



Ken Starts:

WE ARE A PRODUCT DESIGN FIRM

Industry recognized for product vision, our patented design work emphasizes customer research, workflow, and technology.





In 1988, Donald Norman appropriated the term affordances in the context of human-machine interaction to refer to just those action possibilities that are readily perceivable by an actor.

PEOPLE FORM EXPECTATIONS BASED ON PAST EXPERIENCES

- EFFECTIVE USER EXPERIENCE DESIGN CONFORMS TO EXPECTATIONS
- MATCHES EXISTING MODELS
- FOLLOWS THE PRINCIPLE OF LEAST ASTONISHMENT

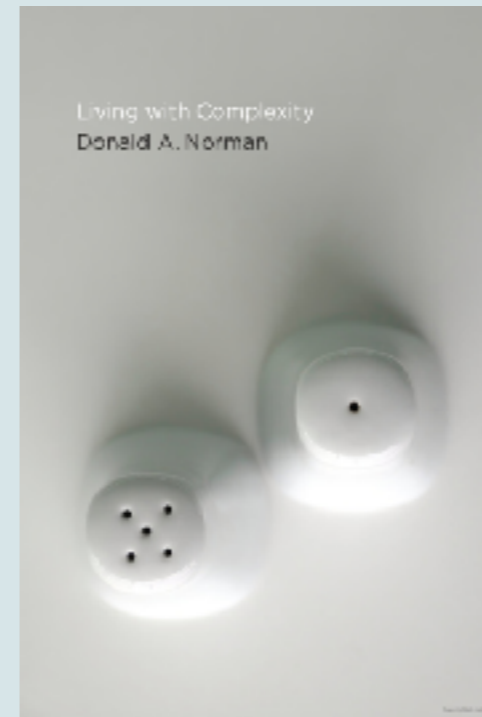


USABILITY

THE DEGREE TO WHICH USERS
CAN PERFORM A SET OF
REQUIRED TASKS

ONLY BY ATTENDING TO THE
DETAILS DOES USABILITY EMERGE
AS A DOMINANT PROPERTY

"WHY WE DON'T REALLY WANT SIMPLICITY, AND
HOW WE CAN LEARN TO LIVE WITH COMPLEXITY."



UX DESIGN PROCESS

1. UNDERSTAND THE PROBLEM
2. WATCH, LISTEN AND LEARN
3. DEFINE THE FEATURE SET AND WORKFLOW
4. CHOOSE DESIGN PATTERNS AND SKETCH
OUT A STORY
5. ESTABLISH A VISUAL LANGUAGE
6. PROTOTYPE MAIN/SECONDARY SCENARIOS
7. DELIVER AND TEST THE DESIGN



Understand the problem

step 1 of 7

Ken's still.



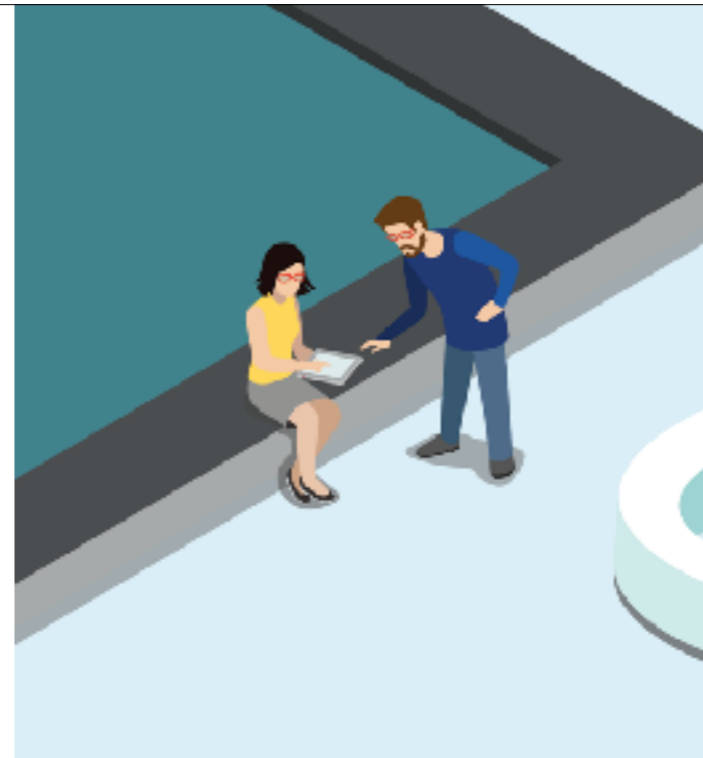
WHY IS THIS IMPORTANT?

