UX Analysis and Planning Methods
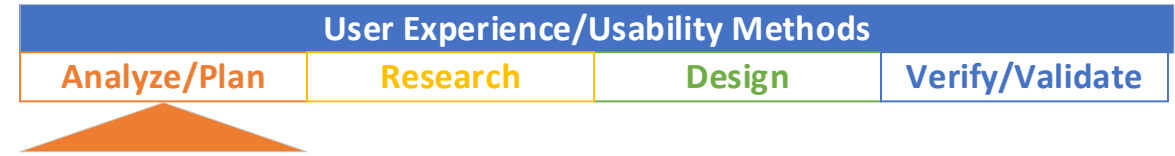
Embedded Interface Design

with **Bruce Montgomery**

Learning Objectives

Students will be able to…
- Understand considerations for selecting methods
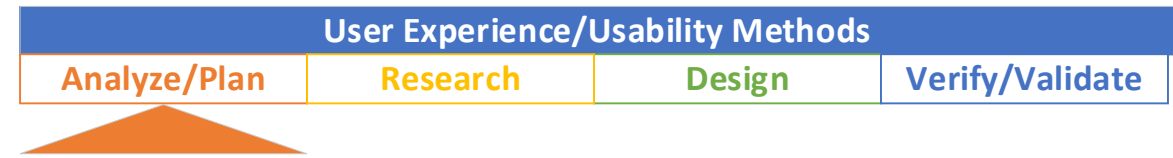- Review, select, and apply selected UX Analysis & Planning methods

# Analyze/Plan Methods

Selected Methods for Review
- Project Plan
- Project Overview
- Project Brief
- Stakeholder Interviews
- Elevator Pitch
- Artifacts from the Future
- Kano Model
- Pecha Kucha
- Kickoff Meeting
- Work Breakdown Structure (separate lecture)

Selection Criteria

When looking at which methods are appropriate to your design cycle, consider the following method attributes

- Time (preparation, execution, follow-up)
- Complexity
- Goal (communication, learning/analysis, planning, authorization)
- Fit to your overall project – available resources, skills, level of detail, etc.
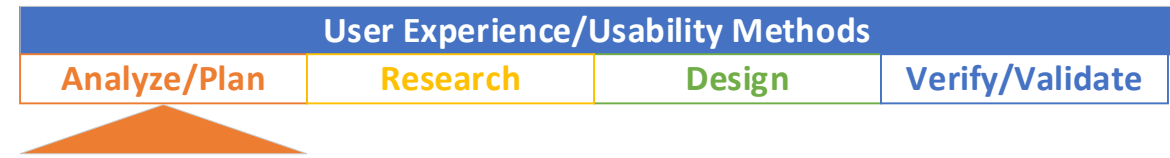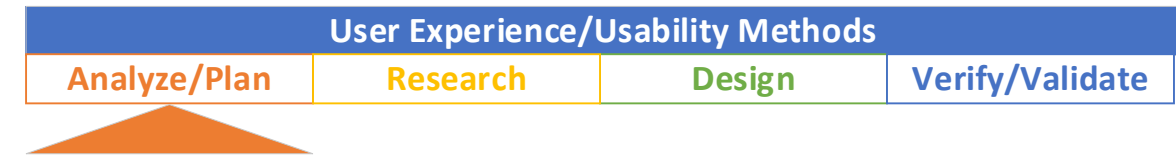
Project Plan

- Time: hours to days, varies with level of detail
- Goals: planning, communication, authorization
- Could be for a UX design effort or part of an overall project plan
- Clarifies processes, scope, and deliverables
- Could feed into a project management flow (Scrum, Kanban, etc.)
  - Could include a WBS (more later)
  - Typical elements: Objectives, Scope, Schedule, Resources, Assumptions, Dependencies, Risks, Change Control, Reporting, Success Measures
- Reference [1]

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Project Overview

User Experience/Usability Methods			
Analyze/Plan	Research	Design	Verify/Validate

