Go from a Nebulous Vision to Iteration One in 3 Steps

Mary Brodie
The Situation
“We need a way to easily support this new program. Let’s create a Web site for it!”

“We need to have [something] done by x date.”

“Let’s create an app that....”
When this approach works

• There is an idea and a team – well, kinda

• There is executive sponsorship
  – Or the founder support the initiative

• There isn’t a vision, goals, problem to solve, revenue plan, etc. – yet!
Create a vision quickly

Step 1
The Big Vision
3-5 Years Vision
Dream site - Blue Sky

Step 2
Reality Hits
6mo – 1 yr Vision
What’s REALLY needed

Step 3
Define releases
Present - 3mo Vision
How get revenue

Sometimes, this is ongoing...
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Step 1: The Big Vision
Getting Started

Goal: Create the Blue Sky solution

Anything goes!

Sharing ideas – big ideas – and possibilities

Challenge: Need to determine the problem
How to get started?

• Kick-off meeting
  – All team members are present
  – Represent business, development, QA, UX
  – UX Designers are Facilitators

• Uncensored brainstorming of what’s needed
  – Sketching on the whiteboard
  – Games

• 1-2 hour follow-up meetings with individual team members
Avoid full-day workshops

• Adults can’t focus for more than 1-1.5 hours at a time without a break

• Keep everyone focused and avoid competing with email, other meetings and priorities
## Meetings & Discussions

<table>
<thead>
<tr>
<th>Type</th>
<th>Time</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly group meeting</td>
<td>1-2 hours</td>
<td>• Review current wireframes/sketches</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Gather input/ideas</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Discuss other sites</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Innovation Games</td>
</tr>
<tr>
<td>Smaller stakeholder meetings</td>
<td>1 hour</td>
<td>• At least 2 per stakeholder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Get requirements</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Review status</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Review wireframes/sketches to date</td>
</tr>
</tbody>
</table>
Meet to brainstorm

• UX Team: Draw & sketch!

• Review Basic Wireframes (UX)
  – Use a clean, lightly documented diagram

• Talk about various apps & competitors

• Talk about features & functionality
  – Group post-its
  – Mind Maps
Whiteboard fun
The Lady with the Chisel Tipped Marker


Visualization techniques

Books:
• Visual Mojo
• NEW: Create Change: How to apply innovation in an era of uncertainty
Post-it Party!
Alternative approach

• Play games – Innovation Games (Conteneo)
  – Product Box
  – Cover story
  – Empathy map
Group design on the fly would be like group story writing on the fly –

Direction, ownership and roles are not clear.
## Group Design vs. Creating Visualizations

<table>
<thead>
<tr>
<th>Group Design</th>
<th>Creating Visualizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is no “owner” for the design</td>
<td>The UX Designer is the facilitator and creates what is used for discussion</td>
</tr>
<tr>
<td>The team actively designs together</td>
<td>The team gives feedback/suggestions for what is presented</td>
</tr>
<tr>
<td>Not necessarily driven by requirements or data</td>
<td>Designer facilitates collecting requirements, knows usability data</td>
</tr>
<tr>
<td>Requires guide design recommendations</td>
<td>Requirements guide design recommendations</td>
</tr>
<tr>
<td>Everyone takes turns sketching a central diagram</td>
<td>Everyone provides their own sketch as a requirement or as a guide for discussion to make an idea come to “life”</td>
</tr>
<tr>
<td>Require something visual to discuss</td>
<td>Require something visual to discuss</td>
</tr>
</tbody>
</table>
Psychology of brainstorming

• Everyone wants to feel they can:
  – Change it
  – Comment on it
  – Contribute to it

• Paper implies possibility – thoughts

• Prototype may “feel” too tangible – too final
Groups need a common understanding

Every human brain, from the moment of birth, develops in unique ways, and thus no two people have the same communication style. This allows for a wide range of creativity, but it also explains why it’s easy to misunderstand each other.

