The complete UX process from strategy to design

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Create The Strategy Behind The Design

The Plan phase is about collecting information and creating the strategy for designing the product. This isn’t easy—things can easily get out of hand if you spend too much time gathering data and interviewing stakeholders. On the other hand, if you don’t set goals or define the scope of your project, you won’t have relevant information ready; this could jeopardize the overall success of your project.

Also, let’s be clear on what a “project” really is. When I say “project,” I’m referring to a new product’s first version, a redesign of an existing product, or simply designing a new feature. I use the term “project” to refer to something that’s a process—begin, execute, and finish. Then, rinse and repeat.

Simply put, the Plan phase is about three things: (1) understanding user needs, (2) mapping out business goals, and (3) deciding what features and functionality should go into the product. Sounds easy as pie, right? It’s also very important that everyone on the project understands the goals they want to achieve and that everyone feels comfortable with pitching their own ideas within the group.

Collecting data

One of the first things we need to do when planning a UX project is collect all the information that’s relevant and that will be useful later on. Data is also important for understanding what kind of research we need based on the assumptions we have.
Planning helps lay out the ideas and goals for the project.

**Stakeholder interview**

One important resource is a stakeholder interview. Stakeholders have a wealth of knowledge regarding the product, market, goals, and requirements. At this point, we’re not making design decisions or creating plans. Instead, we’re focused on collecting ideas, requirements, and business goals that are directly related to the project.

You can interview the relevant product stakeholders on a one-to-one basis. However, from my personal experience, I find it’s best to run a workshop in which all stakeholders share their opinions and ideas. By doing this, we can clarify what we’re aiming to achieve.

Limit the workshop to four or five stakeholders to allow for a more controlled environment, ensuring a more focused result.

**Analytics and data**

Collecting big data now and having a data team can be extremely useful when you get to the Design phase. You can answer a lot of questions about the users
and their behaviors as well as good and bad things about the current product by examining the data you have. This is not only true for big data. If you have any sort of analytics (e.g., Google Analytics), it’s a good idea to analyze it first. The data can be used to validate assumptions about the user personas (such as demographics and behaviors), and it can also help you identify problems with the product.

**Desk research**

I’m sure you’ve heard of desk research. This is when we use the internet (or any other existing resource for information) to look up relevant data for the project. This doesn’t take a lot of time, and it can be quite useful.

Desk research also involves taking a look at the competition to see their strengths and weaknesses. Here are a few things that you might want to do desk research for:

- Analyzing your competitors
- Looking for existing solutions for a problem
- Seeing what users are searching for (this might help validate a problem)
- Learning about what there is to know about the users

You can use Google (Search, Trends), Facebook (or other social media platforms where your target audience hangs out), Quora, or any other resources to dig deep and find answers.

**Customer support tickets and user feedback**

Most people don’t realize that extremely valuable information can be extracted by analyzing the customer support tickets. But if you think about it, those tickets are actual, real-life pieces of feedback on your product. They tell you what’s good and what’s bad about it. It’s worth reviewing the tickets, the feedback from the users, the reviews, and the ratings of the product. In addition, if you offer
customer support, it’s a good idea to invite a representative for a brainstorming session. They have valuable information about the users (e.g., who they are, what they want, and what they like and dislike about the product). This information will help you better understand the product and define the project scope.

**UX research to apply:**

**User interviews**
Conduct user interviews; they’re great for understanding what your users need, think, and feel. They provide valuable information that you can use to create better user personas.

**A usability test**
If you have an existing product but don’t know where to start, doing an initial round of usability testing can go a long way. You’ll see the users interacting with the product and be able to observe and discover usability issues. Based on this, you’ll end up with a prioritized list of things you need to change in the product.

**The User-Centered Business Canvas**

It’s challenging to see all aspects of the business. You have marketing standpoints, product ideas, business requirements, and user needs. Although we’re designing a product, and UX is about the users, we mustn’t forget that this is a business, after all. Let me repeat that: UX is about aligning user needs with business goals. A great tool for visualizing every aspect of the product is the User-Centered Business Canvas. If you’ve read anything about the lean method (e.g., The Lean Startup by Eric Reis), you’re already familiar with the Lean Canvas template.

The idea behind the User-Centered Business Canvas is that it puts the user in the center. It combines the essential ingredients of a product: the problem, the user, and the product.
**Why do you need a User-Centered Business Canvas (UCBC)?**

- The UCBC is a great way to start a project and begin planning a product. It will give you an overview of the whole product and the foundations of the experience.
- Everyone on the team (and in the company) will see how the product works—on both the business side and the user side.
- It draws your attention to crucial things you have to think about (e.g., the fears of your potential clients and who the early adopters of the product or feature would be).

**How do I use a UCBC?**

Use the UCBC for every project, and remember to keep it up to date! I love to fill in this canvas as a kick-off for a project. At the beginning, there are lots of assumptions and questions regarding the product (especially if it’s a brand-new
product). By filling in the canvas, you can map out these questions and assumptions; this will force you to prioritize and validate them based on how much business risk those assumptions involve.