- Time: a few hours, but varies with level of detail
- Goals: communication, planning
- Outline of Planned Activities
  - Background
  - Purpose
  - Methods
  - Expected Outcomes
- Less complex than a full plan
- Template at usability.gov is for web sites but is generically applicable
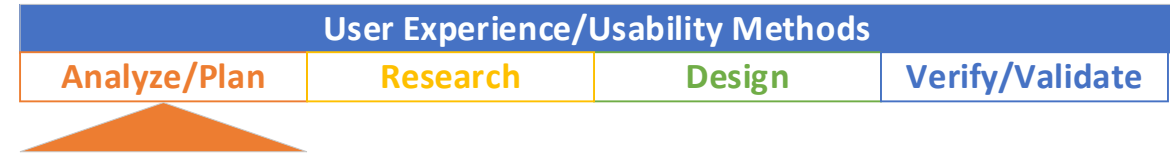- Reference [2]

Project Brief

- Time: A few hours
- Goal: communications
- Summary of overall project plan – even simpler than an overview document
- A poster sized graphic with selected topic sections
  - What are you doing? (Requirements)
  - Why are you doing it? (Vision)
  - Key design elements
  - Constraints and outcomes expected
  - Anything you feel should be shared
- Posted publicly, it allows for visibility
  and discussion on project focus and goals
- Reference [6]
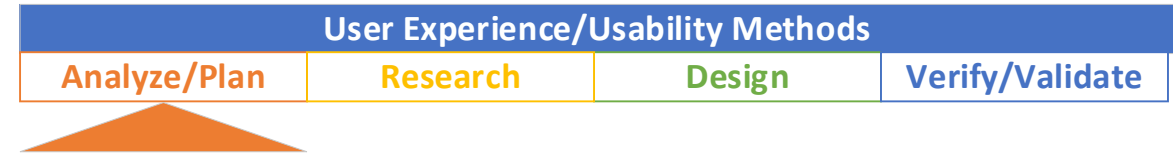
Stakeholder Interviews

- Time: Less than one hour per interview, preparation/wrap-up time required
- Goal: learning/analysis, communication
- Also known as Individual Interviews or a Listening Tour
  - Buley identifies this as the most important method in this phase [4]
- What are the UX priorities?
- Is there support for the UX work?

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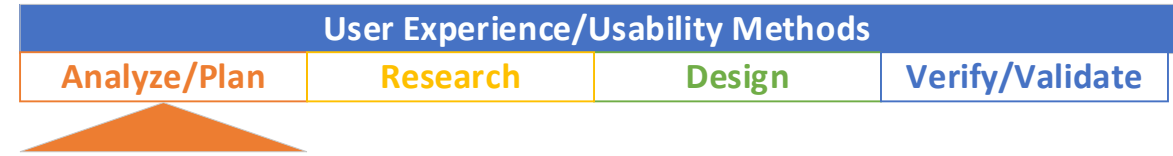
Stakeholder Interviews

- Execution
  - Select interviewees (may change) – team, stakeholders, peers, customers
  - Create question list - what do you want to learn?
  - Conduct interviews – respect their time
  - Can be done remotely (video/phone/web conference)
  - Take good notes
  - Review what you heard – expectations, assumptions, problems, past history, who are supporters or detractors
  - Thanks for the interviewees
  - Share results
- References [4] & [5]
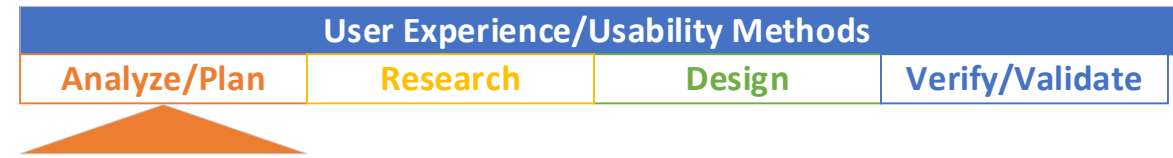
Kano Model

