

Workshopping Your Way into a Solid UX Strategy



Sandra Gonzalez

PRODUCT DESIGN DIRECTOR

@uxcata www.UX4Change.org



Summary



Six fundamental workshops for setting up a UX Strategy

Discover the relationship between user needs, empathy map and value proposition

Effective way to manage stakeholders

Set the product design foundation up for success



User Needs Workshop



2 hours workshop

**Introducing user
needs**

**Introducing our user
groups**

**Familiarizing with user
needs**

Grouping user needs

Prioritising user needs

Next steps



Attendees

Required	Optional
Product or Service Design Lead	Beneficiaries (end-user, decision maker, donor, volunteer, staff)
Senior UX Researcher	
Product Owner or VP	
Product Lead	
Subject Matter Expert	
Product Marketing	
Delivery Lead	
Engineering Leads	



Objectives

Start getting familiar with user needs as a team

Get alignment on user needs as a team

Initial prioritisation of user needs that we can take into Sprint planning

Initial prioritisation of user needs that need research support to validate or explore further



How to Prepare



Collect as many user needs as possible

Write user needs in the format suggested in this course and print them in a card format. Produce two sets of cards.

Decide the user group (beneficiaries' group) for this workshop and print out representation of all the user groups to go over your reasoning for selecting this one

Get flipcharts ready to create prioritization matrices during the workshop



How to Prepare



Get dots ready for dot-voting

Have a camera ready and make sure you take plenty of pictures of the team working as well as the outcomes

Make sure there is a place accessible to everyone ready for documentations

Adapt the next slides to your organization



Introduction to User Needs



User needs

‘User needs’ are the needs that a user has of a product or service, and which that product or service must satisfy for the user to get the right outcome for them.



As a [user group]

I need/want/expect to... [what does the user want to do?]

So that.... [why does the user want to do this?]



As a chicken

I need to cross the road
safely

So that I don't get killed.



Introduction to the Different User Groups





Familiarize with User Needs



Familiarize with User Needs

Break out into two groups

Make sure each group has someone who is a good proxy for the user

Assign one person to read the user need out loud

Encourage everyone to ask questions if there is anything that is unclear



Group User Needs by Themes



Group User Needs by Themes

Check with each team member that all needs are understood

Go over all the needs again but this time start to group them by themes

Produce preliminary names for the theme

After categorizing all the needs finalize the names for each theme



Share the Themes



Share the Themes

Showcase Themes

Ask each team to present the themes they produced

Contrast Themes

Identify all the common themes as well as the outliers

Agree on Themes

As a team agree on what themes to move forward

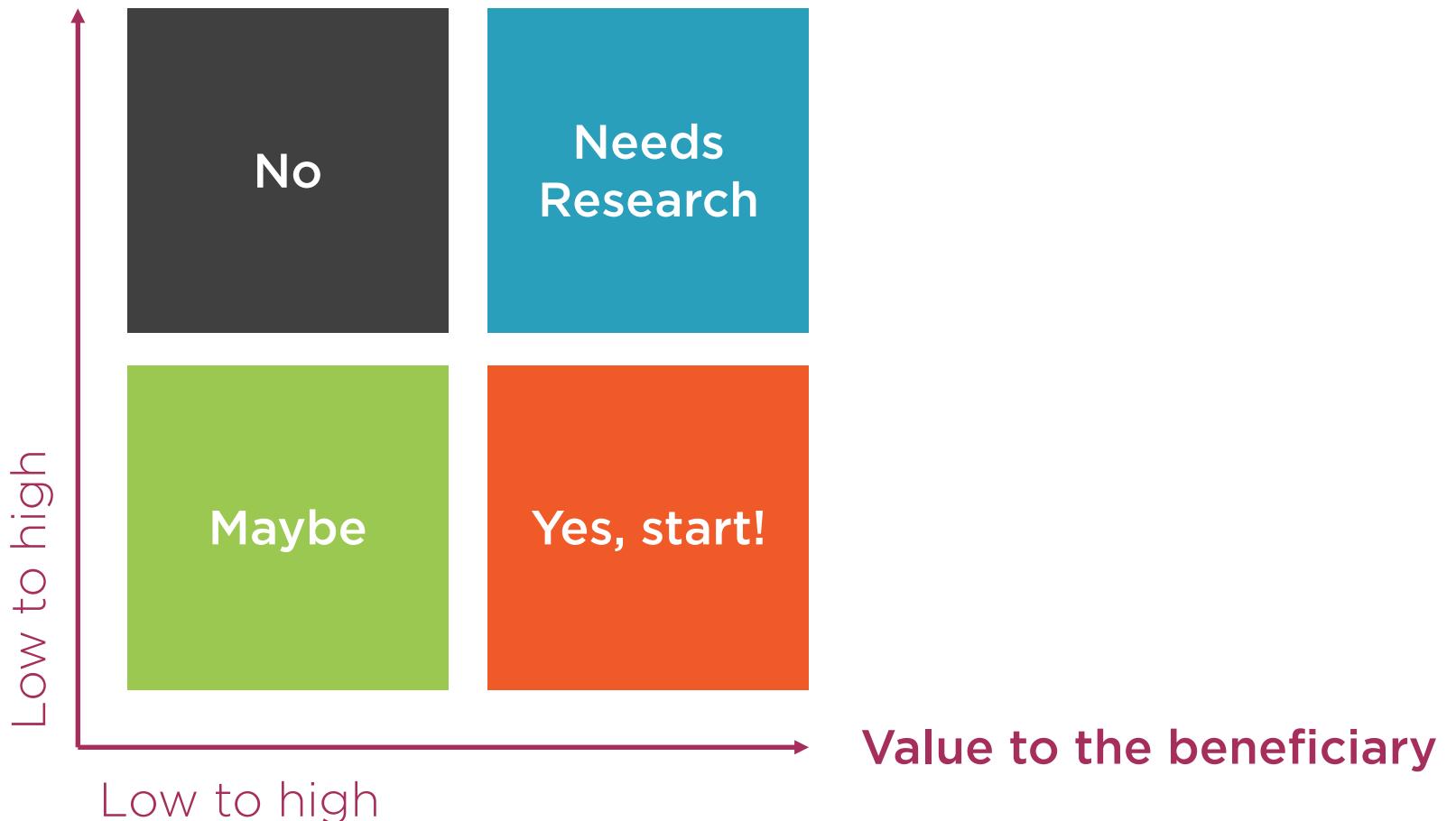


Prioritize User Needs by Themes



Prioritizing User Needs by Themes

Risk to your organization





How are these user needs
different than the ones from
the ODI process?



Conclusions

Themes have been identified and agreed with the team

User needs have been prioritized



**Review the
prioritization with the
Engineering team**

**Run more of these
workshops for other
user groups or new
user needs identified**

Next Steps



Empathy Mapping Workshop



1.5 hour workshop

Intro to empathy map

Warm-up exercise

The job-to-be-done

The senses

The gains and pains

Next steps



Attendees

Required	Optional
Product or Service Design Lead	Beneficiaries (end-user, decision maker, donor, volunteer, staff)
Senior UX Researcher	
Product Owner or VP	
Product Lead	
Subject Matter Expert	
Product Marketing	
Delivery Lead	
Engineering Leads	



Objectives

- Align the team on a single, shared understanding of one beneficiary
- Understand what drives beneficiary's behaviours
- Guide us towards meaningful personas



How to Prepare



Decide with key team members prior to the workshop who they should be empathizing with

Get print out ready for both the simple and canvas empathy maps for each participant

Get a large print out of the Empathy Map Canvas

Have two different color of post-its ready



How to Prepare



Get some verbatim and pictures from research ready to share with the team

Have a camera ready and make sure you take plenty of pictures of the team working as well as the outcomes

Make sure there is a place accessible to everyone ready for documentations

Adapt the next slides to your organization



Introduction to Empathy Mapping

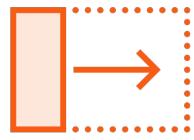


Empathy Map

An **empathy map** is a collaborative visualization used to articulate what we know about a particular type of user.



Benefits of Creating an Empathy Map



It externalizes knowledge about the beneficiary



It captures a moment in the life of the beneficiary



More effective than old school personas because an empathy map is more reliable



Two Approaches to Empathy Maps

Simple

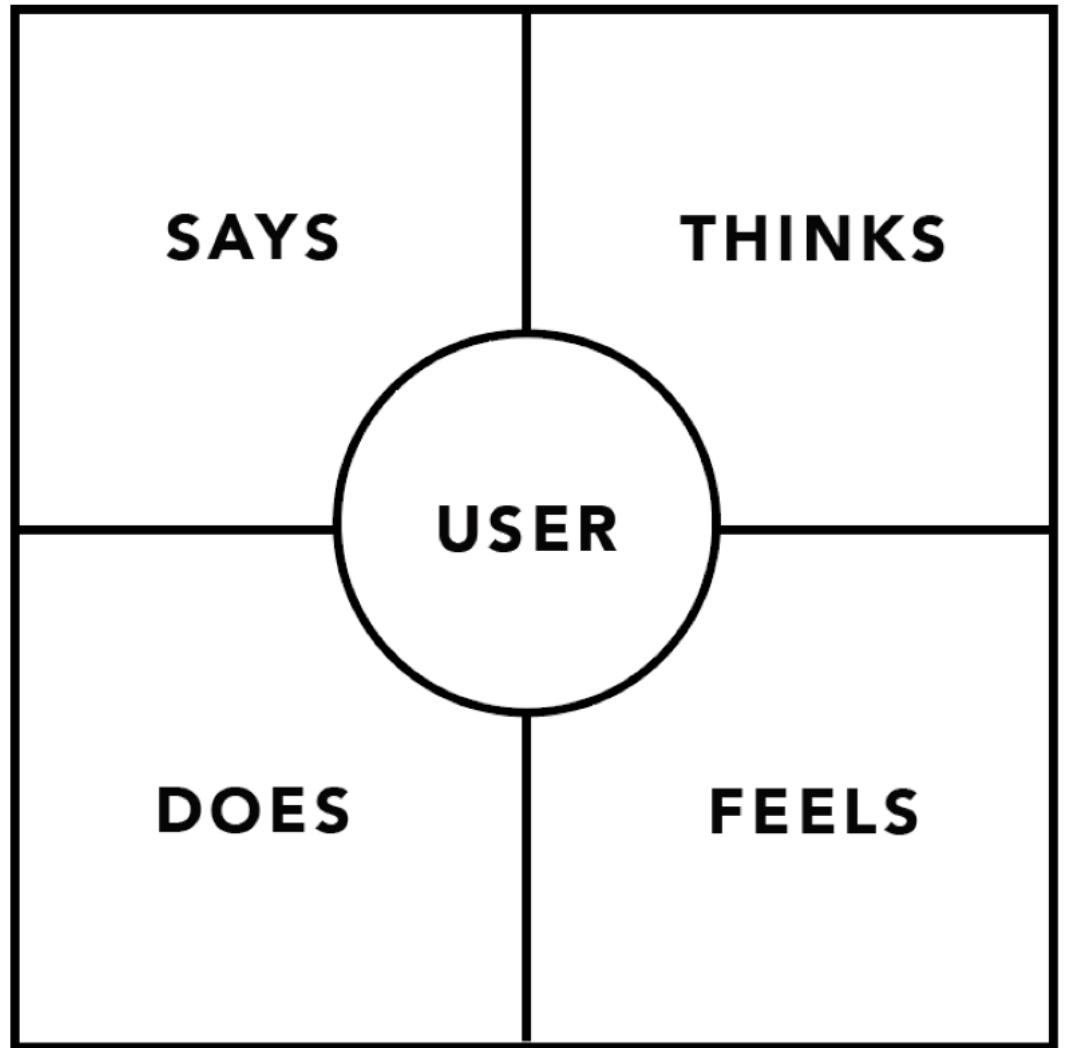
Only four dimensions, ideal for a quick exercise. Very little preparation needed.