Later in the process, we’ll create user personas to represent the target users. It’s much easier to do this by starting with a canvas. Start with the big picture, then think about the users in relation to the problems and existing solutions; it’s just easier to brainstorm this way.

**Keep it up to date!**

The canvas is not something that you do once and then forget about. In the beginning, you’ll use a lot of assumptions when filling in the canvas. You have to validate those assumptions and refine the canvas. For example, if you do user interviews (covered in the next chapter), they’ll be a source for validating information about the users and adding new ones as well.

**How to fill in the canvas?**

The canvas has three main sections: the problem, the user, and the product. The user is the one in the middle, that’s why we call it “user centered.” Smart, no? Although there’s a logical order for the sections, sometimes you have to jump back and forth during the brainstorming—and that’s fine. A good way to begin is to start with the problems or the user section, whichever appeals to you or is the one you have the most information or ideas about. For example, if you start with the user, you can ask yourself, “What kind of problems do they experience?” If you start with the problems, you can ask yourself, “Who might experience these problems?”

Okay, let’s fill in that canvas. As an example, we’re going to fill in the canvas for an online tool that helps people in different time zones find a meeting time that’s good for everyone. You can access the full, filled-in canvas in the 7STEPUX® Resource Center, which will help you get the hang of how it works.
Problems/Needs section

What problems do users face? What needs do they have? List the top, most painful problems and urgent needs of the users. You can use the findings from stakeholder interviews and customer service inputs and brainstorm your own ideas. User interviews and observations can bring in more insight and validate this information.

EXAMPLE:

• Hard to find a meeting time the suits everybody in different time zones
• Need to access it quickly (e.g., during a meeting)
• Have to consider holidays and seasons

Existing Solutions section

Here, we input what kind of solutions users have aside from our product. This involves the competitors’ products. However, sometimes there’s no real alternative. For example, if you were to automize something that people can do only with pen and paper, the existing solution is pen and paper. Don’t simply list the competing products! Instead, focus on the weaknesses. What’s missing? In what ways do the competing product not fulfill the customers’ needs?

EXAMPLE:

• Use of competitor website: hard to access, lots of clicks
• Doesn’t remember settings: have to do it over and over again
• Hard to find matching times in a nonvisual interface

Users section

Who are the mainstream users? What’s there to know about them? If you have multiple user types, you can feature them here. However, from a business perspective, it’s best to focus on the paying user (most likely one persona). Don’t go
into too much detail here. We’ll do that when we create the user personas. Try to list only the most important, most distinctive attributes of the users.

**EXAMPLE:**

- People and teams who often organize meetings and calls with people in different time zones
- Telecommunication companies who embrace working remotely
- Geographically distributed teams

**Early Adopters section**

Early adopters are the first and best customers. They’ll pay for the earliest viable version of your product. This is because they suffer from the problems the most. Early adopters are aware of their problems, and most likely, they’re on the hunt for solutions. Maybe they’re using a competing product (or have abandoned one), or maybe they’re building their own solution. These people are extremely important since you’re going to build the business around them (at first). They’ll come and test the product, give you feedback, and pay for the first version.

**EXAMPLE:**

- Remote working agencies; IT companies with global clientele
- Managers; product owners who communicate regularly (many times a week)
- People who use the existing websites frequently or tried a mobile solution but stopped using it (because it wasn’t handy)

**User Fears section**

Users not only have positive feelings but also fears and worries. These are also important for the product. For example, speaking of an SAAS (software as a service) product, users might fear that it will be too complex and time consuming for them to learn, or maybe they worry that they won’t be able to migrate their
data if they switch to new software. These fears have to be addressed from the product side and in the marketing. So ask yourself, *What do my customers fear? What are they worried about?* This can be related to the product and also to the problems they experience.

**EXAMPLES:**

- Might mess something up and get the wrong time
- Product won’t adjust for holidays, special days, and summer/winter time changes
- Won’t be able to find the right time for everybody

**User Goals section**

What motivates the users? What are their goals? What do they want to achieve? It’s a good idea to keep user needs and goals separate. User goals are not really about what they “want,” in essence, but rather what outcome they hope to get. You have to uncover their needs and understand their goals so that you can design a product that fulfills their needs and helps them reach their goals.

**EXAMPLES:**

- Find a time that suits everybody in the quickest and most convenient way possible
- Spend the least amount of time with organizing
- Be perceived as professional and organized

**Solution section**

Here, you will list the top solutions that will solve user problems. List feature ideas and functionality. How can you solve the user problems? How could the product help them reach their goals? The challenge is that you don’t have much space. You have to address these problems and goals with four to five bullet points.
EXAMPLE:

• A mobile and desktop app that comes in handy whenever you need it
• Presets to save time and an app design that learns the user’s schedule
• Show proof that the product takes care of everything (e.g., adjusting for time changes.)
• A visual interface to make time matching easier

Value Proposition section

What’s the biggest value users get from the product? What sets you apart from your competition? The best way to approach this is to write your answers in a sentence or two.

