

# Say It Before You See It

An Introduction to Pre-visual Design

Me.



\*not to scale

This.

70% of projects fail due to lack of user acceptance

[Forrester Research](#)

100% of Joel Salisburies\* suck at going straight to visual design.

- Joel Salisbury

\* or is that “Salisburys?”

Good “Pre-viz” work makes the visual work easier, more user-focused, and more creative.

- Also me.

It's about a shared vocabulary.

It's about a shared spirit.



You + Client + User = 

# General Overview

...of pre-visual design.

- Knowing the Stakeholders
- Knowing the Users
  - UX Personas
- Planning the Interactions
  - User Stories
- The Document

# Knowing the Stakeholder



**Stakeholder:** anyone who gives a damn. Not this guy^

# The Stakeholder

...that means “client.”

They still matter.

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...that means “client.”



They still matter.  
So find out who they are...

# The Stakeholder

...that means “client.”

They still matter.  
So find out who they are...  
...and who they're trying to reach...

# The Stakeholder

...that means “client.”

They still matter.  
So find out who they are...  
...and who they're trying to reach...  
...and what they want to say...



# The Stakeholder

...that means “client.”

They still matter.

So find out who they are...

...and who they're trying to reach...

...and what they want to say...

...and write it down.

# Part 1: The Stakeholders

## Overview

The Lab is operated by Digital Media and Design faculty at the University of Connecticut. This lab is being established in order to develop and test theories, best practices, and process recommendations in the field of Digital Experience Design. The lab will engage with partners of varying types, developing digital products on a variety of platforms: web, mobile, non-touch (e.g., Kinect, Amazon Echo, Google Home, etc), wearables, and UAVs. The findings resulting from these engagements will be published in the form of books, whitepapers, videos, speaking engagements, and blog posts.

### Project Stakeholders:

- Joel Salisbury, Co-PI and Assistant Professor, Digital Media and Design
- Michael Vertefeuille, Co-PO and Associate Head, Digital Media and Design
- Michael Toomey, Research Assistant, Digital Media and Design

## Caveats and Considerations

The website will be subject to the [University of Connecticut Branding Guidelines](#) and should be developed within the [University's Wordpress platform, Aurora](#).

An example.

## Stakeholder's Intended Audiences

We anticipate that the visitors to our website will be comprised of the following:

- Potential Partners
  - Corporations (small and large)
  - Other University Departments
  - Nonprofits (small and large)
- Potential Contributors
  - Undergraduates Seeking Employment
  - Faculty and Staff seeking to engage in the research
- Review Bodies
  - University Administration
  - Legislators
- Researchers
  - Members of the field seeking resources and reading material

An example.

## Stakeholder's Goals

Through this website, the Digital Experience Lab aims to accomplish the following:

- Attract potential partners to engage in sponsored research and collaborative digital projects (i.e., "hire" the lab to produce a unique digital experience)
- Demonstrate expertise and thought leadership in the field of Digital Experience Design through production of high-quality digital projects and publication of field-relevant research outcomes.
- Attract potential staff members and faculty contributors, including:
  - Undergraduate Staff
    - Designers
    - Developers
  - Graduate Students
  - Faculty in Relevant Fields
- Demonstrate value to University administration through research outcomes

An example.

# The Stakeholder

...in the document.

## Part 1: The Stakeholders

- Overview
- Caveats and Considerations
- Stakeholder's Intended Audiences
- Stakeholder's Goals

# Knowing The User

# The User

...this is where it gets fun.

Who are they?

And what do they want?

# The User

...this is where it gets fun.

First, allow yourself to be general.

Start with your stakeholder's audiences and categorize them.

