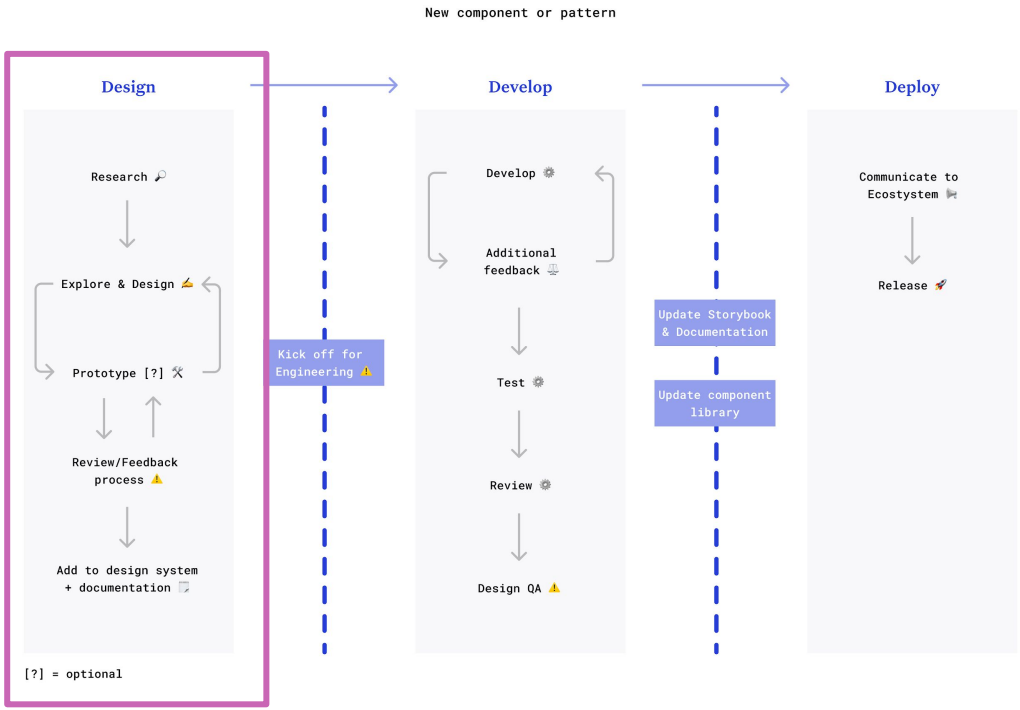
Design phase

Explore & design ✍️

Create the actual component or pattern. Get creative and always refer back to the principles of the design system: this will help ground your design decisions.

Make sure to check for color contrast - minimum AA



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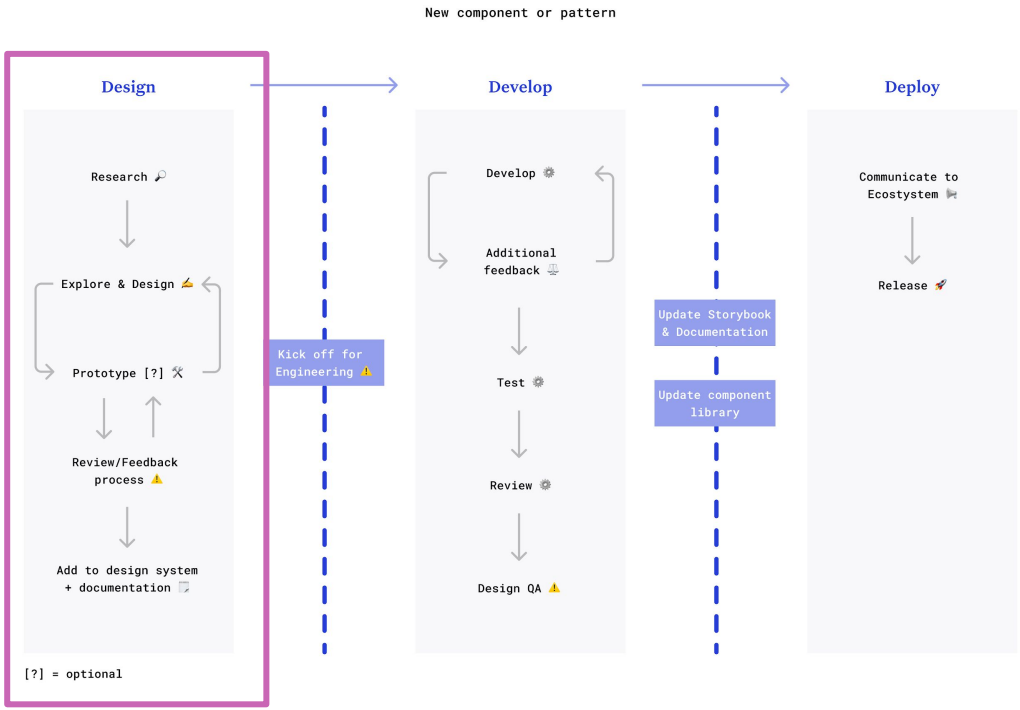
Design phase

Prototype [optional] 🛠️

If requested, work through a prototype to test out interactions and further flesh out the design.

This will be helpful for catching use cases, understanding tradeoffs, and overall extensibility and usability of the component.



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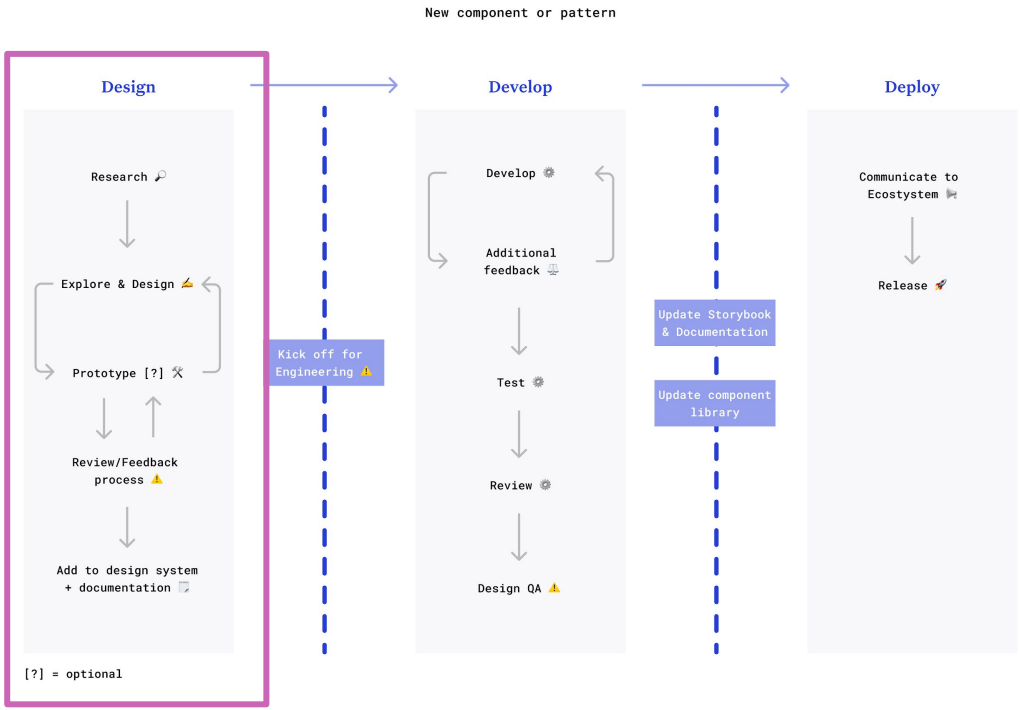
Design phase

Review / Feedback ⚠️

The review process can be iterative, and not all the questions have to be answered all at once.



⚠️ = major milestone

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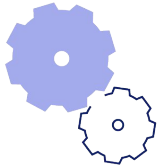
Review/Feedback ⚠️



Feedback

Design DRI seeks out feedback during studio time and iterates if necessary.

Final Review

Team discusses and agrees that component or change is the right direction to pursue.

Scheduled during studio time

Weekly Eng Sync

Round table with UI Platform team and PD to inform each other of updates & roadmap.

Every Tuesday @ 4pm

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Review/Feedback ⚠️

Feedback (Studio Time)

When: DRI schedules when needed
Who's involved:

- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: Design DRI

Steps:
1. Consider which designers need to be involved
2. Claim studio time for feedback (questionnaire filled out to best extent)
3. Host feedback session with the people involved
4. Iterate and review (if needed)

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Review/Feedback ⚠️

Questionnaire

Every designer is expected to fill out a questionnaire during their design phase.

Questions

- What feature or product is it for?
- Why do we need this component?
- Interaction documentation?
- When to use it? (Usage notes)
- Designers to consult for past work?
- Status?
- Considerations?
- Theme-able attributes?

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Review/Feedback ⚠️

Final Review (studio time)

When: DRI schedules when needed
Who's involved:

- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: Design DRI

We want to address the following:

- Could something existing solve what this new component is trying to solve?
- Is this a unique case that we need in the design system?
- Does this component extend an existing pattern? (is this better than what already exists and is it better)?

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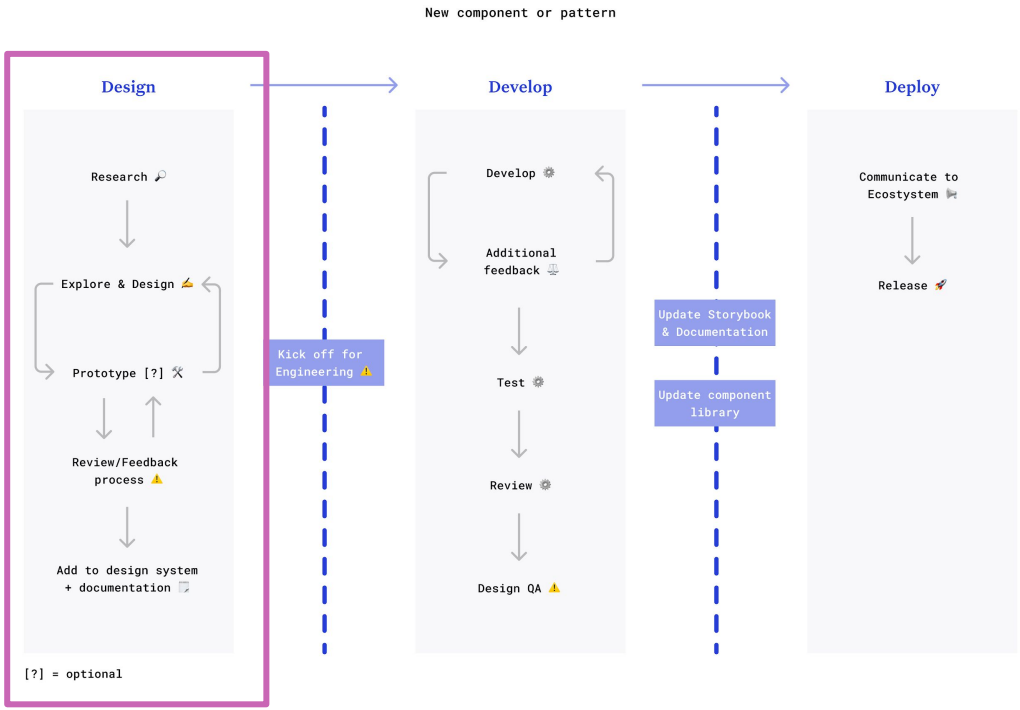
Design phase

Adding design to Figma

Adding it to the design system in Figma, will mark the first major milestone of the pipeline - the component is ready to be built.

