

THE DISCOVERY & DESIGN PLAYBOOK

Guide to a bulletproof design sprint
aligning client and end-user goals



leapfrog

The Discovery & Design Playbook



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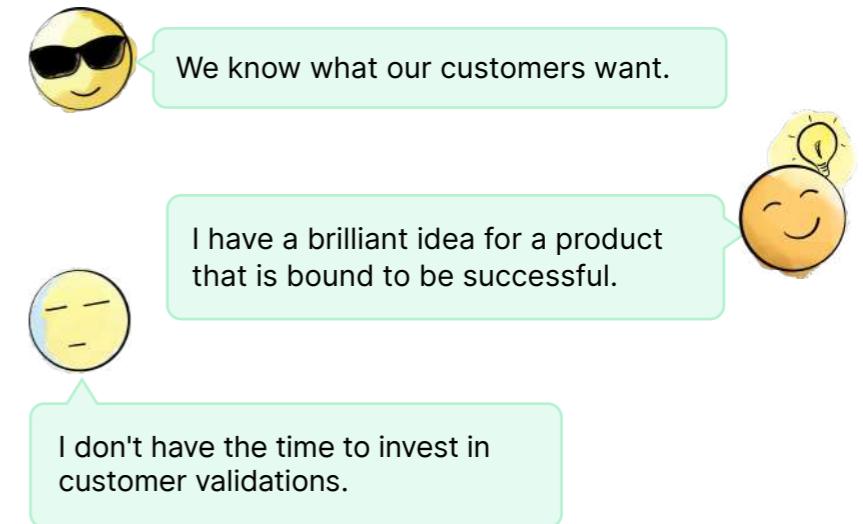
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Abstract

If these are your thoughts as a product owner, they should change ASAP. Building a successful product is not about you; it is about the customers whose pain points you are resolving.

Let's look at it from a different perspective. If you are interested in dating someone, you would probably take every necessary step to woo them. You invest time and effort into knowing what makes this person happy, what fascinates them, what they like, and dislike. You do not just assume and take chances with this person. You put on your detective hat and stalk their social media profiles to validate your assumptions about this person.



So, why should it be any different when developing a product?

Yes, your idea about the product might be brilliant, but what if your target customers have a different opinion regarding it. Despite brilliant ideas, your product could still fail. It is better to indulge in research earlier than regretting later.

We as development partners advocate for customer-centric discovery and design approach. Even while we work remotely for clients, we make sure to carry out the processes seamlessly by collaborating with clients and their target users. Hence, we crafted this playbook as a guide for anyone who wants to run the discovery and design phase and gain crucial insights about their target customers.

“I get very uncomfortable when someone makes a design decision without customer contact.

Dan Ritzenthaler

Senior Product Designer at HubSpot

Introduction

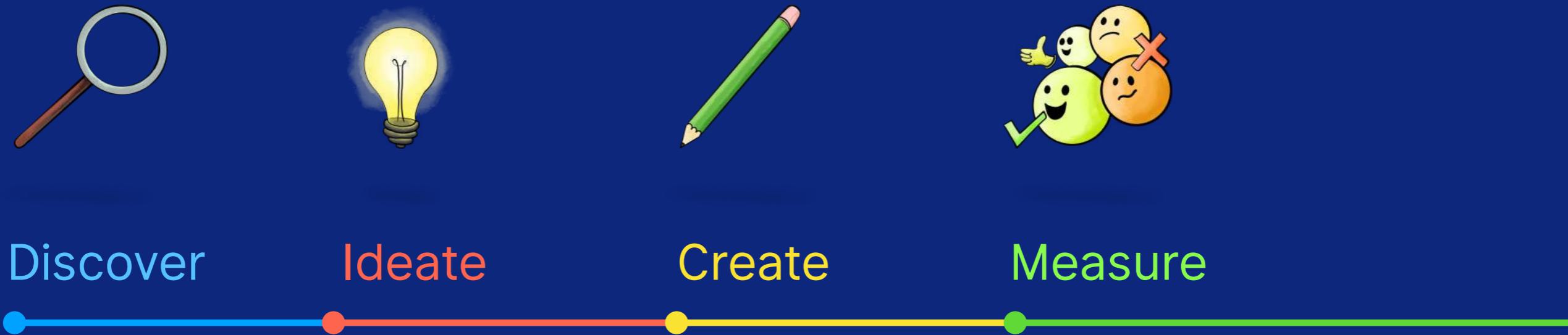
The product discovery and design cycle is an iterative process that allows us to understand the user needs and align them with the client's goal. The stages in this cycle revolve around the research on the purposes of the new business (or existing), identifying the potential users, their pain points, and the best way to solve them.

With the product discovery and design phase, we are garnering insights that help the development team, including designers, to explore innovative ways to approach your product. By analyzing the requirements, we are paving a clearer path to development.

The time duration for this cycle depends typically on the size, complexity, and number of people involved in the project. Since it is an iterative process, we generally spend 3 to 4 weeks to a couple of months. Again, the duration can change upon the client's understanding of the product.

At Leapfrog, we come across clients who have already invested in this phase prior to coming to us. So, in such cases, it generally takes 1-4 weeks to run through the design and discovery phase. Moreover, there are clients who emphasize on running the discovery phase before every development sprints. We currently do so in a nurse engagement platform and a marketing platform which helps validate the functional assumptions of new features in the system. But at times, when clients come in with a high-level idea of a product, we suggest implementing a rigorous discovery and design session.

Stages in the discovery and design phase



As we discussed earlier, the discovery and design phase is an iterative process. We climb up and down the stages until we find a feasible solution that solves the users' problem and meets the business goals.

Now, we will look into details for each phase.

“If you don’t talk to your customers, how will you know how to talk to your customers?

Will Evans

Design Thinker in Residence at NYU Stern

Discover



As the name suggests the discovery stage is all about exploring the solution from the viewpoint of the users. It is about finding out more about the proposed solution by focussing on the problem of the target users.

We strongly suggest to always start with discovery. The purpose of the Discovery Sprint is to help the team understand the problem the product is trying to address. In the shortest duration possible, we aim to align the business strategy, identify the users' needs and pain points, propose values, and validate proposed solutions.

Ignoring this phase is like blindfolding yourselves and heading on to a road full of traffic. You do not know what will hit you and when. By running the discovery phase, you are assessing your product from various perspectives. This is the phase where you can identify problems and a viable solution to it. And, probably, avoid being hit by uncertainties after the product launch.

The discover stage involves multiple steps. However, whether you want to go through every step or not depends on the size, complexity, and duration of the project.

- a. Collect data
- b. Create user personas
- c. Outline user journey
- d. Document major pain points
- e. Prioritize the action points

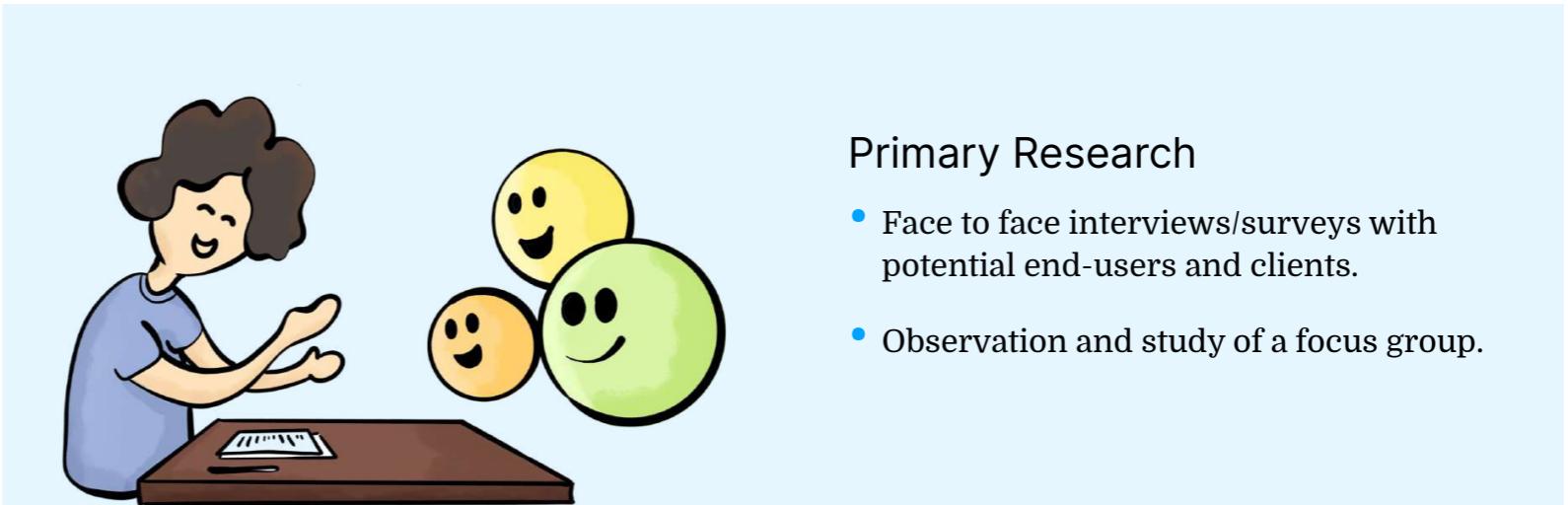
Collect data

Collect data to understand the problem and people involved using primary and secondary research.