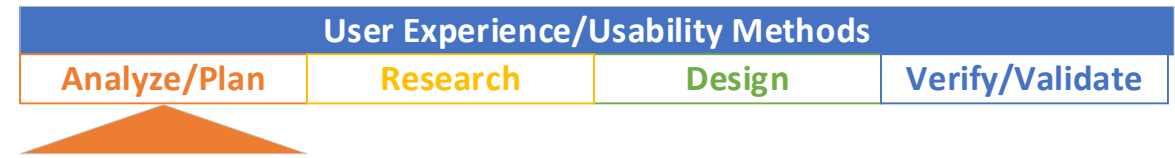- Time: one to a few hours
- Goal: learning/analysis, communication
- What do users care about? Identify which features are:
  - Delighters
  - Satisfiers
  - Basic needs
  - Indifferent
- Two Questions:
  - Satisfaction if product has attribute
  - Satisfaction if it doesn't have attribute
- Answers:
  - Like, Must Have, Neutral, OK, Dislike
- Reference [6]

Kano Model Structure
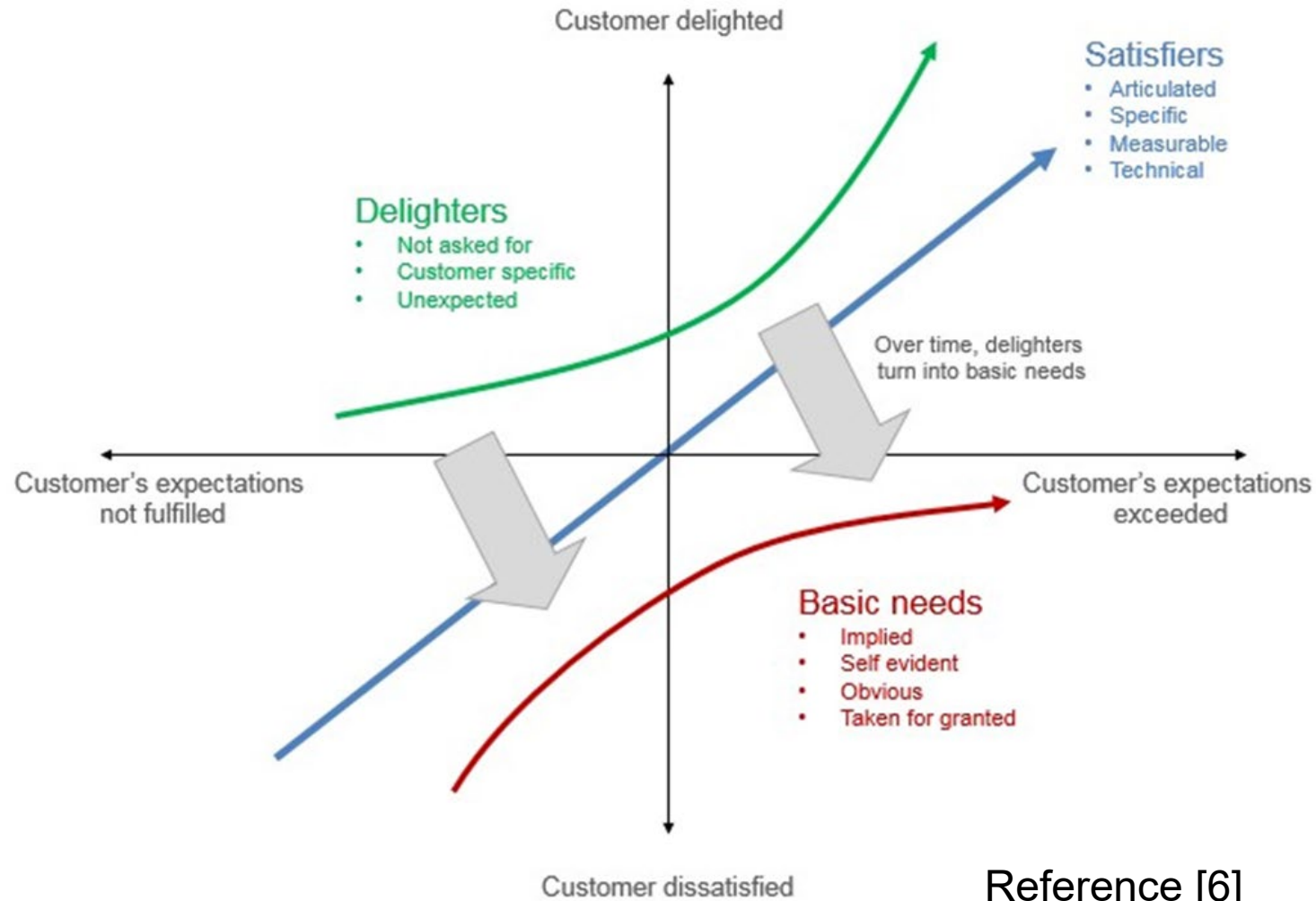
Reference [6]