All the notes and documentation from the Review/Feedback process should included.



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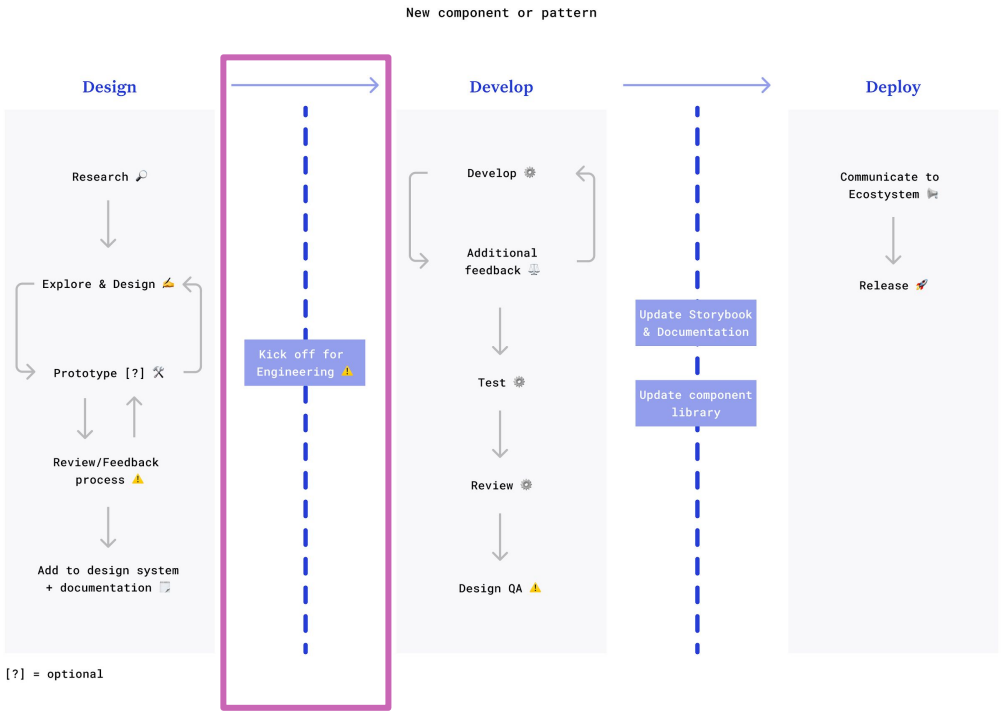
Design phase

Kick off for engineering ⚠️

Set up a time with your engineering counterparts and present the component.

This will help address any additional constraints and help prioritize the component into a sprint.



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Kickoff for Engineering ⚠️

When: Design DRI schedules the meeting

Who:

- ui platform lead
- engineer (ui platform)
- product manager
- Design DRI
- d.tech

Who drives the conversation: Design DRI

Topics to cover:

- draft spec: call out paddings, margins, colors, or any anomalies if needed.
- time needed for testing, adding the component to storybook should be factored in.
- micro-interactions or animations
- share out prototype
- create JIRA ticket (can happen after the kickoff)
- backlog/priority: figure out stack ranking of other components that need to be done.

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Develop phase

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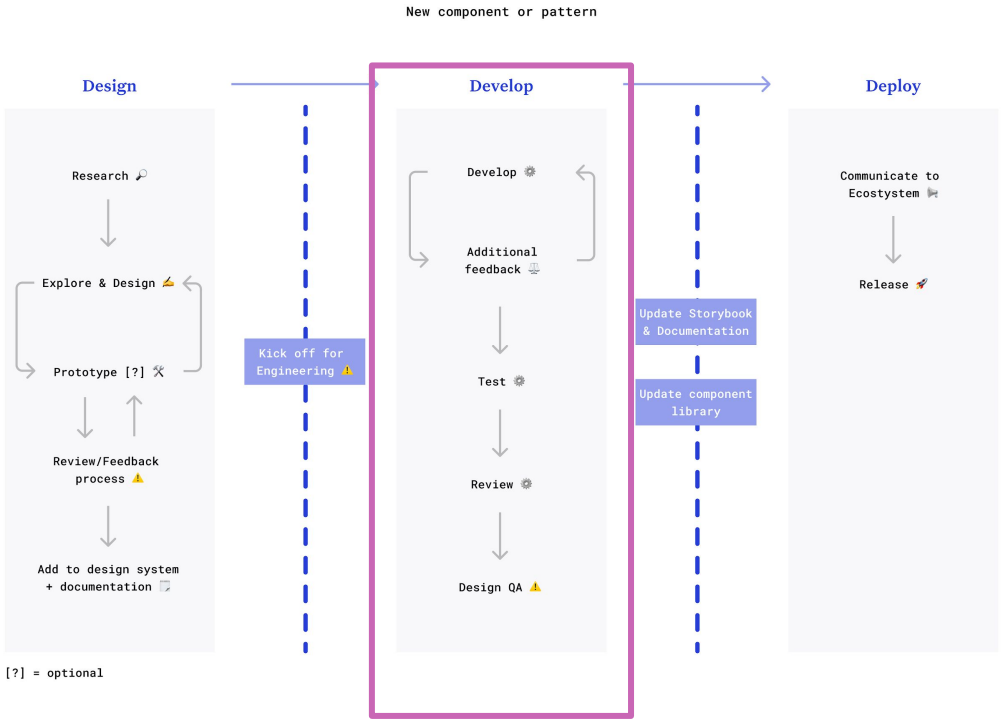
Develop phase

1. Develop ⚙️
2. Additional feedback ⚖️
3. Test ⚙️
4. Code review ⚙️
5. Design QA ⚠️
6. Update Storybook & Documentation
7. Update component library



⚠️ = major milestone

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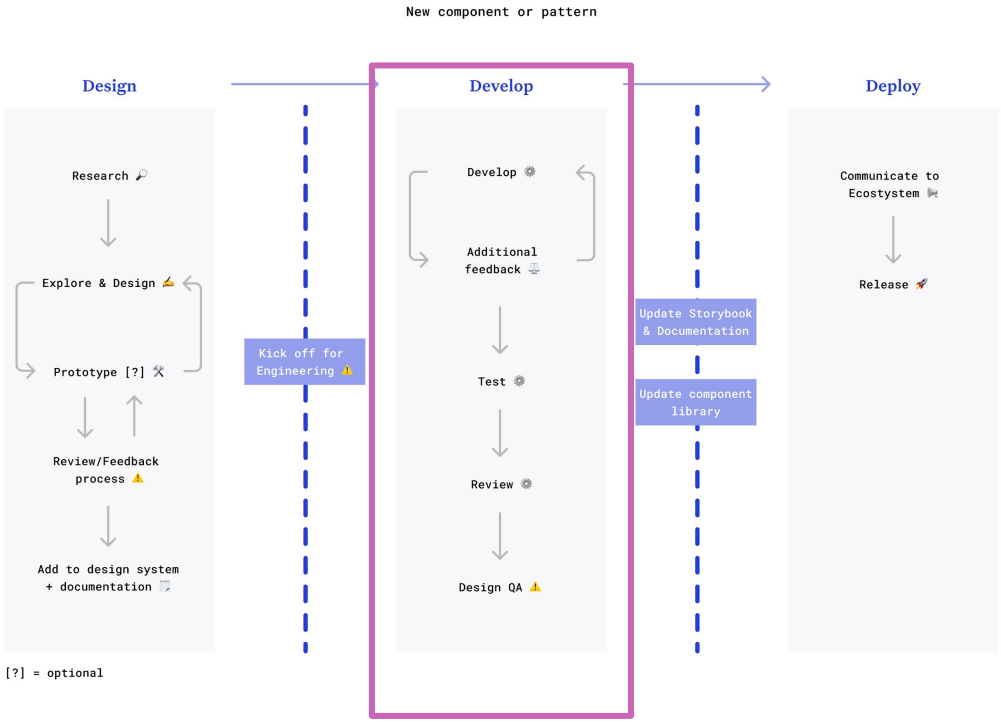
Develop phase

Develop ⚙️

Build.



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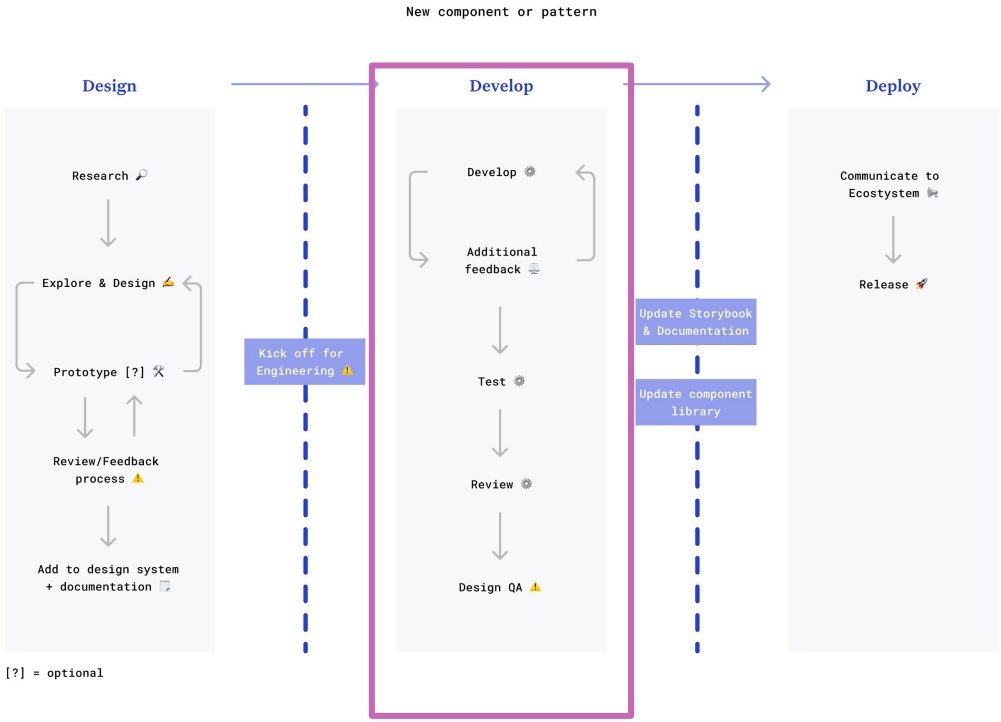
Develop phase

Additional feedback ⚖️

Collaborate with design if there are any outstanding questions, technical constraints, or additional points of feedback.