EXAMPLE:

• Hourly solves the problem of organizing meetings across the globe for teams in different time zones in an easy to use and intuitive way.

Acquisition Channels section

How do you acquire new customers? What kind of channels can you use to reach your audience? Here you can list your ideas for marketing. The canvas will force you to think in context and not be too vague, such as saying, “We’ll use social media.” You’ve defined your users and your early adopters. Which social media platform do they hang out on? Can you use ads to reach them, or is it more like a direct sales approach? Also, you may need different marketing channels in the early stages of the product as opposed to later in the life cycle.

EXAMPLE:

• Target the users of the existing sites (e.g., using AdWords display ads)
• Content marketing using relevant content
• Target time-saving and remote working related content sites and resource list blog posts
Revenue Sources section

How do you make money? How is the product monetized? Since this is an SAAS tool, it might be as simple as subscription fees. But in most cases, you have multiple options for monetization. In addition, you might use different monetization at the start than you’ll use in later phases. For example, you can launch a product with only the monthly/yearly subscription fees, and later you can add premium functionality that users can buy as an extra. Your team will be better able to focus on outcomes when they understand how the project is going to make money.

EXAMPLES:

• App purchases
• Premium functionality (e.g., machine learning features)
• Ad revenue from relevant, targeted ads (e.g., productivity tools)
• Affiliate marketing

Metrics section

Metrics are about measuring the success of the product. The question is, which metric will tell us if the product is successful? We’ll go into this in more detail in a moment, and I’ll show you an easy way to come up with useful metrics for the product. You’ll need different metrics at different stages of the product. For example, the number of new customers in a given period is a good place to start. The number of beta sign-ups would also be helpful. But when you move forward, you’ll need to focus on activating these users and retaining them; you’ll need another metric, such as retention rate.

EXAMPLE:

• Number of returning users in a given time period
• Number of app downloads in a given time period
Have a workshop!

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<th>Duration</th>
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1. **Prepare.**

Book a meeting room for two to three hours and invite the participants. You can invite product managers, designers, marketers, and stakeholders. Keep it limited to five to six participants so the workshop doesn’t take up the whole day.

Collect every bit of data that might come in handy during the workshop (e.g., desk research, customer feedback, and analytics). Draw the canvas on the whiteboard.

2. **Introduce the User-Centered Business Canvas to the team.**

Explain to the team why they’re there and why their knowledge is important. Go through the canvas and explain each section so it’s clear to everyone. If you have collected data, share it with the team and talk about it.

3. **Brainstorm.**

Go through each cell step by step and brainstorm ideas. Start with the problem or with the user cell. If it’s a smaller team (one to three people), you can discuss each cell together. If you have a larger team, use a brainstorming technique (see below).

Give Post-it notes and Sharpie pens to the participants, then work independently for five minutes, brainstorming as many ideas on the Post-it notes as you can.
It’s important not to criticize the ideas during the first round because this round is about idea generation. Later, you’ll have time to sort them out. Sometimes, the best solutions come from ideas that seem crazy at first mention.

4. Present and discuss ideas.

When the five minutes are up, put the Post-its on the whiteboard one at a time. The participant who wrote the given Post-it should explain to the others what the idea is about and why they think it’s relevant. Then, go to the next cell and start over. The goal is to brainstorm ideas for all of the cells.

5. Finalize.

Finally, when you’re done, you’ll have to digitize the canvas. In the 7STEPUX® Resource Center, you’ll find a template for this. Take a photo of the whiteboard and fill in the template. One important note here: Fill in the canvas in a way that’s clear and understandable for everyone on the team (even for those who were not present at the workshop). You may have used a lot of abbreviations and keywords while writing on the Post-its, but when you create the digitized “final” version, refine the ideas, merge duplicates, and be very clear with the wording.

User Personas

A user persona is a fictive character that represents the targeted users. Usually, there are multiple personas for a product. They can differ in how they use the product, what problems they experience, or basically who they are. For example, if you think about a freelancing site, like Fiverr, there are at least two personas: the freelancers and the clients who look for talented freelancers. We use these personas to empathize with and understand the users.

Some people think personas—and persona profiles—are useless (what’s the point of filling out a paper with mere assumptions?). Well, it’s true that there will mostly be assumptions at first, but the game isn’t over. We have to validate
those assumptions and refine the persona based on UX research. A persona profile (using the User Persona template) should be a living, constantly updated document.

The persona...

- showcases the most important and relevant information about the users,
- helps us recruit participants for the UX research,
- shows the user needs and goals. We will use these to design a great product for them,
- describes real people (or a group of people)—their background, knowledge, and motivation, and
- reminds you that behind every product, there are human beings with feelings, desires, goals, and limitations.