Elevator Pitch

- Time: one hour
- Goal: communication
- Elevator pitch exercise: create a succinct differentiating statement
- Good for focusing a UX project but also good for anything that you want to convey quickly and cleanly
- Steps
  - Identify your goal
  - Explain what you do
  - Communicate what's unique
  - Engage with a question
  - Put it all together
- Lots of references available on this method
  - Reference Mindtools [7]

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12

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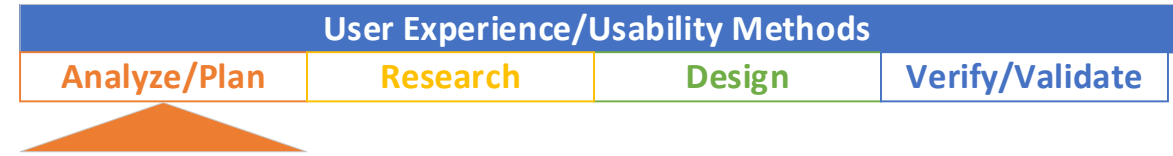
Elevator Pitch Example

- Example:

"My company develops wireless devices for security applications. Our primary focus is on ease of installation. Unlike wired systems, our products can go anywhere, and usually in half the time a wired install would take. How does your business deal with security device installation?"

- Don't end with a yes or no question –
leave open ended to encourage discussion

Elevator Pitch Exercise

- Elevator Pitch Exercise
- Perhaps you're going for an interview…
- You know you're going to get the question:
  - What's next for you after school? OR
  - What are your post-graduate career goals?
- Grab a piece of paper or a text editor
- Come up with two or three sentences to answer the questions above
- Try it on a neighbor
- Get ready to share…
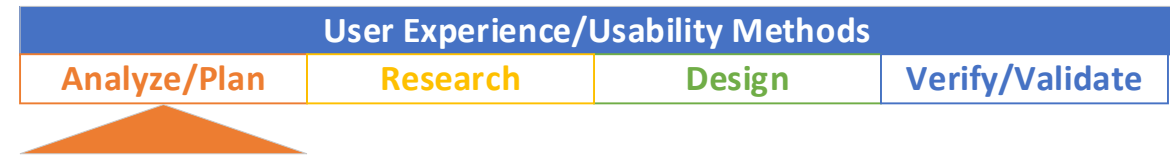
Pecha Kucha