If there is a need to cut scope, make sure the designer is aware of it to reach a compromise.



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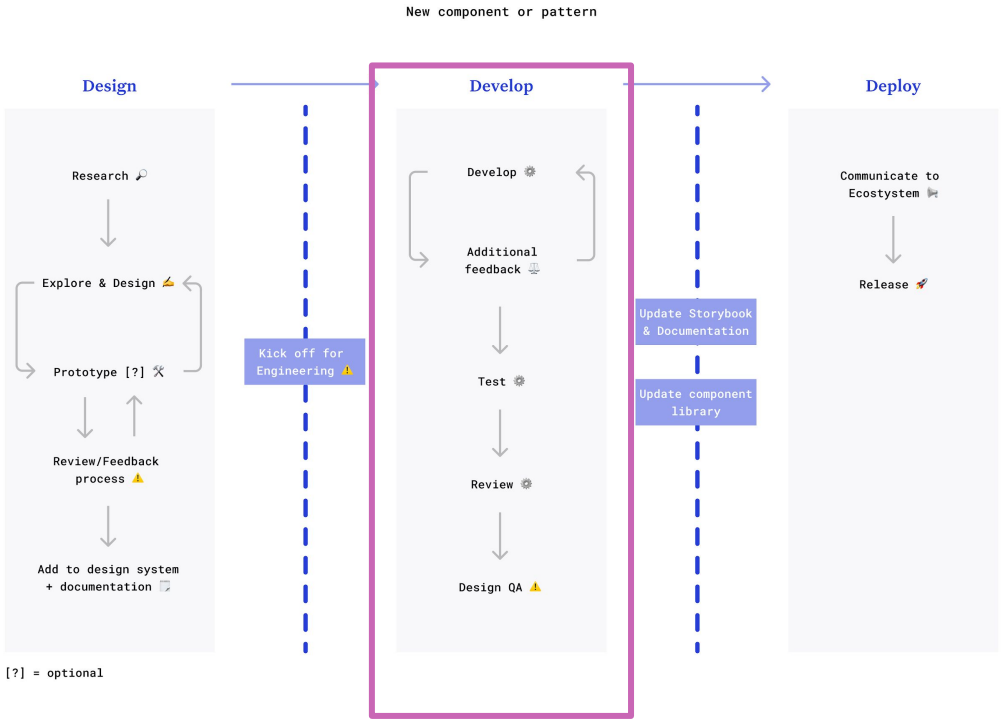
Develop phase

Test ⚙️

code standards ~ test coverage, usage, accessibility



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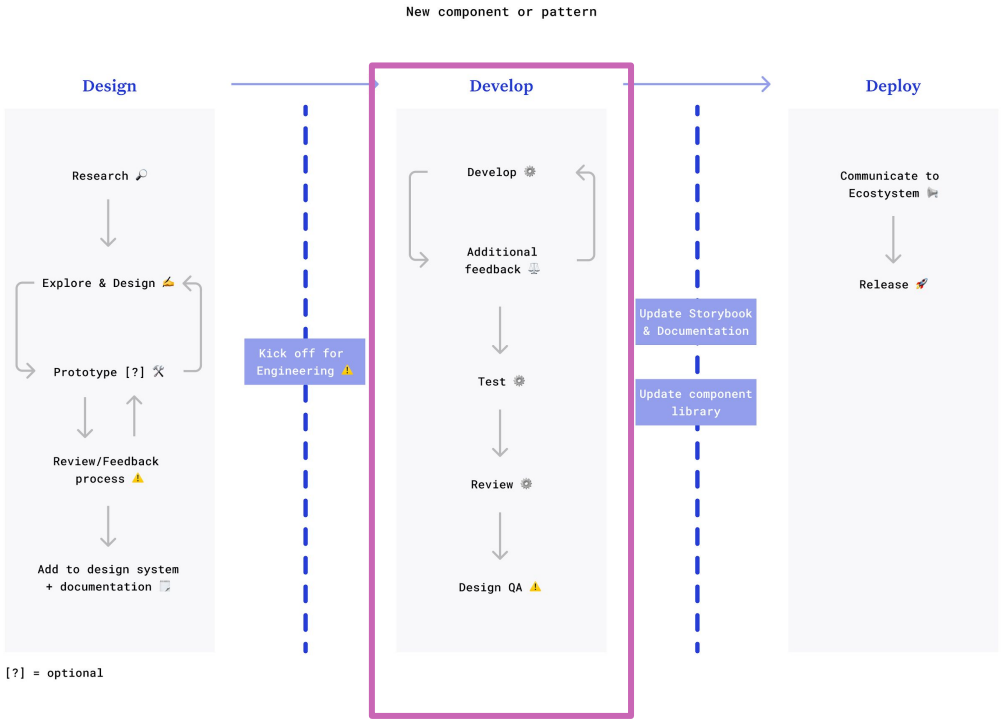
Develop phase

Code Review ⚙️

You know the drill.



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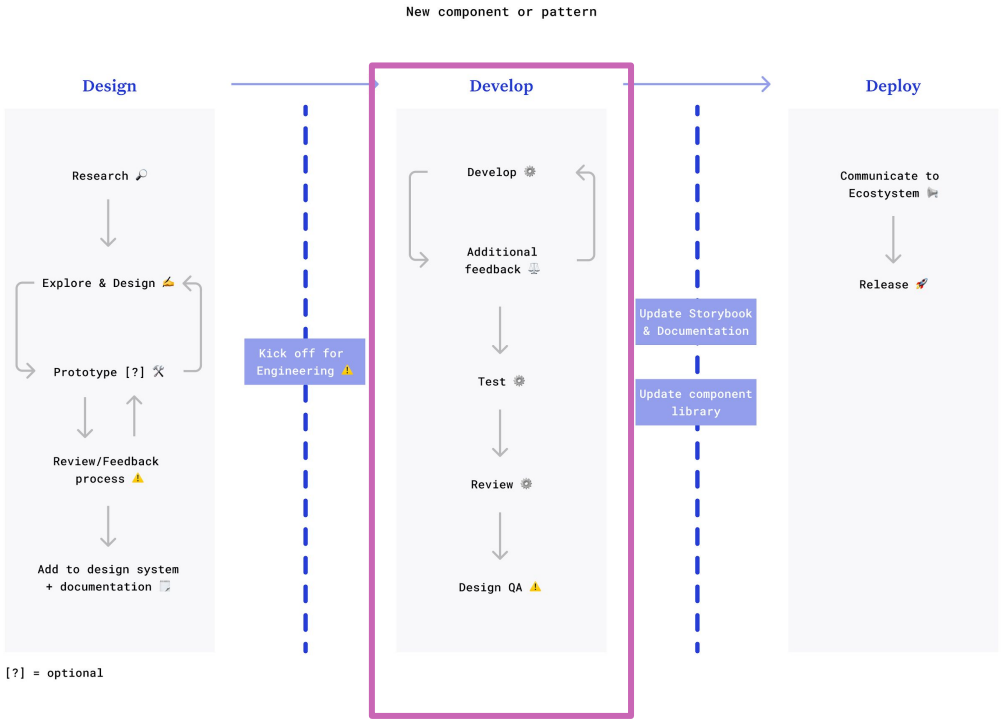
Develop phase

Design QA ⚠️

The engineer implementing the solution should schedule a time to sit down with the designer for a final review of the component.



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Design QA ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

design + engineering:

- check the the component is added to story book
- check in staging/local for fullest context

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Design QA ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

design:

- inspect element and check pixels and match the spec - use best judgement
- avoid bumping up/down colors, text, spacing units
- call out any deviations with the design system or incorrect atoms

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Design QA ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

engineering:

- leverage storybook to verify if component is 100% accessible
- flag any tweaks and make sure the designer updates the designs in Figma if necessary
- deviations are only acceptable if deemed absolutely necessary - *it must have a good justification and it needs to be noted.*
- push back if something is not in the design system

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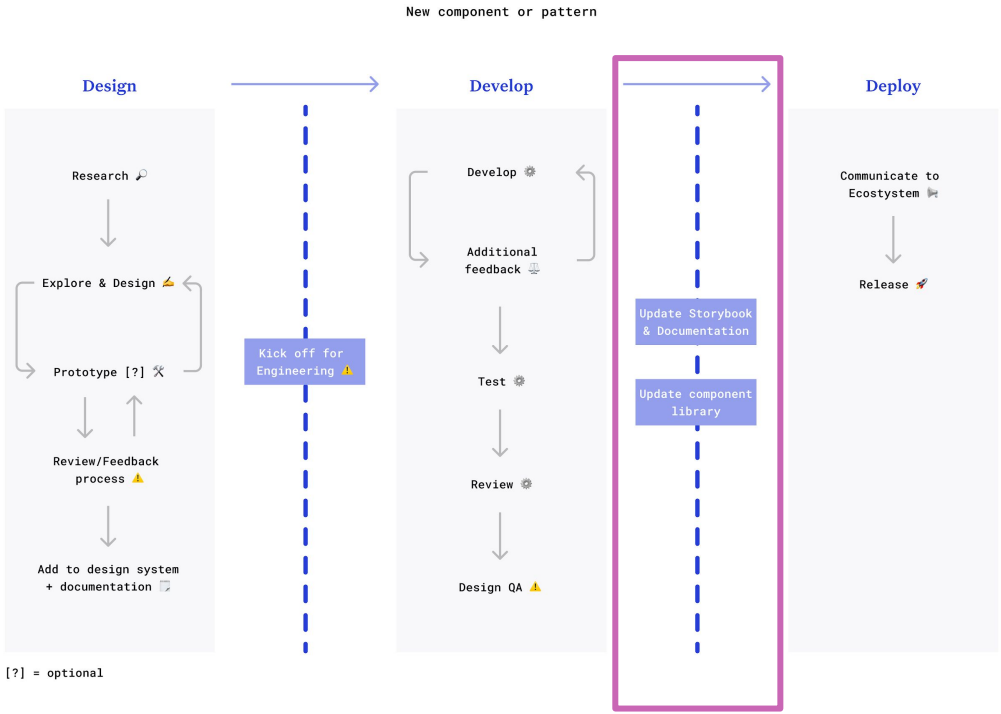
Develop phase

Update Storybook & Add documentation

Add design (styling, usage, etc) + technical documentation (props, interface, etc) to storybook

We want to make sure Storybook reflects the same information + documentation from Figma as well.