**Why should I use a User Persona template?**

As a **product manager**, it will help you focus on the user, come up with better feature ideas, and prioritize them. By maintaining and updating the persona, you can eliminate irrelevant features and focus every meeting and discussion on the product and its users.

As a **UX designer**, you’ll use the information that the persona showcases to design processes and decide what research activities you need and what you have to consider during the Design phase (e.g., where, when, and how the product would be used).

As a **UX researcher**, you’ll recruit participants for tests and research based on the personas, then you’ll use the findings of the research to refine the personas.

As a **visual designer**, the personas will give you an understanding of “who” the target audience is and what previous knowledge and expectations they have so you can tailor the visuals to their needs.
As a marketing specialist or copywriter, you can form the messaging based on what you know about the users. Fears and problems are extremely useful in marketing communication. It’s even better when you have solid, validated knowledge about these fears and problems (and not just assumptions).

There are hundreds of different personas. There are marketing personas, sales personas, and various product personas. Here, we’re going to use a persona that showcases only the must-have details about the users. We can use this for the research and design. However, as mentioned above, these personas are great for other uses as well. Bear in mind that it’s important to keep the personas flexible. If you think you need to add extra information, go ahead and do so.

Most of the products can be covered by two to three personas. The really complex products can take up to four personas. Just try to keep the number of personas as low as you can. By adding new ones, you lose focus.

Building up the user persona

Picture, name, title, description

After you’ve created your personas, give them all names. This makes it easier to refer to them later on (e.g., “Joe would love this new feature!”). Finding a relevant photo also adds to the personality. The title can be a role (e.g., “event manager”) or job title. But get creative on this one. You can create a title that best describes the user. When I was working with a big online magazine, we named the personas after the traffic source they visited the site from (e.g., “Facebook guy”). This was handy because the behavior and attitude of the users differed depending on how they got to the site.

You might also add a quick description explaining the role of the persona. For example, if you differentiate the personas based on what they do inside the product, it’s good to dedicate a few sentences to explain these roles.
## Problems

Problems (or pain points) are one of the most important aspects of a persona. List the main problems encountered in this type of user experience. These are the problems that you want to solve with the product. Furthermore, from these problems, you can derive the persona needs and goals (or the other way around).

### Questions to ask yourself:

- What kind of problems do these people face?
- What makes their lives difficult?

## Needs

Problems and needs are often connected. For example, if my problem is that it’s impossible to keep track of administrative things in my business, I have a
need for organizing, simplifying, and maybe automating these things. Note that these are not what people “want,” but it’s what they need in order to solve their problem.

You can be general (e.g., “needs a way to lower the amount of time spent on administration” or more specific (e.g., “needs a way to migrate existing data easily”).

**Goals**

Mapping out the goals of the users is also crucial. The goals cover what end result or outcome the users are looking for. It’s important to distinguish needs, goals, and what users say they want. You have to understand and focus on what outcome they would like to achieve. Sticking to the administration example, the users might say, “I want a tool that mostly automates the administrative tasks.” Now, this is not a goal. The goals here would be that they want to save time, do less administration, or avoid mistakes and rework.

**Questions to ask yourself:**

- What goals do the users have?
- What outcome are they looking for?

**Demographics**

In the demographics section, we enter information about gender, age, location, and job responsibilities. Enter everything that describes who the user is—we’re going to recruit people based on these criteria. If you have existing analytics or data, you should use that data to fill in this section. As a rule of thumb, only enter data that is relevant and can be used during design and research. For example, don’t include their favorite TV show unless it’s somehow related to the project.

**Questions to ask yourself:**

- What is the age of the target audience?
• What is their gender (mostly)?
• What is their professional background? Job responsibilities?
• What do they do on a daily basis?
• How do they collect information about similar products or related to their problems? Who do they ask for help?
• What are the typical traits of these people? Are they risk takers or risk avoiders? Are they tech savvy or tech dummy? Are they organized or spontaneous? Etc.

**Context**

The context can refer to the context of usage (where, when, and how they would use the product) and the context of how they experience the problems we aim to solve (where, when, and how they experience them). The context of usage covers the 360-degree scope of circumstances in which they use the product. For example, if you’re going to design a cooking application, it’s likely that the product will be used in the kitchen. Therefore, the users probably want to use it on a mobile device, but they can only use one hand, or they might not even want to touch the screen because their hands might be dirty. Knowing this, you can address these issues with the design (e.g., touch-friendly screens and perhaps voice control).

You can discover the context of usage with user interviews and observations. These research techniques will give you more insight and validate your existing assumptions about the context.

**Questions to ask yourself:**

• How are they currently solving the problem?
• Why are they viewing my product?
• When and how will they discover the product (e.g., from Facebook, search engines, or browsing the app store lists)?
• What device will they use to access the product (e.g., cell phone, laptop)?
• What kind of software and tools are they familiar with (you can build upon this knowledge)?
• What prior knowledge do they have about my product or the existing solutions and competing products?

