



UI/UX PROPOSAL

A UX PROPOSAL CAN HELP BOLSTER THE ARGUMENT FOR USER EXPERIENCE DESIGN AND GIVE STAKEHOLDERS AN UNDERSTANDING OF A PROJECT AND ITS SCOPE.

WHAT IS A UX PROPOSAL?

- *A UX proposal is an outline or plan of a proposed change to the UX design of a mobile app, website or product. A proposal outlines a problem and presents a solution*
 - Any good designer will tell you that their decisions rely heavily on in-depth research and investigation. Even the smallest change to a UI element on a website or in a mobile app can cost thousands, if not hundreds of thousands of dollars.
 - It is the UX designer's job to articulate that problem-solution relationship in a proposal and offer the route to overcoming the problem in the best way possible.
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WHEN IT COMES TO A BRIEF, BEING BRIEF IS BEST.

Any proposal will need to have a project name, date and details of who are the stakeholders involved.

THE STEPS

1. Problem Statement
 2. Provide background information
 3. Understand your goals and expected outcomes
 4. Propose deliverables
 5. Assumptions
 6. What is the expected timeline and budget?
 7. Conclusion
-

PROBLEM STATEMENT

Here is where you state what is preventing you from reaching your goals. *Defining the problem* involves identifying the causes of the problem so that you can solve it.

Your *problem statement* should come out of an understanding of business objectives, the context of product use and *user goals*. When you know this information, you will be able to deliver business value with your proposed solutions.

To get that information, you will have to involve those who are affected by the problem with the following methods:

- Interviews
- Experimentation
- Observed events
- Research

A good tip is to maintain easy to understand language and avoid jargon when you write your *problem statement*.

BACKGROUND INFO

Why is this proposal necessary?

- Outline what led to this plan
 - Discuss the history of the project
 - Address similar issues in the past
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GOALS + OUTCOMES

Your goals should NOT be a shopping list of items.

For example: *the goal of this UX design proposal is to create and implement a new design for the sign-up landing page to drive up conversions.*

It does not need to be more complicated than that. In fact, the simpler, the better.

In a few sentences:

- Outline the goals of the proposal
 - If you have too many goals, you might need to create more than one proposal
 - Stay focused on just a couple of issues at a time to prevent overwhelm and create a better workflow
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OUTLINE DELIVERABLES

After you have explained the problem and helped stakeholders understand it, it is time to provide the solution by outlining the deliverables necessary to be successful.

Most *UX design* projects involve research, design and then validation so keep this in mind when thinking about deliverables.

Try not to be vague at this stage. Something like “improve overall UX” can take many meanings depending on the reader..

Your deliverables might include:

- Carrying out a competitor analysis
 - Creating personas
 - User flows
 - Capturing UX requirements
 - Ideation
 - Wireframing
 - Creating an interactive prototype
 - User testing
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EXAMPLES OF DELIVERABLES

The list here contains most common deliverables produced by UX Designers as they craft great experiences for users.

For better readability, I've combined the deliverables according to UX activities:

- User Research
 - Personas
 - User Flow
 - Experience Maps
 - Use Cases
 - Storyboards
 - Market Research
 - Design
 - Moodboards
 - Sketches
 - Wireframes
 - Prototypes
 - Testing
 - Quantitative
 - Usability Reports
 - Analytic Reports
-

PERSONAS

- Persona is a fictional character created to represent a user type that might use a product in a similar way. Personas make it easier for designers to create empathy with users throughout the design process.
 - **Focus on a few primary personas**
 - **Make your personas believable**
 - **Give your personas memorable names**
 - **Use an appropriate persona photo**
-

Clark Andrews

AGE 26

OCCUPATION Software Developer

STATUS Single

LOCATION San Jose, CA

TIER Experiment Hacker

ARCHETYPE The Computer Nerd

Friendly

Clever

Go-Getter



"I feel like there's a smarter way for me to transition into a healthier lifestyle."