The discovery phase begins by collecting data about the product and the people involved. By collecting the data, we are trying to fully understand the problem and the people associated with the product.

Many at times, we are approached by clients with a basic idea of a product such as they want to build a web app that simplifies the sales process. They are not sure about the features or how it solves the problem of users. In such cases, collecting data becomes crucial to figure out more about the product and the problem it is trying to solve while aligning with the business value.

In order to collect the data, we use both primary and secondary research.



Primary Research

- Face to face interviews/surveys with potential end-users and clients.
- Observation and study of a focus group.



Secondary Research

- Looking for existing data, case studies and analytics/statistics online and offline.
- Competitive and comparative analysis.

Primary Research

Under the primary research, **interview is the most crucial**.

We interview our clients for two reasons:

1. To understand the problem
2. To understand the people

Understand the Problem

In order to fully understand the problem, the team will have to answer some basic questions like:

- Product background/ basic understanding?
- What is it?
- Who is it for?
- Why do they need it?
- When is it available?
- Where is it available?
- How does it work?

Deliverable

A written document outlining problems of the project.

Understand the People

Articulate who the key players are in this process. There are usually two main groups: the clients and their users. By separating these two groups, we can uncover their individual motivations and desires. Some important questions to tackle for:

Clients

- Who is the client?
- What are their pain points?
- What do they wish to gain from the project?
- What is motivating them to build this product?

Users

- Who are the potential users?
- What are their pain points?
- How do they solve their problems currently?
- What are the other products they use?

Deliverable

A written document outlining who the client is, who the user is, and what their motivations are.

To understand more about the people aspect, we recommend reading this article

[Understanding Customer Life Cycle Management.](#)

<https://www.lftechnology.com/blog/product-management/customer-life-cycle/>

Some tips on how to take an interview.

- ✓ Avoid close ended questions that can be answered with a yes/no or in a single word. They limit new information.
- ✓ Do not ask leading questions as why recycling is important. Instead, ask about their own recycling habits.
- ✓ As an interviewer listen more, talk less. The goal is to encourage the interviewee to talk as much as possible. Get them to share their stories.
- ✓ Do not generalize. Try to keep the interview as specific as possible by asking for precise examples. For instance, instead of asking what they usually have for lunch, you might ask what they ate for lunch today.
- ✓ Don't structure your question in a way that suggests a "right" answer. Be neutral.
- ✓ Don't forget to take notes! However, take permission from the interviewee if you are going to record the conversation.
- ✓ Observe your interviewee and take notes of their non-verbal cues and activities.
- ✓ Don't hesitate to ask, "Why?"



Secondary Research

For comparative and competitive analysis, we can look into an existing solution to help us with our current problem. We can gain inspiration by checking out relevant products.

Noting a few important UI experiences in this step will help in the creation phase. Analyze the ratings and reviews to see how users are responding to certain features, their likes, and dislikes.

The focus at this stage should be on the scope of the problem. Most of the time, we might divert from our objective without even realizing it. In cases as such, follow the [Five why process](#). It will keep you in track meanwhile revealing important information.

To understand more about the people aspect, we recommend reading this article, [Understanding Customer Life Cycle Management](#)

<https://www.lftechnology.com/blog/product-management/customer-life-cycle/>

Create user personas

After the research, we create personas based on the understanding of people. A user persona is mostly semi-fictional with demographic and psychographic information which represents your common target users.

Mostly, 4-5 interviews with your target users can help generate user personas that represent your target market. However, with bigger data size, we will have an enriched persona and understanding of the user. At Leapfrog, we tend to keep the pain point of the user as well in the persona so as it is easier to look into and explore solutions based on persona.

Here's a step by step guide to creating personas:
[Creating User Personas](https://uxplanet.org/how-to-create-personas-step-by-step-guide-303d7b0d81b4)
<https://uxplanet.org/how-to-create-personas-step-by-step-guide-303d7b0d81b4>



Mr. Mustache Nevercut

Age: 1-100
Work: Job Title
Family: Single, Married, Kids etc
Location: Seattle, WA
Character: Type

Personality

| | |
|------------|-----------|
| Introvert | Extrovert |
| Analytical | Creative |
| Loyal | Fickle |
| Passive | Active |

Goals

- The goals this user hopes to achieve
- A task that needs to be completed
- A life goal to be reached
- Or an experience to be felt

Frustrations

- The frustrations this user would like to avoid
- The obstacle that prevents this user from achieving their goals
- The problems with the solutions already available
- The product or service that currently does not exist

Bio

The bio should be a short paragraph to describe the user journey. It should include some of their history leading up to a current use case. It may be helpful to incorporate information listed across the template and add pertinent details that may have been left out. Highlight factors of the user's personal and of professional life that make this user an ideal customer of your product.

Motivations

| |
|-------------|
| Incentive |
| Fear |
| Achievement |
| Growth |
| Power |
| Social |

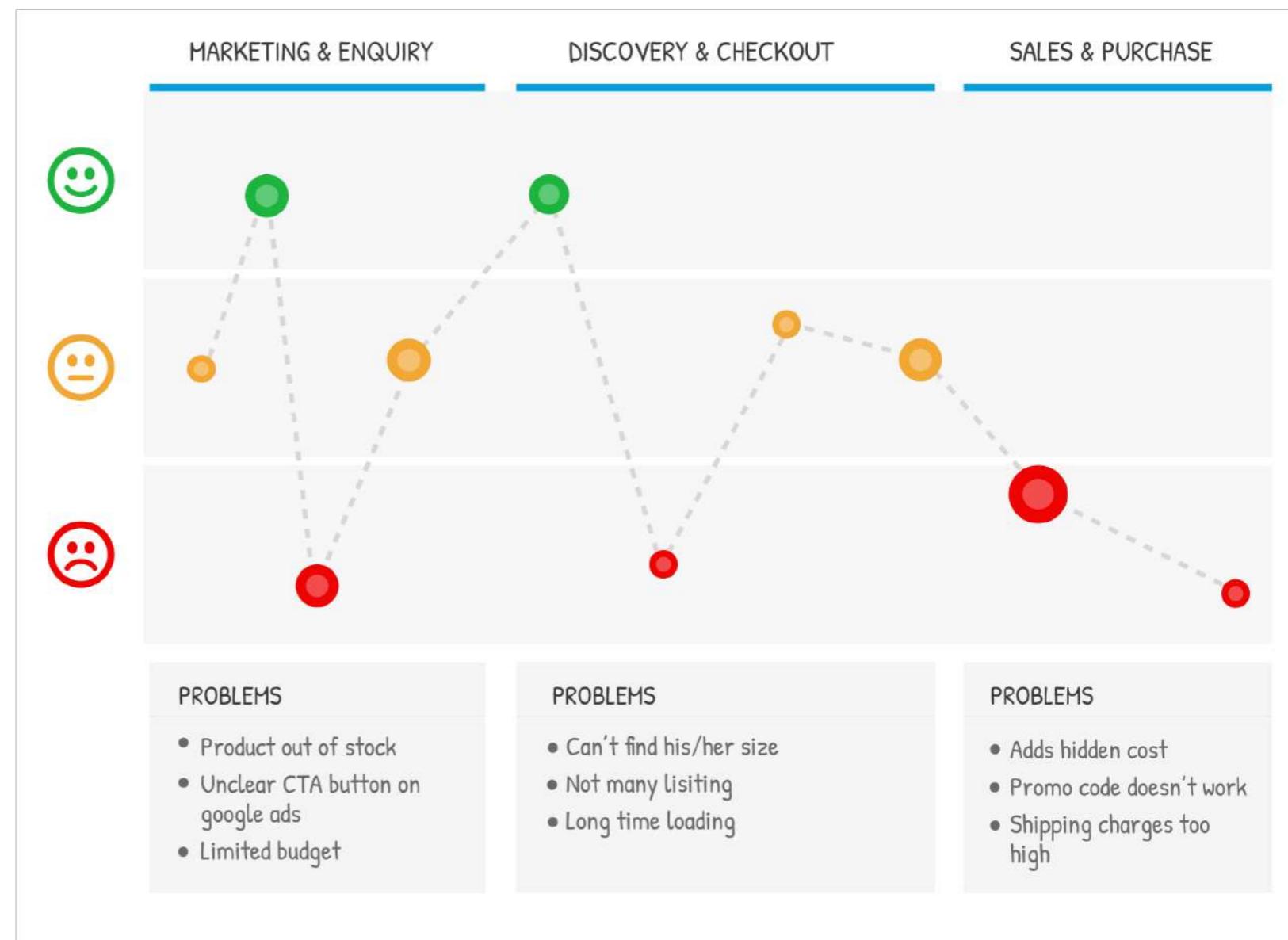
Preferred Channels

| |
|------------------------|
| Traditional Ads |
| Online & Social Media |
| Referral |
| Guerrilla Efforts & PR |

Outline User Journey

We have identified our users, their pain-points and created personas based on the pattern of data collected. Next, we map out the current user journey of the target users. The user journey is a stepwise process followed by the user in a certain scenario. At this stage, we create a user journey to represent how the user interacts with the problem and the existing solutions they use.