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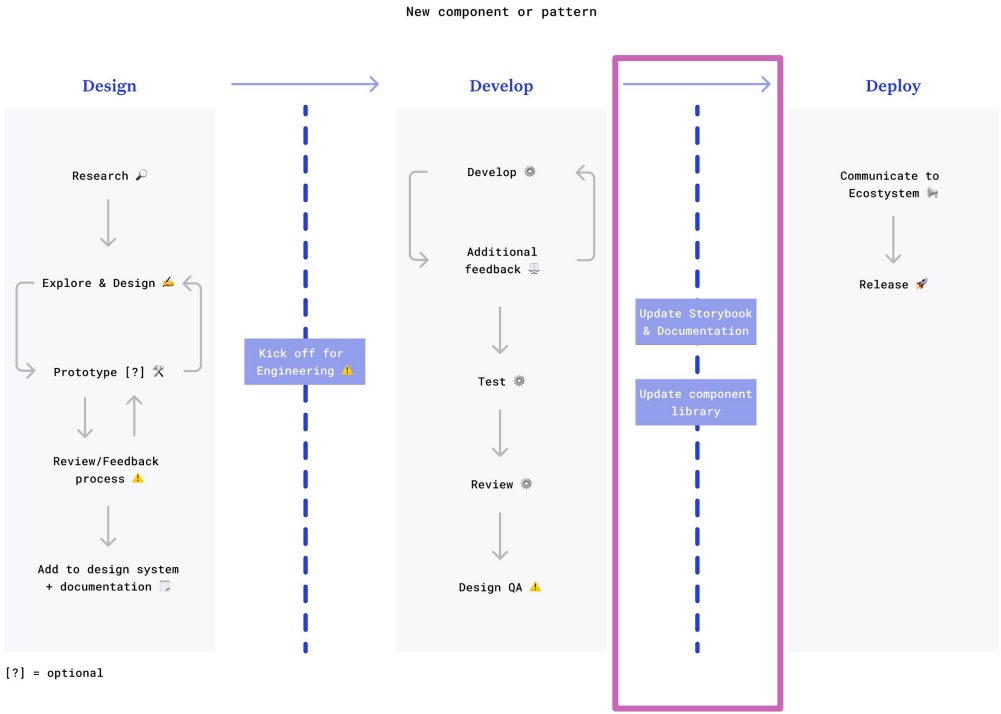
Develop phase

Publish changes in component library

🚀🚀🚀



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Deploy phase

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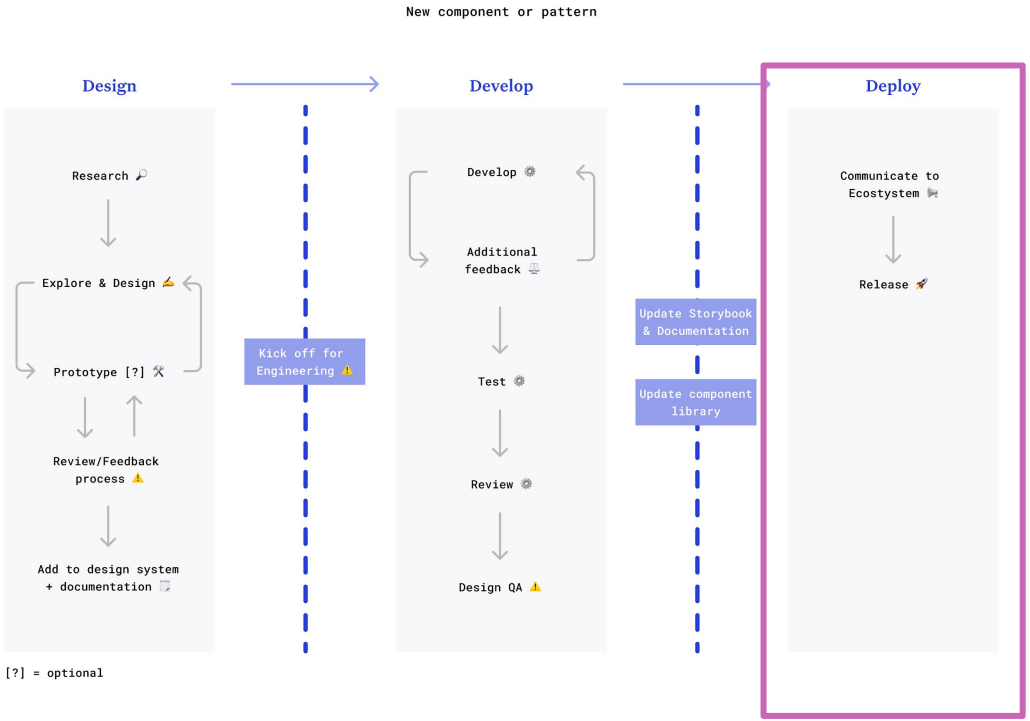
Deploy phase

Communicate to ecosystem

Notify the necessary stakeholders - email or slack group.



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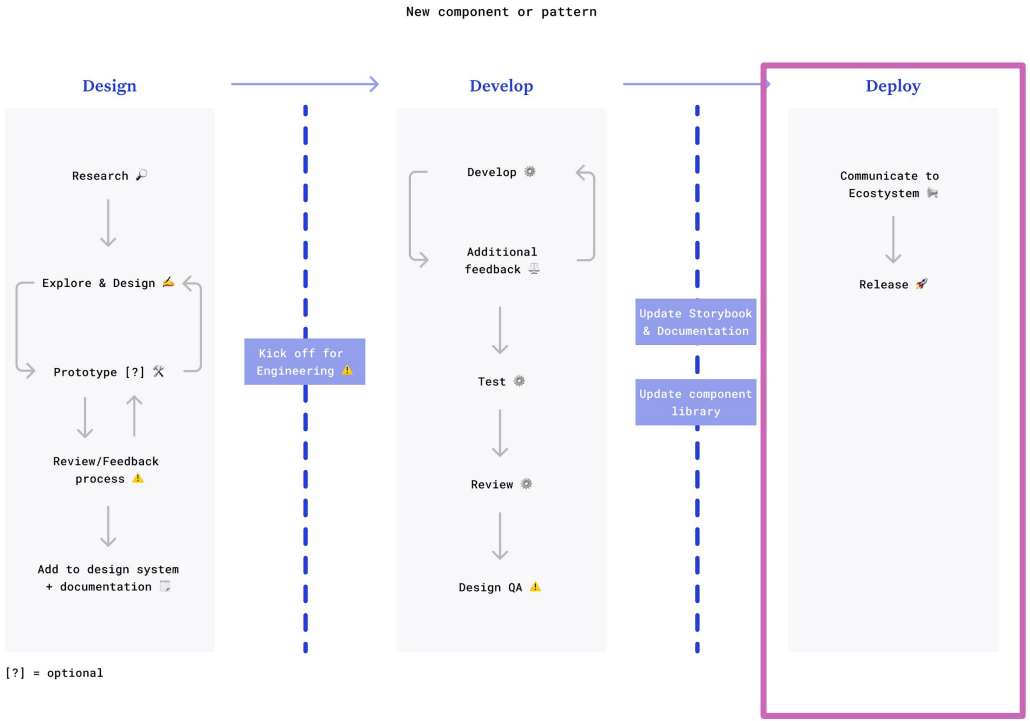
Deploy phase

Release

Check the release notes!



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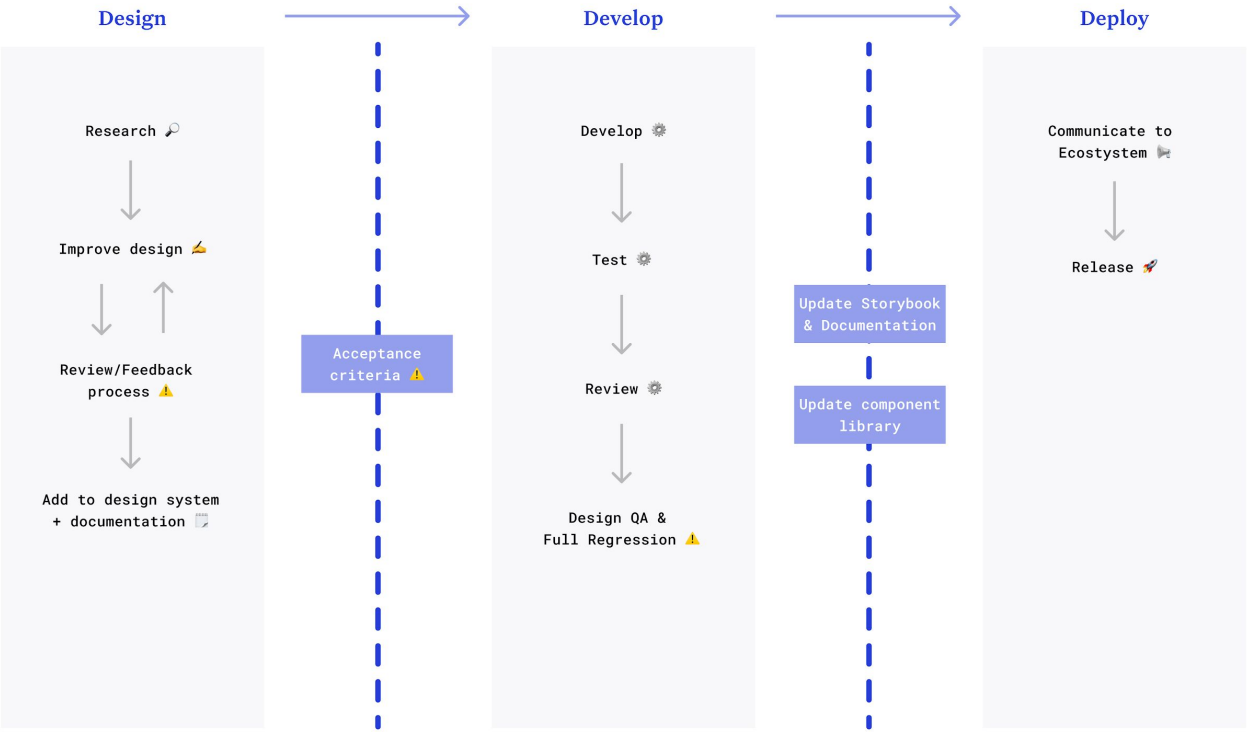
Updating existing component



