# Define Phase

The define phase is where initial ideation of a concept, issue, or enhancement begins. In this phase ideas and enhancements are determined to be viable to move forward or further categorized into another step in the lifecycle.

Overall Define Phase Deliverable:  
Concept document – skeleton document that can be used for communication, reference, and standards for the project and/or program. Project cannot move forward until this document is accepted. This should be primarily owned and operated by a Program Manager.

#### Content

Content needs to be defined before it can be incorporated into a website.

Questions at this point include:

* Does this content support a key business objective?
* Who will be the content owner?
* What kind of content is it? (text, images, video, documents, etc)
* What is the audience?
* What is the lifespan of this content? (launch, sunset) timing
* Does this content already exist in other markets or sites? Can it be re-purposed?
* How will this content be delivered? (CMS, static, app, external site)
* How will success be defined for this content? (metrics, awareness)
* What are the translation/localization considerations?

This phase covers discussions about how the content will be created and maintained. Discussions at this point are focused around business requirements, strategic direction, and scope.

Define Phase Deliverables:

* Strategic assessment
* Business requirements document
* Metrics analysis
* Competitive analysis

#### Web Design

It is important to find out as much as possible about the design request in order to achieve the goal or end result the client is looking for.

Questions at this point include:

* What is the purpose or intent of the request?
* What do you hope to accomplish with this update or new request?
* Are there any special requests for the imagery such as skin color, race, etc.?
* Under which Nu Skin web property will the project reside?

In general, this is the step where we help the client know ***exactly*** what they are requesting by defining it and how to move it to the next phase.

Define Phase Deliverables:

* Design deliverables based on business requirements
* Design plan outlining project’s purpose, key events, and timeline

#### User Experience (UX)

The UX process combines two sub categories within the define phase: Define and Discover. During the define portion of this phase we are trying to get a basic understanding of the issue.

Questions at this point include:

* What’s the issue?
* How did we discover it?
* How did this become an issue?

Typically during this process we will be talking to the key stake holder and/or the person that reported the issue. The purpose of this phase is to get enough knowledge about the issue to be able to know what specific questions we should be asking in the section of the define phase.

Discover the root is the second portion of the UX define phase. At this phase we start collecting data that will inform the final recommendation. We will start by asking questions to get to the root of the issue.

Questions at this point include:

* How big of an issue is this?
* Why is it an issue?
* Who is this an issue for?

We will gather data from many different sources. We will start by collecting data that we already have. Examples of this include **call center feedback, Omniture analytics, data from SAP,** and **applicable data from past projects.**

If we feel the need for more specific data we will start gathering new data aimed at answering specific questions. This involves things like **usability studies, card sorts, & surveys.**

Define Phase Deliverables:

* Project plan outlining project’s purpose, key events, and timeline
* Summary of research findings

# Design Phase

The design phase is where initial ideas and concepts are given structure and specifications. An idea or concept becomes a project and expands to include additional resources both internally and externally within this phase.

#### Content

Content needs design considerations

Questions at this point include:

* What are the design rules? (Style guide)
* How does is this content structured? (Information Architecture)
* How is the content delivered to the user? (UX considerations)
* What technical considerations need to be made? (CMS templates, apps functionality, CSS)

This phase applies design considerations not only from a business perspective but also from a technical perspective. The business makes decisions about branding, messaging, and look & feel. Global Web Programs makes decisions about which platform to use, usability, and train-the-trainer if necessary. Web development makes decisions about infrastructure, bandwidth, and application integration.

Phase Deliverables:

* Content Style guide
* Reverse content inventory
* Template and/or component requirements

#### Web Design

The design process is built to fit within the **UX** and **Content** processes as needed.

Questions at this point include:

* What design guides apply?
* Is a new design needed?
* What is the overall intent and who is the audience?
* What is the time frame?