The user journey can be presented in simple diagrams using flowcharts. They are easy to understand and visually presents the steps a user takes to solve the problem in the absence of your solution.



Document major pain points

From the research, we will have a list of problems/needs identified. But not all problems will be in the scope of your product. So, identify the major pain points that your product can resolve.

To identify the pattern in those problems and group similar ones together. From these categories, we highlight the major pain points of the user.

Remember

Always validate the documentation with your client and end-users. As it will drive the later stages in the design phase.

With client's input, the documents created up to this point can be solidified and the understanding should be locked down for all team members moving forward.

Define the problem you are trying to solve for the end-user and why it's going to be important to them. Keep referring back to this as you go

What problem are you trying to solve for your end-user?

- Find freelance teaching job on her phone
-

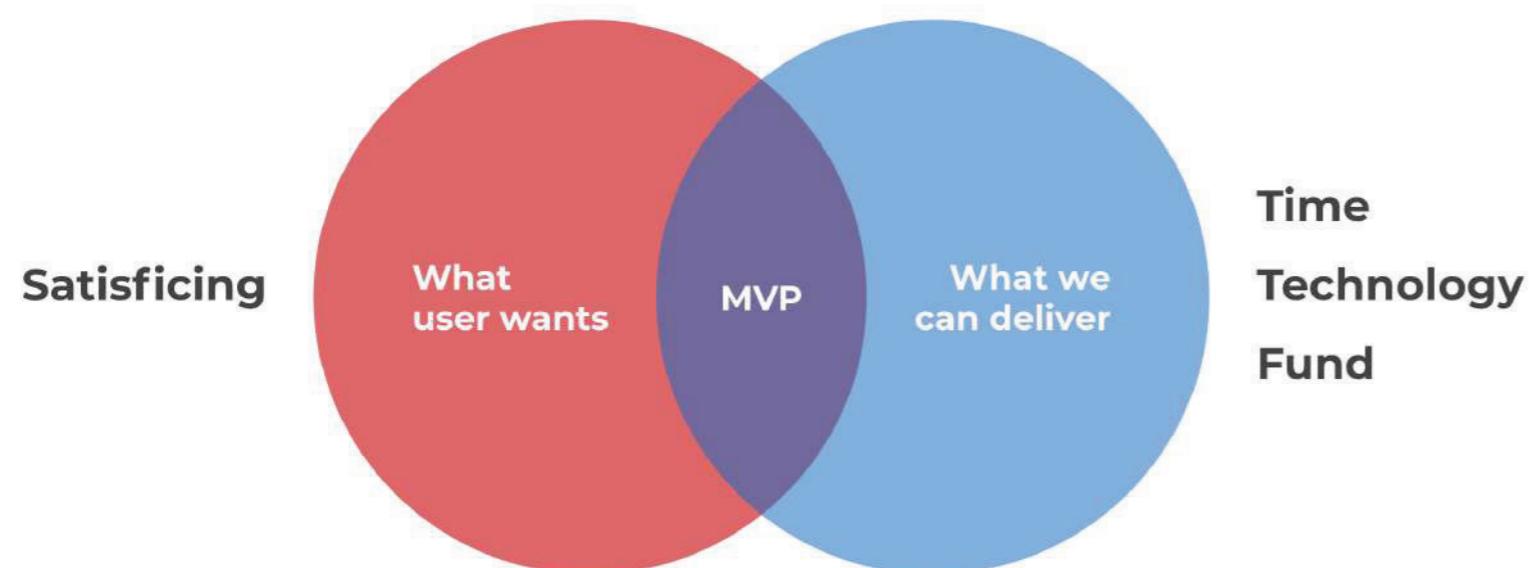
Why is this important to them?

- As a freelance teacher, Shopia is often working in classrooms away from her laptop. That means she needs to quickly find and apply for new teaching slots on her phone before they get filled.
-

Prioritize the action points

After the documentation, we decide on the action steps. Based on the user information gathered and the knowledge of the product, we list out the features and prioritize them. The features are prioritized based on the value it will generate for the client and their users while keeping the business goal in mind.

We define the roadmap for MVP depending on the business goals of the client while solving the major pain points of the end-users.



There is a close collaboration of designers, developers, project managers and the client during this stage. This is where we decide what falls under the scope of MVP and what doesn't.

Remote Tips



For the discovery phase, the remote team should have access to a single shared document with all the explorations made about the problem and people.



The progress during the stage can be communicated via daily stand-ups in Slack or bi-weekly calls.



Time
Technology
Fund



Ask for video or audio recordings for the user interview with clients if you are not taking their interview.



Updates via calls and emails as per needed.

“ The goal of ideation is to give you a mass quantity of ideas quickly... not solutions, but the seeds to possible solutions. Solutions take real hard work. Brainstorming gets you the lay of the land quickly for possible solution areas to investigate. But good solutions are like bodybuilding, there's no way to cheat the hours of the gym you got to put in.

Art Sandoval

Senior Director of Engineering at Lunar Design

Ideate



Ideation is the phase when we start thinking about the solution. We brainstorm for ideas and follow approaches that heighten creativity. There should not be any limitation on the number of ideas, nor should we criticize any of them.

Once we have understood the key players, we can start to think about possible high-level solutions. This does not mean coming up with one idea and sticking to it. This also does not mean design solutions, but simply what can be done to ease the user's pain-point.

The team can think about the various ways to solve user's problem. This can be an extremely creative process, as we are not bound to development capabilities at this stage. These ideas can serve as a reference point to the prototyping phases and can be validated with the clients along with the paper prototypes.

The duration of the ideation phase can again depend upon the time constraint and the team composition. However, at Leapfrog we spend a minimum 1 week at this stage. Below are a few of the approaches we follow in the ideation phase:

- a. Lots of ideas
- b. Possible user journey
- c. Process flow
- d. Wireframes
- e. Low fidelity mockups

Lots of ideas

At this stage, we value quantity of ideas over quality of ideas. Generate lots of ideas that could help you tackle your user's problem. Be open to any kind of ideas, and let your creative juices flow to help you portray a conceptual landscape.

These ideas will set stepping stones for the solution. So make sure you are not discouraging your team for shouting out crazy ideas. Welcome the craziest ideas with an open mind and bring out as many of them as possible.

By generating lots of ideas, the team is moving a step closer to finding an innovative solution to the problem.



Possible user journey

By this step, we will have a list of features that solves the users' pain-point. Now, we create a user journey considering how the user will interact with your probable product to ease their pain-points. The user journey will define visually of how the user will move on to one step from the other, till their requirement is fulfilled.

Tools like Visio, Draw.io or even Figma can be used to create a user journey.

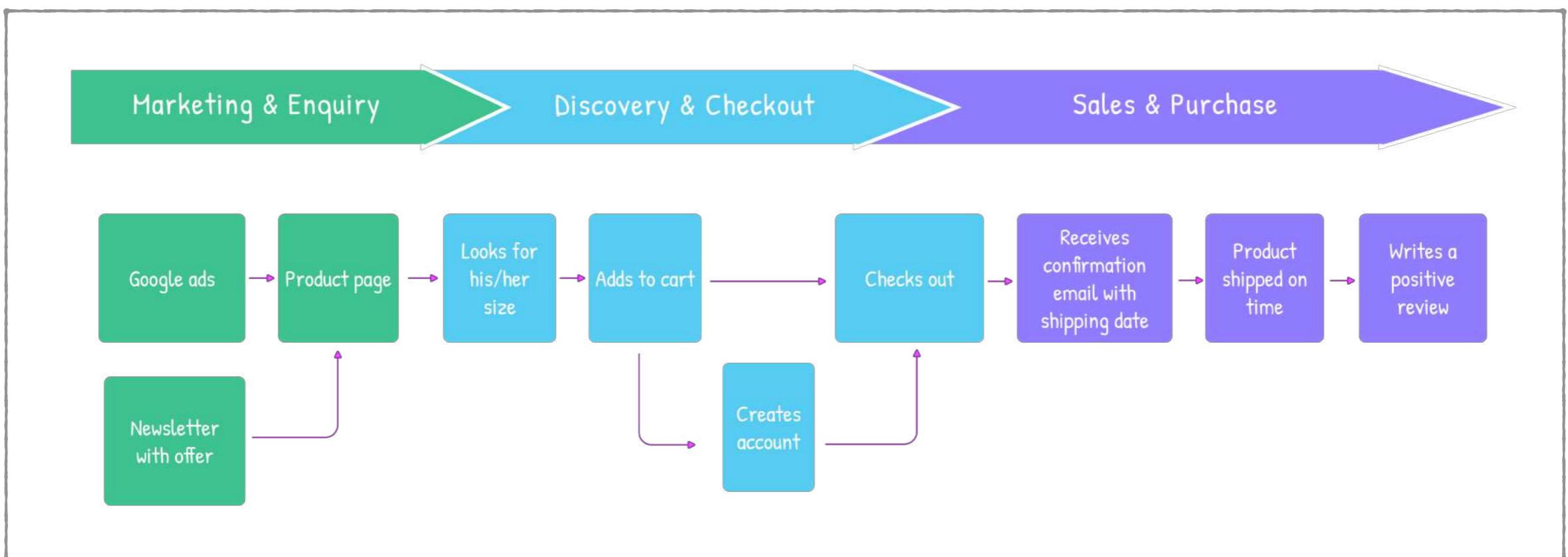
Things to remember while creating new user journey:

- Create the user journey based on the user persona.
- The context in which the user is using the system.
- Progression from one step to another.
- The functionality the user interacts with.
- The device user uses to interact with your product.