Canvas

More detailed with a well-rounded approach to all the senses



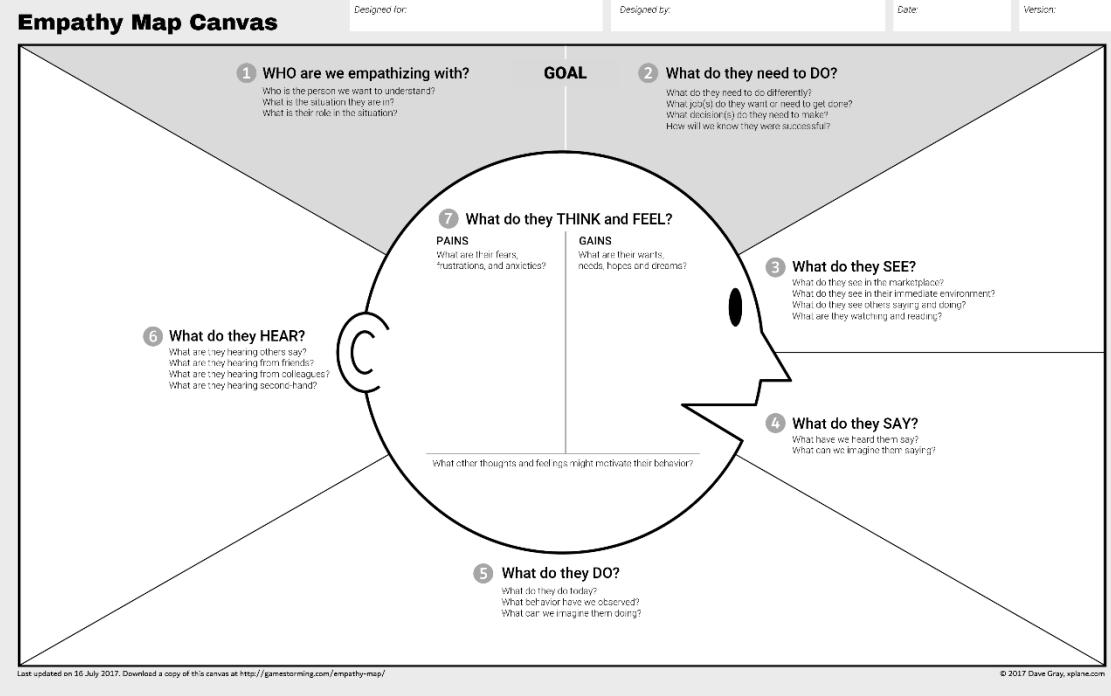
EMPATHY MAP



Simple

Only four dimensions, ideal for a quick exercise. Very little preparation needed.

Empathy Map Canvas



Canvas

More detailed with a well-rounded approach to all the senses



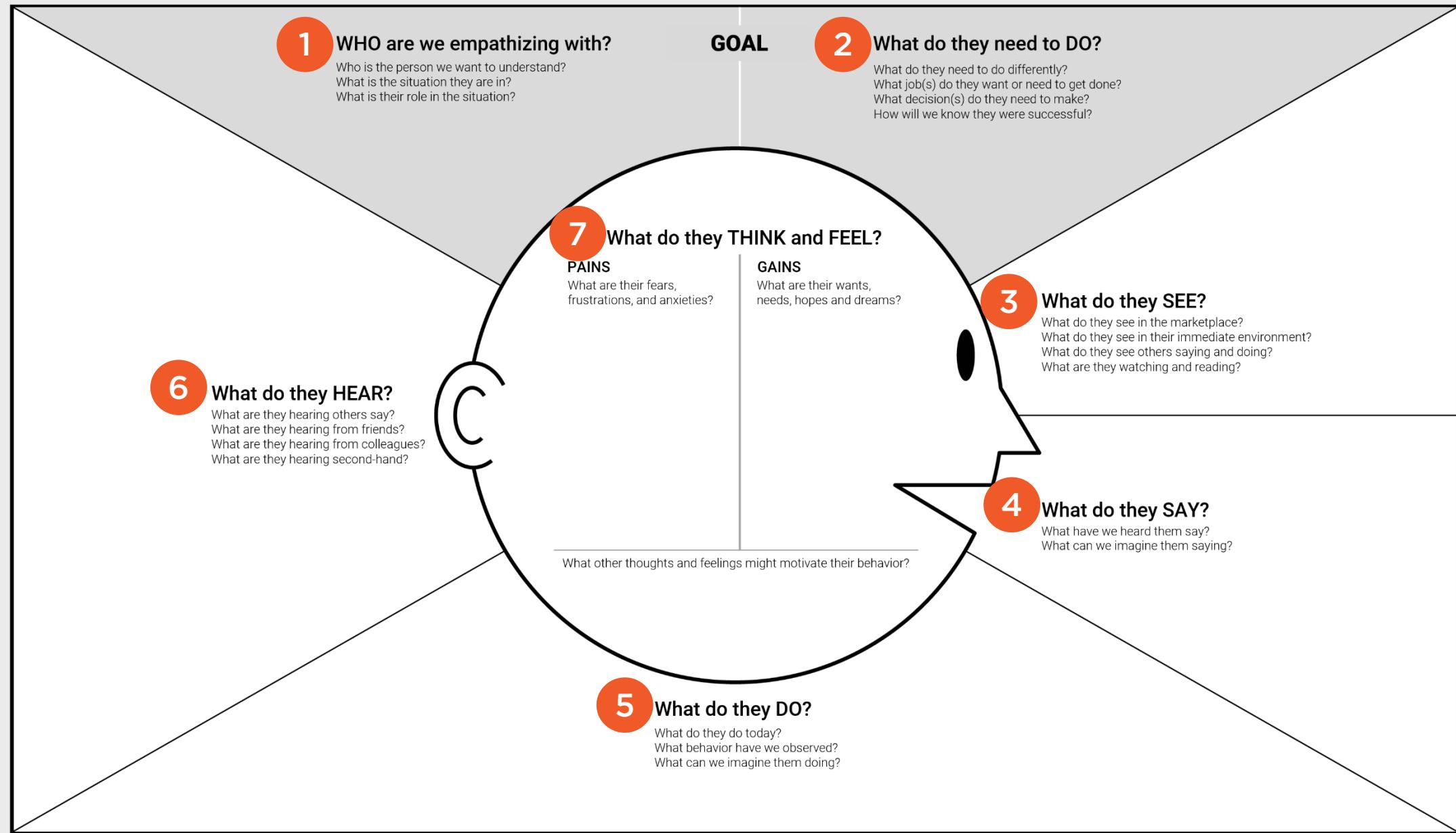
Empathy Map Canvas

Designed for:

Designed by:

Date:

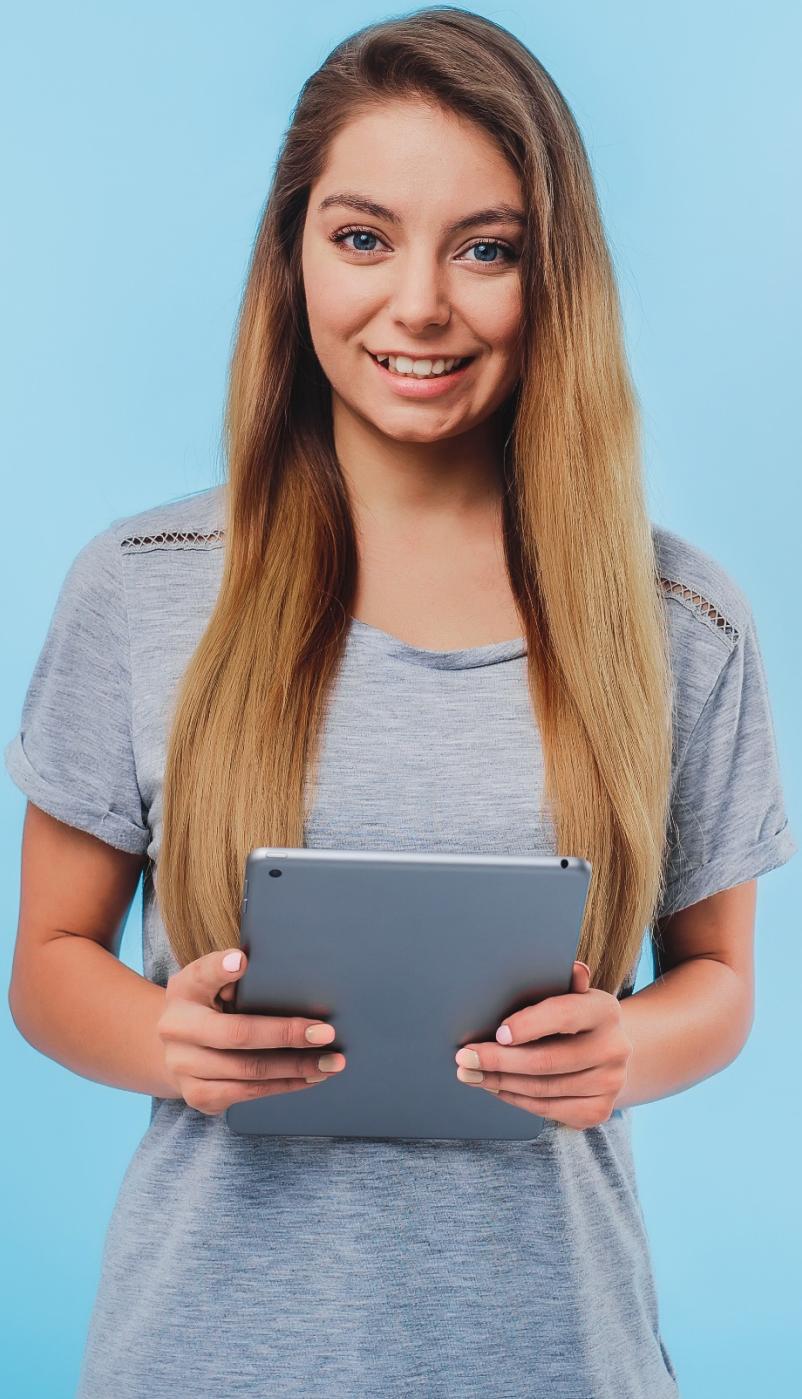
Version:

