Fears

Lastly, we have to list the fears of the users—just as we did with the User-Centered Business Canvas. Remember, fears can be connected to the problems the users experience or toward a product or solution. It’s important to think of both. Later in the process, when you think about functionality and marketing communication, fears will be important. You have to double check that you’ve addressed these fears with functionality, content, and communication.

Questions to ask yourself:

• What fears do users have?
• What are they worried about?

Expert advice: Map out functionality relevant to each user persona

When you’re organizing information and collecting functionality, it’s helpful to put the user in the middle and collect the relevant features and functions that the given user type would use or benefit from; this way, you’re connecting each functionality to real user needs and goals.

Questions to ask yourself:

• Which features and functionality does the given user need?
• How could we solve the specific user needs?
• What is the biggest benefit in the product for the specific user?
Draw a mind map for each user persona and group the features that are relevant to them.

Proto-personas

As you can see, we need a bit of information to enter into the User Persona template. But, if you think about it, we missed a beat—what if you don’t know how many different personas you should create? If this is the case, create proto-personas. The point of proto-personas is to come up with different user types and sort them out so you can start creating the detailed user personas we discussed earlier. So, in essence, creating proto-personas is a brainstorming exercise.

Step one: Brainstorm!

The first step is to brainstorm as many different user types as possible. It’s as simple as that. Grab a sheet of paper, divide it into four equal parts, and jot down four mini-personas. Since this is about idea generation, it’s best to have a workshop. Invite the product managers, stakeholders, designers, and marketers.

For each of the mini-personas, enter four key bits of information:

Name:
You have to call the kid something, and the name can provide a lot of informa-
A name can tell you about the persona’s gender or even refer to an attribute (e.g., “Impatient John”).

Creating proto-personas will help you identify different user groups.

**Title:**
The title can be a job title, position, or location, but be creative on this one. You can use titles to enrich the persona and add bits of information. For example, you can use persona titles, such as “Facebook user,” “Frequent coffee buyer,” or “Tennis court owner.”

**My problem is...**
Most of the users can be split up by the types of problems they experience. I mean, demographics are important, because teenagers and forty-somethings use the same devices completely differently. But most of the time, the problem and goals are the differentiators. You need to know and understand the problems first in order to come up with a solution. So quickly jot down a sentence explaining the specific problem or frustration these type of users experience.

**I want to...**
The other cornerstones of design are needs and goals. You can complete the “I want to...” sentence to reflect the most important user needs or describe the user’s goals. Uncovering different user goals will help you prioritize and identify certain user types.
Step two: Prioritize!

Once you have your proto-personas, you have to prioritize and select the ones that you want to further refine and create user personas from them. Remember, you have to limit the number of personas to two or three (having more than that will lead to a loss in focus). Just take a look at the User Persona template. How much time do you think it would take for you to fill out 10 personas? Yep, pretty much that. So be tough; prioritize ruthlessly.

- Dump the irrelevant or duplicated personas.
- Merge the ones with overlaps. At this stage, demographics isn’t really important since we know little to nothing about the users. So, for example, if you have two personas with the same problem—but the gender or age is different—skip that. It’s one persona at this stage.
- Choose the most relevant ones for the project! Who is the paying user? Which user type would be an early adopter for the product?

The goal of proto-personas is to get you started with a few specific user types that you can move forward with and use to create a detailed user persona from.

Validating the user personas

The methods discussed above are great ways to identify your users and gather your initial assumptions about them. But you have to keep them as assumptions until you have proof that they’re valid. Why? Because if you have an invalid assumption about the users’ problems, this could easily mean that you’ve solved the wrong problem for them.

Risk comes in when you don’t have information on something that could affect the product and the business. The less you know about the personas, the higher the potential risk is. This can have a big impact on the product (possibly in a very negative way). So go through your personas—start with the paying user—and
identify the assumptions that would get you into trouble if you were wrong about them.

For example, if you’re going to build a mobile app because you think the solution for the problem would be a mobile product, then there’s a potential risk unless you have proof of two things: (1) The problem really exists and hurts the users bad enough to look for a solution, and (2) they want to use it on a mobile device for some reason. You have to know these to be true—and, the earlier the better.

When you create your personas, apply UX research and data to validate your assumptions.

To validate the information in your personas, you have to apply analytics and UX research. We’ll discuss these methods in length in the next chapter, but let’s do a quick overview of which techniques you can use to validate personas.

**User interviews**

Interviews are the most common and best way to collect information about the users and validate your assumptions. This is the moment of truth. Meet and talk with your users, uncover their problems, and understand their needs and their goals.
Observation

Observation means that you go out to where your customers are and see how they’re currently solving the problem. This is a great way to get to know more about the users and observe their behaviors.

Analytics, big data

Analytics and big data can be used to validate and add information to the Demographics section and the Context section of the persona. By analyzing user behavior, you can also come up with problems regarding the product or see a need in cases when the users don’t find something they’re looking for.