To learn more read:

[Beginner's guide to user journey](#)

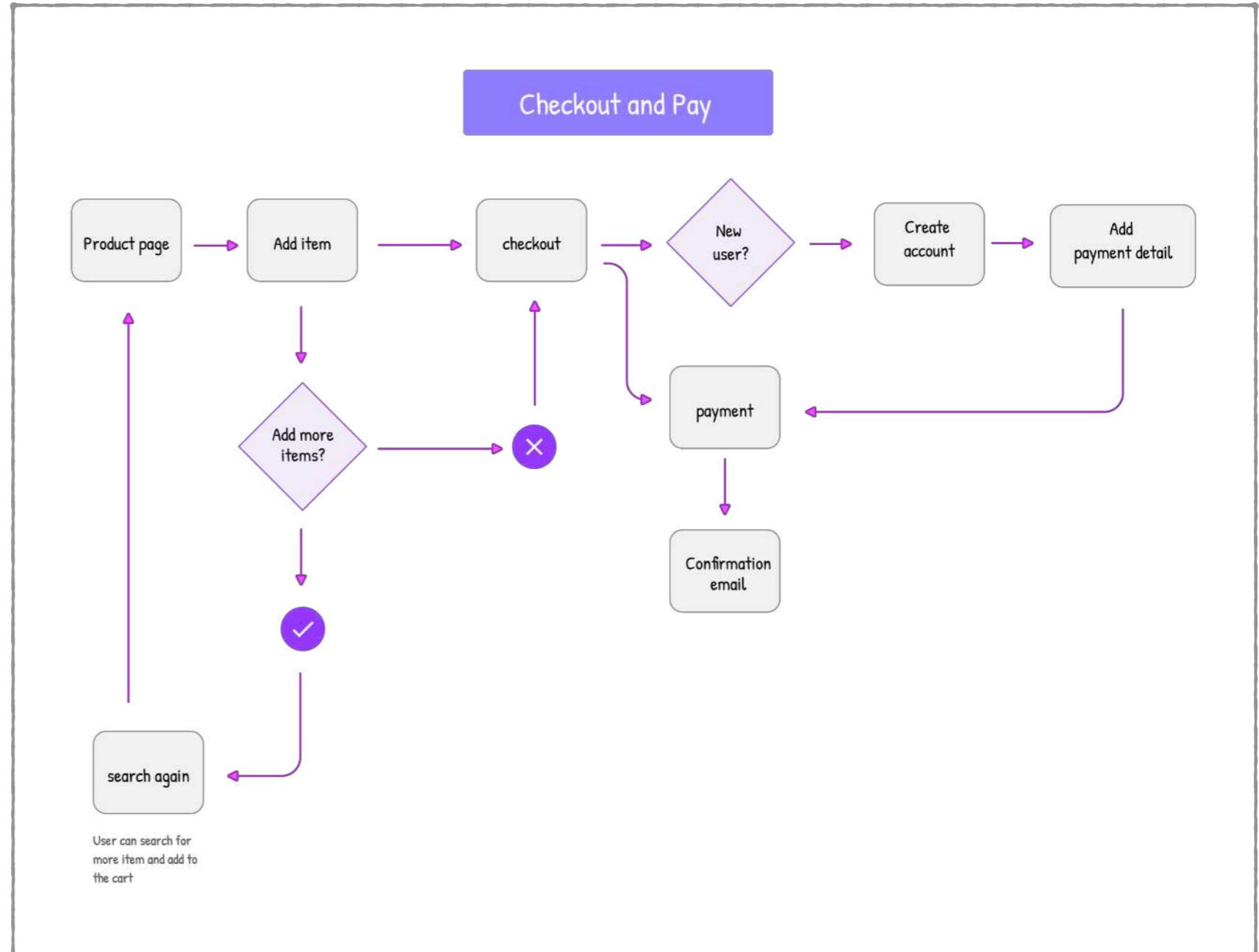
<https://theuxreview.co.uk/user-journeys-beginners-guide>



Process flow

Unlike the user journey, the process flow is created for individual functionality. This diagram will visually represent the steps involved in a single feature. The process flow diagram will allow you to have a high-level view of the size and complexity of the product.

Before starting with wire-framing, you have to know which features will go in your product and how they link with each other and on which steps. Thus, by creating a process flow, you get a high level of idea of which processes are linked. Moreover, it helps you to create a call to action that drives the user to linked features.



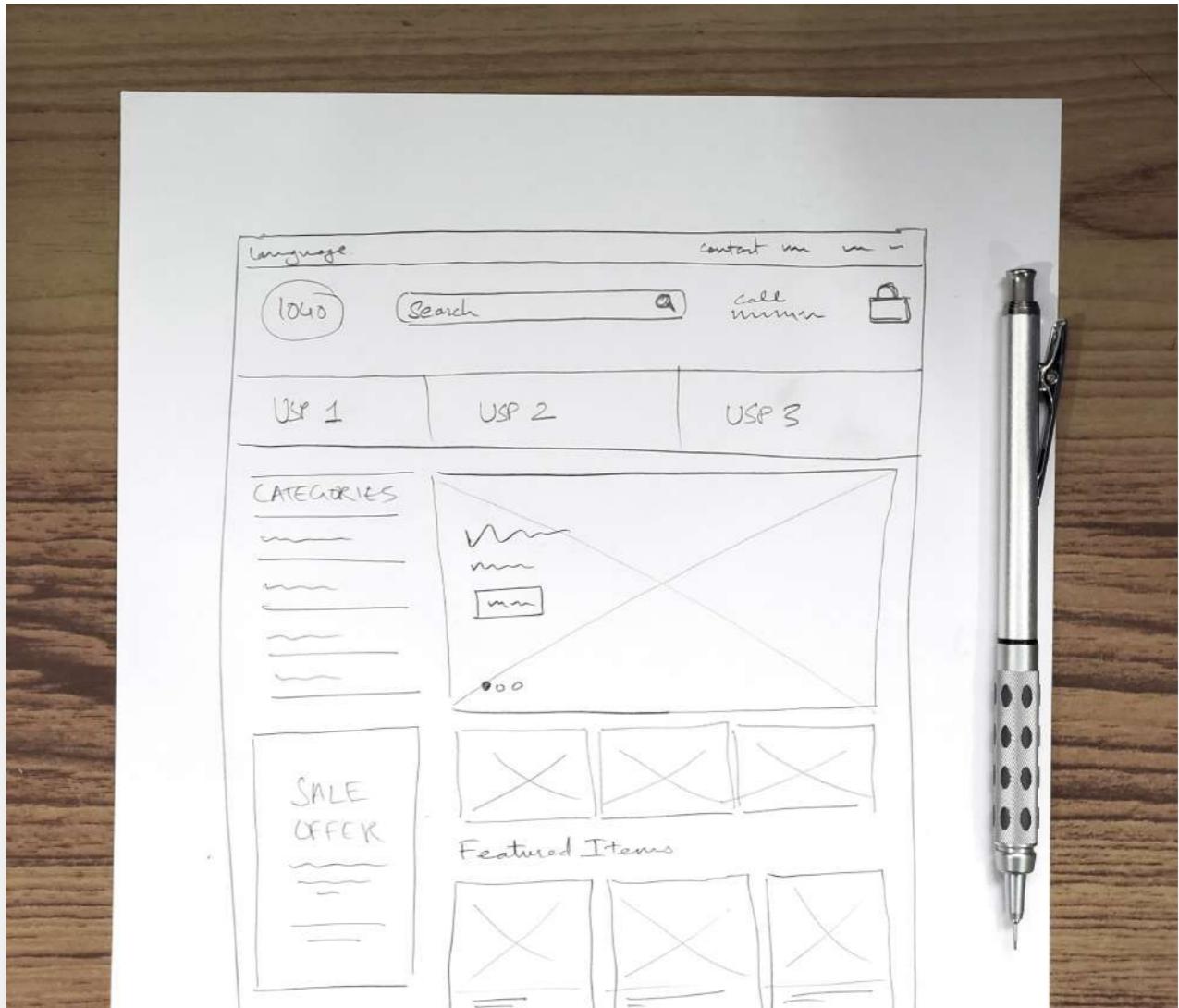
Wireframes

After user journey and process flow, we create wireframes. In the initial phase, the wireframing can be done using paper and pencils. The paper prototyping stage marks a shift in the process to have a stronger focus on potential solutions. Not only does this allow for fast iterations, but ensures that no idea becomes the favorite too early in the process.

The goal of this stage is to roughly sketch many ideas and basic UIs so that the team has many solutions to pick from before creating high fidelity mockups. Depending on the tech-savviness of the client, the ideas generated from these exercises can be shared and validated. Their ideas can help steer the direction of which sketches to pursue further.

Regardless, in a remote team, you can use Figma to collaborate on wireframes and validate the process from the clients

Balsamiq can also be used during wire-framing but it lags when number of interface increases. Balsamiq cloud can also be used for collaborative work online.