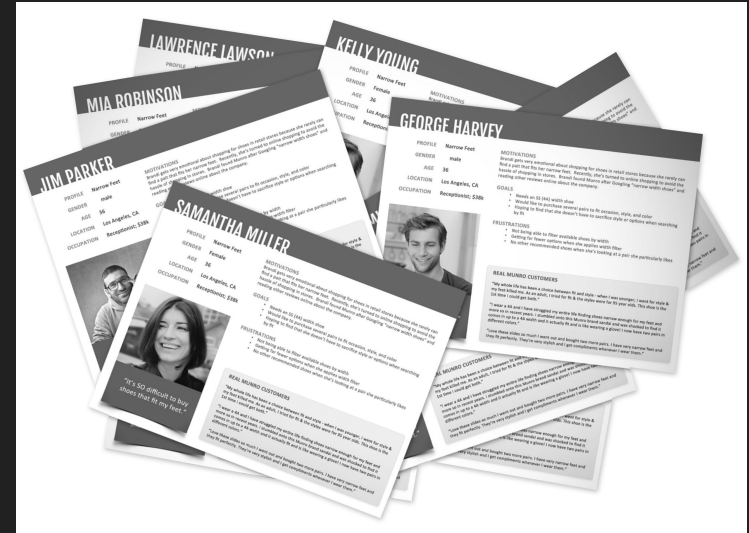


# UX Personas

UX Persona **!=** Marketing Persona

# UX Personas

“A persona is a way to model, summarize and communicate research about people who have been observed or researched in some way. A persona is depicted as a specific person but is not a real individual; rather, it is synthesized from observations of many people.”



Source: [Smashing Magazine](#)

# UX Personas

...and you thought your friends  
were fake.

They're fictional characters that we  
create, and they serve as a  
reminder of who our users are.

And they should be based on real  
research.

# UX Personas

...the best ones...

- Reflect patterns observed in research
- Are realistic, not idealized
- Reflect a potential user's
  - Behaviors
  - Attitudes
  - Needs
  - Challenges/pain points
  - Goals and motivations

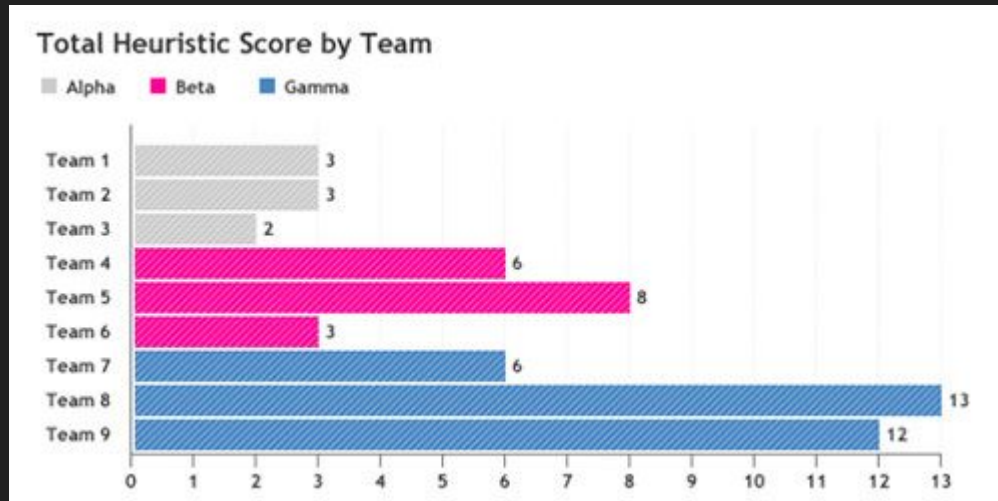
# Now exiting the Land of Make-believe



# UX Personas

...seem unrealistic?

...enter the proto-persona.



Designs based on personas scored higher in heuristic evaluations. - [Long, 2008](#)



# Proto-personas

...fakeception

They're not based on research.

# Proto-personas

...fakeception

They're not based on research.

But why?

y tho



Remember...

It's about a shared vocabulary.

# UX Personas

...why, again?

- **At best**, they're a research-based, accurate representation of your user base.
- **At worst**, they're a way for you and the stakeholders to agree upon who you're designing for.

Sources: [Nielsen Norman Group](#), [Frank Long](#)

# The User

...in the document.

## Part 2: The Users

- Audience Identification
- Primary Audiences
- Secondary Audiences
- Personas

In this section, we provide an overview of the website's users and outline their goals.

## Audience Identification

### Primary Audiences

- Potential Clients and Funding Bodies
- University Administration

### Secondary Audiences

- Potential Employees
- Potential Faculty Partners

General User Categories (in the document)

# Proto-Persona (Webdev Conference Attendee)

**Name:** Jane Smith

**Role:** Senior Web Developer, University of Whatever

**Quote:** *“Why am I the only one who cares about doing it right?”*

**Overview:** Jane is a senior webdev at a major research university. She’s interested in improving the web presence of her university through adherence to best practice and industry standards. Sometimes, it feels like she’s shouting into the wind.

## Goals and Tasks:

- Gain insight into UX process and how it can help her in her job;
- Gather “convince-your-boss” material to help improve the work of her team;
- Spend 45 minutes pretending she has time to actually inject any process into her team’s workflow.