Usability tests

When testing the product with real users, you also have an opportunity to gather input for the personas. During a usability test, users are interacting with the product, doing tasks, and expressing their opinions. You can get feedback on the users’ prior knowledge and the context of usage. Fears and needs can even surface during a usability test.

Customer service

Talking to customer service representatives in your company and analyzing the tickets, emails, or other materials they have can also validate assumptions about the users. Most of these inputs will be problems, such as what the users are unhappy about with the current product and maybe what features they’re missing.

UX Surveys

Creating surveys and sending them out to potential users can also get you closer to them. This is especially useful if you don’t have the opportunity to do interviews. Come up with a bunch of open-ended questions, send them out to potential users, and see if the results validate or invalidate your assumptions of the persona.
Do a workshop!

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<td></td>
<td>Stakeholders</td>
<td>Post-its</td>
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<td>User Persona template</td>
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<td>Customer service reps</td>
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1. **Prepare.**

Book a meeting room with a whiteboard for a few hours and invite participants. An ideal size for the workshop is four to five people. Don’t invite more people; otherwise, the workshop will become clunky. Bring all the data and insight that could add value to the personas: analytics, big data reports, and/or any other data you have on your users.

Draw the six sections of the persona (Problems, Needs, Goals, Demographics, Context, and Fears) on the whiteboard. If you have multiple personas, draw this as a table with the columns being the different user types and the rows representing each section of the persona.

2. **Brainstorm.**

Explain to the attendees what the workshop is about and what you’re going to do. Go through and explain each section of the persona and give hints on how to fill them in. You can print out the questions we discussed earlier, and that can serve as a cheat sheet.

Work independently for 10 to 15 minutes. Ask the participants to brainstorm ideas for each section of the persona and write each idea on a Post-it. The goal is to have as many ideas as possible. Don’t start selecting ideas; don’t throw away the bad ones. Just brainstorm.
You can do the brainstorming one of two ways. You can either pick a category to focus on, or you can let everybody freely brainstorm in any category they like. If you choose to go through the categories one by one, it’s best to start with the Problem section, then continue with the Needs and Goals.

3. Discuss and iterate.
When time’s up, ask participants to place each Post-it on the whiteboard in the category it belongs to and explain the idea. Rinse and repeat until you have enough information in every category and every persona (if there are multiple personas).

4. Finalize the personas.
By the end of the workshop, you’ll end up with a few dozen Post-its. The next step is to sort the information out and create the digital persona. For this, use the User Persona template from the 7STEPUX® Resource Center. Take a photo of the whiteboard or collect the Post-it notes so you can sit down and start to digitize them.

When creating the digital user persona, sort out the redundant ideas and merge the duplicates. Also, pay close attention to the wording. During the workshop, it’s common for people to use abbreviations since there’s very limited space on a Post-it. But when you fill in the digital persona, make sure the ideas are understandable and make sense to everybody (even those who were not present at the workshop).

When you’re ready, print out the personas, put them on the wall, and ask for feedback from your team and inside the company. Keep it as a living document, validate the assumptions in it, and keep it up to date.

Expert advice: Using Post-its.
I know this will sound like a no-brainer, but there are a few tips and tricks about using Post-its. When you write on a Post-it, use capital letters and make sure it’s
legible. Think ahead. You’ll take a photo and digitize it later, so please avoid using Sanskrit. Sharpies work better than regular pens or pencils, which are hard to read. Use the space available, and make the text as large as possible. Lastly, don’t free the Post-it from the stack from the bottom up (because it will bend and fall off of whatever surface it’s on). Instead, turn the stack and pull the Post-it from the side. This way it will remain straight, won’t bend, and can be attached to any surface. You didn’t think there was that much to Post-it notes, did you?

Pull the Post-it notes from the side instead of from the bottom up. This way, they won’t fall off or bend. I know... It’s pure magic.

Mapping out the functionality

Once you have the strategy and goals set, it’s time to decide what goes into the product. The emphasis is on “what” and not on “how.” Basically, a user can do two things inside the product:

• Use a function (do something)
• Consume content (see, listen, or read something)

A function is something the user can use and interact with. In our time zone converter app, the functionality allows the user to select different time zones, find matching times, save presets, and so on. We have to gather every functionality that we need to design. Aside from functionality, there’s content. When I say content, I’m referring to any sort of content the user can consume (e.g., text,
images, or videos). Put simply, content is information that we show to the users for a specific reason.

When we brainstorm functionality and content, we come up with ideas that solve the users’ problems and fulfills business goals. If you’re dealing with a web or mobile app, you’ll most likely brainstorm features and functionality that enable the users to accomplish certain tasks. If you’re designing a website or landing page, you’ll mainly focus on the content the users have to see to move forward in the process (e.g., sign up and/or buy something).

At this stage, I’m sure you already have a lot of ideas on what features you should have in the product. Sometimes the most challenging part of the Plan phase is to not jump in and start to flesh out the ideas you have. The best way to come up with great ideas is to make the user the starting point for brainstorming. Take a look at each persona and ask yourself:

• What feature would solve the persona’s problem?
• What feature is the persona looking for?
• What type of content do they need?
• What content would help resolve fears regarding the product?
• What information are they looking for?