Motivations

Incentive

Fear

Achievement

Growth

Power

Social

Goals

- To cut down on unhealthy eating and drinking habits
- To measure multiple aspects of life more scientifically
- To set goals and see and make positive impacts on his life

Frustrations

- Unfamiliar with wearable technology
- Saturated tracking market
- Manual tracking is too time consuming

Bio

Aaron is a systems software developer, a "data junkie" and for the past couple years, has been very interested in tracking aspects of his health and performance. Aaron wants to track his mood, happiness, sleep quality and how his eating and exercise habits affects his well being. Although he only drinks occasionally with friends on the weekend, he would like to cut down on alcohol intake.

Personality

Extrovert

Introvert

Sensing

Intuition

Thinking

Feeling

Judging

Perceiving

Technology

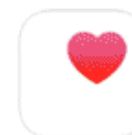
IT & Internet

Software

Mobile Apps

Social Networks

Brands



PERSONAS

Peter

The busy parent

About Peter

- Works in London for an advertising firm
- Lives in Surrey with his wife and 2 young kids
- Has a busy life so is a big fan of time savers
- Is comfortable online and does a lot of shopping online (as it's more convenient)
- Is a 'hunter' shopper – wants to get in and out as quickly as possible
- When shopping usually just wants to find something that ticks all the boxes
- Wants to get good value – preferably the best price possible
- Gets frustrated by not being able to specify a delivery window for online purchases
- Gets annoyed by slow and clunky websites



*"I don't want to have to
faff around"*

Key goals

- To get the best price possible
 - Be inspired
 - A quick and painless online purchase
-

PERSONAS

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- **Focus on a few primary personas**
 - The number of personas you create is dependant on the size and diversity of the user base for your product or application.
 - **Make your personas believable**
 - If a persona isn't believable then people won't buy into them, they won't empathize with them
-

PERSONAS

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- **Give your personas memorable names**
 - This will help people to remember them. Think of your personas as brands. The easier to remember the brand name the better.
 - **Use an appropriate persona photo**
 - A picture paints a thousand words which is why the picture you use for a persona is so important.
-

PERSONAS

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<http://www.uxforthemasses.com/personas/>

- **A good size** – You don't want people squinting to make out the person shown.
 - **A head shot** – you don't need the whole person shown (unless it's important to the persona, like a sportsman perhaps)
 - **Natural** – Think holiday snap rather than catalogue photo
 - **Royalty free** – be careful about copy protected photos
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How To Create A Customer Journey Map

- <https://youtu.be/mSxpVRo3BLg>

Wireframing for UX: What it is and how to get better at it

- <https://youtu.be/8-vTd7GRk-w>

Better User Research Through Surveys

- <https://youtu.be/bi2JMRpL9Ik>
-

EXPERIENCE MAPS

“Stories have defined our world.

They have been with us since the dawn of communication, from cave walls to the tall tales recounted around fires. They have continued to evolve, with their purpose remaining the same: to entertain, to share common experiences, to teach and to pass on traditions.”

- A diagram that explores the multiple steps taken by users as they engage with the product. Experience map allows designers to frame the user’s motivations and needs in each step of the journey, creating design solutions that are appropriate for each.
 - A simple experience map reflects one possible path during one scenario
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EXPERIENCE MAPS

Inspired by user research, no two journey maps are alike, and regardless of format they allow organizations to consider interactions from their customers' points of view, instead of taking an inside-out approach.