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Design phase

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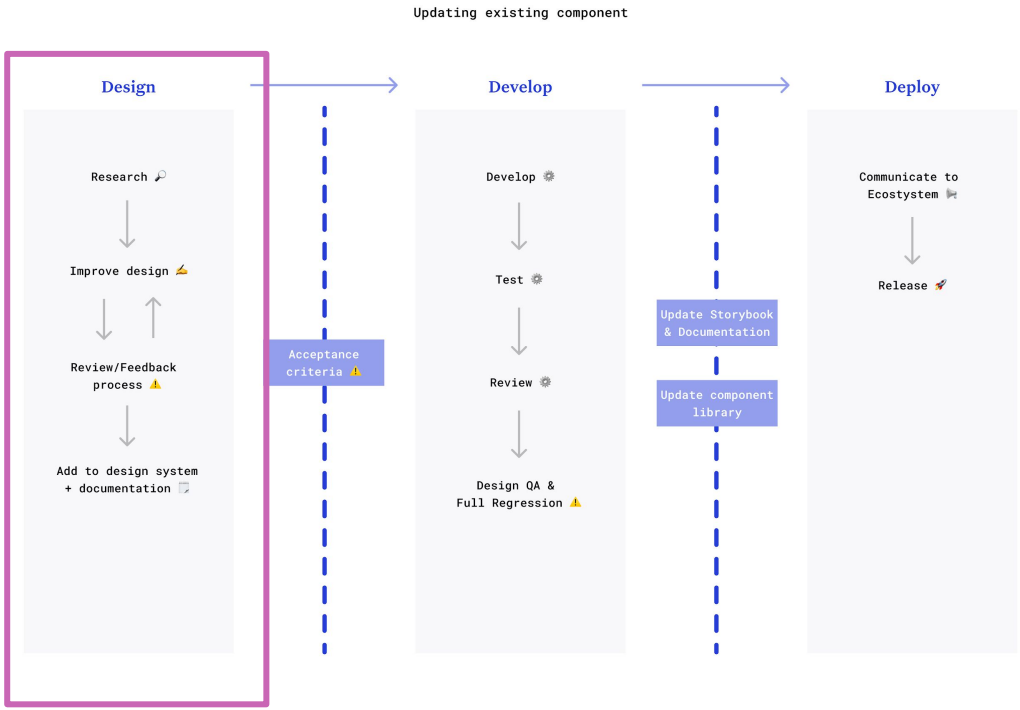
Design phase

1. Research 🔎
2. Improve design ✍️
3. Review / Feedback ⚠️
4. Adding design to Figma 📝
5. Acceptance Criteria ⚠️



⚠️ = major milestone

text = new / different

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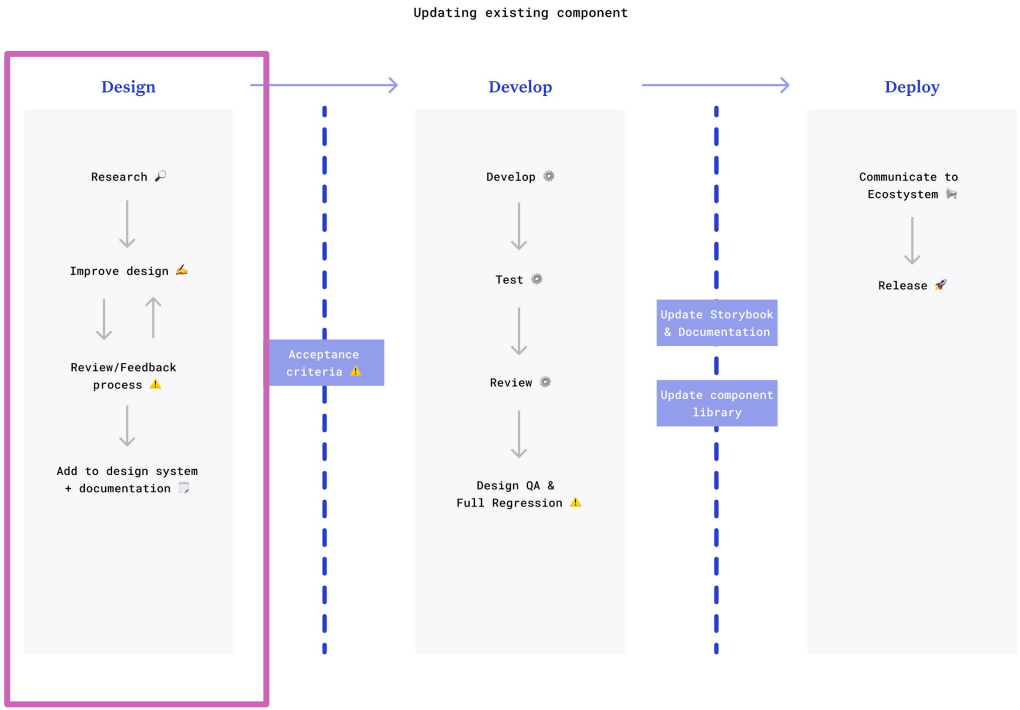
Design phase

Research

Figure out what the use case is and try to narrow down the scope as much as possible.

Reference inspiration or patterns from other products.



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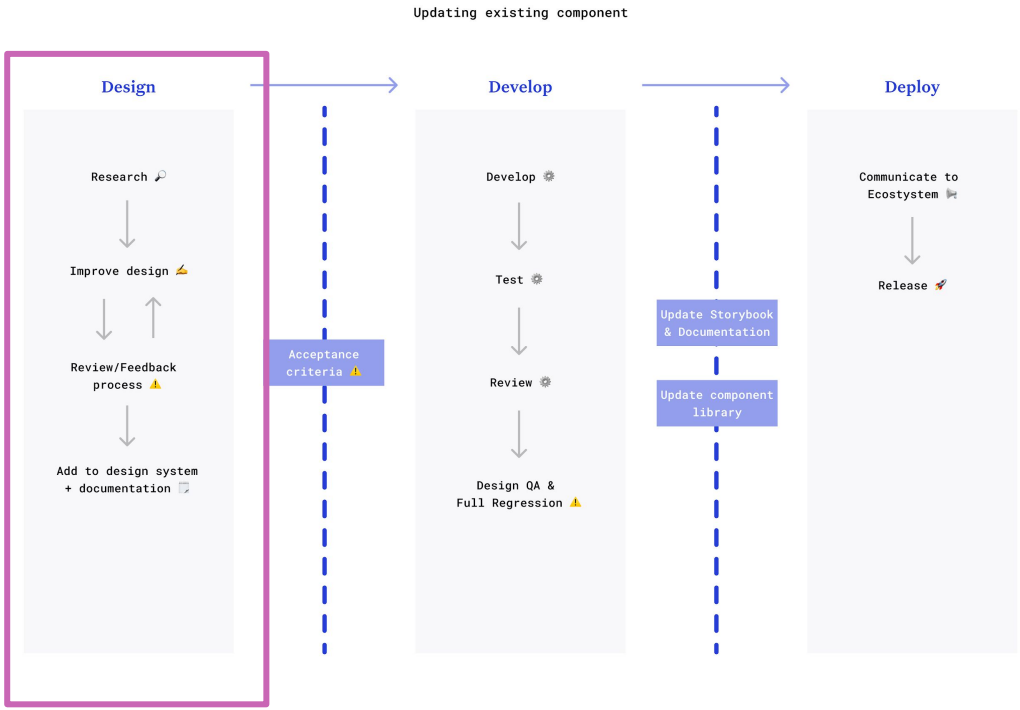
Design phase

Improve design ✍️

Create the actual component or pattern. Get creative and always refer back to the principles of the design system: this will help ground your design decisions.

Make sure to check for color contrast - minimum AA



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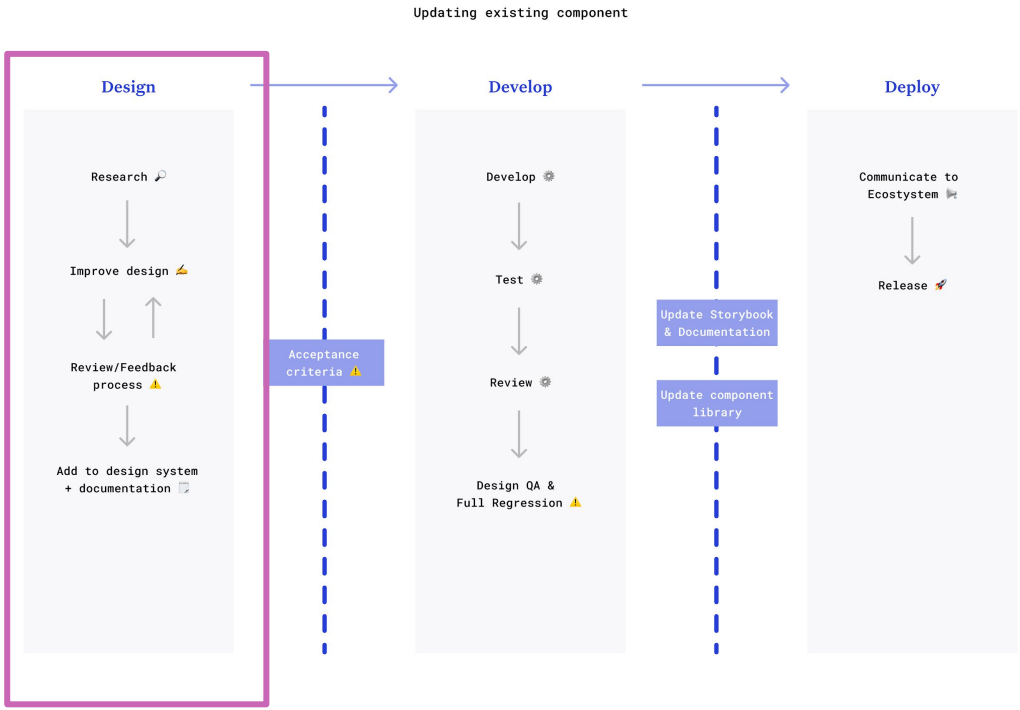
Design phase

Review / Feedback ⚠️

The review process can be iterative, and not all the questions have to be answered all at once.



⚠️ = major milestone

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Review/Feedback ⚠️

When: Once a week during studio time (Tuesdays 4pm, or TBD)

Who's involved:**

- designer or PM or engineer
- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: primary designer

Steps:

1. Consider which designers need to be involved
2. Claim studio time for feedback (questionnaire filled out to best extent)
3. Host feedback session with the people involved
4. Iterate and review (if needed)
5. Make sure the questionnaire (refer below) are answered
6. Host Final Review during studio time

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Review/Feedback

This is the same process

Feedback

Design DRI seeks out feedback during studio time and iterates if necessary.

Final Review

Team discusses and agrees that component or change is the right direction to pursue.

Scheduled during studio time

Weekly Eng Sync

Round table with UI Platform team and PD to inform each other of updates & roadmap.