Warm-up Exercise

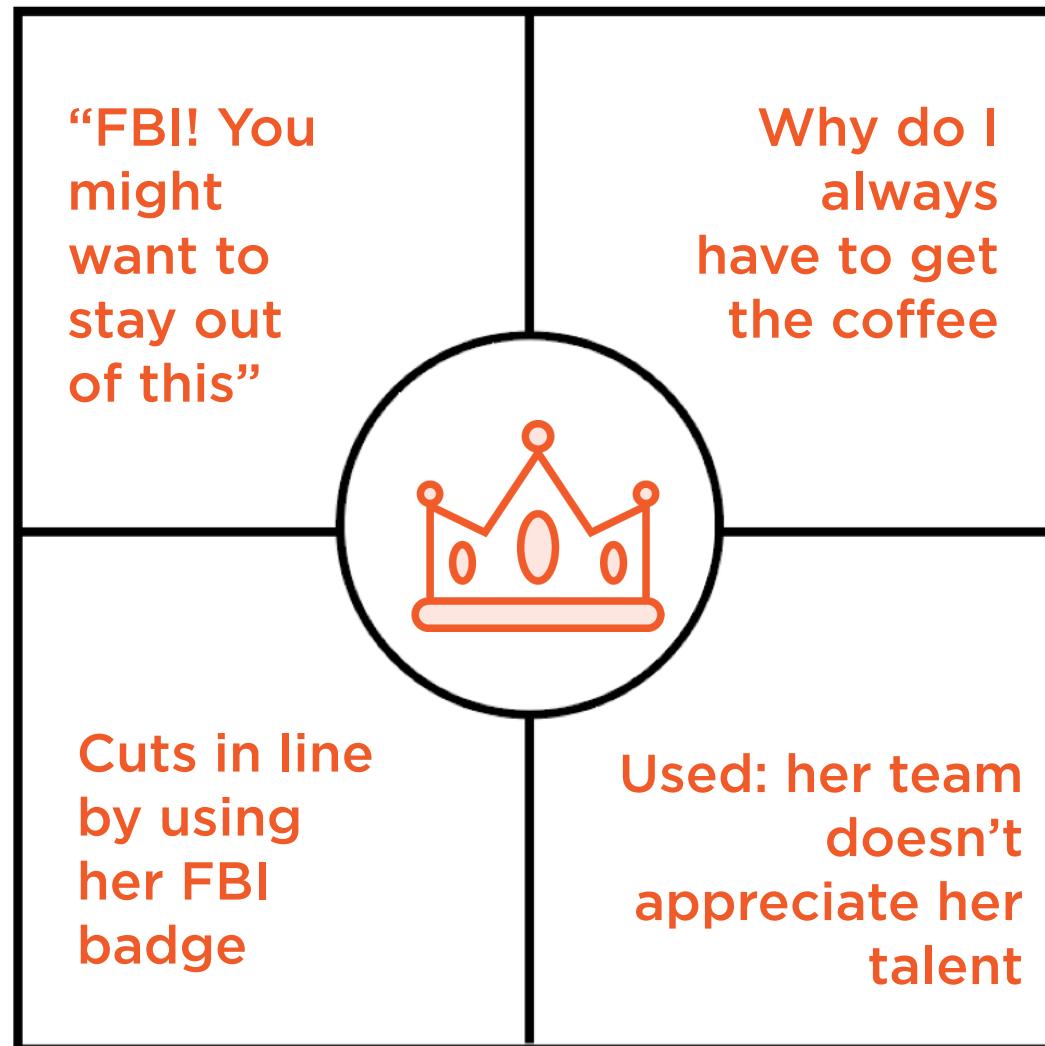




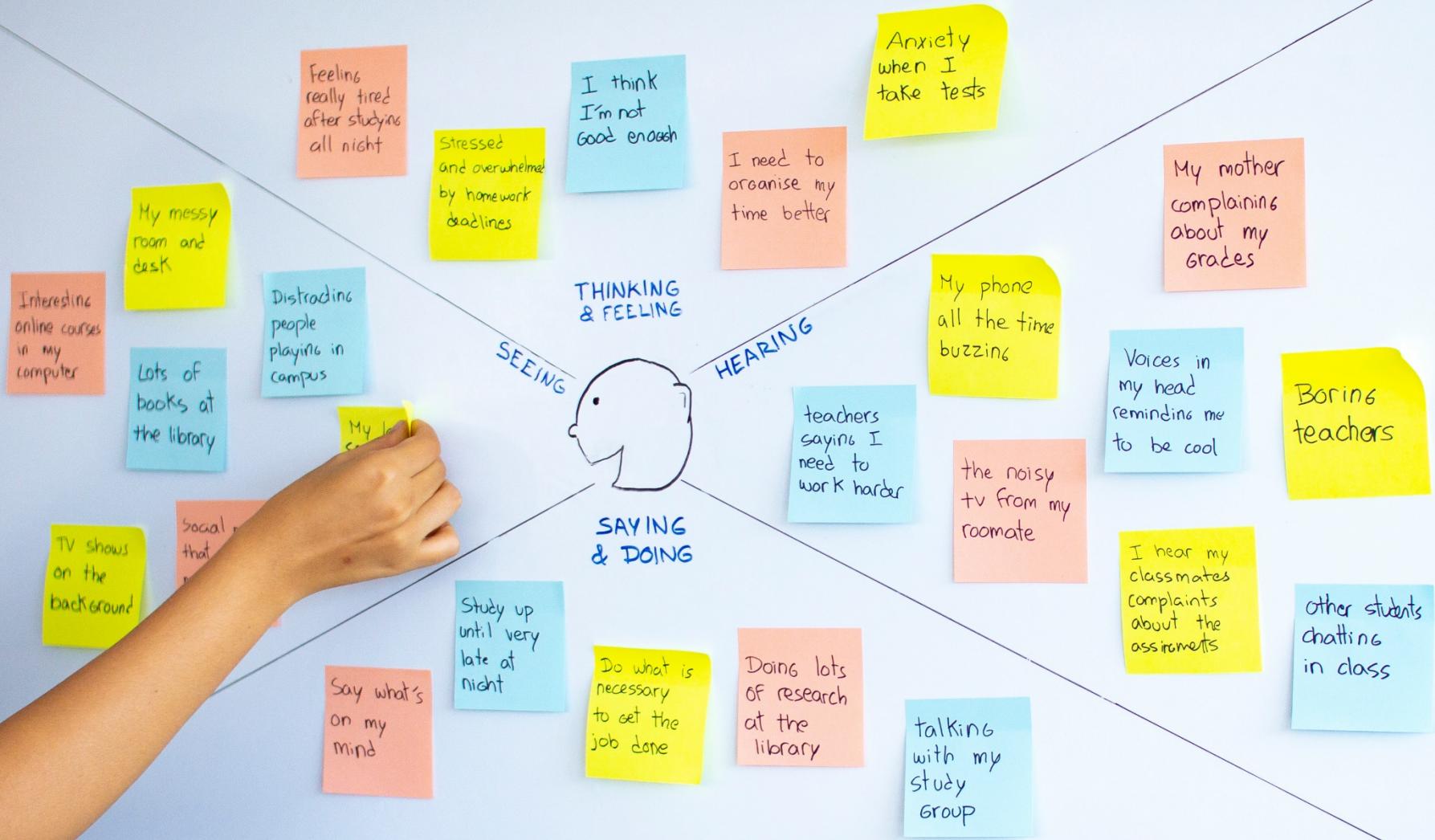
▶ ▶ 🔍 0:28 / 0:57

CC ⚙️ 🎞

EMPATHY MAP



-EMPATHY MAP -



PAINS

Not being able to pay the rent

Stuck indoors when I have lots of homework

Failing to pass the course tests

Being distracted all the time

GAINS

Learning new skills

Having high self-esteem

Accomplishing Goals

The Job-to-be-done



Who Are We Empathizing With?



Who is the person we want to understand?

What is the situation they are in?

What is their role in the situation?



What Do They Need to Do?



- What do they need to do differently?**
- What job do they want or need to get done?**
- What decisions do they need to make?**
- How will we know they were successful?**



The Senses

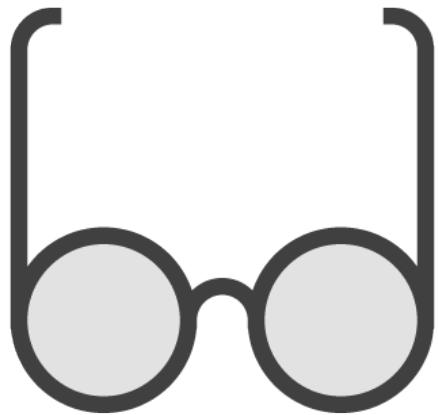








What Do They See



- What do they see in the market?**
- What do they see in their immediate environment?**
- What do they see other saying and doing?**
- What are they watching and reading?**



What Do They Say



What have we heard them say?

What can we imagine them saying?



What Do They Do



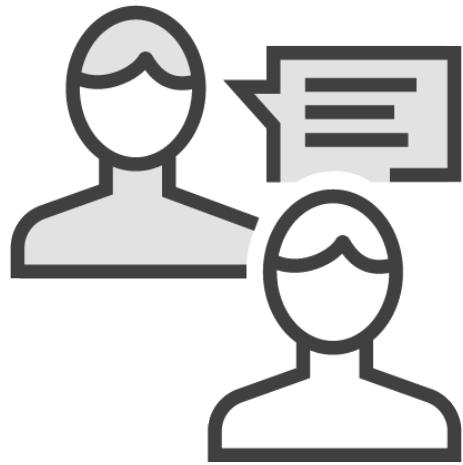
What do they do today?

What behavior have we observed?

What can we imagine them doing?



What Do They Hear



- What are they hearing other say?**
- What are they hearing from friends?**
- What are they hearing from colleagues?**
- What are they hearing second-hand?**



The Gains & Pains



What Do They Think and Feel?



What are their fears, frustrations, and anxieties?

What are their wants, needs, hopes and dreams?

What other thoughts and feelings might motivate their behavior?



Conclusions

- Humans are complex individuals
- It's normal to encounter inconsistencies
- You might have found nuggets of understanding
- You might need more research



**Validate with any
assumptions**

**Run more of these
workshops for other
beneficiaries**

Next Steps



Value Proposition Design Workshop



2 hours workshop

Introduction to Value Proposition Design

Create a Beneficiary Profile

Create a Value Map

Find the fit between the profile and value map

Next steps



Attendees

Required	Optional
Product or Service Design Lead	Beneficiaries (end-user, decision maker, donor, volunteer, staff)
Senior UX Researcher	Sales Lead
Product Owner or VP	Brand Lead
Product Lead	
Subject Matter Expert	
Product Marketing	
Delivery Lead	
Engineering Leads	



Objectives

- To position UX Strategy as a “value focused” discipline to the organization
- To derive a Beneficiary Profile from the Empathy Map
- To turn user needs into pain relievers and gain creators
- To assess if addressing the current set of user needs is enough to create a Unique Selling Proposition



How to Prepare



Agree ahead of time with team on what beneficiary group you should focused on first and only focus on that group

Bring the Empathy Map created previously as well as the Prioritized User Needs

Select one of the user needs themes

Get post-its, dots and black markers ready



How to Prepare



- Have a camera ready and make sure you take plenty of pictures of the team working as well as the outcomes**
- Make sure there is a place accessible to everyone ready for documentations**
- Adapt the next slides to your organization**



Introduction to Value Proposition Design



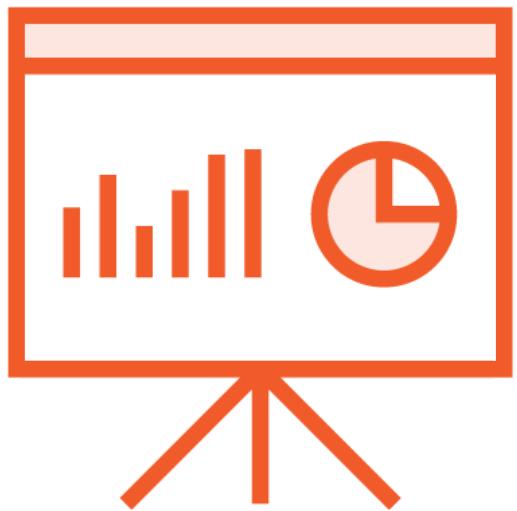
Value Proposition

Describes the benefits customers can expect from your products and services

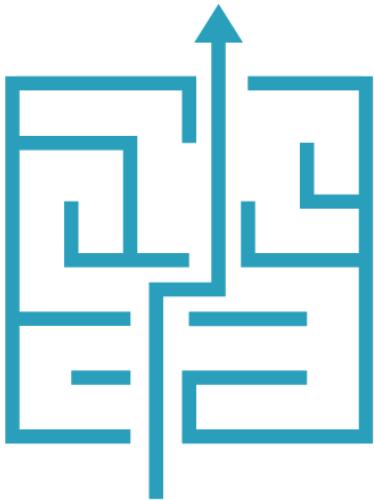


FRESH
LOCAL
PRODUCE

Value Proposition Design Milestones



**Value
Preposition
Canvas**



Design



Test



Evolve



“Value Proposition Design shows you how to use the **Value Preposition Canvas** to **Design** and **Test** great value propositions in an iterative search for what customers want. Value proposition design is a never-ending process in which you need to **Evolve** your value proposition(s) constantly to keep it relevant to customers.”