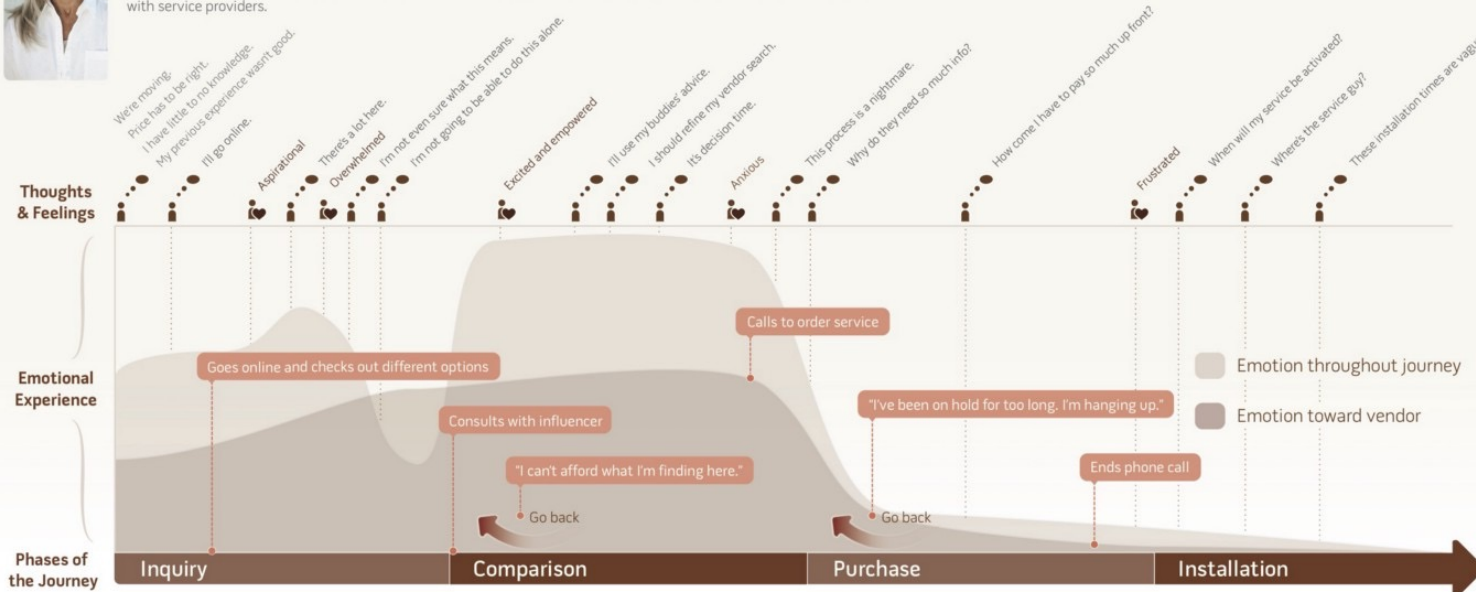
A Customer Journey map is a visual or graphic interpretation of the overall **story from an individual's perspective** of their relationship with an organization, service, product or brand, over time and across channels.



Sarah's Broadband Provider Journey

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.

effective[®]



Description

The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations

Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Description

The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic. If they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations

Use IP location services to geo-locate customers – removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Description

The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification – waiting on service installation and activation.

Recommendations

Reduce the amount of information required by streamlining and improving any areas that contain form fields, using industry best practices. Work on setting expectations for the Installation phase with phone customer service reps to improve the overall experience with your brand.

Description

The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations

Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.