Grab some Post-its!

The easiest way for brainstorming is to just use a whiteboard and Post-its. Put your user personas on the whiteboard, and start to write functions and content ideas on each of the Post-its. A little hack is to use different colored Post-its for function and content ideas. This way, you can play around with ideas and see if all the business goals and user needs are covered.

Prioritize ruthlessly!

UX is mostly about prioritization. When it comes to features, we have to prioritize ruthlessly. Go through each of the functions and ask yourself, Do I abso-
olutely have to have this? If it’s a new product, I like to ask my clients, “Okay, if you don’t have this feature, can you still go to market?” You’d be surprised how much functionality and content can be cut back while still giving you a great first version of the product.

Use a whiteboard or the wall to collect your Post-its. This way, you’ll have a nice overview.

**Identify potential business risks.**

After you know what functionality you want the product to have, it’s time to identify potential business risk. Risk appears when you only have assumptions about something (e.g., who the users are, what their needs are, and what functionality they’re looking for). Once you see what will go into the product, you can identify the features and content that are risky. The risks here are that they will take too much time to design or develop and that you have no evidence that the users will actually use them. At this stage, you can apply UX research to validate these ideas.
UX research to apply

User interviews
User interviews give you insight into what the users need and what prior knowledge they may have on the product or problem. This insight will help you validate feature ideas and come up with new—and better—ones.

Card sorting
A great method for selecting which feature to keep and which to discard is to do a card sorting exercise. To do this, you ask potential users to rank feature ideas based on how important they are to them. This way, you’ll also learn how well they understand the described features.

Create a functionality map!

The tool I use all the time for organizing information is a functionality map. A functionality map is basically a mind map where we map out every functionality for the product. Pretty straightforward, right? The concept of mind mapping works extremely well, since you can start adding high-level features (e.g., Book a Lesson), then go deeper and add more and more data (e.g., Sign Up, Choose a Location, Choose a Teacher, etc.).

You can use various tools for creating mind maps, but I prefer to use XMind. It’s free to get started, and it has all the functionality you need for this job. The goal is to collect every functionality and all the content you can think of that would be useful to have in the product. With XMind, you can also add symbols (e.g., colored flags) that can be used to indicate priority. You can use them to flag functions when you’re unsure of user interest.

Try to map out the high-level ideas first. Don’t jump into the details right away. This way, you’ll have a clear overview of the project. Then, go deeper and add more details.
Building a functionality map will help you get a full picture of all the features you need to design.

For example, in our time zone app, we would add the “select time zones” as a high-level feature. Then, you can add that the product will know whether it’s summer time or winter time in the given time zone, and the users can enter the desired location.

The goal of the functionality map is to have a great overview of the product and see what you have to design. It’s up to you how much detail you want to put in the map. However, in my experience, it’s best to go as deep as possible and list every detail you can think of at this stage. This is because mind maps can handle and reflect an enormous amount of information without becoming overwhelming.

Create a sitemap.

When you’re working with a lot of screens, you need a tool that gives you an overview and helps you see which screens are related to each other. A simple tool for this is a sitemap. A sitemap displays the pages of a website and the logical relationship between them. It’s a good idea to create a sitemap if you feel like you might get lost in the sea of information that’s at your disposal. You can use sitemaps for keeping a record of the screens and content you’ve designed. This will help ensure that nothing is left out.

Sitemaps also help you decide what sort of content to put on which site—no designs here, just pure information architecture! And, sitemaps reveal how the navigation should work; in other words, which screens are accessible.
Creating a sitemap will help you keep track of all the screens you have to design.

User stories

If you know the agile method, user stories will be familiar to you. A user story is a one sentence statement about what the users want and why. They don’t tell you how to design the solution. Instead, they focus on the user needs and force you to think through every process in the product.

Here’s how it looks:

As a [type of user], I want to [...] so that [...].

For example:
As a product manager, I want to quickly find the right meeting time that works for everybody so that I don’t have to waste time and energy organizing.

Why are user stories great?

- User stories will help you avoid dead ends in the product.
- User stories protect you from feature creep by focusing on user needs. Feature creep is when you keep adding feature after feature until the product becomes unusable.
• User stories make it simple and clear for everybody to know what each feature does and why it’s important.

**Step one: Start with “big-picture” stories (epics)**

Take a look at the design brief (we’ll get into this in greater detail later in this chapter), and and write out the big-picture stories for every function. Let’s say you’re designing a CRM. In this case, you have a lot of functions to manage users. You can come up with big-picture stories first:

“As a user, I want to quickly add a new lead to the CRM so that I can keep track of all information from now on.”

As you can see, this is pretty general. It doesn’t tell you what type of information to enter for a lead and how you can access the feature. At first, just write out these big-picture stories for the product.