Every Tuesday @ 4pm

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Feedback (Studio Time)

When: DRI schedules when needed
Who's involved:

- designer or PM or engineer
- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: Design DRI

Steps:
1. Consider which designers need to be involved
2. Claim studio time for feedback (questionnaire filled out to best extent)
3. Host feedback session with the people involved
4. Iterate and review (if needed)

Review/Feedback ⚠️

Feedback (Stud

When: DRI schedules when needed

Who's involved:**

- designer or PM or engineer
- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: Design DRI

What if a product manager or engineer is suggesting an improvement?

The contributor should pair up and work with a designer if they feel strongly about making an improvement to an existing component to the design system.

It is strongly encouraged for the contributor to also try and fill out the form so they can come prepared to work with a designer.

If a change is needed due to a bug, the same process applies, but do include the JIRA ticket if it is already prioritized or if it is important

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Review/Feedback ⚠️

Questionnaire

Every designer is expected to fill out a questionnaire during their design phase.

Questions

- What feature or product is it for?
- Why do we need this component?
- Interaction documentation?
- When to use it? (Usage notes)
- Designers to consult for past work?
- Status?
- Considerations?
- Theme-able attributes?

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Review/Feedback ⚠️

Final Review (studio time)

When: DRI schedules when needed
Who's involved:

- **Design DRI**
- d.tech
- any designers as consultation (previous work, experience, interest)
- 1 designer from each cohort / project work space

Who drives the conversation: Design DRI

We want to address the following:

- improvement - does this improve an existing component or pattern?

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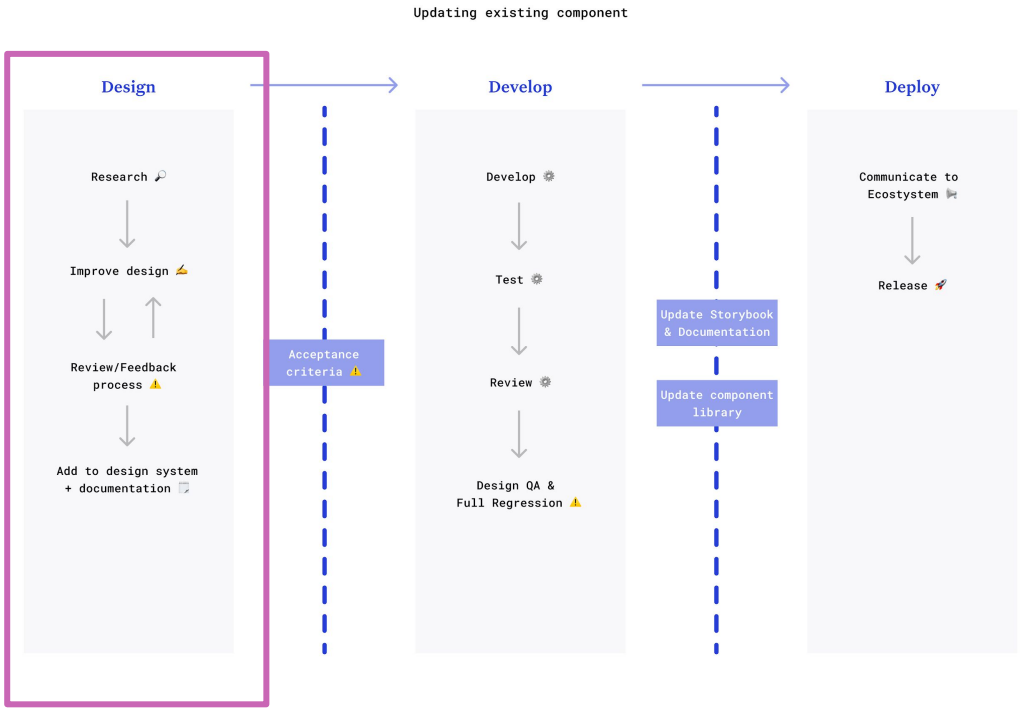
Design phase

Adding design to Figma

Adding it to the design system in Figma, will mark the first major milestone of the pipeline - the component is ready to be built.

All the notes and documentation from the Review/Feedback process should included.



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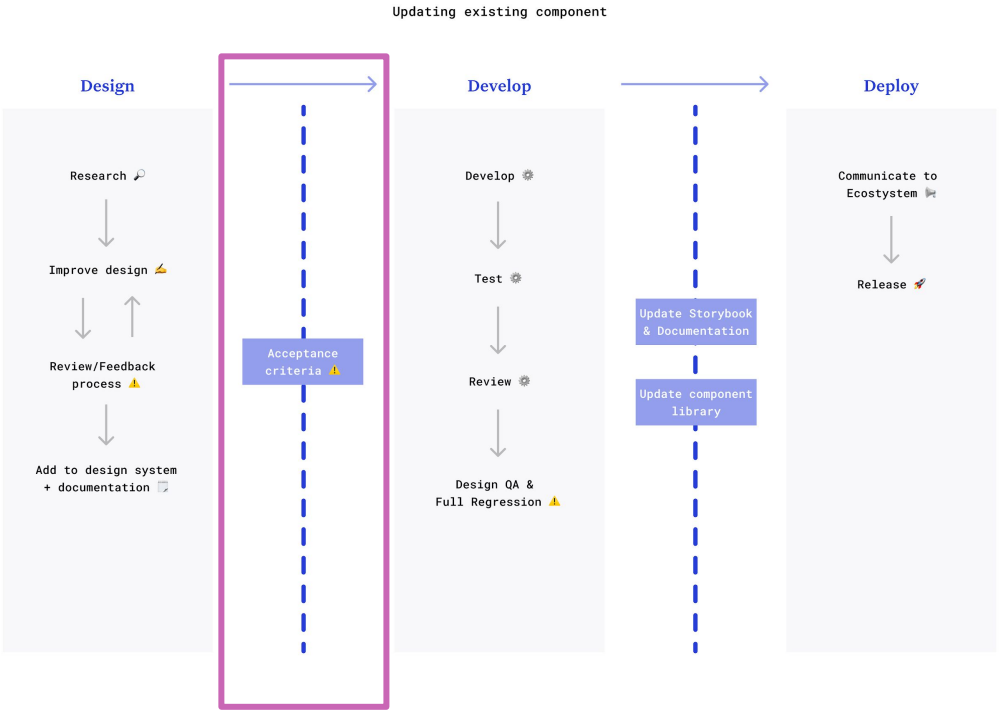
Design phase

Acceptance Criteria ⚠️

Set up a time with your engineering counterparts and present the component.

This will help address any additional constraints and help prioritize the component into a sprint.



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Acceptance Criteria ⚠️

When: primary designer schedules the meeting

Who:

- ui platform lead
- engineer (ui platform)
- product manager
- **Design DRI**
- d.tech

Who drives the conversation: primary designer

Topics to cover:

- call out paddings, margins, colors, or any anomalies if needed.
- micro-interactions or animations
- assess impact of change: we want to make sure we know exactly what parts of the product this change will touch.
- create JIRA ticket / backlog

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Develop phase

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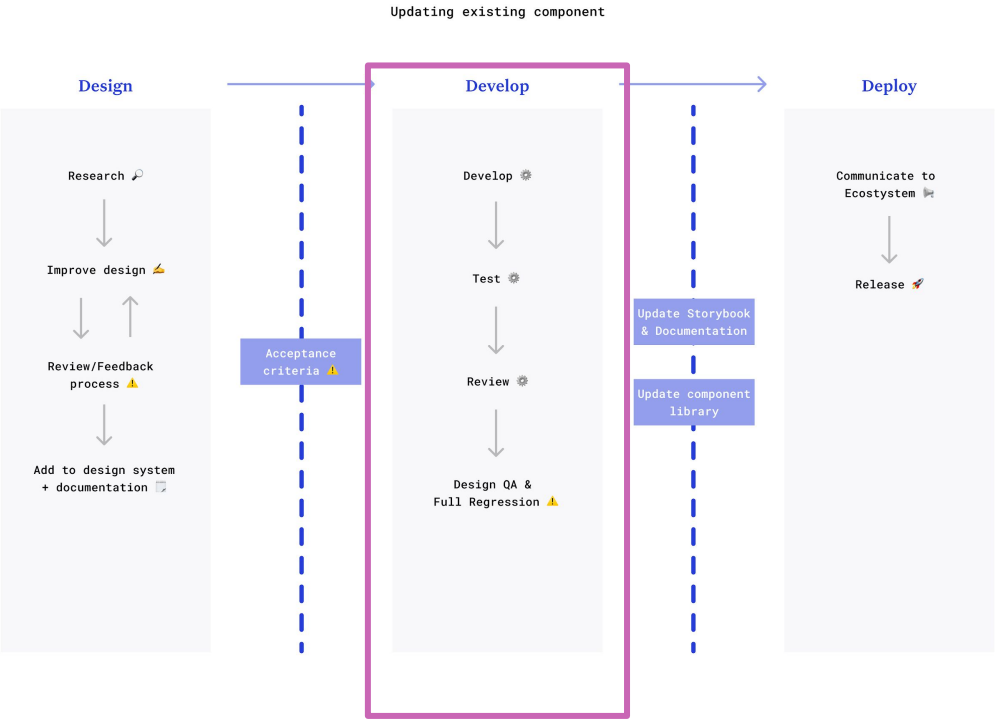
Develop phase

1. Develop ⚙️
2. Test ⚙️
3. Code review ⚙️
4. Design QA & full regression ⚠️
5. Update Storybook & documentation
6. Update component library



⚠️ = major milestone

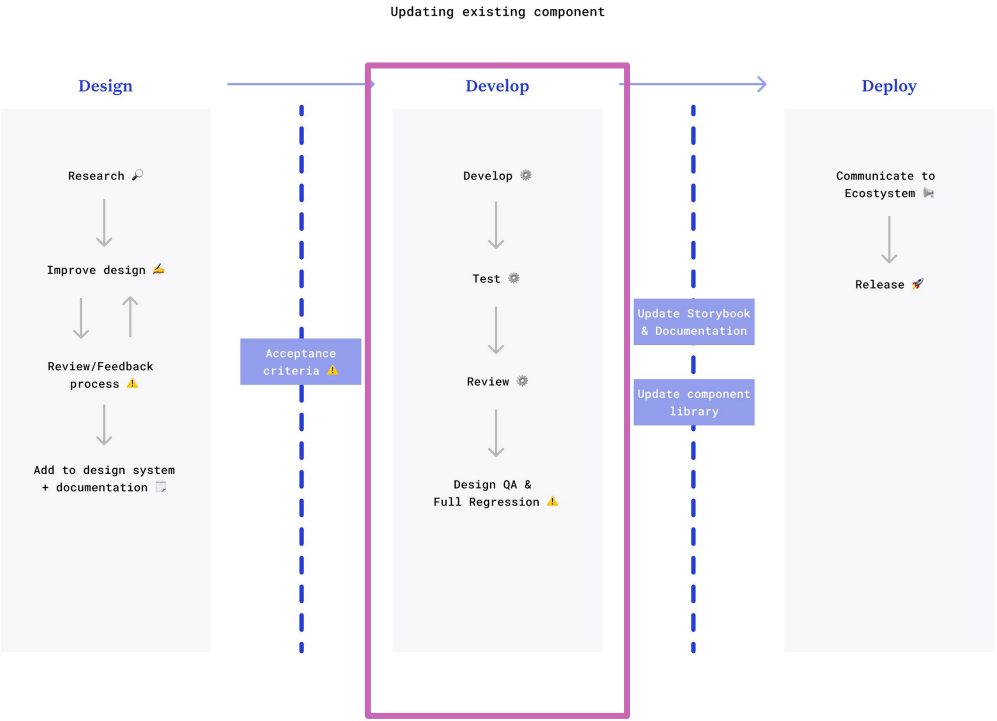
blend

Develop phase

Develop ⚙️
Build.