- Time: one to a few hours to prepare, six minutes and 40 seconds to present
- Goal: communications
- Pecha Kucha is from Japanese for "chatter"
- A timed PowerPoint presentation of 20 slides at 20 seconds per slide
- Often used to present a creative project or work
- Designed to be brief and compelling, not detail oriented
- "Pechakucha Nights", meetings to hold such presentations, are trademarked by an organization – not for profit, focused on sharing content
- References [9], [10]
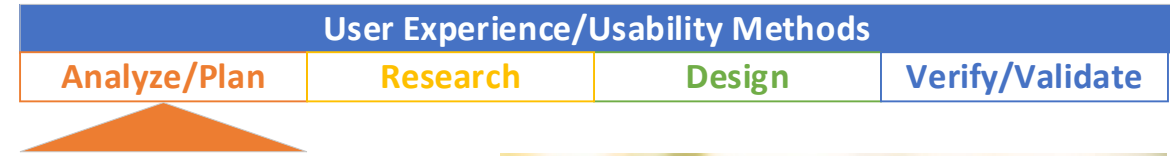
Artifact from the Future

- Time: hours or more, depending on complexity/fidelity
- Goal: communication
- Fun way to envision and present your product
- Can be anything – product containers, ads, videos, product reviews, or a mockup of the thing itself
- Gives a chance to think about what this product should eventually achieve, and how people will think about it
- Opens up strategic discussions
- Reference [8]
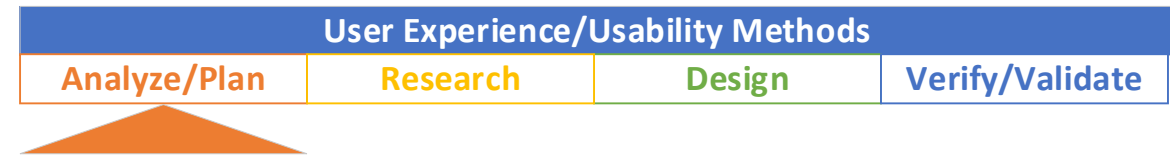
Kickoff Meeting

- Time: meeting could be anywhere from an hour to a day, plus preparation
- Goal: communication, authorization, planning
- Launch the project, align all involved to what the project is about
- What is the UX work to do: audience, user tasks, any current UX issues to solve, etc.
- What is the business case?
- Review the project plan: scope, vision, goals, etc.
- Opens up moving into more detailed research and design phases
- Reference [11]
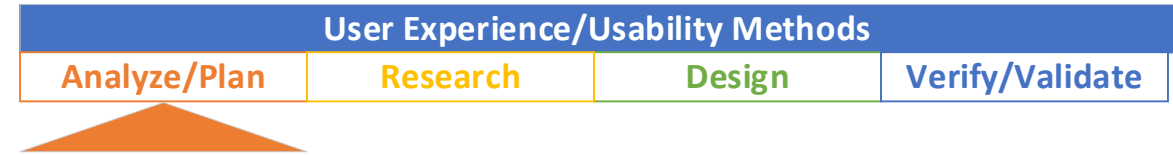
Summary

- Looking at the methods, hopefully you can see that you could pick and choose what method might be appropriate for a given project and situation
- Think about which ones seem to be most useful for projects you have worked on or might work in the future
- One more method we'll look at in detail for planning – work breakdown structures (WBS), a very useful approach to looking at what deliverables really are for a project

References

[1] https://www.usability.gov/what-and-why/project-management.html

[2] https://www.usability.gov/how-to-and-tools/resources/templates/ux-study-overview-template.html

[3] https://rosenfeldmedia.com/ux-team-of-one/3641/

[4] https://rosenfeldmedia.com/ux-team-of-one/ux-method-of-the-week-listening-tour/

[5] https://www.usability.gov/how-to-and-tools/methods/individual-interviews.html

[6] https://www.interaction-design.org/literature/article/the-kano-model-a-tool-to-prioritize-the-users-wants-and-desires

[7] https://www.mindtools.com/pages/article/elevator-pitch.htm

[8] http://www.iftf.org/what-we-do/foresight-tools/artifacts-from-the-future/

[9] https://www.wired.com/2007/08/st-pechakucha/

[10] https://www.pechakucha.com/faq

[11] https://www.usability.gov/how-to-and-tools/methods/kick-off-meeting.html

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19