**Because solving the right problem
builds careers, organizations, and
professional relationships.**

UNDERSTAND THE PROBLEM

The Steps:

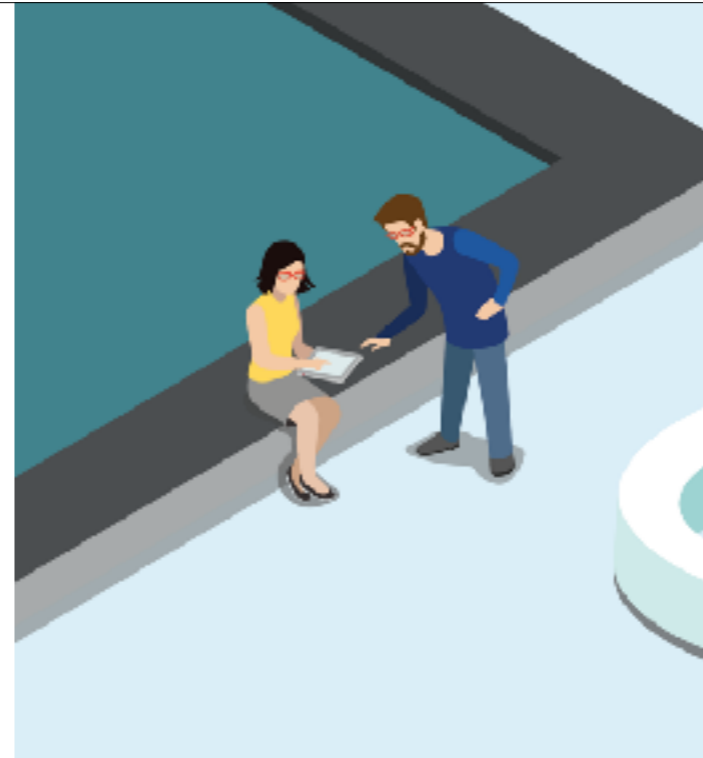
- Workshop sessions & heuristic reviews
 - Best with least exposure
 - Stakeholders, subject domain experts
 - Working knowledge of problem domain
- Interview sessions
- Summarization and recommendations



UNDERSTAND THE PROBLEM

The Steps:

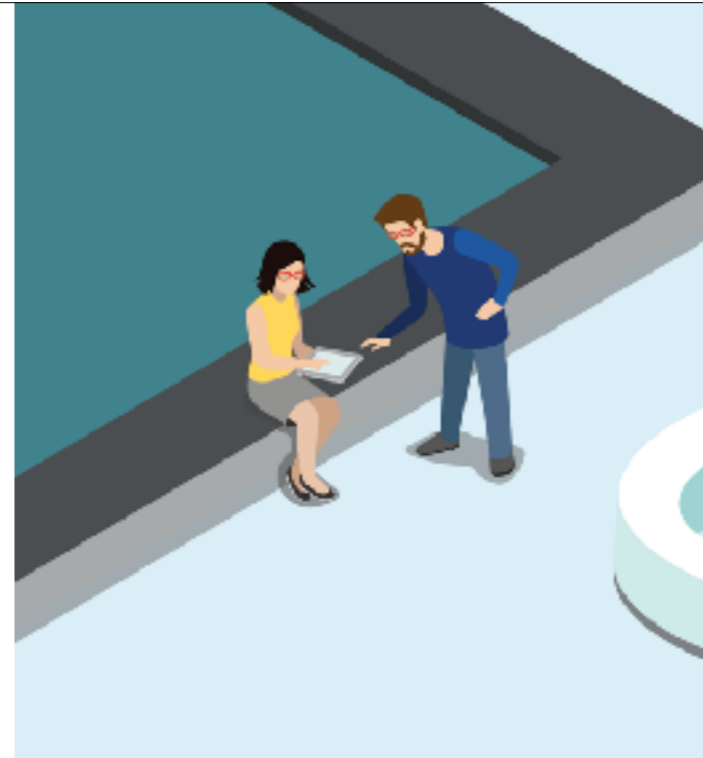
- Workshop sessions & heuristic reviews
- Interview Sessions
 - Roles of customer population
 - 6-12 subjects
 - Task based observation and informal question outline
- Summarization and recommendations