- Words Can Change Your Brain, Andrew Newberg & Mark Waldman
Creating Concepts

I need to see it... (or IKIWISI)

• Visualizations are key to helping the business decide what they need

• Helps create the prioritization list
  – Starts their decision making process and ideation
Are visualizations dead?

Visualizations are required to make a product

• Not everyone can visualize in his head
• Two people in the team don’t see the same thing– Plato’s ideal
• Need to rally everyone around what the vision and see what's possible
Visualization Samples

From simple flow charts

To site maps
Visualization Samples

Wireframe sketches
Why do we need stories, requirements, and documentation?

- Learn constraints and define what’s needed
- Outline the goals and the plan
- Get everyone to the same vision
How much detail is too much?

How is the team’s memory regarding various discussions and decisions?

Developers like!
• Something concrete to work from

Business Likes!
• Records of agreements with UX and Development – why decisions were made

QA Likes!
• Know what the front-end is expected to do
# Sketch or a Wireframe?

<table>
<thead>
<tr>
<th>Sketch</th>
<th>Wireframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any team member can create</td>
<td>Any team member can start; leverage a UX individual to provide detail and flesh out the idea</td>
</tr>
<tr>
<td>Step 1 to creating a product</td>
<td>Advanced sketch</td>
</tr>
<tr>
<td>Paper, electronic, whiteboard</td>
<td>Typically in an electronic file that can be printed</td>
</tr>
<tr>
<td>Outline of what will be included on the screen</td>
<td>Outline of what will be included on the screen</td>
</tr>
<tr>
<td>Minimal detail</td>
<td>Minimal to heavy detail</td>
</tr>
<tr>
<td>Light documentation</td>
<td>Light to heavy documentation depending on the team</td>
</tr>
<tr>
<td>Typically does not detail features but it can</td>
<td>Can include feature details</td>
</tr>
<tr>
<td>Sketches can address various scenarios</td>
<td>Expectation that scenarios are addressed</td>
</tr>
</tbody>
</table>
Designing for Step 1

- Create a simple, scalable framework
  - Add detail later as the stories emerge
  - Don't get more detailed than necessary

Remember – the design will be iterative & collaborative
Example

Cape Cod House
(Agile Framework)
Start small – grow in many directions

McMansion
(Waterfall Framework)
Custom built
Focus on Page Structure

• Create a scalable structure/outline

• Keep in mind: always be flexible to change
In the meantime...

• Business team is:
  – Researching: comparative/competitive data
  – Defining goals
  – Starting a revenue model
  – Organically defining the problem by finding the solution

• Development team is:
  – Researching architecture options
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Step 2: Reality Hits
Time to Focus!

Goal: It's about the necessities...

What’s necessary? What do we need?

What problem are we solving?

Start to filter must have from “dream”
How do we do this?

• More group meetings than stakeholder meetings
  – Business owner drives the prioritization
  – Team starts to define scope and discuss tradeoffs

• Discuss options and combinations
What’s happening in the teams?

• Business owner will be getting more focused and define the business problem
  – Comparative/competitive data
  – Defined goals
  – Start a revenue model

• Development team determines architecture needs & requirements
Focused brainstorming

• UX Team: Draw & sketch!

• Review Basic Wireframes (UX)
  – Use a clean, lightly documented diagram

• Talk about various apps & competitors

• Continue to prioritize features
  – Keep some
  – Move some ideas into a backlog – for now
Focus on paring down features

• Prioritize on a whiteboard
  – Group post-its, pull some down for later

Innovation games:
  – Speedboat
  – Buy a feature
  – Prune the tree
Innovation Games: Buy a feature

Include names of players and budget for each

Include a list of features to buy (or pages, etc.)