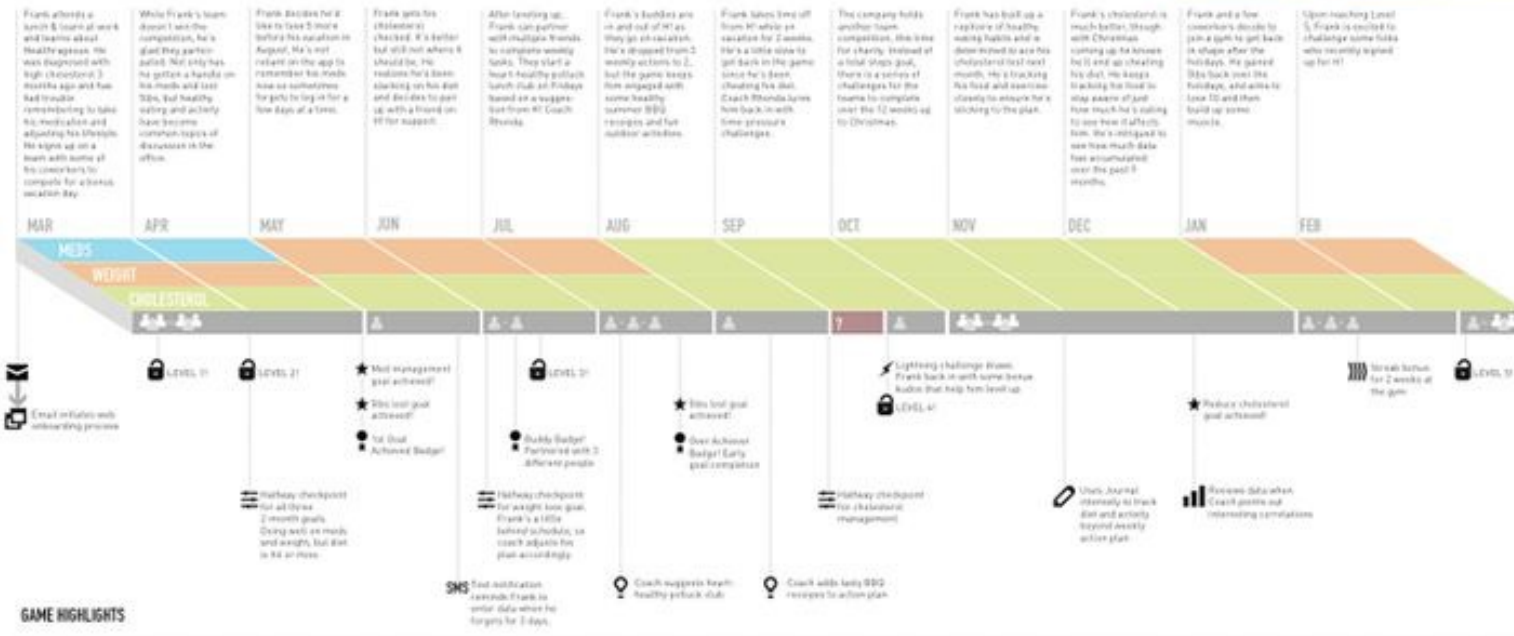
EXPERIENCE MAPS

How To Create A Customer Journey Map



FRANK 43, Call Center Manager, Family Man
Recently diagnosed with high cholesterol

GADGETS: Pedometer, Wireless Scale in Office, Smartphone
GOALS: 100% Med Adherence, Lose Weight, Reduce Cholesterol