UNDERSTAND THE PROBLEM

The Steps:

- Workshop sessions & heuristic reviews
- Interview sessions
- Summarization and recommendations
 - High-level observations supported by specific evidence



Watch, listen and learn

step 2 of 7

Emma continues:



WHY IS THIS IMPORTANT?

**User studies are the biggest driver of
product innovation to create a
competitive advantage.**

HOW TO WATCH, LISTEN & LEARN

The Steps:

- Watch the user's environment
 - Ditch the lab. Meet in the field.
 - Observe one-on-one
 - Record sessions
- Listen to off-the-cuff reactions
- Learn how their context and habits inform their interactions



How do you learn these pivotal things about the user?

Watch the user's environment. Ditch the lab and meet in the field.

- Lab environments **take away some of the candor** you get when you meet the user in their comfortable environment. It automatically becomes a **“test” like atmosphere**.
- Observe on-on-one:
 - We often hear people throw out terms like **“focus groups”** when we're talking about user studies. These are not focus groups.
 - We advocate for one-on-one interviews because they're more personal and you can focus on observing a **user complete a set of tasks** as well as ask informal interview questions to **get a feel for their perception of the app or digital product**.

Record to refer later

HOW TO WATCH, LISTEN & LEARN

The Steps:

- Watch the user's environment
- Listen to off-the-cuff reactions
 - Stop analyzing, focus on understanding
 - Listen to actions
- Learn how their context and habits inform their interactions



It's important to give weight to the off-the-cuff responses. This is usually where the emotional connections lie.

Listen to actions

Listen to what the users say versus what they do.

For example:

We did a user study where we interviewed a handful of subjects that use a web app to track professional development training hours, upload and approve certificates.

When we talked to the users about the perception of the app, they all said it was easy, that it was straight forward.

But when we watched them complete tasks, it would take three tries for them to navigate to the right place within the app to upload their hours.

If you listened to their actions, What they said was very different from the navigation troubles they displayed.

HOW TO WATCH, LISTEN & LEARN

The Steps:

- Watch the user's environment
- Listen to off-the-cuff reactions
- Learn how their context and habits inform their interactions
 - Ask about subject's background
 - Let the user get off-task



This ties into the point about meet them in the field.

When you go to the user, take note of their environment. Is it distracting? Do the majority of users have double screens? Are they always on the go?

Ask about their background, this will give some context to the actions you're viewing.

Let the user get off-task. It's okay to step away from walking the user through a checklist or script. When the user gets off task is usually where the "eureka" moments lie. When you see what they're drawn to or their natural workflow.

Define the feature set and workflow

step 3 of 7

Ken jumps in:



WHY IS THIS IMPORTANT?

A correct, prioritized feature set and workflow is the first step to designing a winning customer experience...because everything else is a fish scaler.



Fish scaler: Although the fish scaler is used by many fishermen to scale fish, it's often derided as one of the least useful tools in this model. However, there are other uses for the fish scaler, including carving pumpkins. – [Knife Depot](#).

DEFINE FEATURE SET & WORKFLOW

The Steps:

- Document common user scenarios
 - What problems are your customers trying to solve?
 - What would they do without your product or service?
 - Text outlines, narratives, diagrams
- Develop main success scenario and a prioritized task list



DEFINE FEATURE SET & WORKFLOW

The Steps:

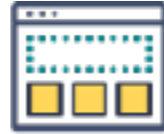
- Document common user scenarios
- Develop main success scenario and a prioritized task list
 - Select most important user scenarios
 - Build set of use cases supporting these scenarios
- Go back to user population and test your concepts with one-on-one interviews



**Choose design
patterns and
sketch out a
story.**

step 4 of 7

Emma's step:



WHY IS THIS IMPORTANT?