Strategyzer.com



Value Preposition Design Objectives



Understand the patterns of value creation



Leverage the experience and skills of your team



Avoid wasting time with ideas that won't work



Design, test and deliver what customer want



Top Value Preposition Design Skills

Entrepreneurial Knowledge

Enjoy trying new things

Toolbox

Systematically use tools

Design Thinking

Divergence & Convergence

Customer Empathy

Focused on unmet needs

Experimentation

Systematically seek evidence to ideas



Create a Beneficiary Profile



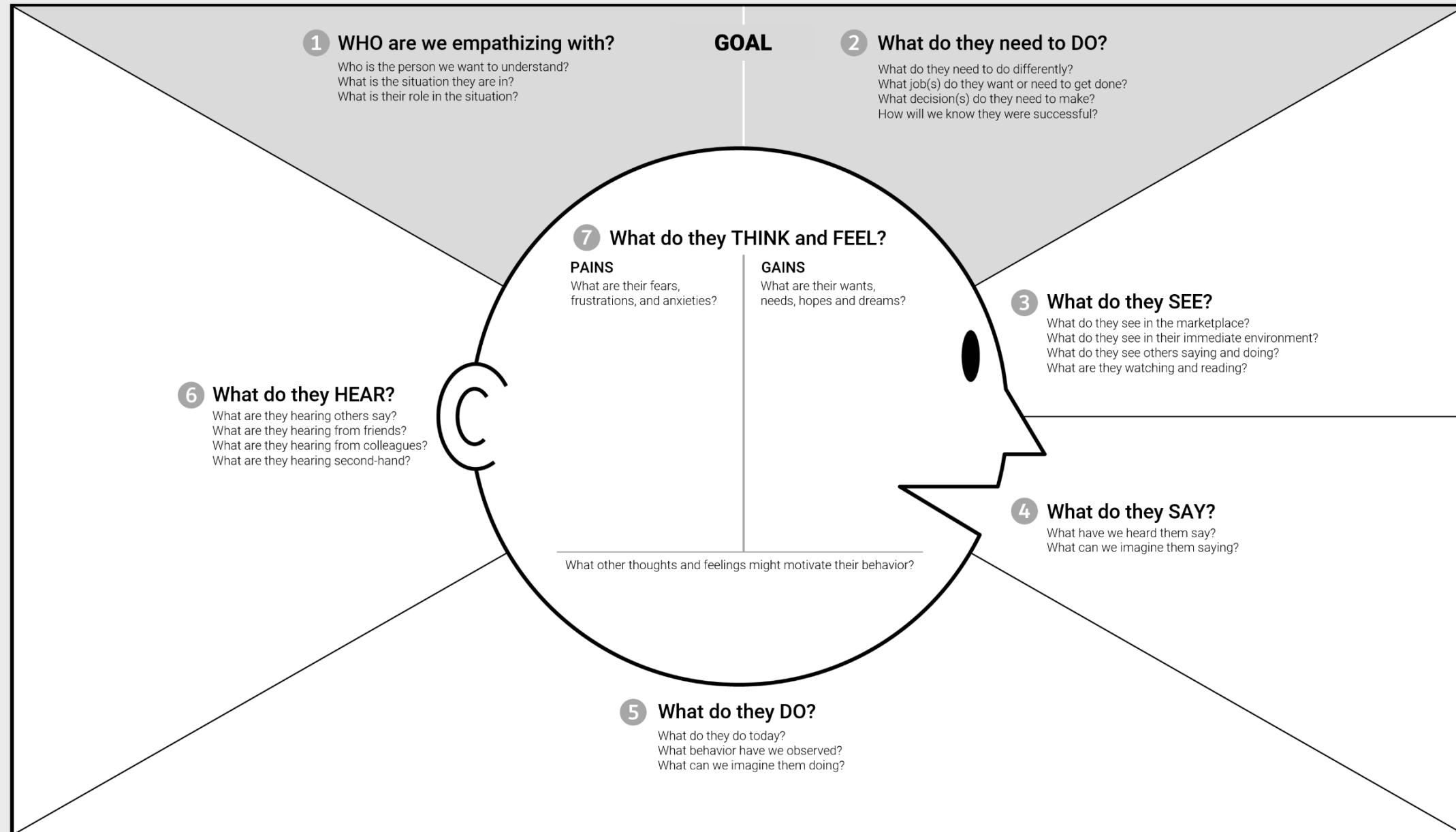
Empathy Map Canvas

Designed for:

Designed by:

Date:

Version:



Empathy Map Canvas

Designed for:

Designed by:

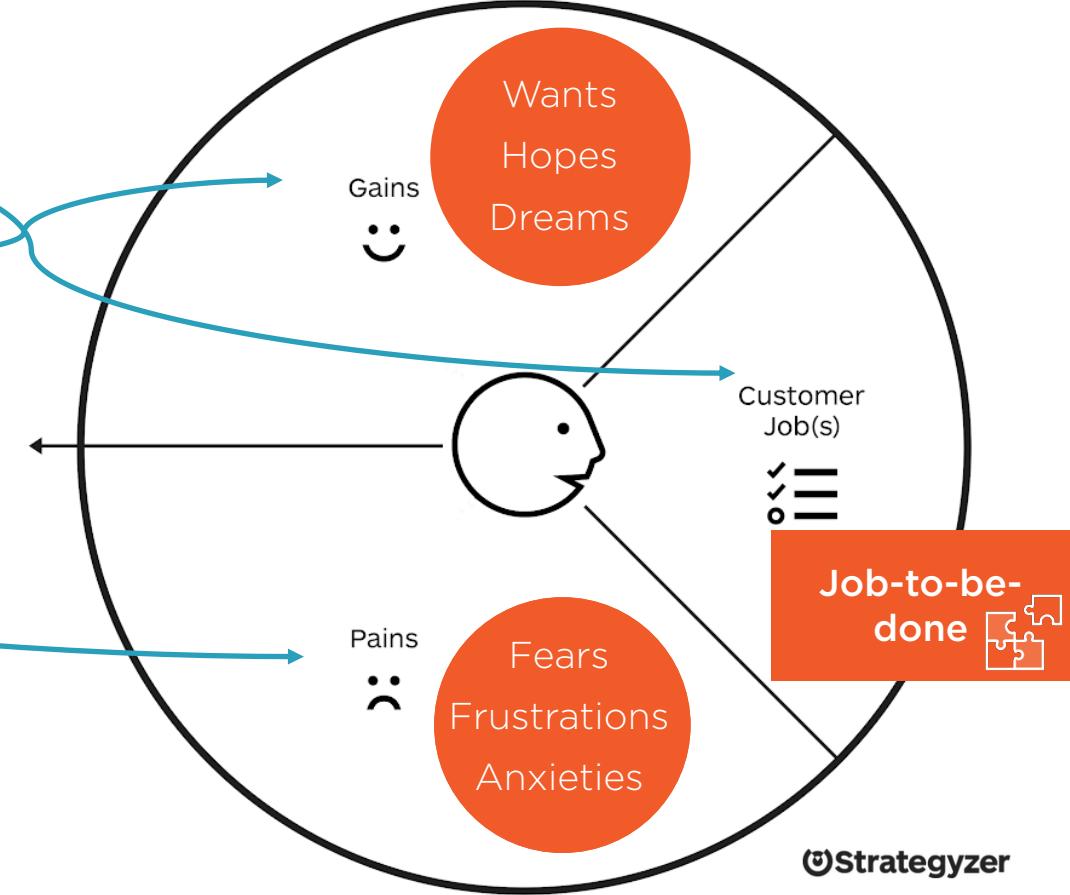
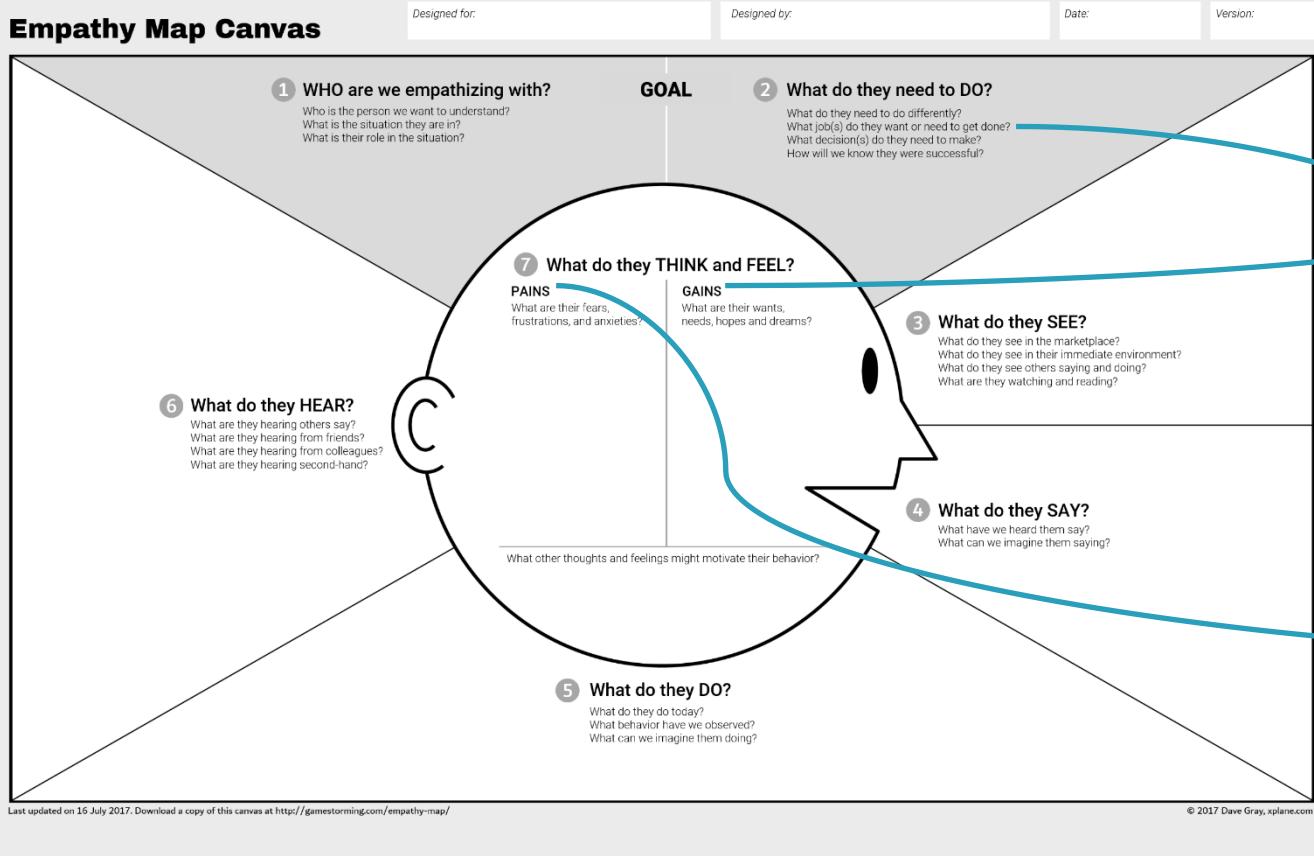
Date:

Version:



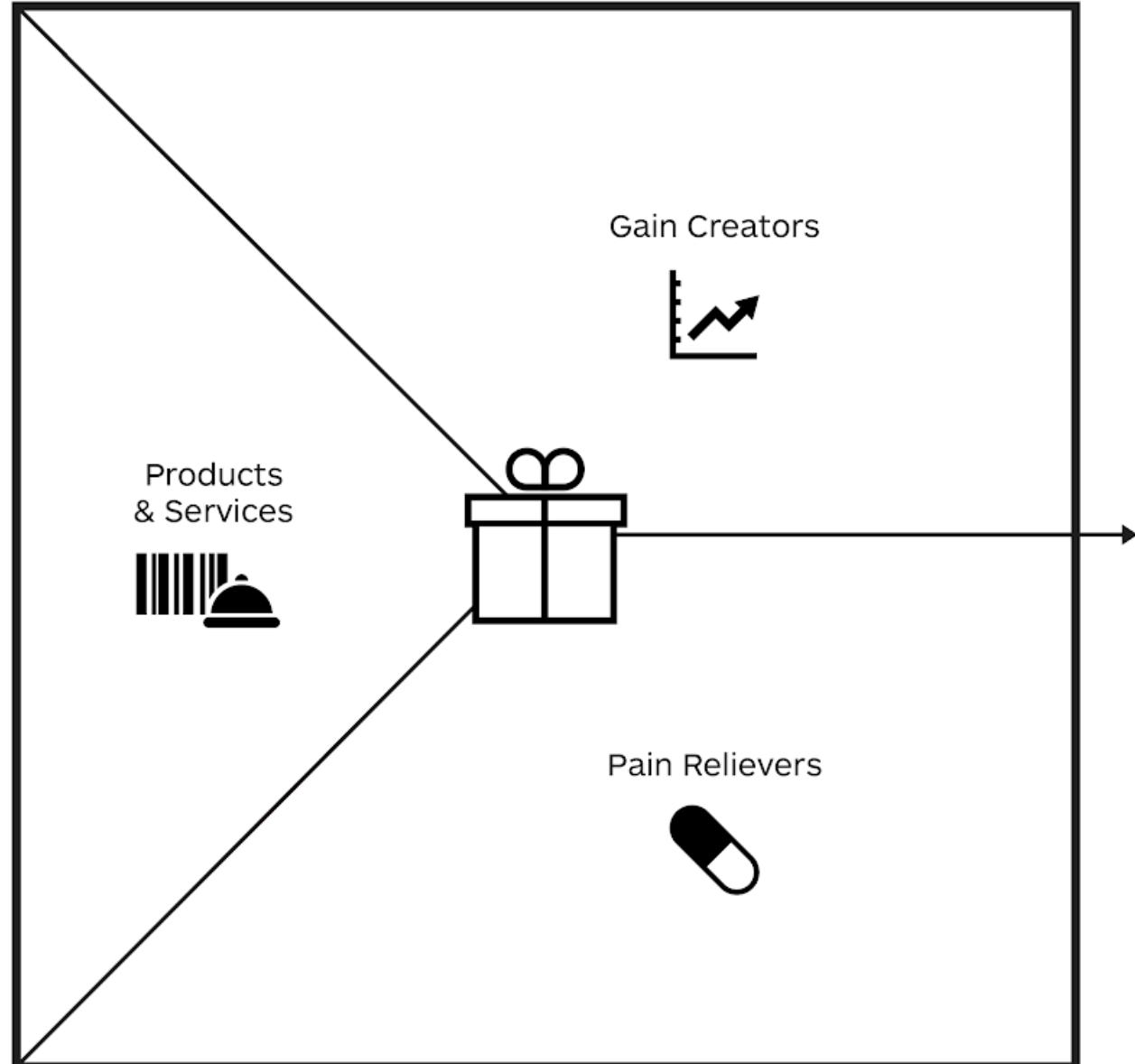
Empathy Map vs. Beneficiary Profile

Empathy Map Canvas



Create a Value Map





Value (Preposition) Map

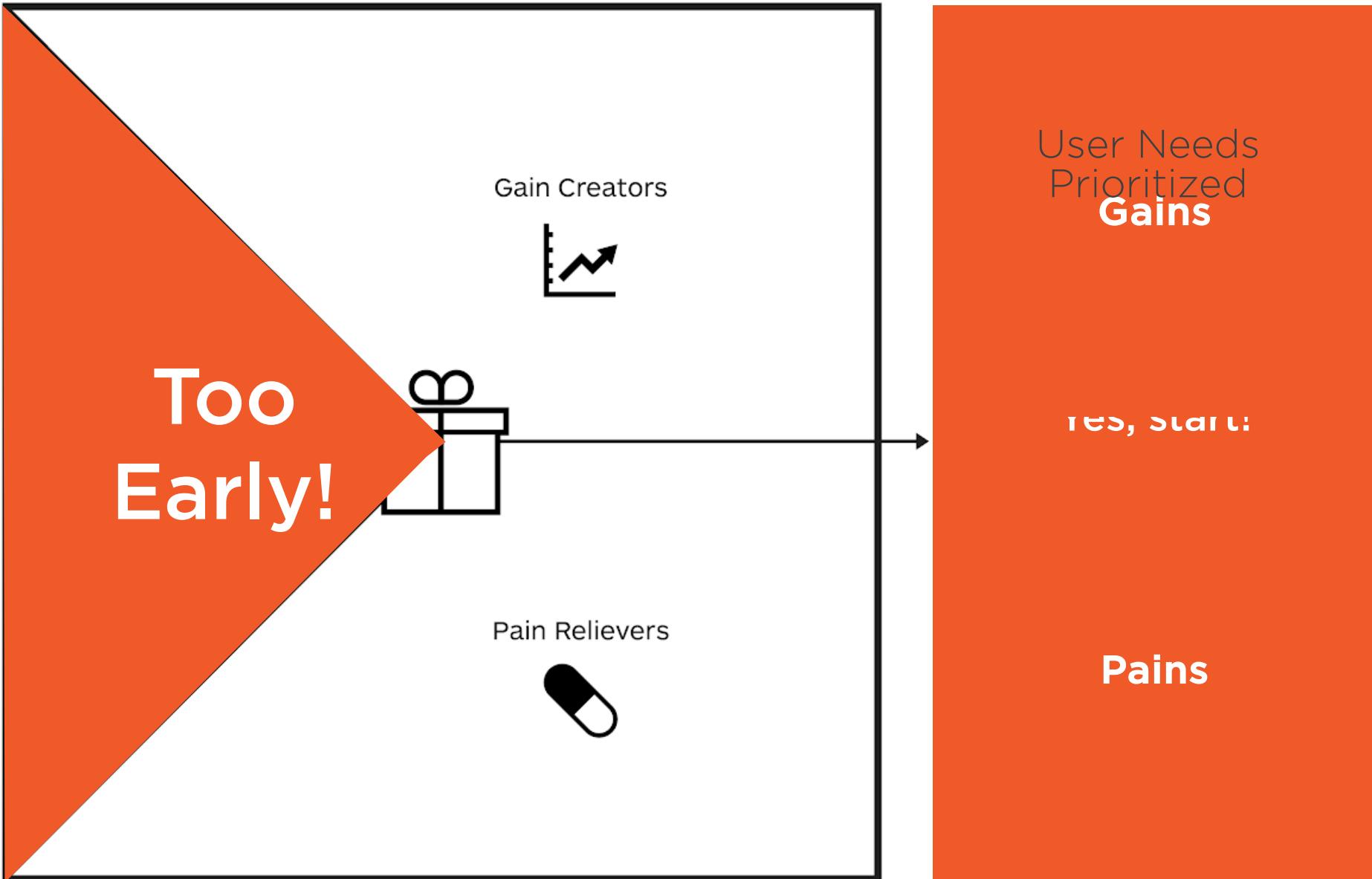
Breaks your value preposition down into product and services, pain relievers and gain creators

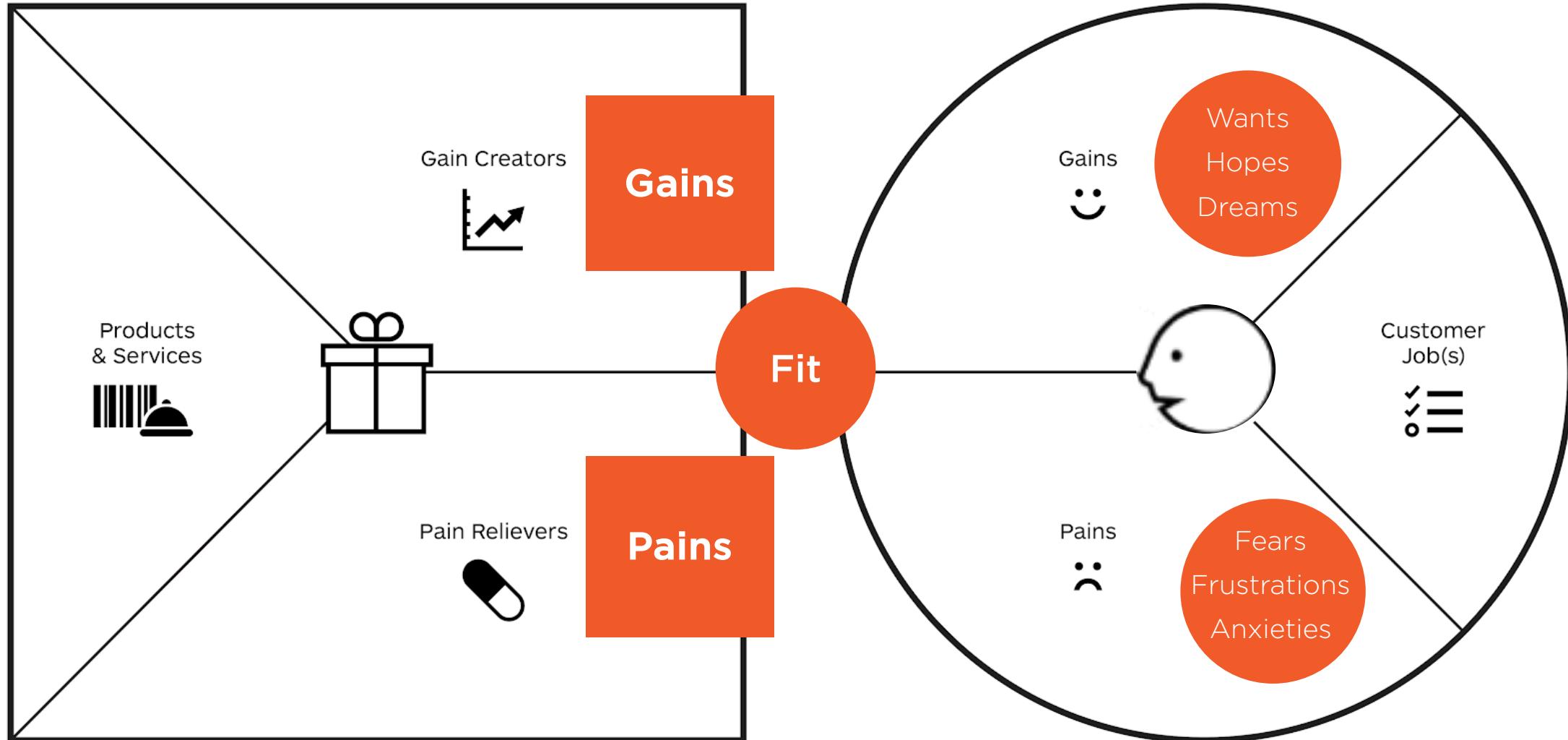


User Needs Prioritized

Risk to your organization





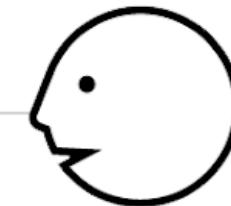




Create Value

The benefits we're
trying to deliver

Fit



Observe Customers

Our Beneficiaries' needs



Conclusions

Our initial set of prioritized user needs are or are not ready to bring value to our beneficiaries



**Plan another session
for each theme and
beneficiary**

Next Steps



Stakeholder Mapping Workshop



1 hour workshop

**What dimension of
the new product or
service to explore**

**Select the top four
groups of
stakeholders**

**Place each
stakeholder in the
appropriate level of
engagement**

Next steps



Attendees

Required	Optional
Product or Service Design Lead	Any outside stakeholder that can help bring clarity (for example Brand, Marketing, Sales or Advisory Board)
Senior UX Researcher	
Product Owner or VP	
Product Lead	
Subject Matter Expert	
Product Marketing	
Delivery Lead	
Engineering Leads	



