

1) Emphasize

Rough brainstorming - How can we help the user

- Why is it a problem?
- What factors are involved?
- What motivates them?
- What prevents them from doing it?
- User goals and objectives

2) Scoping:

Identify project goal and success metrics

- General problem to be solved and how it aligns with business goals
 - Exploratory user interviews
 - Purchased research
 - Internal data analysis
- How to define success?
- Identify internal risks, assumptions, and constraints
- Identify what resources are available

Optional: Business models

- PESTEL
- Business Model Canvas
- Strategy Map
- Five Forces Competitive Analysis
- & Service Design Models

3) Define

Dive deep into who the users are:

- Who are your users and why will they use the system? (Value Proposition)
- What behaviors, assumptions, and expectations color their view of the system?

User Research Techniques:

- Empathy Map
 - Says, Thinks, Feels, Does
- Current Experience Mapping
 - Phases, actions, thoughts, mindsets/emotions
 - In some cases Customer Journey Map or Service Blueprint
- Voice of the Customer
 - A detailed set of customer wants and needs organised into a hierarchy and prioritised in relative terms of importance & satisfaction with current alternatives
- Naturalistic Observation
 - How they currently solve the problem, routines, pain points
- Online Surveys

Using affinity mapping to condense the findings

Prioritize insights into:

- Business Needs
- Success Criteria

Create Persona with research findings

- Demographic details, such as age, marital status, or income
- Personal details, such as a short biography, photograph, and name
- Professional and Technical background
- Attitudinal and/or cognitive details, such as information about the persona's [mental model](#), [pain points](#), and [feelings about the tasks that need to be accomplished](#)
- Goals and motivations for using the product
- Behavioral details about how the persona tends to act when using the product

Personas may require iteration with the preliminary user research

Use research findings and personas to determine **Jobs to be done / Requirements**

Functional and Emotional

- Low: Competitive Analysis
- Medium: Existing Data / Stakeholder Interviews
- High: User Studies / Ideation Sprints

4) Refine

Adding to User Research

- Auditing Existing Product/Service
- Exploring issues from a business and customer perspective
 - Analyse existing processes
 - Review revenue models
 - Look at Customer satisfaction data
 - Perform qualitative fieldwork

Storyboard:

- Combining personas and Jobs to be Done (Scenarios and goals)
 - Review with target users

Strive for alignment between

- Users needs (verify with storyboard)
- Business Stakeholders
- Project Stakeholders (team)

Create Use Cases

- List of steps that define the interactions between a user and a system
 - **Categorize use cases under FEATURES**

Confirming use cases with quick user surveys/interviews

5) Prioritize

- SWOT
- Use prelim user research and personas to prioritize features based on user needs
- Business Review
 - Budget
 - Feasibility
 - Time frame
 - Capacity
 - Planning the team

6) Plan

- Flow planning (IA) for features (Card Sort, Treejack)
 - Establish flow map
 - How will all the features interact with each other?
 - How many hierarchy levels does the project need?
 - Do we know approximately how many screens will be required?
 - Do we know approximately how many components will be required?
 - Can the components be modular? Can they be reused?
- Map to use cases and goals
 - How does each item in the flow satisfy a feature requirement
 - Does satisfying the feature requirement satisfy the use case
 - Does the use case still align with user needs

7) Design

- Brainstorming
 - Design Sprints (Envision!)
 - Workshops (Crazy 8, Round Robin, etc.)
 - Collaborative Design
 - Paper Prototypes
- Wireframing!
 - Best Practices
 - Stealing from competitors
 - Hypothesis
- Solo Iteration

8) Test

- Internal Testing (Scrums, internal survey, presentation)
- Wireframe testing
 - Prototype testing
 - Alignment to personas and goals
- Analytic Testing (Google Analytics)
- A/B Testing
- Survey
- Feedback systems

9) More Design

- Design Systems (Color palettes, Typography, Structure)
 - Visual and pattern libraries
 - Design research
- Mood boards, aesthetic research
- High Fidelity Screens

- More user testing - More in depth, user interviews, reaction to mockups
 - Vision concepts

10) Production

- Development
 - See Agile Sprint Development Model
- Beta Launch
- Documentation / Wiki

11) Evaluation

- Continuous testing
- Collecting Feedback
- Learning
- Prioritization
- Optimizing
- Revisiting Roadmap