Test ⚙️
code standards ~ test coverage, usage, accessibility

Code Review ⚙️
You know the drill.



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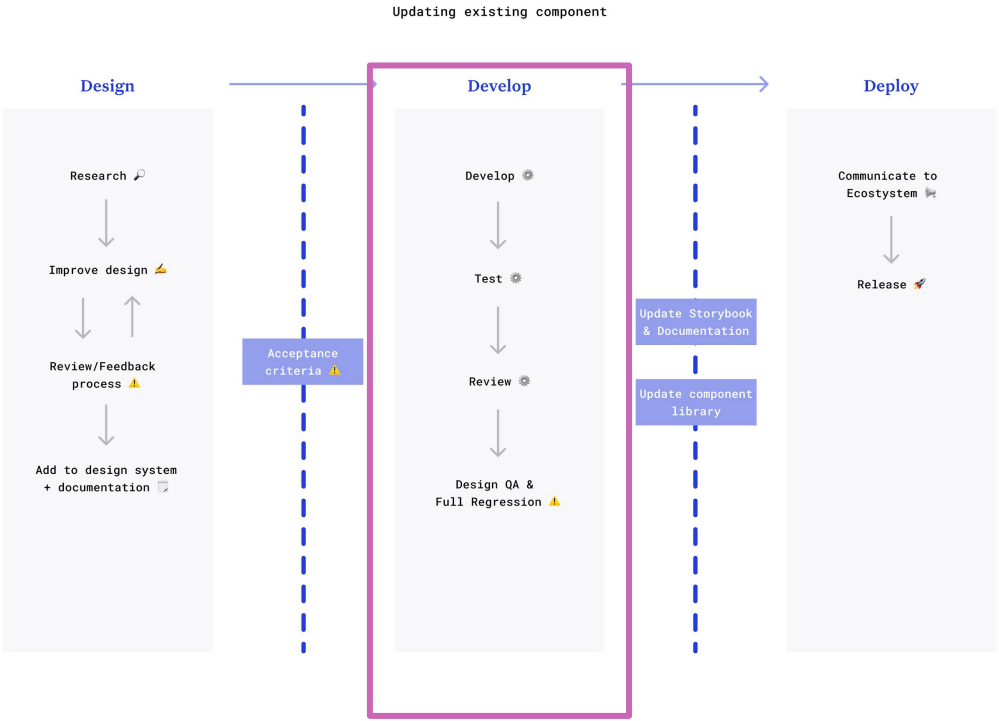
Develop phase

Design QA & full regression ⚠️

The engineer should schedule a time to sit down with the designer for a final review of the component. Depending on the impact, a regression might need to take place.



blend

Design QA & full regression ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

design + engineering:

- check if the change is reflected in storybook
- call out if it needs to be added to storybook
- check in staging/local for fullest context
- if a regression is needed
  - the engineer should have a rough idea of the testing plan
  - schedule a time to run test plan with QA if it was scoped out

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Design QA & full regression ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

design:

- inspect element and check pixels and match the spec - use best judgement
- avoid bumping up/down colors, text, spacing units
- call out any deviations with the design system or incorrect atoms

blend

Design QA & full regression ⚠️

When: engineer schedules the meeting

Who:

- engineer (ui platform)
- **Design DRI**
- d.tech [optional]

Who drives the conversation: engineer

Checklist:

engineering:

- flag any tweaks and make sure the designer updates the designs in Figma if necessary
- deviations are only acceptable if deemed absolutely necessary - *it must have a good justification and it needs to be noted.*
- push back if something is not in the design system

blend

Develop phase

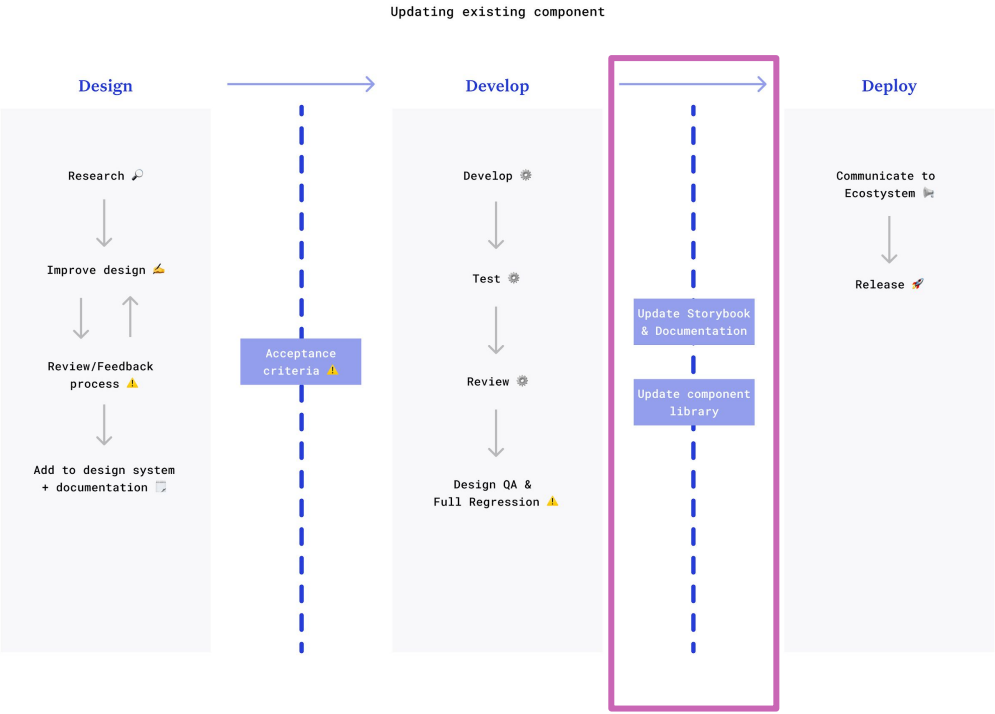
Update Storybook & Add documentation

Add design (styling, usage, etc) + technical documentation (props, interface, etc) to storybook

We want to make sure Storybook reflects the same information + documentation from Figma as well.

Publish changes in component library

🚀🚀🚀



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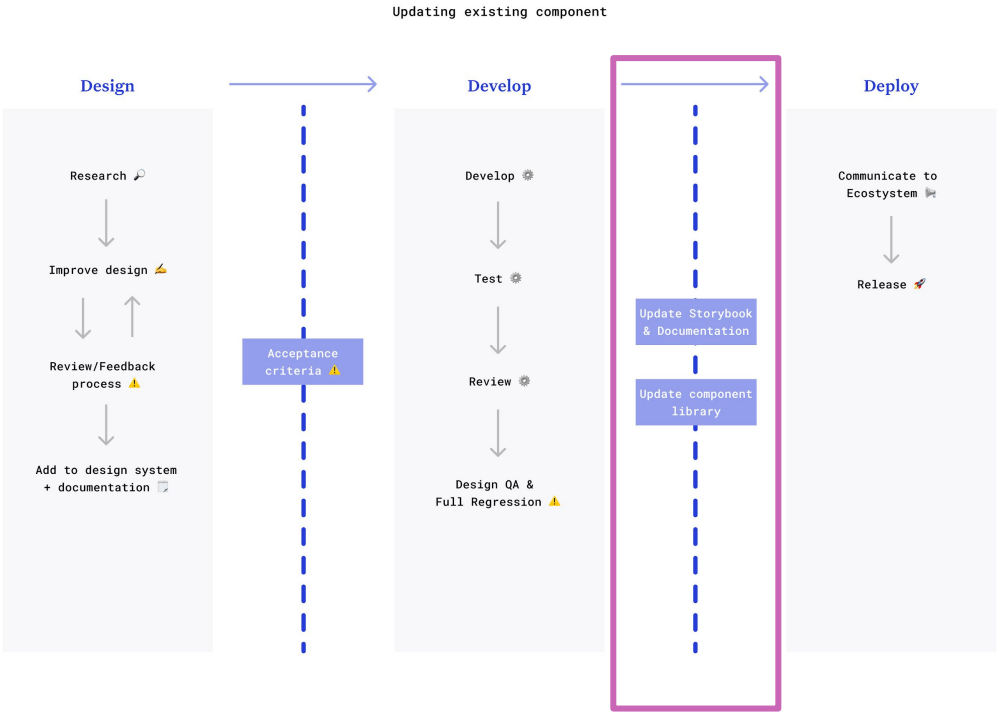
Develop phase



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Deploy phase

blend

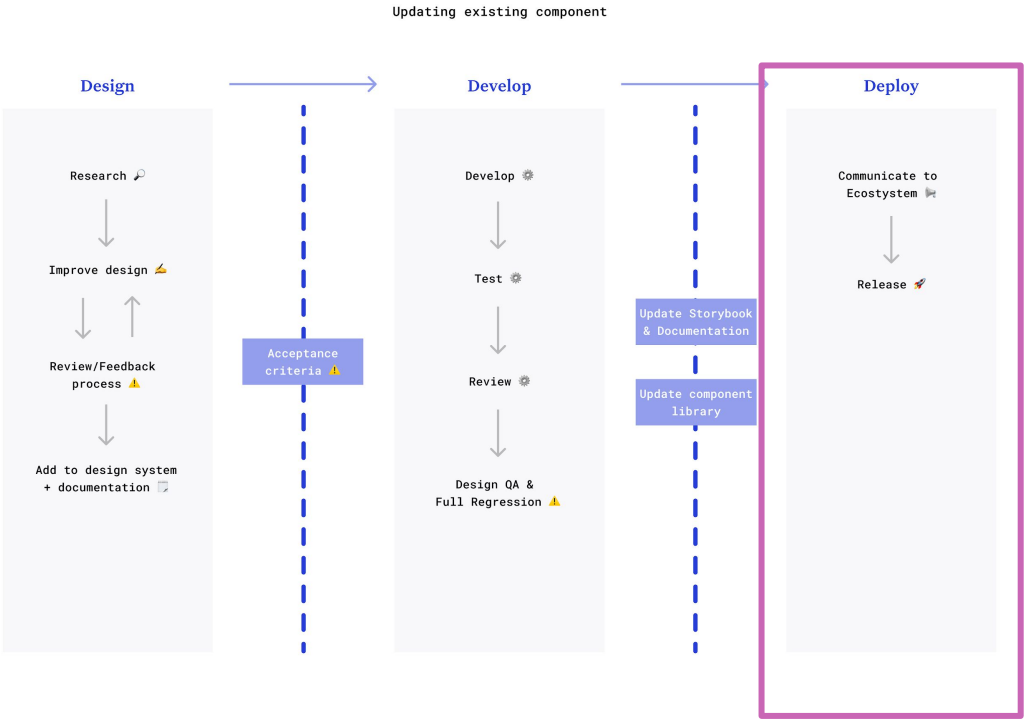
Deploy phase

Communicate to ecosystem

Notify the necessary stakeholders - email or slack group.