The Design Process

1. Mockup/prototype
   1. Sketch
   2. Present & critique
   3. Update
   4. Repeat a, b, and c as needed
   5. Prototype – if necessary
   6. Test – if necessary
2. Design & Refine
   1. Actual design
      1. Follow the design guide
      2. Repurpose other graphical assets as much as possible
      3. Request new imagery as needed from Global Marketing
   2. Apply design to the code(if necessary)
      1. Code to standards
      2. Reusable code
      3. Test code in browsers before hand-off

Phase Deliverables:

* Refined mock-ups and prototype
* Mark-up (HTML/CSS)
* Design Specs/Style Guide
* Delivered on time

#### User Experience

After we feel we have a complete picture of the issue we will start ideation. While a certain amount of creativity comes into play here, the majority of the ideas come from finding something that already works, and applying it to our specific issue. During this phase we are heavily dependent on **Best Practices, Heuristic Guidelines, Pattern Libraries,** and **Competitive Analysis**.

Questions at this point include:

* Have we addressed a similar issue before?
* How do others address similar issues?
* What do best practices suggest?

Phase Deliverables:

* Site Map
* Wireframes
* UX Style Guide
* Tracking and analysis requirements

# Create Phase

The create phase is when the outputs of the design phase are put into practice and a solution is actually built. This includes code, pages, studies, and launch. This phase encompasses the creation and implementation of the outputs of the previous phases.

#### Content

The build phase includes origination and or collection of content.

Questions at this phase include:

* Are the requirements from the Define phase being met?
* Is the content within scope?
* Is the content delivery on schedule?

Phase Deliverables:

* Component/Template acceptance testing
* New templates and/or components are added to the CMS
* New web content is created and added to the CMS
* Content is staged and ready for approval
* New web content is launched as part of new site or larger project
* Communication of new site/components/templates to contributors

#### Web Design

Hand off the design to client or prototype (with code) and design specs to development. Follow up with any implementation issues and be available for any help they might need.

Questions at this phase include:

* Is progress viewable in test?
* Is time set aside for update reviews?
* Are the requirements from the Design phase being met?
* Is the design delivery on schedule?

Phase Deliverables:

* Checkpoints created for review
* Final check that design specs were met before hand-off to QA

#### ***User Experience***

The create phase for User Experience is really made up of validating the ideas generated in the design phase and delivering recommendations based on the results of that validation. Once we have created a draft, we want to make sure that the foundational principles of our ideas are sound and confirm we have not overlooked any major issues.

We are looking to answer these questions:

* Do our ideas actually solve the issue?
* Do they create new issues?
* Will our ideas enhance the end users experience?

How we validate our ideas will depend on the size and scope of the project. For something small we might just ask the business and technical stakeholders if they foresee any issues with the proposal. For larger projects we will create an **interactive prototype** and conduct additional **usability studies** with the prototype. The prototype can quickly be refined and retested as issues come up. Additionally, the prototype can be used to easily communicate with stakeholders what changes will be taking place.

After extensive research and planning we will feel confident that our ideas are an improvement upon what is already out there and deliver our final recommendations.

Phase Deliverables:

* Usability Testing
* Beta/Prototype Testing

# Maintain Phase

The maintain phase is intended to act as a support function for projects launched in the create phase as well as a nursery for new ideas and concepts that will be inserted back into the define phase for review as new initiatives.

#### Content

Content must be maintained and governed after it has been created

Questions at this phase include:

* Does the content meet standards?
* Is the content still relevant, useful, and accurate?
  + Metrics analysis
  + UX testing
  + Content audits
* Who will maintain this content?

This is the last step in the content process as well as the first. Any findings from the maintenance phase should influence the next define phase.

Phase Deliverables:

* Content audit
* Content retirement plan
* Content governance
* Training for contributors

#### Web Design

Designs should be reviewed quarterly in order to make sure design integrity is being upheld to the web design style guide. This review could involve development and or the client depending on project.

Questions at this phase include:

* Are there any issues with the design or code?
* Are there any improvements and or fixes needed?

Phase Deliverables:

* Test any code and review any designs that have been implemented.
* Design governance

#### User Experience

This is the last step in the UX process as well as the first. Any findings from the maintenance phase should influence the next define phase.

Questions at this phase include:

* Is the site usable?
* Are users achieving success as defined in the Define phase?
* Are the personas still relevant
* What are users expecting that is new?

Phase Deliverables:

* Usability testing
* Surveys
* Web metrics assessment