Proven patterns succeed because they play to the expectations that people form based on past experiences.

Like our salt shaker example, the holes on the top of the shakers conform to past experiences. People know what to do.

DESIGN PATTERNS & SKETCHES

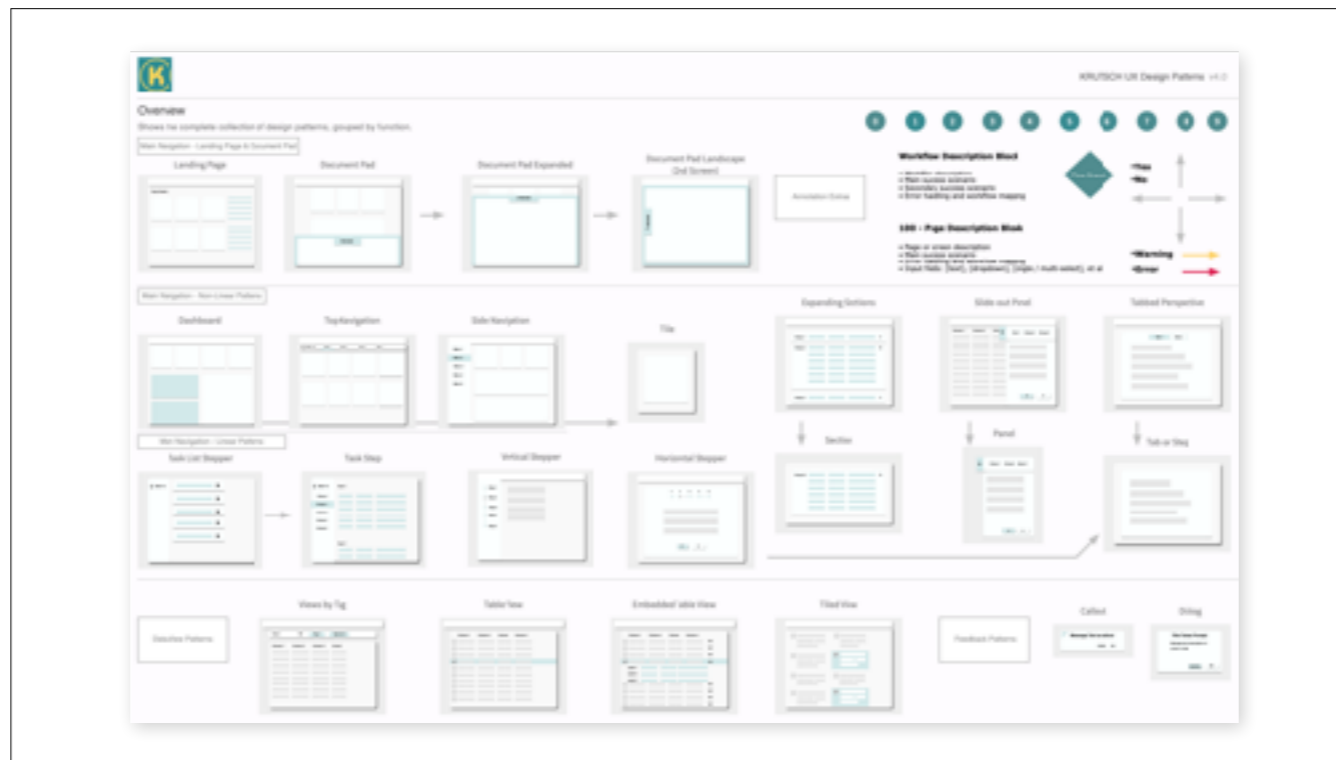
The Steps:

- Pick a pattern
 - Determine needs of each use case
 - Pick a pattern that fits those needs
- Sketch a story to test patterns



You've gone through the steps to understand the problem and users, you've developed a feature set and workflow.

Now you need to pick a pattern. You do this by determining the needs of each use case and picking a pattern that fits those needs.



We decided to crystalize this step a bit further by developing an Omnigraffle stencil set. When we're building out workflows, we're picking patterns at the same time.

