CHALLENGE / TRIGGER

PRE-PROJECT

REQUIREMENTS GATHERING (PRODUCT-LED)

PMs bring the below together for the project kick-off 🚨

Cross-functional team

Where does the project originate?
- An idea
- Insight from previous research
- Quant and qual insight
- A change in the market
- A macro economic change
- Response to competitors

Identify the stakeholders

Cross-functional team
Cross-functional team should include:
- Product
- Research
- Design (UX / UI / Copy)
- Engineering
- SME
- Product Marketing / Sales (if relevant to project)
- Problem-solving team

PM to identify what research needs to be done:
- Research office hours check in by PM
- If big discovery piece, to be completed at least one quarter ahead of Project Kick-off
- If a lightweight piece, this could be carried out by designers
- Bear in mind, it might not need any new research at all, pull on previous research

Cross-functional teams bring a variety of skills, domain-expertise and knowledge.

Involve the cross-functional team upfront and then together identify the different stages where each of the discipline stakeholders might need to get involved throughout the project.

RESEARCH

DISCOVERY

PROJECT KICK-OFF (PRODUCT-LED)

Create alignment around project requirements and the Problem Statement 🚨

UNDERSTAND THE CURRENT SITUATION

Understand the current situation 🚨

DIVERGE

Cross-functional team

Project goals / strategy
- Discuss and understand with the team
- Have challenging conversations at the start
- Read the epic created by the PM

DACI Framework
- Create with PM and add to the epic
- PM to create confluence page
- Check slack channels about the topic

KPIs / Measuring success
- Define and agree KPIs (Product)
- Use Google HEART framework to measure success from a user's point of view (UX/Product)

Managing expectations
- Define expectations, make sure they are feasible

Managing scope:
- Keep reminding PM. Monitor ourselves throughout the project to avoid building in scope creep.

WHO TO INVOLVE
- **Cross-functional team**
  - **Engineers:** Involve at an early stage to understand any immediate concerns they might have and highlight any previous work (spikes, similar projects)
  - **SMEs:** Involve in the kick-off (Paul Lodder, Katie Hoare, Jonathan Gaunt, Simon Williams, Helen Lloyd (Precision SME)

Cross-functional team

Work with the team
- to understand the current situation by looking at existing qual and quant
- think about how it affects other value streams (remove silos)
- to identify the right problem to be solved and ensure the problem statement is correct
- Involve Research (keep them informed) in these conversations to support in assessing the needs and prescribing what we will do

Objectives / goals
- Rewrite if needed and re-frame the problem statement - get the team's approval
- Breakdown objectives into specific design objectives

Current performance measurements
- If available, add to the ticket/epic
- Define metrics

Languages / regions
- Document per objective

Managing scope:
- Keep reminding PM. Monitor ourselves to avoid building in scope creep

Delivery
- Identify a Design delivery date
- Break the project down in to a high-level timeline of activities and estimates in line with requirements.

Timeline of activities
- Share activities and time estimates with Product so they can create the project roadmap/timeline and set a rough GTM (Go To Market) date
- Feasible and realistic timelines (breadth of UX work is generally underestimated)

Use the Google HEART framework to measure success from a user's perspective

DEFINE

GATHER DATA QUAL + QUANT

Create Miro board with all existing and new qual and quant data 🚨

CONVERGE

UX / PMs / Research / Copy

Previous research
- Check with PM, Researchers, Designers what might already have been done

New qual and quant research
- Book a slot for Research Office Hours as early as possible to decide what kind of research (if any) you want to conduct for this project
- Ensure to leave enough time for the Researcher to plan in any work that needs to be done. If they have been involved thus far in the project, it should simply be a conversation

Miro board
- Source of truth for all past, current qual and quant research, designs, etc

Share
- Share insights and next steps with a Designer, Researcher and a PM before proceeding onto finding a solution

Timeline of activities
- Agree high level timeline of activities with estimates

How do we ensure Miro board is read and digested by the team?

Engineering spikes can be carried out in parallel to the design process.

DESIGN

DEVELOP

IDEATION

Exploration of potential solutions based on discovery 🚨

DESIGN

Create low / mid-fi designs 🚨

REVIEW DESIGNS

Present designs/prototype back to cross-functional team 🚨

ITERATION

Iterate on designs 🚨

TESTING

Plan, scope and execute usability testing 🚨

FINALISE DESIGNS

Create final designs based on outcomes of testing 🚨

REVIEW WITH PM / HANDOFF TO UI

Handover to UI team 🚨

DIVERGE

Cross-functional team

Ideation / exploration
- Team ideation / workshops / low fidelity

Problem statement
- Check in with problem statement and focus of project

Scope & Prioritisation
- After ideation, check in with PM around scope and prioritisation of design delivery
- Check in on previous timelines and estimates and adjust where necessary
- Breakdown objectives into specific design objectives
- Towards the end of the ideation phase, create copy brief

WHO TO INVOLVE
- **Copy:** In workshops and/or sketch ideation to understand context of the project and identify if translations are needed.
- **Research:** Ideation is based on research that has previously been carried out so include Research
- **Engineers:** Involving early can aid technical constraint check in and discussing complexity of ideas and whether new or existing libraries.
- **Check your components:** Check new and existing components with the Custodian Team aka Dexterity Team aka Component Team
- **SMEs:** Involve an SME either directly or through 'Accountancy Hours (similar to Research and Design Office Hours)
- **Product Marketing** - check in to see if they would like to be involved at this stage.