SAMPLE ACTION PLANS & KUDO SCORES

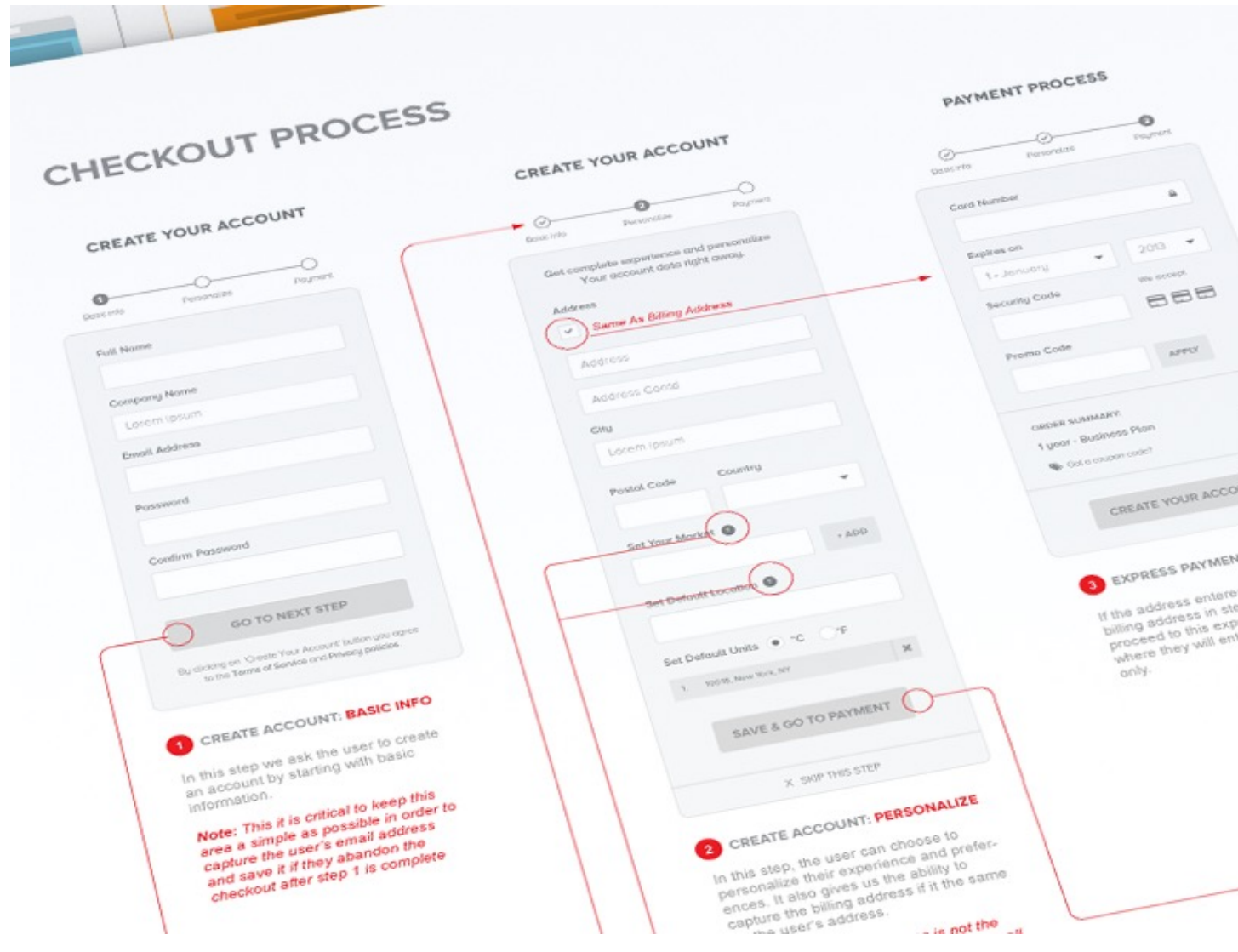
WEEK 1 (MAR)	WEEK 8 (APR)	WEEK 18 (JUL)	WEEK 22 (AUG)	WEEK 27 (SEP)	WEEK 36 (NOV)	WEEK 47 (FEB)
<ul style="list-style-type: none"> Take medication when reminded by M mobile app Walk 2500 steps per day (for team competition) Eat alone w/ to eat instead of butter 	<ul style="list-style-type: none"> Take medication without being reminded by M mobile app Walk 4000 steps per day (for team competition) Play 5 minutes with the kids 	<ul style="list-style-type: none"> Cook 3 healthy meals this week Go for a 3 mile bike ride Healthy pre-lunch (Sun, Tue, Sat, Mon) 	<ul style="list-style-type: none"> Healthy 900 with family Seem for 5 hours 	<ul style="list-style-type: none"> Make a healthy trail dessert (in 4 nights for bonus bonus) Walk 5000 steps per day 	<ul style="list-style-type: none"> Track meals in journal Eat 15 servings of veggies (for team competition) 	<ul style="list-style-type: none"> Go to the gym for Pack a new lunch box for you and the kids Walk more than a Level 5 group (Susan, Eric, Yang, Tony)
2 1 per action	18 1 per action + 42 completion bonus + 42 completion bonus for 3rd place	19 1 per action + 8 on-up bonus + 10 goal completion bonus	5 1 per action + 1 on-up penalty + 5 goal completion milestone	14 1 per action + 5 lightning bonus + 42 completion bonus	4 1 per action + 26 completion bonus	24 1 per action + 8 streak bonus + 4 challenge win + 42 completion bonus