Objectives

To agree who do we consider to be our stakeholder

Get alignment on the top four stakeholder groups

Identify key stakeholders per group

Identify levels of engagement for each stakeholder



How to Prepare



Agree ahead of time with the team what dimension of the product or service to explore

Get a large white board or a flipchart to work with the team

Get three different colors of post-its for the following type of stakeholders

- Manage closely
- Keep satisfied
- Keep inform



How to Prepare



Identify and interview any stakeholder you or your team is not closer to

Have a camera ready and make sure you take plenty of pictures of the team working as well as the outcomes

Make sure there is a place accessible to everyone ready for documentations

No slides needed for this workshop





What Dimension of the New Product or Service to Explore



Select a Dimension

Product

Brand

Event

Services

Product Marketing

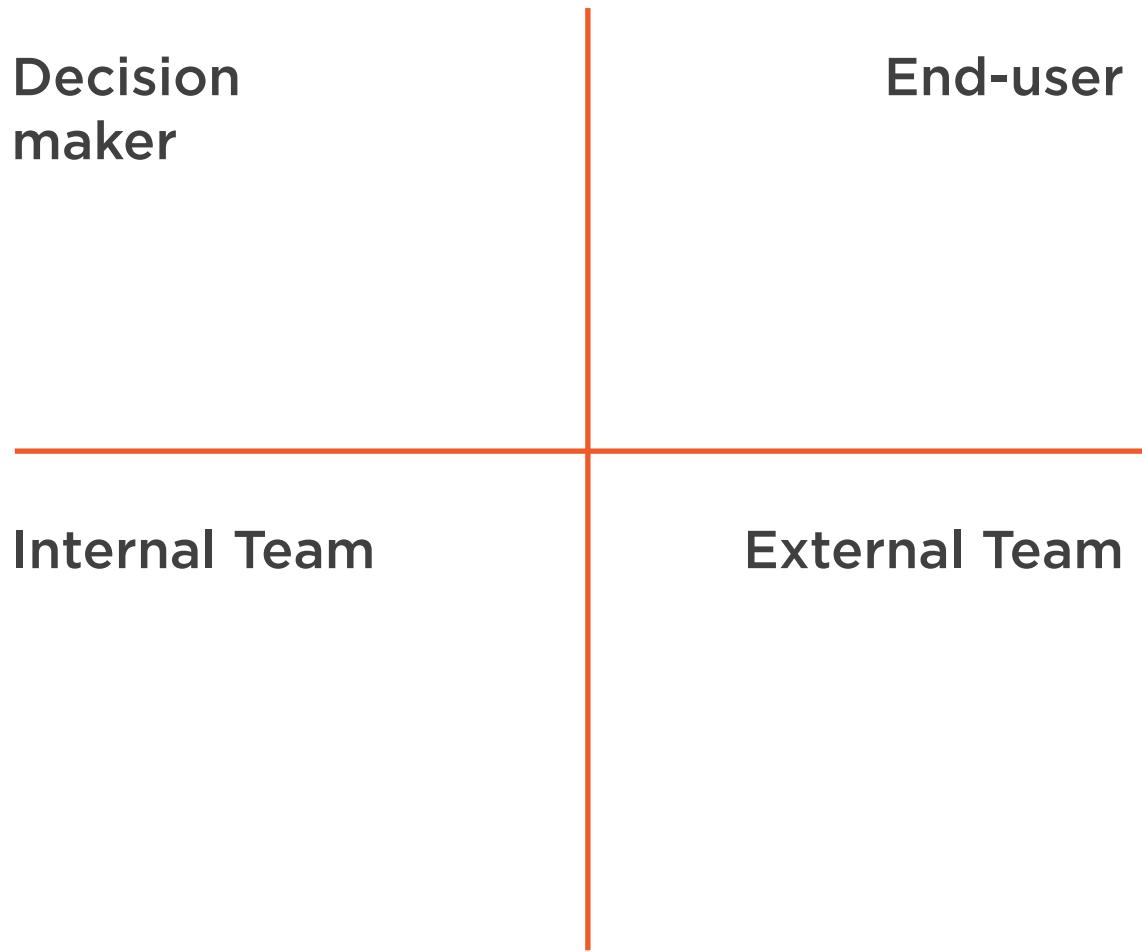
Campaign



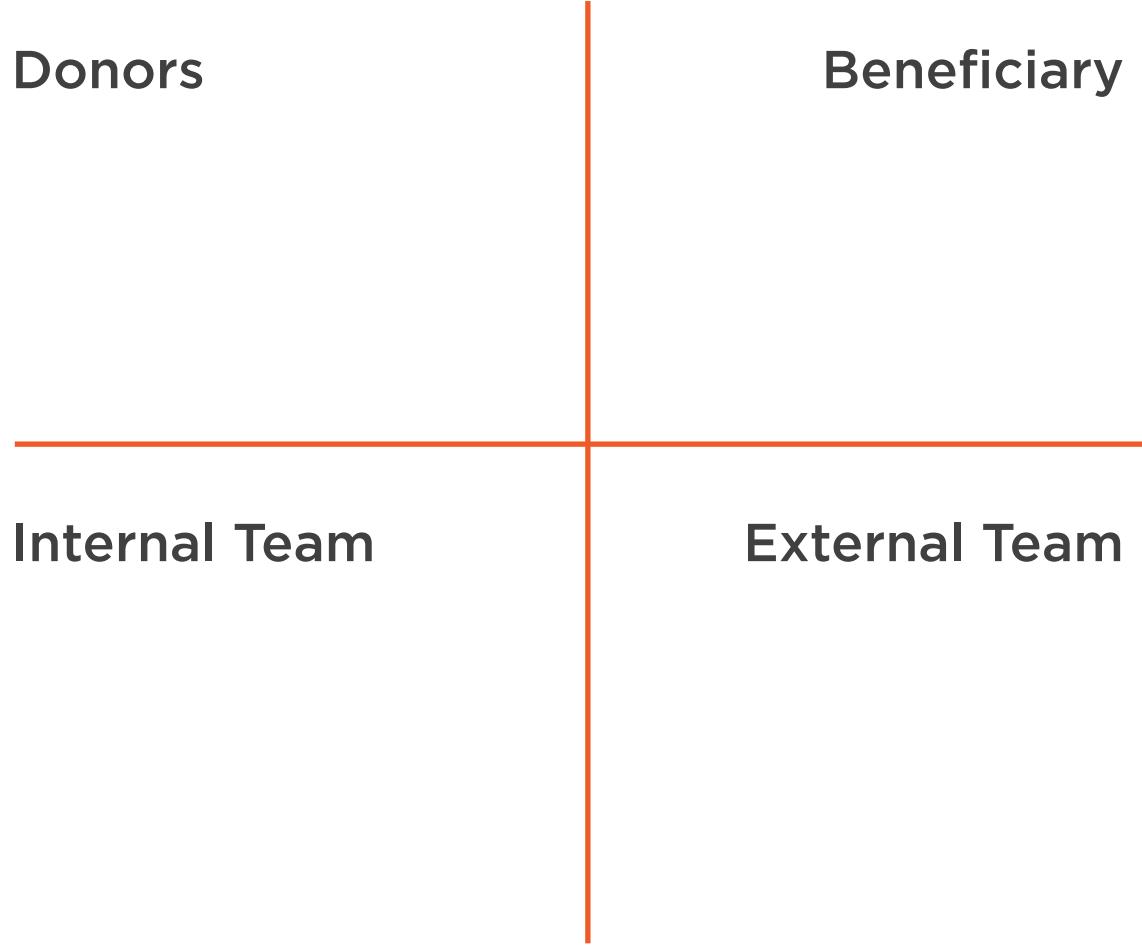
Select the Top Four Groups of Stakeholders