**Step two: Break down each story**

Once you have your big-picture stories, you can break them down. The goal is to have a list of actionable stories that you can use to design an interface. Sticking with the CRM example, we can break that functionality down:

• “As a user, I want to access the add new lead feature so that I can quickly add new leads to the system.”
• “As a user, I want to import existing data from an Excel sheet so that I don’t have to manually re-enter all the information.”
• “As a user, I want to save the entered data easily.”

**Step three: Add extra details to the stories**

If you take a look at the second story, it’s still not actionable because we didn’t specify what kind of information we need to enter for a lead. This is when you add descriptions for the stories. In this case, I would add this:
• The user enters basic details:
  • Name
  • Upload profile picture (and remove or update)
  • Email address
  • Phone number
  • LinkedIn URL
  • Etc.

Now, this is something that you can sit down and start to flesh out, and that’s exactly why we’re creating stories!

**Be flexible!**

As you can see, I didn’t use the “so that...” part all the time. It’s great to indicate why that story is important for the users, but you don’t always need to. For example, you don’t have to give a reason why a user wants to log in or enter payment information; it’s pretty straightforward, right?

Likewise, in some cases, you just use the “As a user...” when speaking generally. In other cases, you’ll refer to a specific persona like, “As a product manager...” or “As a coffee fanatic...”

Think of user stories as a backlog for the design. With that said, it’s best to start writing user stories before you start to design the screens. However, user stories constantly evolve throughout the process, so you have to update them. This is because you don’t know all the stories up front. Despite a well-planned project, you still have a lot of things that will only come up during the design process—so keep those stories up to date!

Fire up an Excel sheet or use the User Stories template from the 7STEPUX® Resource Center. Enter the big-picture stories, then continue to break them down, adding details until you have a great backlog that covers everything that needs to go into the design.
Create a spreadsheet for the user stories. This way, you can easily add new stories and more details.

Don’t forget to update the stories! When designing the interfaces, if you add a new function or page, create a story for it. When you realize you’ve forgotten about an interaction, add it to the backlog immediately!

The Design Brief

So now that we understand who the users are, we have set goals for the project, collected feature ideas, and prioritized them. Since this information is distributed across several documents, we’re going to create a short design brief that will serve as a starting point for the design. Let’s not beat around the bush—a brief is meant to be brief! There’s no need for a thousand-page-long SRS.

Sum up the most important things regarding the design.

- Who are the users?
- What are the user needs and goals?
- What are the product/business goals?
- What functions should we design?
Let’s break it down.

1. **Who are the users?**

Sum up the most important points or ideas relating to your personas. The goal is that anyone who reads the design brief should be able to understand the different user types that need to be addressed with the designs. Don’t go into too much detail! After all, that’s what the user personas are for.

For example:
We have two different personas: (1) the product manager, who organizes global meetings on a weekly basis, and (2) the freelancer, who has an international clientele and who needs to organize meetings quickly, working across different time zones and maintaining a professional and organized approach to work.

2. **What are the user needs and goals?**

List the top needs/goals for the personas. These will be addressed during the design.

3. **What are the product/business goals?**

Dedicate a few sentences explaining what you want to achieve during the project. Be as specific as possible.

For example:
Our goal is to increase user retention and bring users back frequently by finding new ways to engage with them on our website.

4. **What functions should we design?**

The most important part of the design brief is the functionality. All the other information is for adding context to the story. So, start to list and describe every function that goes into the product. If you did the functionality map, you just have to open it up, add the functions from there, and add a quick description.
Descriptions are very important. If you just write “book a lesson,” that’s not enough information. Everyone who reads the design brief should understand what the function does and how it works. If you skip this, there’s a chance that you won’t remember what the function or content was good for during the brainstorming session. The best way to describe the functions is to explain them through a story.

Returning to the time zone converter app, let’s add and describe a function:

Function name:
Time picker

Description:
When a user enters the two desired locations (e.g., Budapest CET and Miami EDT), the time picker appears and displays two timelines. In the timeline, the user can see the usual work hours and the matching times highlighted in green. A slider will help the user pick the time that’s good for both parties.

Key takeaways

• Planning is the most important part of the UX process. Don’t rush it! Don’t jump into the design straight away, as this will cause many headaches along the way.

• Start by collecting relevant information on the project from stakeholders, users, and any data that’s available.

• Have a workshop with all the stakeholders present where you fill in the User-Centered Business Canvas, create the user personas (using the User Persona template), and brainstorm the functionality for the product. It’s best to do one big workshop and get all these done as opposed to chopping them up into separate sessions.

• Learn how to create awesome UCBCs and user personas. These are invaluable tools that can ensure the product directions are clear and help
you avoid confusion with stakeholders and clients.

- Do functionality maps to collect the high-level functions and pieces of content that need to go into the product. Then, use user stories to break these high-level functions down into a well-documented backlog for designers and developers to work from.
- Create a design brief and run it by every stakeholder to get a green light and make sure everybody is on the same page about what you want to achieve during the project.