Low fidelity mockups

Finally, we can begin to conceptualize the product in a visual way that will begin to give us a glimpse of the end result.

Based on the paper wireframes, the designer can combine the ideas into full-fledged wireframes. It is important to determine which workflows will need to be prioritized.

Starting with the key workflows that represent most end-users will be useful.

Remember, we can't prioritize all the features in the product and we have to focus on the key end-user. Depending on the client, each workflow can be validated individually. It is particularly important to validate with the client when certain features are prioritized over the others. A potential prioritization of workflows could be:

- High-frequency use workflows
- Complicated workflows
- Fringe use cases

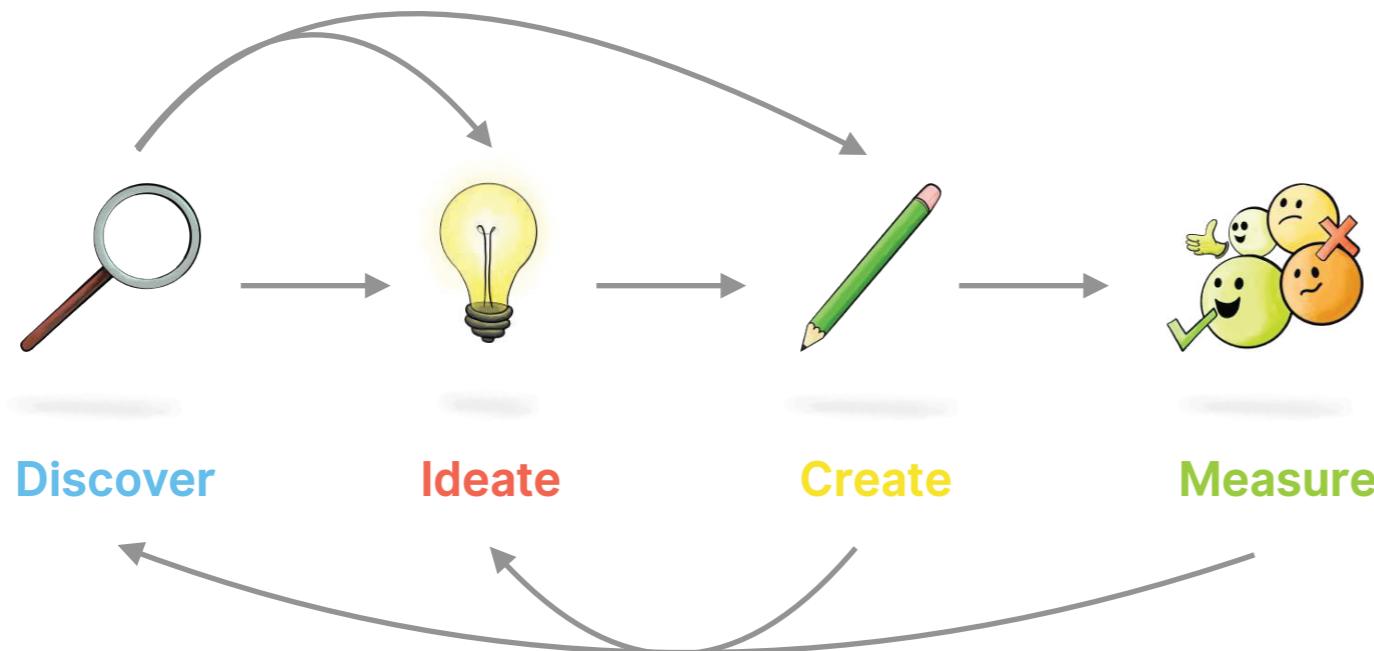
While preparing the low fidelity mockups, we do not want to engage in the design aspect of the product which includes colors, shapes, aesthetics, etc. When these elements get involved, the focus shifts to designing rather than the functionality and the process. So, we need to keep low fidelity mockups as simple as possible.

The tools you can use for creating the mockups are Balsamic or Figma. The choice of tools depends on the complexity of the product. If it is a simple system, pen and paper will be enough to create the low fidelity mockups. As the features and processes get complex, Figma or ProtoPie would be a better option.



We hope you haven't forgotten that the discovery and design phase is an iterative cycle. Every output from each step is measured against the client's expectations and goals.

Ideation is not an exception either. The use-cases are validated against the end-users and changes are incorporated accordingly in the wireframes and mockups. We repeat the step until we reach a final go-ahead from the product owners.



Remote Tips



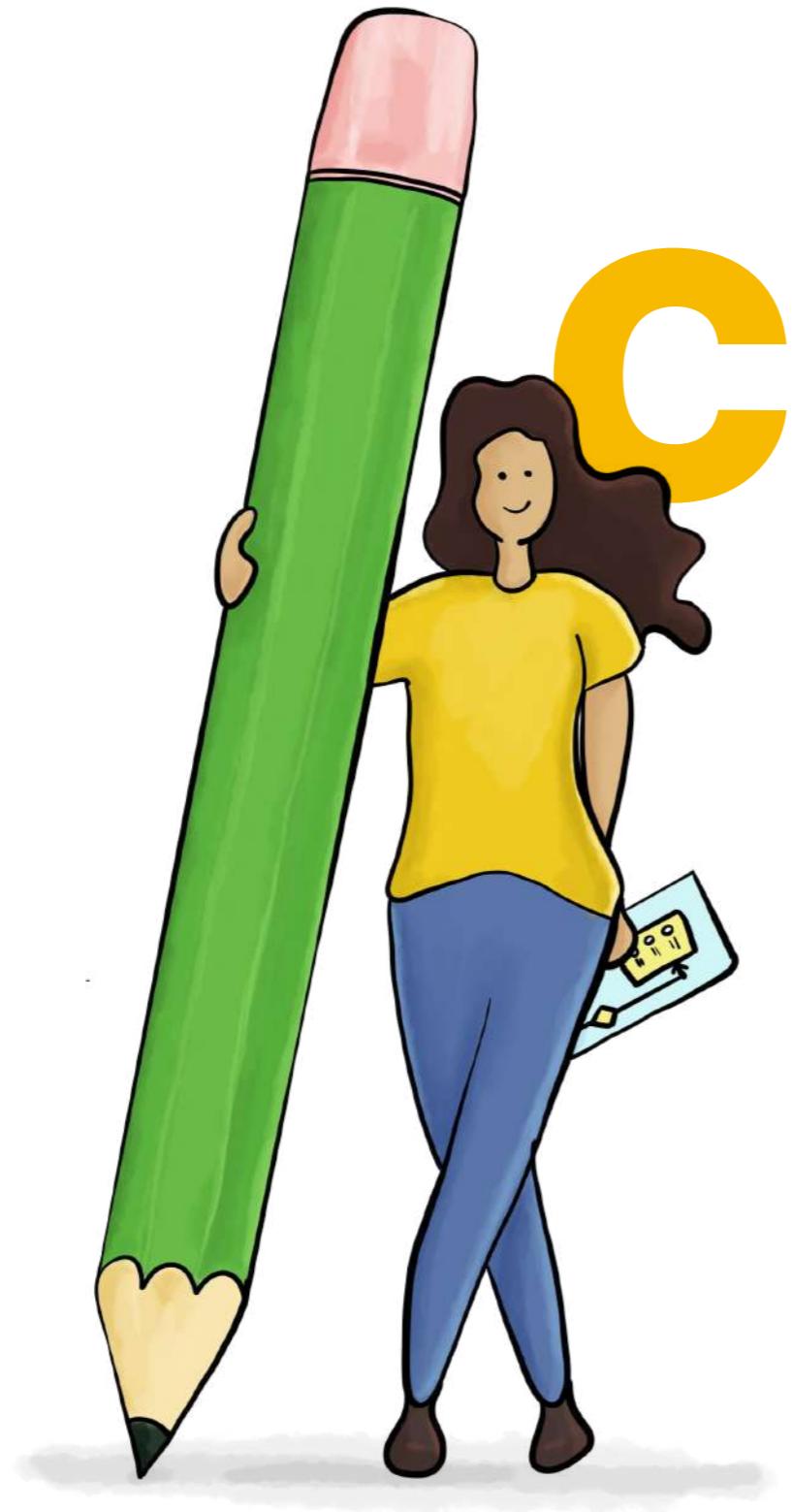
Tools like Figma allow team collaboration. This will help the clients and the development team to track progress and validate the wireframes as they are being created.



The video recordings are the best choice when it comes to observing the users interaction with the mockups. It will show you exactly where the user is facing problems and what could be done better.



Weekly updates can be shared via emails or calls as needed.



Create

We have understood the problem of users, we brainstormed brilliant ideas to resolve those problems, and we even created low fidelity mockups for the product. Next, we finally head on to designing. We create high fidelity mockups, interactive designs, and prototypes in this phase. We bring the product to life with design. As in the steps above, we validate the outputs as per users and client's expectations.