## Frustrations:

- Too many projects, too little time;
- Pressure and opposition from bosses, teammates, and clients;

# Planning the Interactions



# User Stories

...what are they?

“Once you have a clear idea of **who** might use your product, it’s time to map out **how** they might use your product.”

[via UXPin](#)

# User Stories

...might look familiar.

*As a \_\_\_\_\_, I want  
\_\_\_\_\_, so that  
\_\_\_\_\_.*

# User Stories

...might look familiar.

- Borrowed from Agile

# User Stories

...might look familiar.

- Borrowed from Agile
- Keeps the team focused on the interactions

## BRAND CAMP

by Tom Fishburne

# ATTACK OF THE FEATURE CREEP

VOILA, OUR NEW  
PRODUCT - SIMPLE  
AND ELEGANT

GREAT, BUT CAN  
WE ADD A...

MONTH 1

WE'VE INCORPORATED  
YOUR FEEDBACK

I HAD ANOTHER IDEA  
IN THE SHOWER...

MONTH 2

HERE ARE A FEW  
THOUGHTS I WROTE  
ON A COCKTAIL NAPKIN

MONTH 3

IT MUST APPEAL TO BOTH  
BOOMERS AND TWEENERS

MONTH 4

IT'S JUST NOT SINGLE-  
MINDED  
ENOUGH

MONTH 5

© 2005

SKYDECK CARTOONS.COM

# User Stories

...might look familiar.

- Borrowed from Agile
- Keeps the team focused on the interactions
- Help prevent feature creep

# User Stories

...might look familiar.

Identify a full set of user stories before doing any visual design. It can save you trouble down the road.

# User Stories

...might look familiar.

For each user story, see if it can be broken down into smaller, more specific stories. “Epics” are fine for a high-level overview of the needed features, but don’t leave things too broad. Get specific.



# User Stories

...might look familiar.

**Never put a design element in an interface that doesn't have a corresponding user story \*.**

Documenting the what and why of each element promotes organization and makes the handoff to the design team much smoother.

\*[via UXBooth](#)

# User Stories

...encourage creativity



# User Stories

...should be associated with tasks.

“As a new visitor I need to create a new account.”

- **Create a new username**
- **Enter my password**
  - Re-enter to verify
- **Enter an email address**
- **Submit information**
  - Receive feedback regarding status of action

Story	Detailed Stories	Priority
As <b>any user</b> , I can easily navigate between views.		High
As a <b>new user</b> , I can create an account, <b>so that I can save my To-Dos for later.</b>	<ul style="list-style-type: none"> <li>• Enter Username</li> <li>• Enter password <ul style="list-style-type: none"> <li>◦ Confirm password</li> </ul> </li> <li>• Enter email address</li> <li>• Submit</li> </ul>	High
As a <b>returning user</b> , I can view my open to-dos.	<ul style="list-style-type: none"> <li>• Sort to-dos <ul style="list-style-type: none"> <li>◦ By Due Date</li> </ul> </li> </ul>	High
As a <b>returning user</b> , I can add a new to-do.	<ul style="list-style-type: none"> <li>• Enter To-Do Name</li> <li>• Enter a description</li> <li>• Select a due-date</li> </ul>	High
As a <b>returning user</b> , I can edit an existing to-do.	<ul style="list-style-type: none"> <li>• Select the to-do</li> <li>• Change the name</li> <li>• Change the description</li> <li>• Change the due-date</li> <li>• Mark as complete</li> </ul>	High

# User Stories

...can be tied to personas

**As Jane Smith the senior web developer, I need to hear clear, actionable ideas so that I can more easily convince my boss that UX process is important.**

# User Stories

...are Design-Agnostic



# The Interactions

...in the document.

## Part 3: The Interactions

- Stories

# The Document



# The Document

...is about doing the RIGHT  
work.

## Part 1: The Stakeholders

- Overview
- Caveats and Considerations
- Stakeholder's Intended Audiences
- Stakeholder's Goals

## Part 2: The Users

- Audience Identification
- Primary Audiences
- Secondary Audiences
- Personas

## Part 3: The Stories

# Okay bye.

For these slides and a Previsual Document template, check out [pre-viz.com](https://pre-viz.com).

To send me hatermail and make me feel sad, hit me up at [@joelsalisbury](https://twitter.com/joelsalisbury) or [joel@uconn.edu](mailto:joel@uconn.edu)

# BYE!