EXPERIENCE MAPS

How To Create A Customer Journey Map



USER FLOWS



EXPERIENCE MAPS

Use Cases

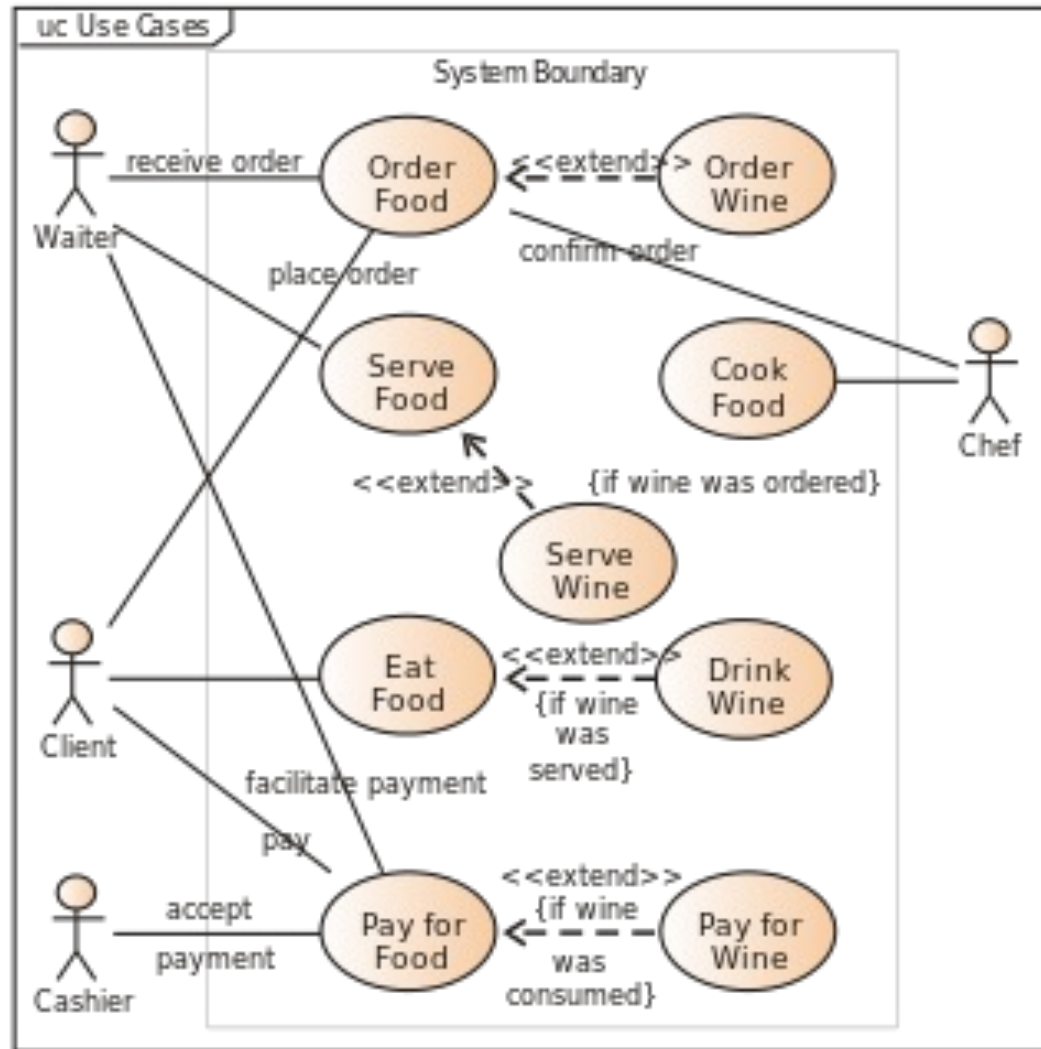
Example

Use Case – Search of the *cheapest* public transport route.