Purchased/not purchased indicated
UX has an additional goal

- Define general design
- Introduce patterns
  - Leverage general design conventions
    - For example: Expand/collapse elements
  - How to display multiple pages/many results
  - Data displays
Collaborative

Reflect all input in the design to achieve easiest approach

<table>
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<tr>
<th>UX Input</th>
<th>Developer input</th>
<th>Business input</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the user goals?</td>
<td>• What are the system and architecture requirements?</td>
<td>• What are the goals (including cost goals)?</td>
</tr>
<tr>
<td>• What are the UX baselines?</td>
<td>• Which best practices should we consider leveraging?</td>
<td>• What will appeal to the user?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Prioritization – Agile style</td>
</tr>
</tbody>
</table>
To prototype or not to prototype?

Nothing replaces a good prototype!
• Demonstrates how a system would work
• Easy to talk to/comment on

When is a good time for the prototype?
• Need a balance
• Too early: seen as a permanent solution
• Too late: part of development
When’s the right time to prototype

- How many options/directions are being discussed?
- Do you need feedback from people not involved in product development?
- Are you starting to talk to customers?

*If you have 1-2 directions and the answers are yes, it’s time!*
Health Insurance
Pre-Authorization Tool

Develop a tool for:

• Customers to submit pre-authorization requests
• Agents to approve the requests
• Agents to provide support to customers who call
Defining scope took ~3 weeks

Started with Blue Sky > what’s required
  – Focused on creating a vision
  – Visuals helped the prioritization discussions
  – What we need to launch vs what’s nice to have

Multiple sessions included multiple stakeholders
  – Address attention span in modern work environments
Visualizations Thru Wireframes

Discuss layouts, data needed, functionality – getting more detailed each time
Travel Site & Expansion

- Lots of enhancements for modernizing UX
- Needed to standardize on approaches that were cost-effective for business and development
How did we do this?

• Learned that developers were optimizing the site by removing “gizmos”
  – Expand/collapse elements were allowed

• Started to leverage this concept throughout the site and it became a convention that we used consistently

• Similar with error messages on the pages
  – Developers preferred one approach, refined with UX
Wireframes showing possibility
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Step 3: Define Releases

Creating a Product

Goal: rough draft of scope for launch

Continue product focus, prioritization

Problem is fairly well-defined

Team needs to feel comfortable enough with initial vision to get to Iteration 1
Around 80% Complete

- Goals
- Vision
- Revenue model
Get into the details

• Define specific features/functions
  – Scale to meet priorities
  – Leverage tools agreed upon OR create new tools that can be leveraged

• Discuss what's available
  – Technologists give suggestions for what’s possible

• Great time to build a prototype
Activities

• Innovation Games
  – Buy a feature
  – Prune the tree

• Continue making hard decisions with Post-its
Organize your Post-its!
Visualizations: Wireframes to Comps
What you will have done...

• A good idea of what needs to happen for the first few iterations

• Room for priority change based on business need
Introduce Users as Stakeholders

• UX facilitates prototype review sessions
  – Represent voice of the users

• Concept needs to be fairly stable
Do & Learn - Iterative Learning

• Multiple sources to learn what customers do
  – Usability studies – online, remote, onsite
  – Web metrics

• Leverage learnings during iterations
  – Project becomes more iterative - it's never final

• Incremental improvements go a long way!
  – Easier to test and record success (or failure)
Summary

• Starting a project with defined problems is awesome – but rare
• Team has to define/”create” the problem to solve
If this situation describes you...

- There is an idea and a team – well, kinda

- There is executive sponsorship
  - Or the founder support the initiative

- There isn’t a vision, goals, problem to solve, revenue plan, etc. – yet!
This process may help you...

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2 Options

1. Activity

2. Discussion
Activity

Need to create an app that will support our partners. It needs to help them sell our software product and support installation/services.

How would you start this project?
For discussion...

• Do you experience similar situations in your organization?
• How did you address your challenges?
• How did the project evolve?
• How did the collaboration work?
• How could this 3-step approach have helped you?
Thank you!
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