Below are a few of the assets that we produce in the create phase:

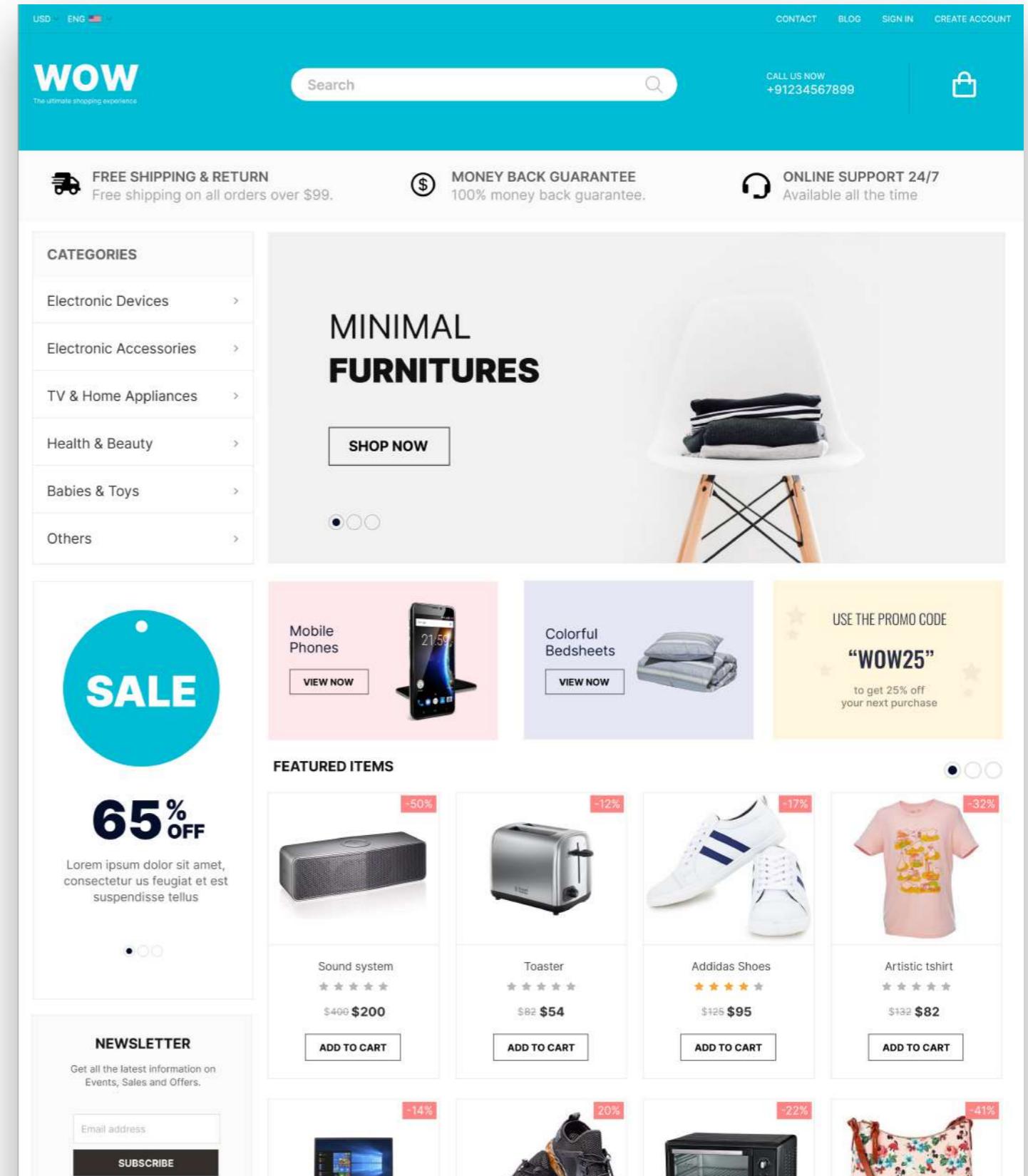
- a. High fidelity mockups
- b. Interaction design
- c. Prototype
- d. Design system
- e. Handoff

High fidelity mockups

The high fidelity mockups incorporates everything that we left in low fidelity mockups. Here, we think of aesthetic and the brand of the product. Hence, the first component of high-fidelity mockups is determining a style guide for a client.

Be sure to involve the client in this process so that they feel the colors and branding represent their product adequately. The guide should be comprehensive enough so that developers can use it for all the UI elements of the product.

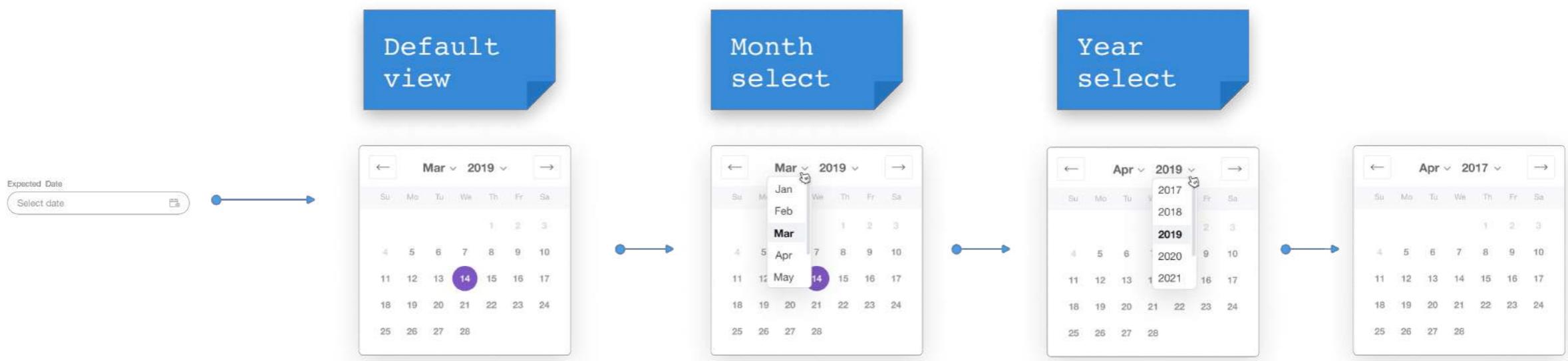
A document outlining fonts, color schemes, logos, iconography, and all UI elements of the product should be created and shared with concerned stakeholders. Meanwhile, the client should be involved in this process, and validate the end result with them before the full designs.



Interaction design

In this phase, we also work on interaction designs. By interaction designs we mean, what user experiences after interacting with the elements in the design. For example, color change in text while hovering over the text, pop ups, success and error states etc. These interactions can be created through Figma, Adobe After Effects, Principle for Mac, Marvel, Origami or even HTML/CSS/JS. They require extensive tests inside the team as well as with the user.

The designer can use the above mentioned tools to create a clickable interface of the product. This will allow the client as well as end users to test the functionality and design.

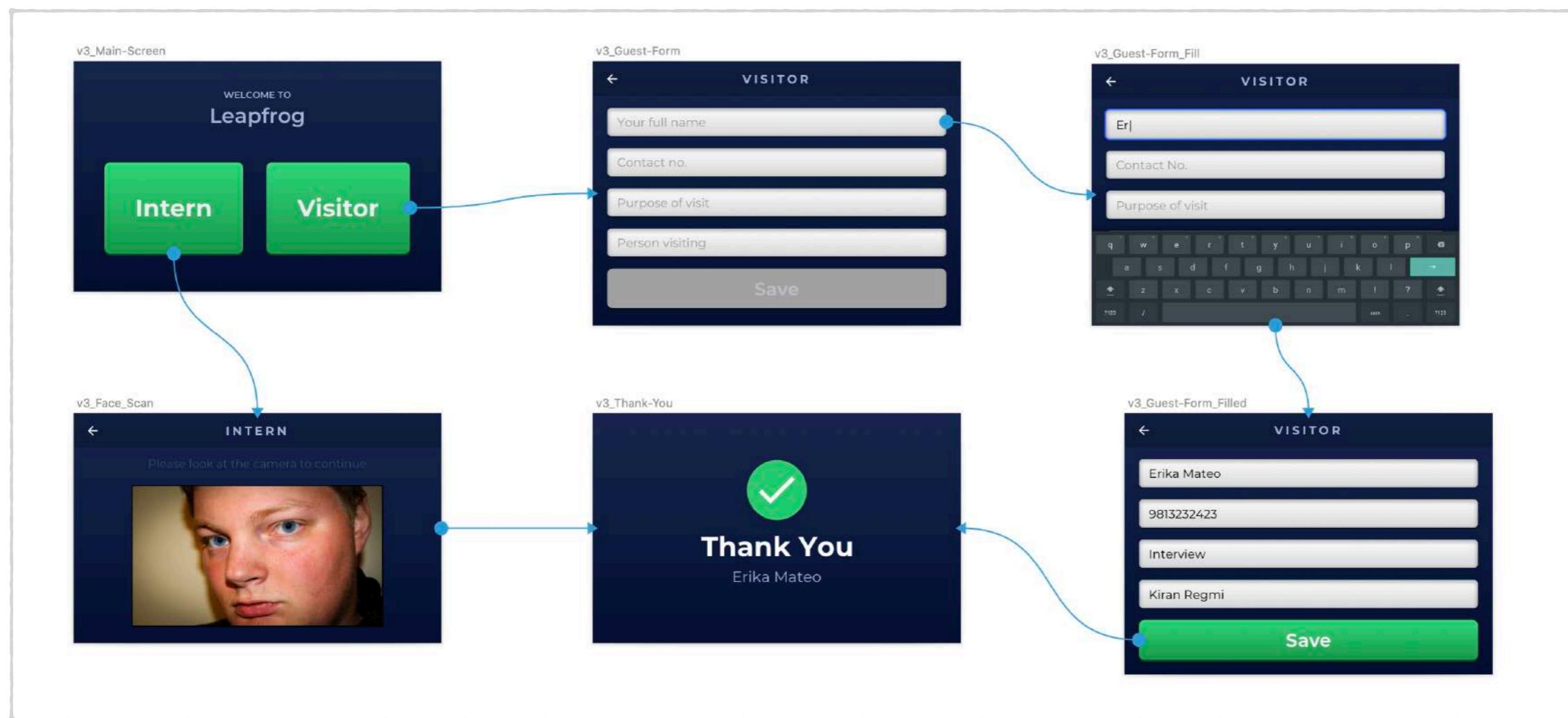


Prototype

When we have a final validated mockup, we build a prototype to test the concept. A prototype will then be shared with the clients and end-users who will interact with it and give feedback. What we need to remember is while the users are testing the prototype, we should just calmly observe how they use the product. By observing, we can realize where the user is facing the difficulty to use the product and improve on user experiences.