Do we need a high level view of something? A dashboard pattern

Do we need break some workflows down into guided steps? Stepper or wizard pattern

Is there going to be heavy data entry? A slide out panel so we have space to work but don't lose context.

DESIGN PATTERNS & SKETCHES

The Steps:

- Pick a pattern
- Sketch a story to test patterns
 - Fill in the happy-path details
 - By hand or tablet
 - Be quick and general
- Helps clients and user test subjects envision their product faster

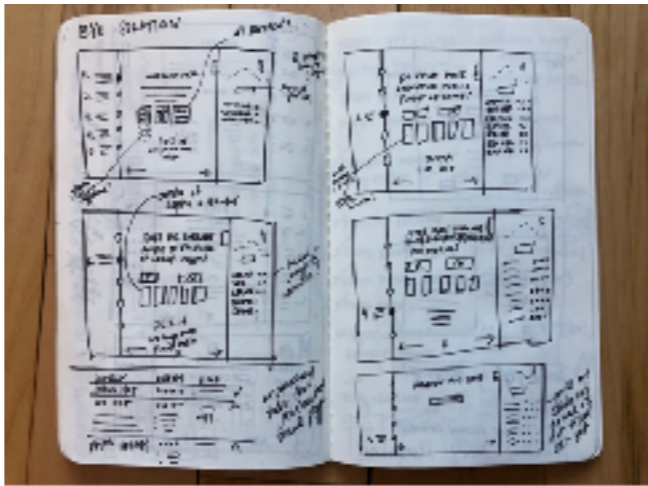


Once you have a pattern set in mind, start sketching to test your patterns

Use narrative to fill in the happy-path details, by hand or tablet but be quick and general. Be iterative

Sketching is one of the first steps of the process that helps clients and user test subjects see their product in a more tangible way.

Even quick sketches can save a lot of headaches down the line because it helps keep everyone on the same page. Sketches make sure everyone has the same vision in their head as you discuss the design.





1. Dashboard Overview



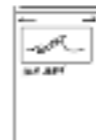
2. Sales Performance



3. User Profile



4. Settings



5. Analytics Report



6. Contact Form



7. Task List



8. User Profile Card



9. Settings Form



10. Data Table

Establish a visual language.

step 5 of 7

Emma's step:



WHY IS THIS IMPORTANT?

**A visual language builds visual cues
across the application, building user
trust and interest.**

More than a coat of paint. Visual language affects comprehension, recall, reinforces brand, builds an emotional connection.

It works to build trust with the user through consistency, but also by using a look and feel that matches those mental models.

A medical data entry app would feel wrong or suspicious with bubble gum graphics. Those mental models wouldn't be met.

DESIGN PATTERNS & SKETCHES

The Steps:

- Stylized sticker sheet
 - Start to test out brand colors, fonts, and standards within design
 - Helps establish consistency
- First looks to test colors and styles
- High-fidelity storyboards



Once you've chosen your framework — Material, Fabric, Bootstrap— Build a sticker sheet.

Start to apply brand colors and fonts across components. main and secondary CTA buttons, dropdowns, tables, headers. You start to feel how style can be incorporated.

Sticker sheet, or a component library, helps establish consistency. You're always pulling from the same place.

It can evolve, but it adds an extra level of restraint.

Action Buttons



Sectors



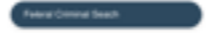
Floating ActionButtons



Mobile buttons



CREATE NEXT PACKAGE



Controls



Material Design

Suggested button size is 36px
According to Material Design Guidelines.

Design Observation

Rounded corners are in trend.
Use the large mobile button as much as possible.
Large color band at top to handle any notches on phone.
Use only the separators and icons as tabs.
No bar at bottom instead of hamburger menu.

DESIGN PATTERNS & SKETCHES

The Steps:

- Stylized sticker sheet
- First looks to test colors and styles
 - Helps clients conceptualize
 - Makes project feel tangible early on
 - Builds trust and increases engagement
- High-fidelity storyboards



We like to use “first looks” to test colors and styles.

These are a step up in fidelity from the sketches and start to pull in some of the branding and style of the sticker sheet.