Top Groups of Stakeholders



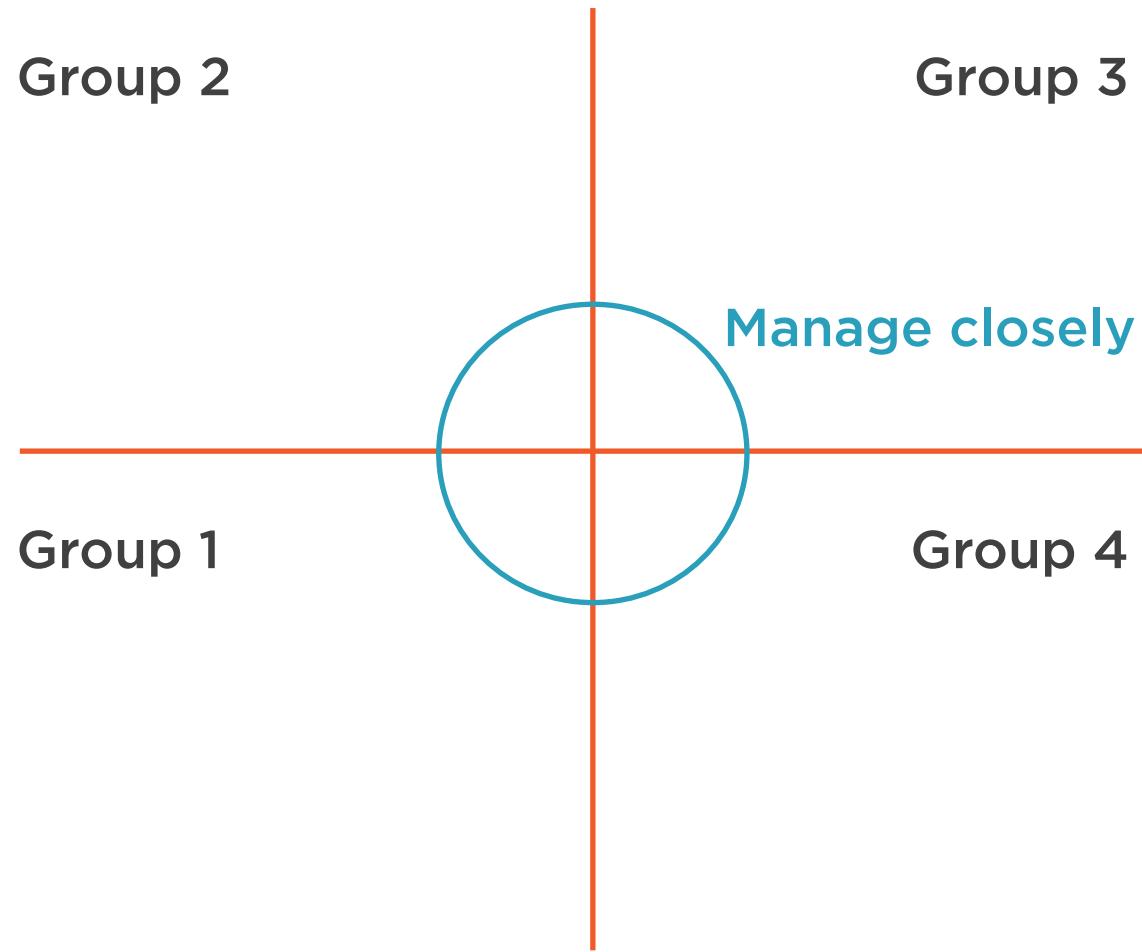
Top Groups of Stakeholders



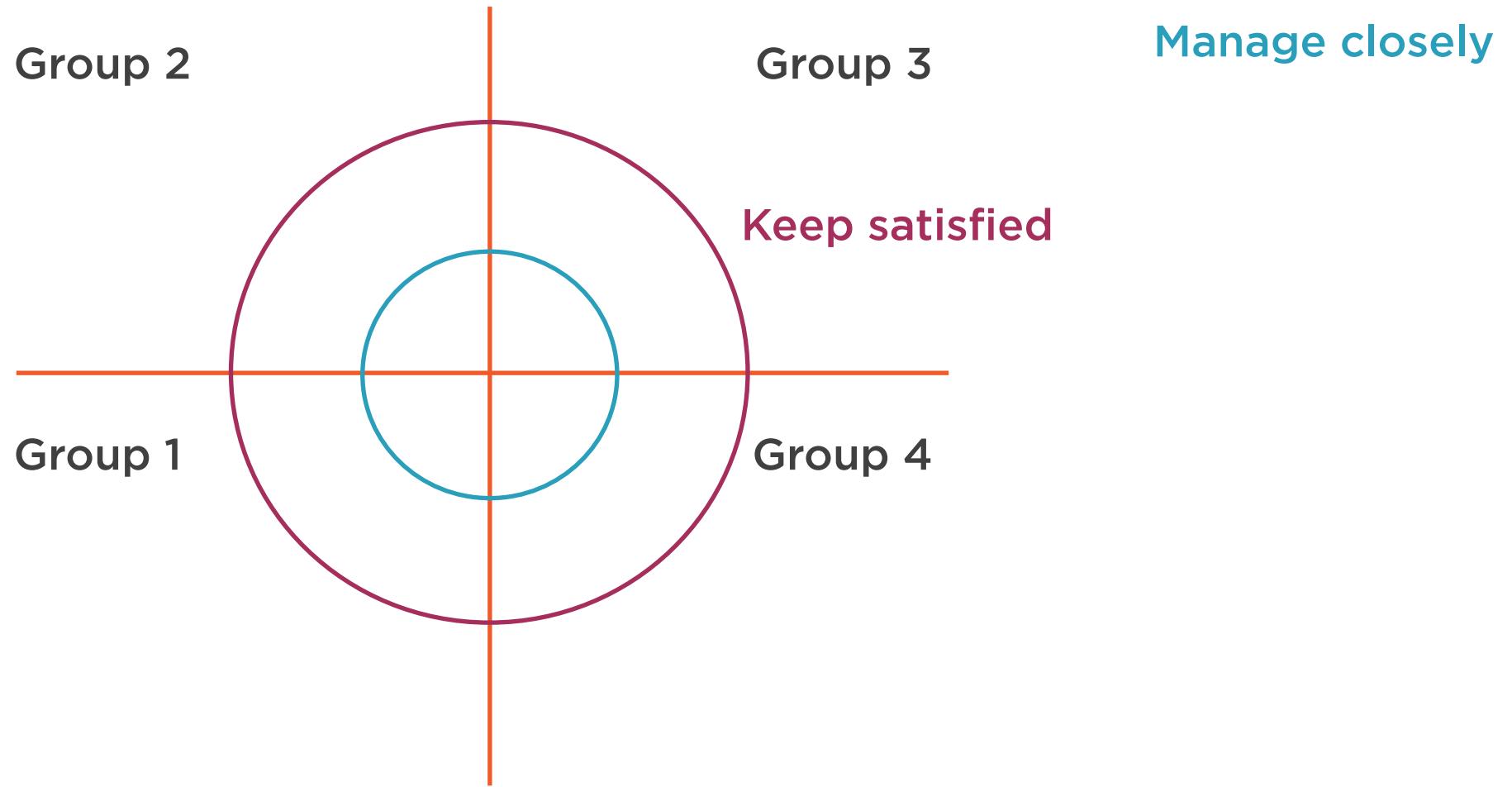
Levels and Methods of Engagement



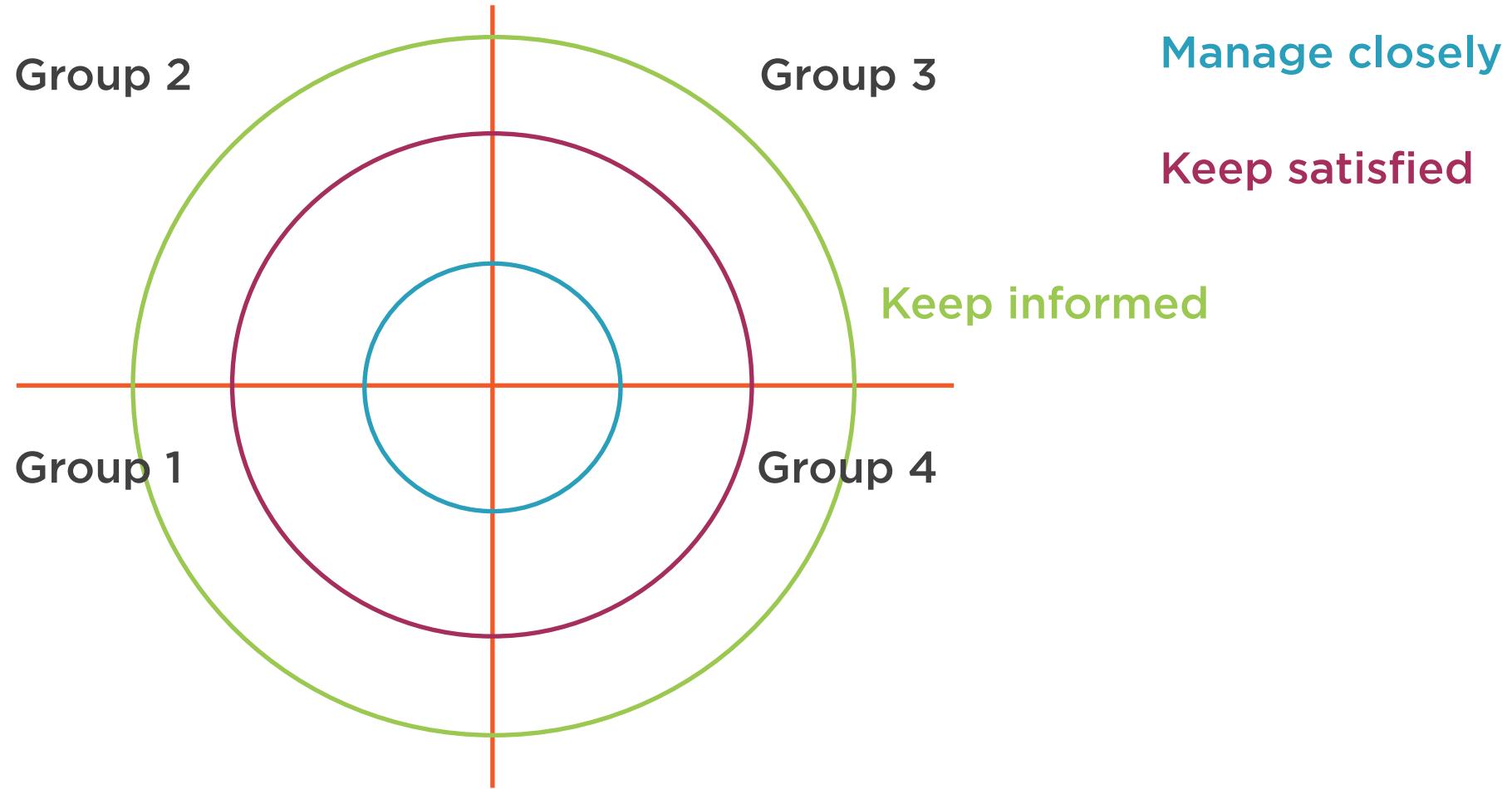
Levels of Engagement



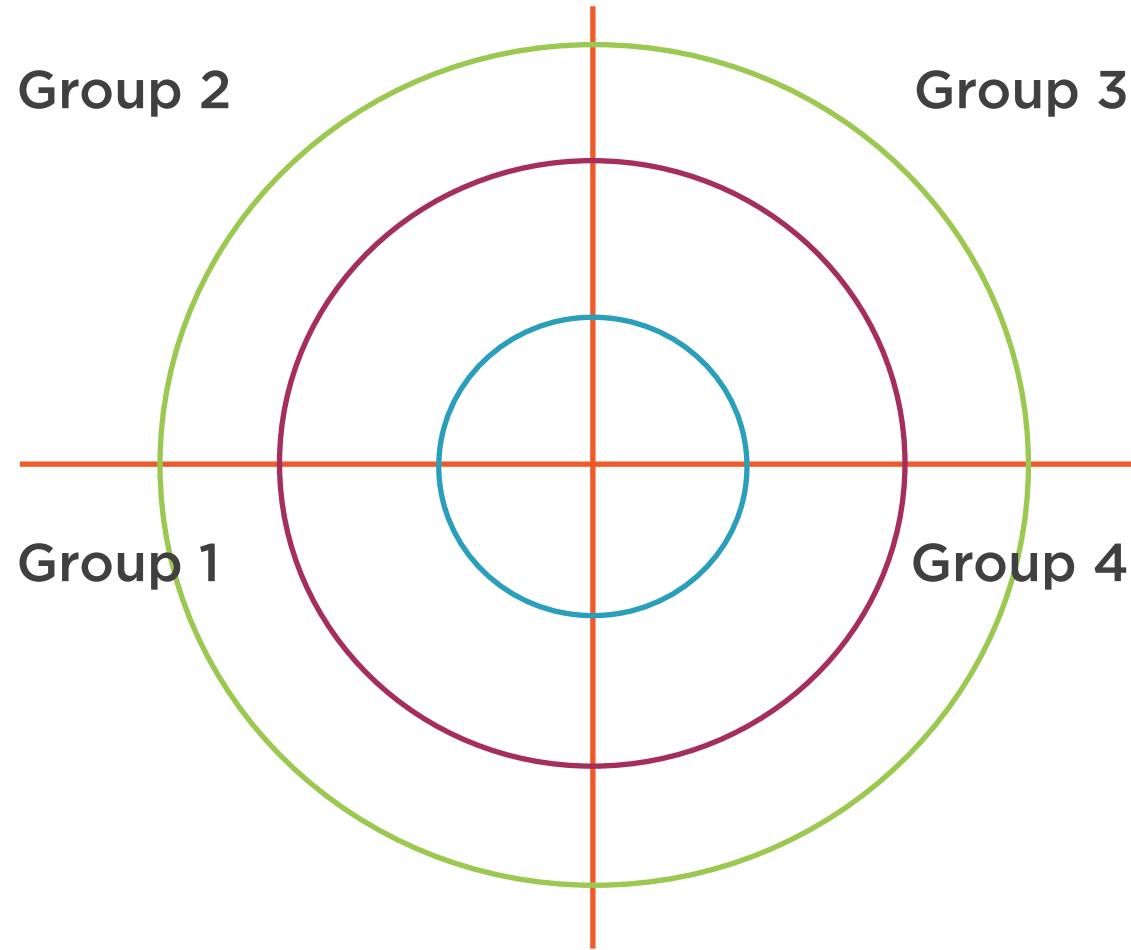
Levels of Engagement



Levels of Engagement



Levels of Engagement



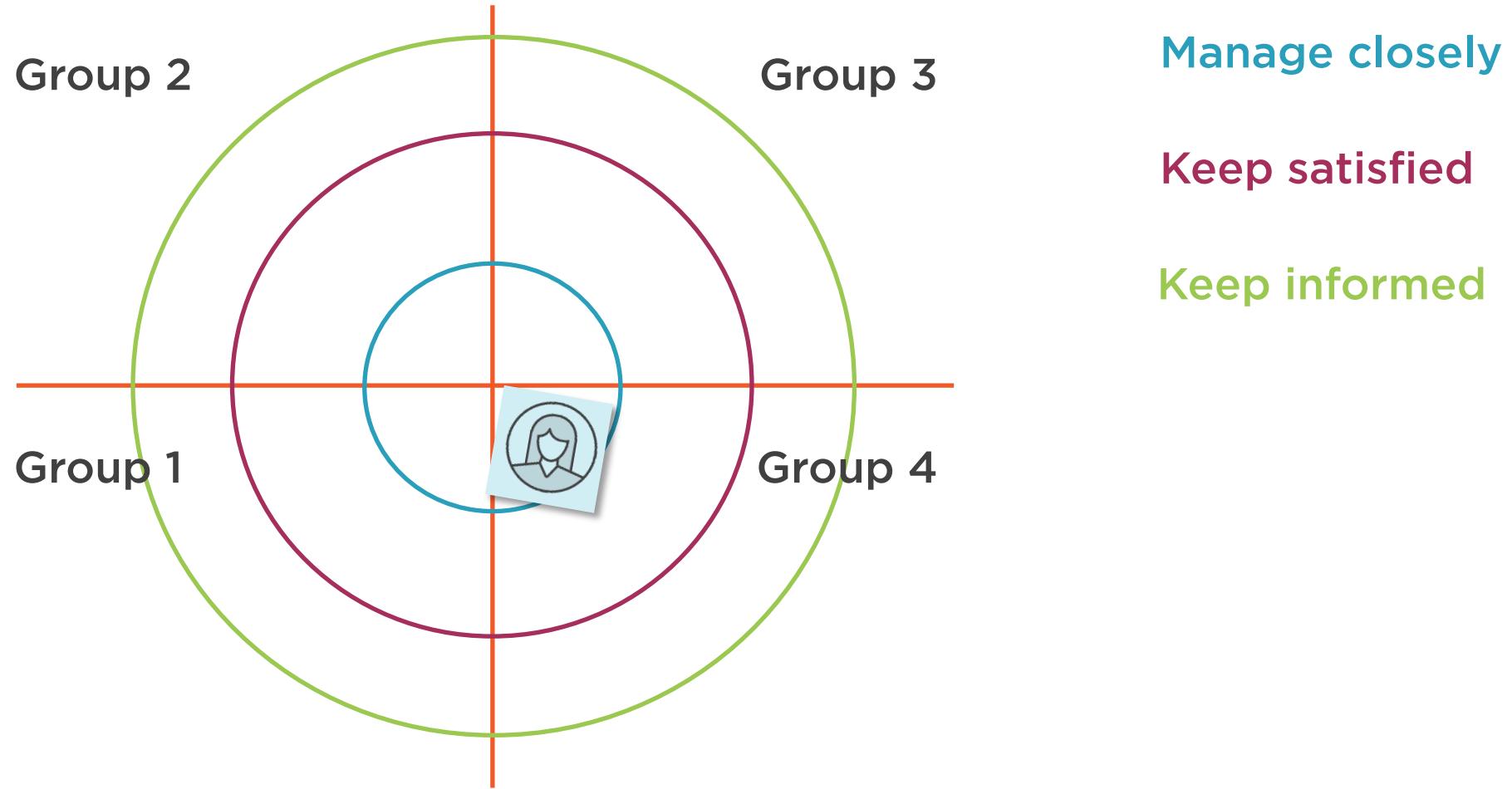
Manage closely

Keep satisfied

Keep informed



Levels of Engagement





Conclusions

What are the key internal and external stakeholders the team needs to keep in mind to keep this UX Strategy on track

What is the right level of engagement for each of them

What are the best methods to engage with these stakeholders

- Coffee chats
- Invitation to demos
- Weekly update via email



**Socialize the
Stakeholder map to
the rest of the
organization**

**Run another
workshop for any
other dimension
identified earlier**

Next Steps



Design Principles Workshop



2 hours workshop

Warm-up Exercise

**Why we need Design
Principles**

**Format, examples &
use cases**

**Establish a draft set of
Design Principles**

Next steps



Attendees

Required	Optional
Product or Service Design Lead	Brand Lead
Senior UX Researcher	
Product Owner or VP	
Product Lead	
Subject Matter Expert	
Product Marketing	
Delivery Lead	
Engineering Leads	



Objectives

To get consensus on benefits of Design Principles

To create our a first draft of Design Principles



How to Prepare



Research other companies' Design Principles

Collect about 30 Design Principles from a diverse number of companies

Print each of the selected Design Principles in separate card. Create as many sets necessary to later have enough when creating groups of three

Get dots ready for dot-voting



How to Prepare



Create blank cards so that new Design Principles can be created on the spot

Have a camera ready and make sure you take plenty of pictures of the team working as well as the outcomes

Make sure there is a place accessible to everyone ready for documentations

Adapt the next slides to your organization



Warm-up Exercise





The Goal

Reflect on how Principles are present in our day to day, even if we are not conscious of it



3 Simple Steps



Pick one of the two proposed themes: vacationing or housing



Individually reflect around the theme and then answer to the question



We will spend 5 minutes discussing with the group



A. How did you plan your vacation?

Write down 4 principles/considerations/guidelines you can identify:

1

2

3

4

Helping questions:

Have you been there before?

How much time did you have?

How much money did you want to spend?

What did you want to do when you get there?

What do you enjoy the most doing when on holidays?

Are you a foodie?

Examples:

- See the world one country at a time
- Good company makes it better
- Culture is everything
- Food is everything



B. How did you decide where you live (rent or buy)?

Write down 4 principles/considerations/guidelines you can identify:

1

2

3

4

Helping questions:

Did you buy or rent? Why?

How did you decide on the decoration for your bedroom?

Are you living near a tube station?

Does your area has a nice park?

Is there a gym nearby?

Examples:

- Ownership
- Secure, warm, safe and comfortable
- Practical and functional house
- Well connected with public transport
- Make my partner happy. Consider my partner's deco taste
- Cheapest option available



Why Design Principles

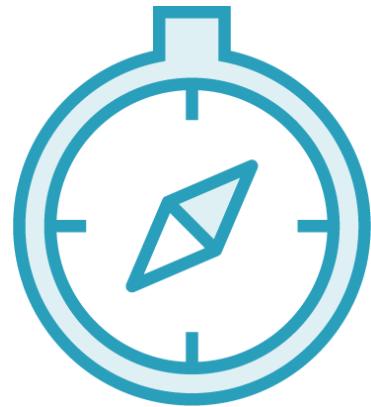


Design Principles provide ways to enhance usability, influence perception, increase appeal, make better design decisions, and teach through design.