We generally use Figma for prototyping.

The major point is to validate the design from the users and iterate as per the feedback and also align the goals of stakeholders.



Design system

DesignBetter.co describes design systems as a collection of reusable components, guided by clear standards, that can be assembled together to build any number of applications. It is collection of style guide, pattern library and so much more.

Imagine having to work in multiple projects that could use similar design elements. With the use of design system, you can easily reutilize the components, saving you both

time and effort. Besides, standards and principles will act as a guide to new members joining the team and also aid developers in following the guidelines.

For more details on design system:

<https://uxdesign.cc/everything-you-need-to-know-about-design-systems-54b109851969>

<https://www.invisionapp.com/inside-design/guide-to-design-systems/>

Design system Handbook by Designbetter:
<https://www.designbetter.co/design-systems-handbook/>

Style Guide - Colors

Colors

PRIMARY & ACCENT



#23489C

Brand color, Links, L4U default, Primary button

#42A5F5

Calculator & recognition



#032164

Accountability, High turnover rate, Danger, Sticky header text



#EF5350

Risk of burnout



#133788

Profile warning bg, Default item hover



#EE8E03

Risk of burnout



#284DA0

Medium importance, Warning



#FFA726

Medium importance, Warning



#4E6FBC

Employee development



#7E57C2

Employee development



#E0E6F3

Links hover and active bg, Secondary title bg



Other



#4CD964

On fire icon



#26A69A

L4U - complete



#66BB6A

Light blue/teal icon



#1AB8B2

Light teal footer, Empty status message, Dark text

Style Guide - Typography

Typography

FOR MAC

Helvetica Neue

Regular, Bold

FOR WINDOWS

Arial

Regular, Bold

TYPERCASE

Title Case

There are some words that are generally left capitalized when using title case. These include short words and characters.

- Articles (a, an, the)
- Coordinating conjunctions (and, but, for)
- Short (fewer than 5 letters)
- Prepositions (off, by, from, etc.)

Sentence case

Sentence case simply inserts one capitalizes the first letter of a sentence, proper nouns, and nothing else as opposed to capitalizing almost every first letter in title case.

USAGE

The quick brown fox...

Atlas, Regular

The quick brown fox jumps ove...

Atlas, Regular

The quick brown fox jumps over the lazy dog

20px, Regular

The quick brown fox jumps over the lazy dog

16px, Bold

The quick brown fox jumps over the lazy dog

16px, Regular

The quick brown fox jumps over the lazy dog

16px, Regular

The quick brown fox jumps over the lazy dog

14px, Regular

The quick brown fox jumps over the lazy dog

12px, Regular

The quick brown fox jumps over the lazy dog

10px, Regular

Style Guide - Form elements

Forms

BUTTONS

Default

Primary button

Hover

Primary button

Disabled

Primary button

Active

Primary button

FAB

E-card button

Ghost button

Ghost button

Link button

Link button

Link button with icon

Link button with icon

Link button

Link button

Text box

Text box

Text box with placeholder

Placeholder text

Text box with value

Text box with value

Text box with error

Error message

Text box with disabled value

Disabled value

Text box with masked value

Masked value

Text area

Placeholder text

Dropdown

Default dropdown

Selected dropdown

Selected dropdown

Selection dropdown list

Dropdown item 1

Dropdown item 2

Handoff

After the designs are validated from the users and it meets the business goals, it is time to hand it off for development. In this phase, the collaboration between the designers and developers become vital. They need to clearly communicate and stay in the loop with others about any changes in the design from the early stages.

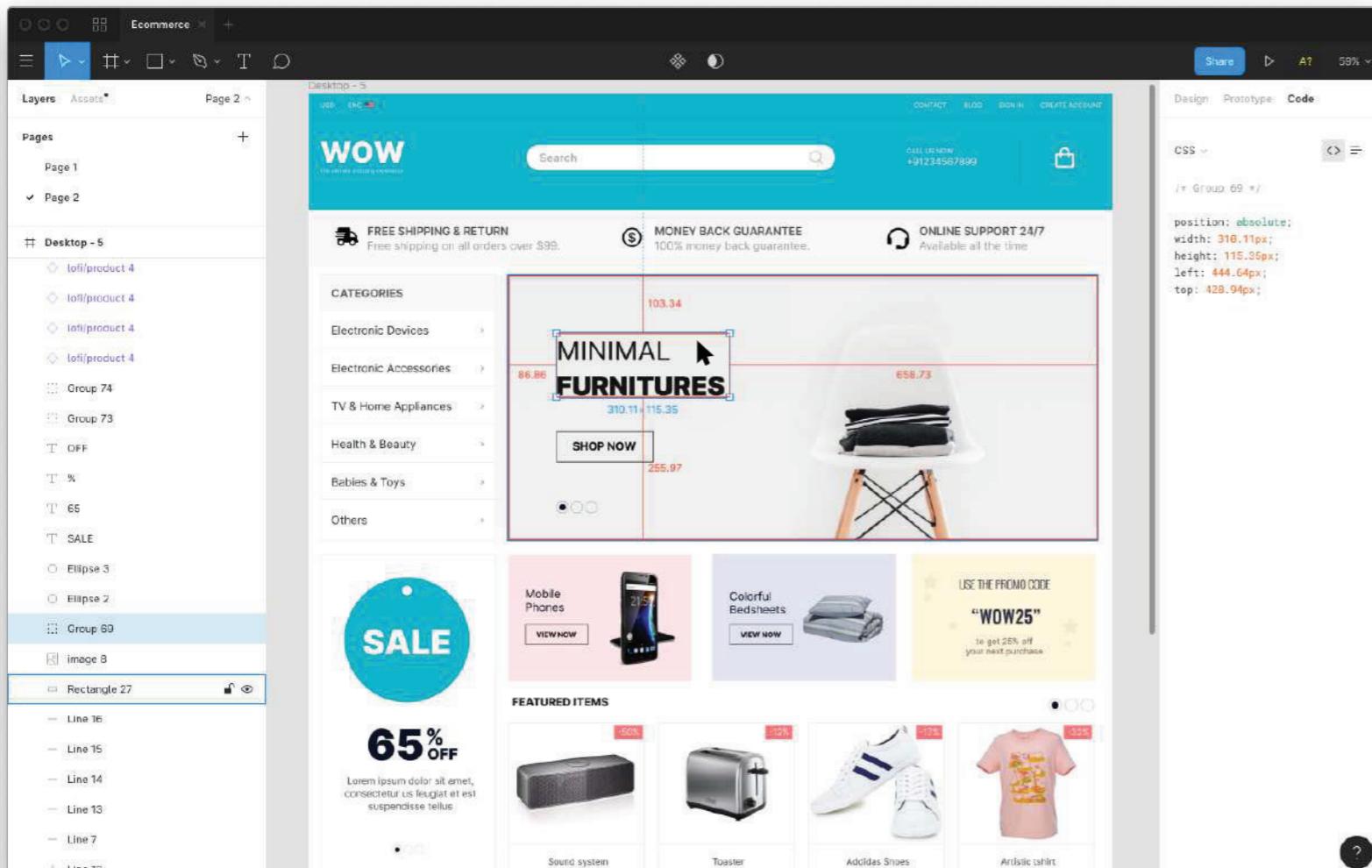
Both the designers and developers should have a common understanding when it comes to developing the product.

The designers need to handover the developers all the necessary design files and assets.

After the development, we suggest spending enough time on design verification by working on a feedback loop.

Further details:

<https://phase.com/magazine/designer-and-developer-handoff-guide/>



Remote Tips



The feedback can be received from shared documents, live recordings of users using the prototype, audio-video recordings and so on in a remote team.



Similar to the ideate phase, the collaboration for design creation can be done in tools like Figma

“ Usability test answers the question, “Can the user accomplish their goal?”

