503108

UI/UX DESIGN

CHAPTER 1: THE USER EXPERIENCE PROCESS

LESSON 02 – Establishing Requirements

OUTLINE

1. Understand the Current State

2. Gather Ideas from Stakeholders

3. Basic Steps of User Research

4. Define Your User Groups

5. Choosing Research Techniques

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1. Understand the Current State

- Heuristic Analysis
  - A heuristic analysis is a technique you can use to evaluate the usability of an existing design, based on best practices within the user experience field

- Why Conduct a Heuristic Analysis?
  - Conducting this kind of analysis is a relatively quick and inexpensive way of obtaining feedback on a design

- How Do I Do It?
  - Gather product and project background knowledge
  - Choose the heuristics to use
  - Walk through prioritized areas of the site

1. Understand the Current State

- Gather product and project background knowledge

  - The objectives of the site

  - A list of the main user groups that need to be supported

  - Information on the kind of environment users are likely to be working in

- Choose the heuristics to use

  - List of design principles: www.asktog.com/basics/firstPrinciples.html

- Walk through prioritized areas of the site

1. Understand the Current State

Observation #4
The search function does not appear to be bringing back all possible results.

HIGH Concern

A sample test of the search function yielded mixed results. Searches using a name in a relatively new post, featuring a less commonly covered topic, occasionally returned no results. It also appears that primary search returns link to new stories only, not videos.

Recommendations
1. Ensure newly added content is indexed and searchable before, or very shortly after, being publicly available.
2. Consider surfacing related content when search results are brought back—for example, stories in similar categories or with similar tags—so users who are exploring have more threads to follow.
3. Consider universal search that presents results organized by category.
4. Use search term logs to understand commonly searched items. This may also provide insight into items that users are having trouble finding.

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2. Gather Ideas from Stakeholders

- Outline roles and responsibilities
    - Involves members of the project team interviewing key business stakeholders to gather ideas
    - Business stakeholders are those within the company who have a business oriented stake in the success of the project
    - Project sponsor (or sponsors) is the business stakeholder who also has direct responsibility for the success of the project, often at a relatively high level in the company, such as director
    - Project team includes people officially assigned to the project as ongoing resources

2. Gather Ideas from Stakeholders

- Gather the Right Stakeholders

  - To gain an understanding of relevant project-related ideas, needs, knowledge, and frustrations from various points of view

  - Involving a large variety of people is frequently a good idea

  - Schedules and budgets must be kept in mind

2. Gather Ideas from Stakeholders

- Create a Plan for the Meetings
  - Have a different plan for each group
  - Decide on the level of detail you're aiming for in the meetings

Sales: Requirements-Gathering Meeting

Participants

Inside Sales: Jenny Bee, Tracy Kim, Joseph Arnold

Lead Management: Kevin Abernathy, Cat Parnell

Time frame: 2 hours

Objective: Understand the current sales process and identify issues and opportunities for how the web could better support that process.

Background: We have reviewed a PowerPoint presentation on the purchasing process, which provided a good background on how purchasing decisions are made. We also plan to talk to the Customer Service team.

2. Gather Ideas from Stakeholders

- Run the Meetings Effectively

  - Ensure a Shared Vocabulary Is Used

  - Listen to Ideas and Dig Down to Needs

- Coalescing Requirements

  - Provide insight into the overall need that must be addressed

  - Represent and consolidate needs provided by different stakeholders

  - Give direction for design, without being too specific about how it will be accomplished

  - Serve as a distinct unit of work for purposes of prioritization and tracking

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3. Basic Steps of User Research

- Define your primary user groups

- Plan for user involvement

- Conduct the research

- Validate your user group definition

- Generate user requirements

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4. Define Your User Groups

- Create a List of Attributes
  - Documents explaining company strategies
  - Market segmentations of current customers and other demographic data gathered by the marketing department
  - Previously conducted user research
  - Surveys, such as user satisfaction surveys and feedback forms
  - Customer service reports covering frequently occurring issues

4. Define Your User Groups

- Prioritize and Define

  - Which of the attributes listed above do you think have the greatest influence on how and why different user groups might use the site

  - Focus on the ones that you think will have the greatest impact on a user's goals or behavior

  - Prioritize those attributes

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TABLE 6.1 Common User-Research Techniques

ACTIVITY	WHAT IT IS	WHEN IT'S USEFUL	CHALLENGES	TYPICAL TIME FRAME *
User Interviews	A one-on-one conversation with a participant who belongs to one of the site's primary user groups.	There is access to users, but type of access (in person, by phone, etc.) varies. You want to gain context but can't go to the user.	Getting straight-forward opinions. It can be hard to gather information about attitudes and context, especially if interviews are conducted remotely.	2–4 weeks for 12 interviews: Up to a week to plan, 1–2 weeks to interview, and up to a week to compile results.
Contextual Inquiry	An on-site visit with participants to observe and learn about how they work in their normal, everyday environment.	The project team has little information on target users. Users work in a unique environment (e.g., a hospital). Users are working with fairly complex tasks or workflows.	Gaining access to participants. Going to users' environment may raise concerns about security, intellectual property, and intrusiveness. For business applications, it can be easier to visit on a workday.	3–4 weeks for 12 inquiries: 1 week to plan, 1–2 weeks to observe, 1 week to analyze and report results.
Surveys	A series of questions consisting of mainly closed-end answers (multiple choice) used to identify patterns among a large number of people.	You want to state results in more quantitative terms (e.g., "80% of the target user group said they never purchase cars online"). You're more interested in gathering information about preference than actual performance.	Getting an appropriate sample. Making sure questions are well-written so that you get accurate answers without leading respondents to a particular answer.	3–4 weeks for a short-run survey: 1 week to plan and write the survey, 1–2 weeks to run the survey, 1 week to analyze and report results.

5. Choosing Research Techniques

TABLE 6.1 Common User-Research Techniques (*continued*)				
ACTIVITY	**WHAT IT IS**	**WHEN IT'S USEFUL**	**CHALLENGES**	**TYPICAL TIME FRAME ***
Focus Groups	A group discussion where a moderator leads participants through questions on a specific topic. Focuses on uncovering participants' feelings, attitudes, and ideas about the topic.	The team believes that users' attitudes will strongly influence their use of the solution (e.g., if there have been problems with it historically).	Understanding how to target your questions to get the right information out. Facilitating the group effectively.	3–4 weeks: 1 week to plan and write questions, 1–2 weeks to conduct focus groups, 1–2 weeks to analyze and report results.
Card Sorting	Participants are given items (such as topics) on cards and are asked to sort them into groups that are meaningful to them.	You're working on a content source site with many items and want an effective structure for your user groups.	Determining which topics would be best to include.	3–4 weeks: 1 week to plan and prepare, 1 week to conduct research, 1–2 weeks to analyze and report results.
Usability Testing	Users try to perform typical tasks on a site or application while a facilitator observes and, in some cases, asks questions to understand users' behavior.	An existing solution is being improved. Competitive solutions are available to test. You have a prototype that lets users complete (or simulate) tasks.	Choosing the appropriate tasks to focus on. Determining how formal to make the test.	3–4 weeks for 10 users and medium formality: 1 week to plan and write the tasks, 1 week to run the tests, 1–2 weeks to analyze and report results.

5. Choosing Research Techniques

- User Interviews

- Contextual Inquiry

- Surveys

- Focus Groups

- Card Sorting