UX / UI / Copy

Step 1: Lo-fi designs
- Start iterating on ideation with more detailed sketching (low-risk, low-cost, quick)

Step 2: Low-fi Wireframes Kit / Mid-fi designs
- Consider happy & unhappy paths
- Error states

Step 3: Prototype (if needed)

Copy order:
- V1 written - ideally Design can design with real copy
- EN copy gets approved
- FR localisation copy starts
- FR localisation gets approved (Country Managers as no FR PM)

Be mindful of:
- Brand Voice
- Spelling
- Style conventions (check the glossary)
- The possibility that localised text may need extra space
- Our existing component library (check in with UI)

JIRA
- To ensure visibility and traceability of work, add all work to JIRA tickets with links to source files

Timeline of activities
- Timelines are continuously assessed and adjusted (between designer and PM) depending on outcomes of ideation and low-fi designs.

Cross-functional team

Peer review
- Move your JIRA ticket into Design Review and ask a UX Designer to peer review your work

Show and Tell
- Organise a cross-functional workshop to share your designs.
- **Ask for specific feedback** 🚨
- Be sensitive about time and deliverables
- Component check-in with Engineers and UI

Testing
Start thinking about Testing and pre-book a slot for Research Office Hours

Analytics
Event tracking and / or dashboard for tracking purposes? (PM)

Be mindful of Cost x Effort

DESIGN APPROVALS
- **Engineers** (components, tech complexities, considerations and build)
- **UI Team**
- **Copy**
- **Research**
- **Stakeholder check-in**
- **SMEs** (book slot in advance as diaries get so busy)

UX / UI / Copy

Design iterations
- Iterate designs according to feedback from cross-functional team
- Dependent on fidelity of designs

Review
- After iterations, the UI and Engineers review designs once more before testing

UX / Research / Copy

Speak to Research Team
- Book slot at Research Office Hours to check:
  - discussion guide
  - interview questions
  - recruitment and interviews (if moderated)

If research team have involved throughout the early part to the process, this will need to only be a quick check in

Usertesting.com
- Set up test (unmoderated) and create screener

Post-testing
- If needed, iterate the designs

This step happens until you solve the main core / Problem Statement you have

UX / UI / Copy

Share
- Present findings and designs

Sign-off
- Refer back to the original DACI created at the start of the project to identify who should sign off
- If in house (UI initiated) sign off will be within team.
- If multiple stakeholders or a value team then cross-functional sign off

Copy
- Check in with copy for proofing / typo / visual check
- EN copy signed off + handed to UI / Dev
- FR localisation in UI / handed to dev

WHO TO INVOLVE
- **Product Marketing** - check in to talk about any asset creation / brand team conversations. PMM need to start thinking about the story.

UX / UI / PM

Figma
- Upload to the proper Figma layer as specified on Onboarding doc

UI Team requests
- Notify the UI team and create JIRA tickets in advance
- Include any supporting documentation in the JIRA tickets and Figma file if necessary

Notify UI team at least a week in advance and check they have received the request

DELIVER

DELIVERY

Handover to Engineering team 🚨

ITERATE

Track performance and measure success 🚨

CONVERGE

UX / UI / Engineering

Handover to Engineering
- UI put pixel perfect artwork in the relevant Section of Figma for Engineers
- Designer checks in with Custodians for final consistency check
- The owner of the designs will then have a kick off with the Engineers so that both are aligned on what is to be built

Refinement
- UX / UI attend Engineer Refinement / T-Shirt sizing

QA
- Build QA with Design - Devs have been asked by dev leads to send demo scenes back to the original designer from the handover going forward
- Use the QA spreadsheet to help with identifying and prioritising issues that need to be fixed pre or post go live
- Once prioritised, issues should be created in Jira which is used for tracking, reporting and as a source of truth to avoid wrong assumptions around capacity.

UI sign off pre-live
- UI (& UX?) Designer signs off the build in demo scenes before go live

Designers must be sent demo scenes by Engineering for final sign off before go live

Product / UX / Engineering

Monitor performance
- Analytics dashboard monitoring (if relevant)
- PMs to monitor feature / product performance and feed back to the team

Copy
- Check copy is still relevant and refine / refresh if needed

Share success metrics
- PM to share success metrics

OUTCOME

POST-PROJECT

PROJECT WASH-UP

Conduct a project retro 🚨

Cross-functional team

Project links
- Ensure links to all work (research, discovery, designs, testing, etc) are added to confluence

Get feedback
- Conduct a retro for the project (PM led)
- Identify any blockers such as: business priorities changing / stakeholder requirements, limitations, tech constraints

Phase II
- Start Phase II if relevant / needed