Why Establish Design Principles



- Enable consistent & faster decisions**
- Resolve disagreements**
- Educate**
- Can change team culture**
- Longer lasting than first releases**
- They inspire**



Anatomy of a Useful Design Principle

BBC Gel Design Principle

Love needs

**Design to the
needs of your
audience.
Every innovation
has to benefit or
delight them**

Simple to remember and
understand
(Title + Description)

It can be used to guide
design decisions

Inspires your team because
it reflects a quality
that is important to your
organization

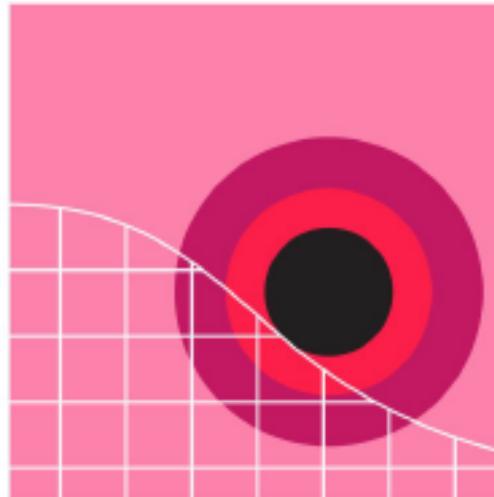


Material Design Principles



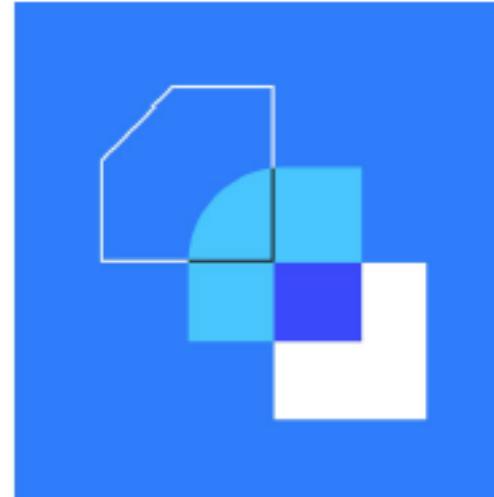
Bold, graphic, intentional

Material Design is guided by print design methods – typography, grids, space, scale, color, and imagery – to create hierarchy, meaning, and focus that immerse viewers in the experience.



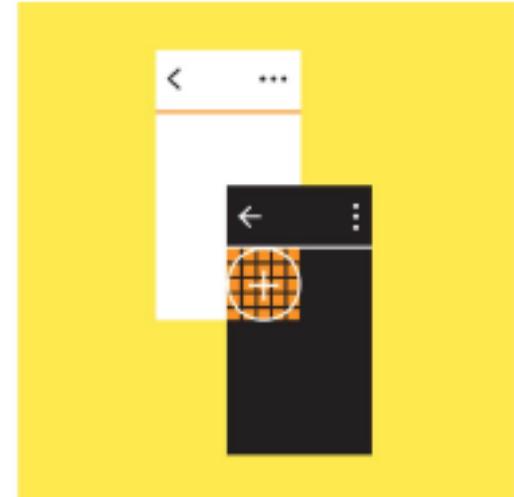
Motion provides meaning

Motion focuses attention and maintains continuity, through subtle feedback and coherent transitions. As elements appear on screen, they transform and reorganize the environment, with interactions generating new transformations.



Flexible foundation

The Material Design system is designed to enable brand expression. It's integrated with a custom code base that allows the seamless implementation of components, plug-ins, and design elements.



Cross-platform

Material Design maintains the same UI across platforms, using shared components across Android, iOS, Flutter, and the web.



When to Use Design Principles





When it seems easier
to make decisions
based on our own
experience



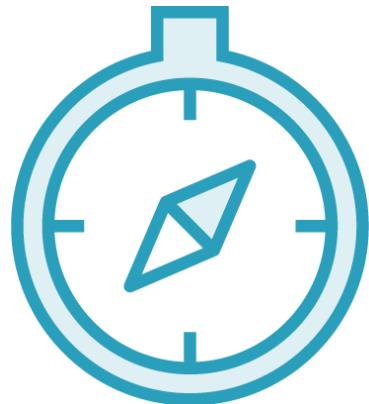


When you have to
challenge a subjective
opinion





Cases for Using Design Principles



Enable consistent & faster decisions

Design principles are a useful reference to refer back to in order to stay on track.

Resolve disagreements

Design principles are a useful reference to refer back to in order to stay on track

Change team culture

To truly work in an agile way, the entire company will need to change



First Draft of Design Principles



Establishing Design Principles



In groups of 3, discuss the design principles from the cards printed in front of you and sort them by importance/relevance to us as a team



Your team will prioritise the top 5 and rewrite them as needed so they feel part of your new product or service



We'll collectively discuss each teams' selections and individually dot vote the most important for us



Conclusions

Highlight the common themes from the workshop

Share the overall vibe of the room during the session

Share anything that might have been challenging or difficult for the team



Analyze the cards that
were voted as top
priority

Select the core Design
Principles

Share the outcome
with the team and get
alignment

Create a poster with
the Design Principles
in order to make them
accessible to
everyone

Next Steps



Other UX Strategy Workshops



UX Strategy Related Workshops

Business Model Canvas

 **Charity Model Canvas**

 **Speculative Design**

 **Service Blueprint**

User Journey Mapping

 **Key Performance Indicators**

Branding

 **Workshops particularly important in non-profits**



How to Design a Workshop



Workshop agenda



Attendees

Required

Think of consensus

Optional

Think of enhancement



Objectives

Make it crystal clear and work towards it



How to Prepare



Empathy is the key here



Conclusions

Make sure it addresses your objective



**Agree together and
drive the
communications to
follow**

Next Steps