Actor – Tourist

Steps –

1. Specify "from" and "to" locations
2. Select day and time of a) arrival or b) departure
3. Show search results with the cheapest price first





MOOD BOARDS

STORYBOARDS



MARKET RESEARCH

<http://www.site-A...>



Pros

- ▬
- ▬
- ▬
- ▬

Cons

- ▬
- ▬
- ▬

<http://www.site-B...>



Pros

- ▬
- ▬
- ▬

Cons

- ▬
- ▬
- ▬
- ▬

<http://www.site-C...>



Pros

- ▬
- ▬
- ▬
- ▬

Cons

- ▬
- ▬
- ▬
- ▬

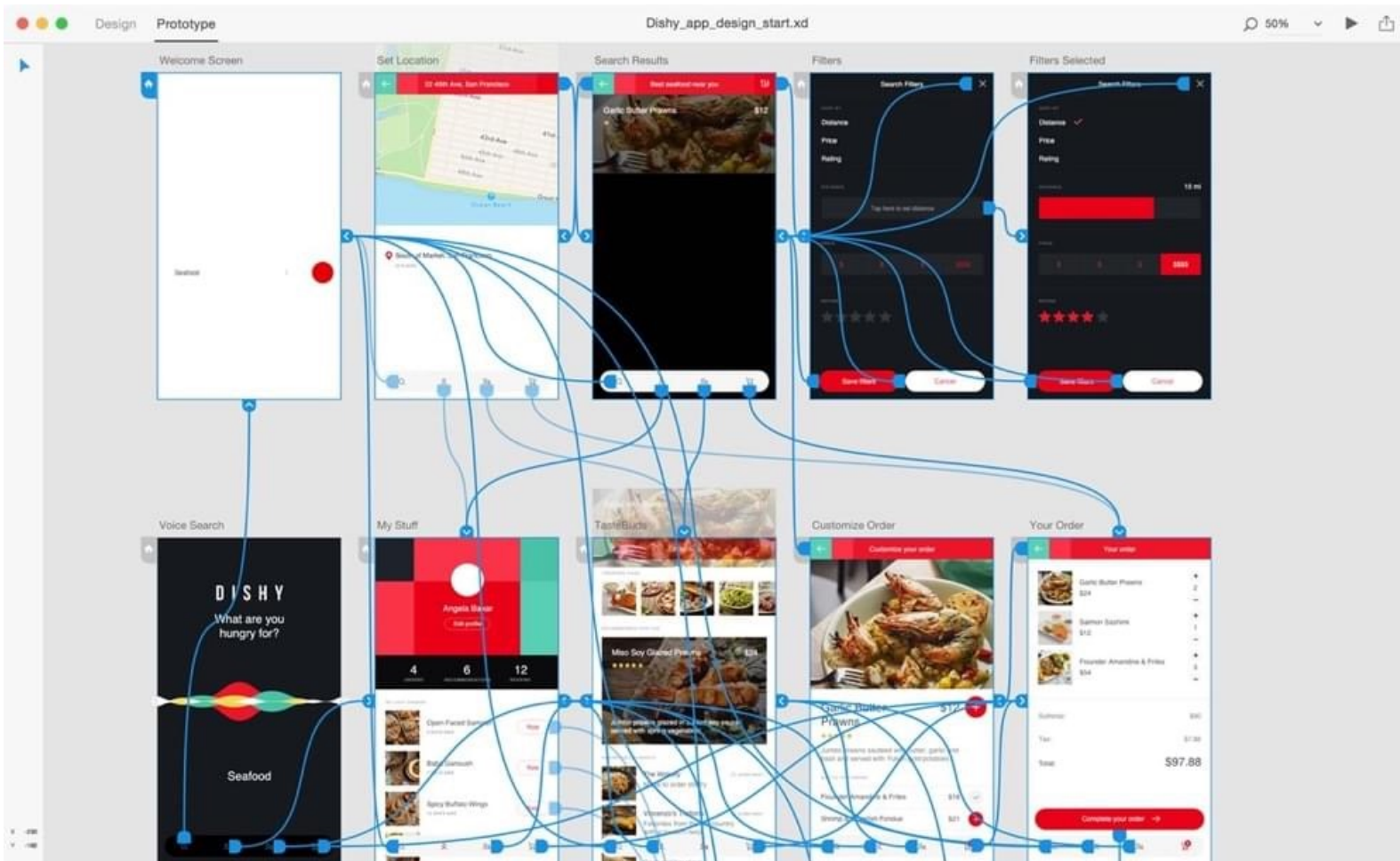
	Competitor 1	Competitor 2	Competitor 3	Competitor 4
Online Giving	Y	Y	Y	Y
- General Support	Y	Y	Y	Y
- Program-Specific Support	Y	Y	Y	
- In Memory of Another	Y	Y	Y	Y
- In Honor of Another	Y	Y	Y	Y
- For a Special Event ¹	Y	Y	Y	Y
- Gift Club (based on \$ amount)		Y		
Offline Giving (Mail/Fax/Phone)	Y	Y	Y	Y
- General Support	Y	Y	Y	Y
- Program-Specific Support	Y	Y	Y	
- In Memory of Another	Y	Y	Y	Y
- In Honor of Another	Y	Y	Y	Y
- For a Special Event ¹	Y	Y	Y	Y
- Corporate Sponsorship	Y	Y	Y ³	Y
- Planned Giving ²	Y	Y	Y	Y
- Major Gifts	Y	Y	Y	Y
- Employer Matching		Y	Y	Y
- Stock		Y	Y	Y
- Endowment		Y	Y	
- Gift Club (based on \$ amount)		Y		