Release

Check the release notes!



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How does this all tie together?

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Airtable - grid view

CB Platform DS

HELP | SHARE | BLOCKS

Component

Grid view | Hide fields | Filter | Grouped by 1 field | Sort | Color

	Component Name	Date Added		Owner	New component or ...	What feature or pro...	Why do we need thi...	Usage Notes - whe...	Interaction docume...	Designers to consul...
NEW COMPONENT OR IMPR New component	Count 2									
1	test component	3/5/2020	1:36pm	Jason Chen	New component	USB POC	because hax		N/A	Jason Chen
2	test 2	3/5/2020	1:38pm	Jason Chen	New component	USB POC	fdasfdasfas		fasfasf	Jason Chen
+										
NEW COMPONENT OR IMPR Improvement	Count 1									
3	test improvement	3/5/2020	1:33pm		Improvement					
+										

Drag to adjust the number of frozen columns

3 records

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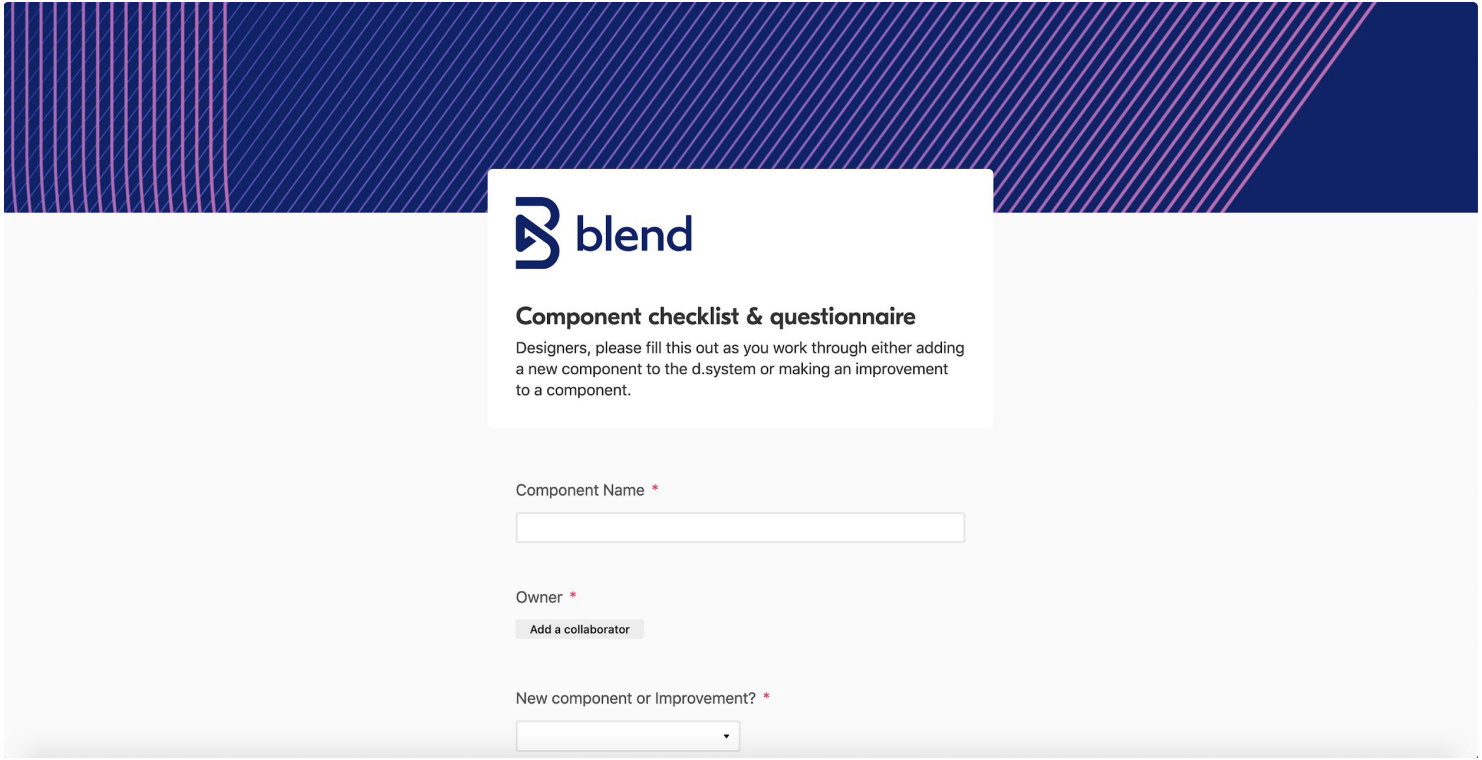
Questionnaire



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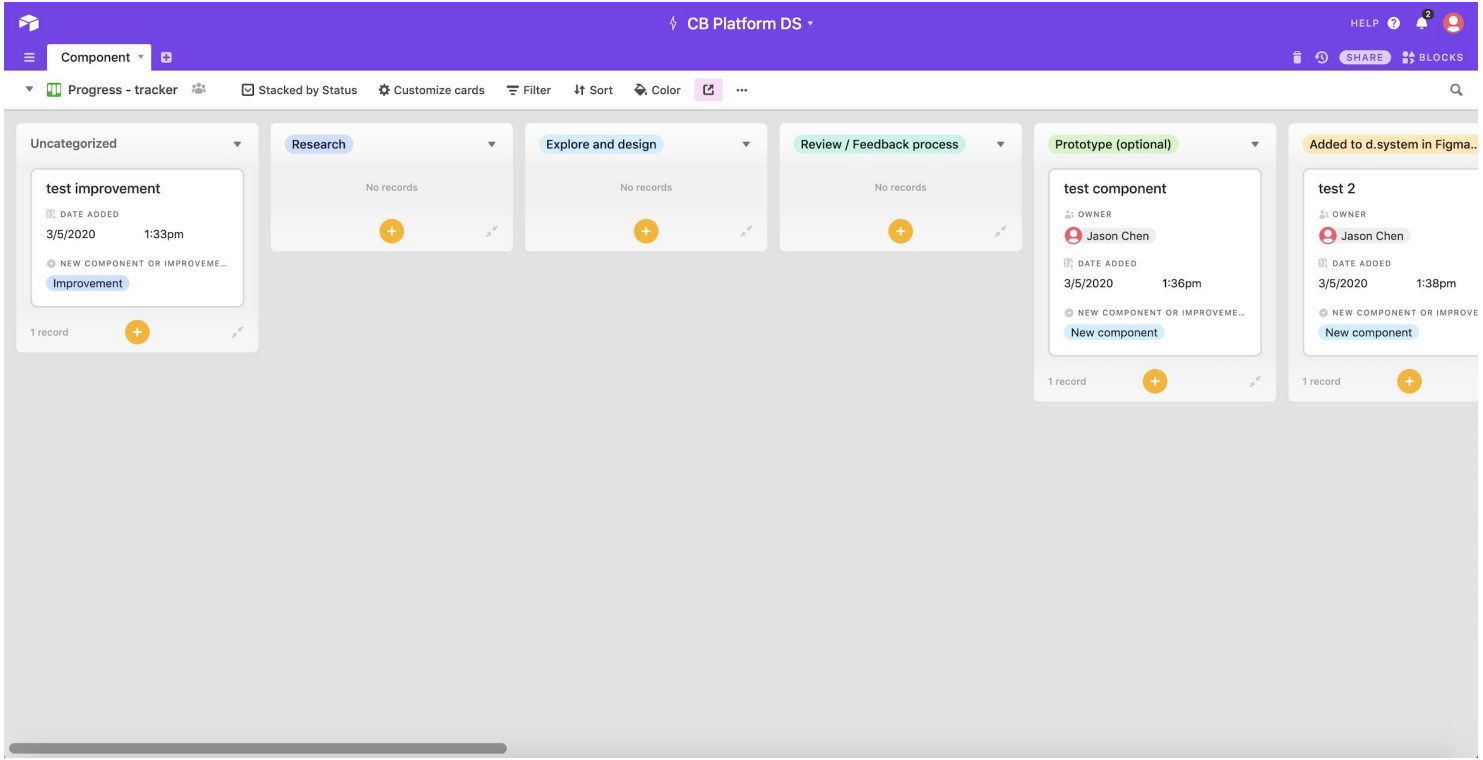
Progress Tracker



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Resources

Documents
Figma link
Storybook link
Airtable links

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Documents

DSystem Process

https://paper.dropbox.com/doc/DSystem-Process--AvquJTju7p_hrocUdff3nzQ5AQ-NozDfc0RvZH4JBi1aox8R

DSystem Principles

https://paper.dropbox.com/doc/LdIln6TJI55MSaFwniyj1

DSystem Milestones - Updating an existing component

https://paper.dropbox.com/doc/GwGRqhERkfNNQE8Yg8Qsp

DSystem Milestones - Adding a new component

https://paper.dropbox.com/doc/2e3a7LaCOAIwQT0arnnbc

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Figma projects

CB Platform DSystem

https://www.figma.com/file/fCpf10UF0s1mMYsUbvKGNA/CB-Borrower-Design-System-V1.0?node-id=575%3A1

USBank POC DSystem

https://www.figma.com/file/4ZECP5IbGSuNb9fXOHfaWk/U.S.-Bank-Shield?node-id=2%3A365

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Storybook links

Consumer-Components storybook

http://blend-ui-kit.s3-website-us-east-1.amazonaws.com/

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Airtable Links

Progress tracker

https://airtable.com/shrkuz2HuiWQgWoSH

Airtable form/questionnaire

https://airtable.com/shrsoE8QDNl2HZbkn

Grid view of all components & changes

https://airtable.com/shrGIjbfTigSZZOam

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Special thanks

Ryan Kois
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Mike Yu
Michael Iseri

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Thank you

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