Joyce Lee

Human Factors Design at Apple

Measure



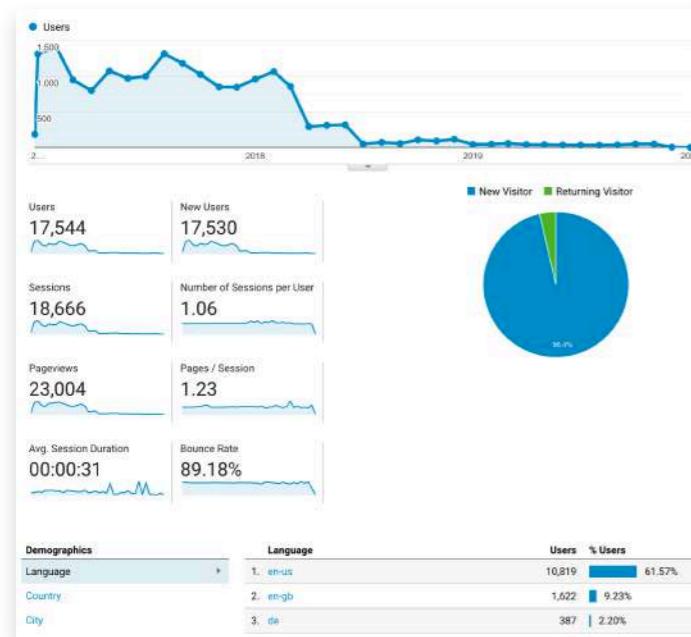
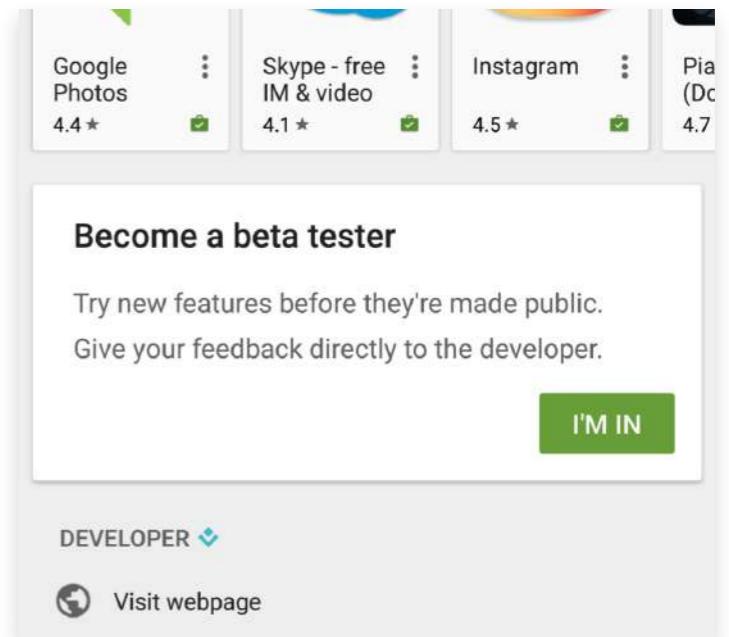
The measure is not exactly the end step to discover and design phase. We carry out this step throughout the process in the form of user testing, business goals alignment, and so on. This is where we interact with the users for feedback and iterate on ideation and creation accordingly. We take stakeholders and user interviews in each of the steps above to validate the solution.

The main goal of measuring is to analyze if we identified the problem that matter and provided the best solution. For example, we developed a system to resolve employee engagement issues which we later tracked using Fullstory to analyze the interaction of the employees. The team discovered what was working and what was not. Then, they were able to provide a better experience with new features and easy functionality.

Different projects will have different objectives. It is crucial to measure the progress and validate findings throughout the design and discovery process.

For this, we follow the following methods:

- a. Use of analytics tools
- b. Invest on User interview
- c. Run a beta program

The interface shows beta testing options for several apps:

- Google Photos: 4.4★
- Skype - free IM & video: 4.1★
- Instagram: 4.5★
- Pia (Dc): 4.7

Become a beta tester

Try new features before they're made public.
Give your feedback directly to the developer.

I'M IN

DEVELOPER

 Visit webpage

Use of analytics tools

Analytics tools can be best used to measure the system quantitatively. The integration of tools like Google Analytics, FullStory, Mixpanel, and others will provide you with crucial data. This information can give valuable insight to tweak the design features for better performance. We generally use Analytics to track various metrics like the number of users, click-through rates, customer acquisitions, etc. once the product is released to the audience.

Invest on user interview

From the beginning of the design and discovery phase, we emphasized the involvement of users. It is best to invest some time after the product is released to interview end-users of the application. Similar to the interview sessions in earlier stages, make sure you are observing the user interaction rather than driving them.

Run a beta program

Running a beta test is a good alternative for gathering feedback for the application. You can register for beta programs in both Appstore and Google Playstore. The beta program will enable you to release your application among the early adopters who then can help you with feedback. However, remember to set the objective of the beta program before running it. This way, you will not deviate from the main aim of running the program.

In summary

Stages in the discovery and design



Discover

- a. Collect data
- b. Create user personas
- c. Outline user journey
- d. Document major pain points
- e. Prioritize the action points

Ideate

- a. Lots of ideas
- b. Possible user journey
- c. Process flow
- d. Wireframes
- e. Low fidelity mockups



Create

- a. High fidelity mockups
- b. Interaction design
- c. Prototype
- d. Design system
- e. Handoff



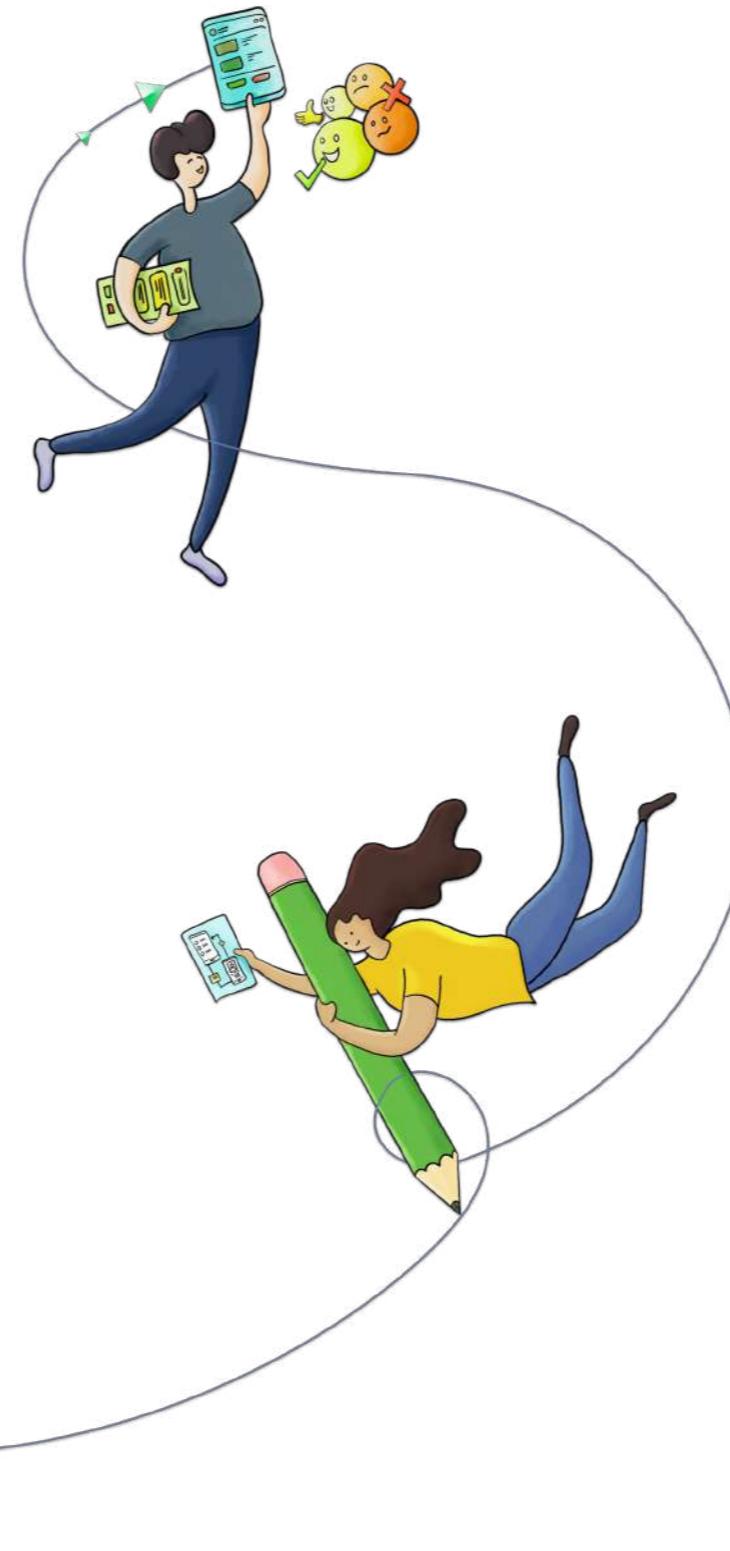
Measure

- a. Use of analytics tools
- b. Invest on user interview
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Conclusion

The discovery and design phase is a must when you are thinking of developing any digital product. It helps us explore the problem and possible solutions while validating our assumptions. By ignoring these steps, one could simply be building a brilliant product that the users don't even need.

The startups and enterprises will gain insights about their product and their target user by simply investing an ample amount of time in these phases. By understanding the problem of the user, and developing a solution around it, we are moving one step ahead to reaching the product-market fit.



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