WIREFRAMES



PROTOTYPES





PROTOTYPES

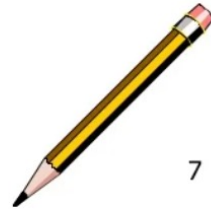
TESTING

Any ideas?

Question 25

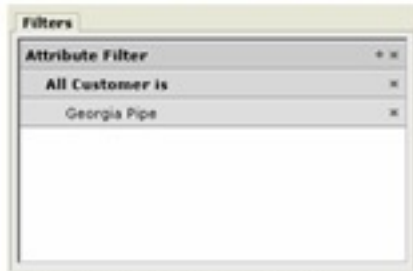
In your **last five days at work**, what percentage of your work time do you estimate that you spent using publicly-available online services (not including email, instant messaging, and search) to do your work using a work computer or other device?

This is a badly-written question, and most of us could only guess wildly at an answer



TESTING

USABILITY TESTING REPORT – PRICE EXPLORER



Filter display - few noticed the filter edit button



After clicking the filter edit button, the current filters are shown in the Attribute Filter window.



But when clicking "Filter by Attribute", the current filters are not shown in the Attribute Filter window.

Editing filters

When asked to change the waterfall chart from showing Georgia Pipe to showing Liberty Plastics, only one of the participants used the filter edit button. It is the "+" icon to the left of the "x" at the top, right of the filter display area. Two tried to click directly on Georgia Pipe in the filter display area, thinking that would bring up the list of customers to choose from.

- "I don't want to clear filters and start over. I want to just go back to the customer list. [Tries clicking on Georgia Pipe] And there's no back button... It would have been easier to have a more obvious way to back up one step."

Two participants clicked the "Filter by Attribute" link and thought that selecting Liberty Plastics would replace Georgia Pipe. After adding Liberty Plastics, they did not notice at first that Georgia Pipe was still in the filter list. That was because clicking the "Filter by Attribute" link brings up a version of the Attribute Filter window that does not show the current filters selected on the right. Clicking the filter edit link brings up the Attribute Filter window with the current filters displayed on the right side. This inconsistency can cause these types of errors.

Recommendations:

- Open the Attribute Filter window when users double click on the items in the filter display area (e.g., Georgia Pipe).
- When filters are selected, clicking the "Filter by Attribute" link should open the Attribute Filter window with the current filters displayed in the "Filter Lists" box on the right side of the window (the same as it appears when the filter edit button is clicked).

ANALYTICS