This is another step in making the project feel tangible early on and building that trust and engagement with the client.

OrangeTree


● ○ ○ ○

Question 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

▶ ▶ ▶

25 %
OF COMPANIES USE THIS TOOL



Your Solution

Service	CRM
• National Criminal Records Search	● ● ● ●
• National Sex Offenders Registry	● ● ● ●
• County/Statewide 7-Year Criminal Search	● ● ● ●
• Social Security Trace/Workers License	● ● ● ○
• Education Verification	● ● ● ○
• Employment Verification	● ● ● ○

These of course are evolving, but is an important starting point.

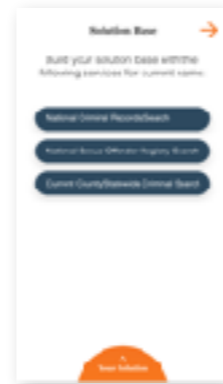
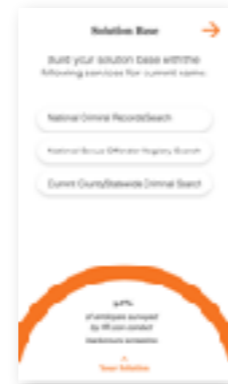
DESIGN PATTERNS & SKETCHES

The Steps:

- Stylized sticker sheet
- First looks to test colors and styles
- High-fidelity storyboards
 - Evolving but pixel perfect
 - Use color, font, alignment, and hierarchy to increase comprehension, develop trust, and drive usability



These storyboards fill in the details. They're evolving but pixel perfect and start to incorporate color, font, alignment, and heirarchy to increase comprehension, develop trust, and drive usability.



Prototype Main/ Secondary Success Scenarios

step 6 of 7

Emma still:



WHY IS THIS IMPORTANT?

**Prototyping's explicit model opens up capacity
to catch missing details, feel unnatural
workflows, or heavy handed decisions.**

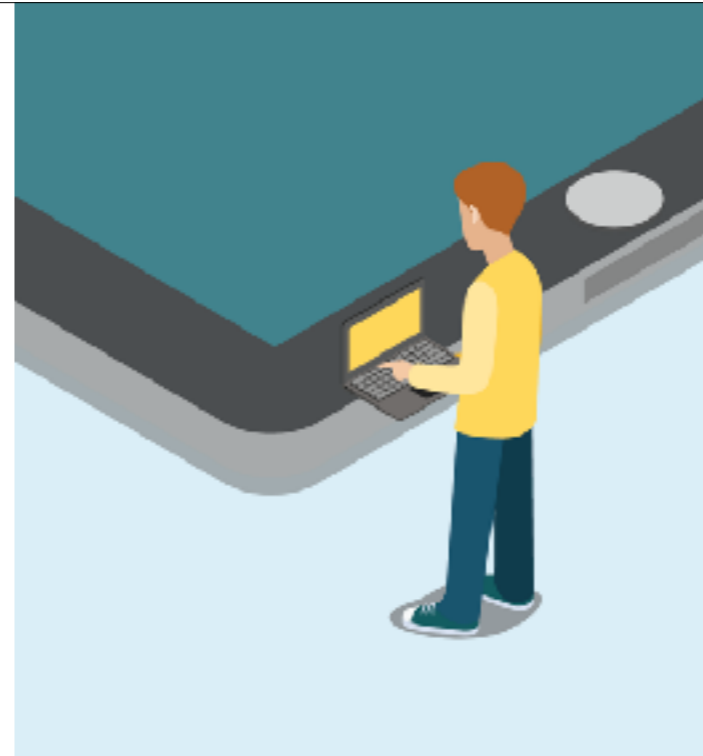
This of course makes sense because a prototype is the closest step of the process to the real thing.

But by removing that small cognitive load it takes to link screens in your mind, you start to catch those awkward workflows, missing details, or heavy handed decisions.

PROTOTYPE SUCCESS SCENARIOS

The Steps:

- Pick a success scenario and prototype
 - Representative or high-fidelity
 - Use narrative, it's more memorable
 - Stay focused, balance details
- Critique against 6 principles of usability



Pick a success scenario to prototype. Or a use case or story.

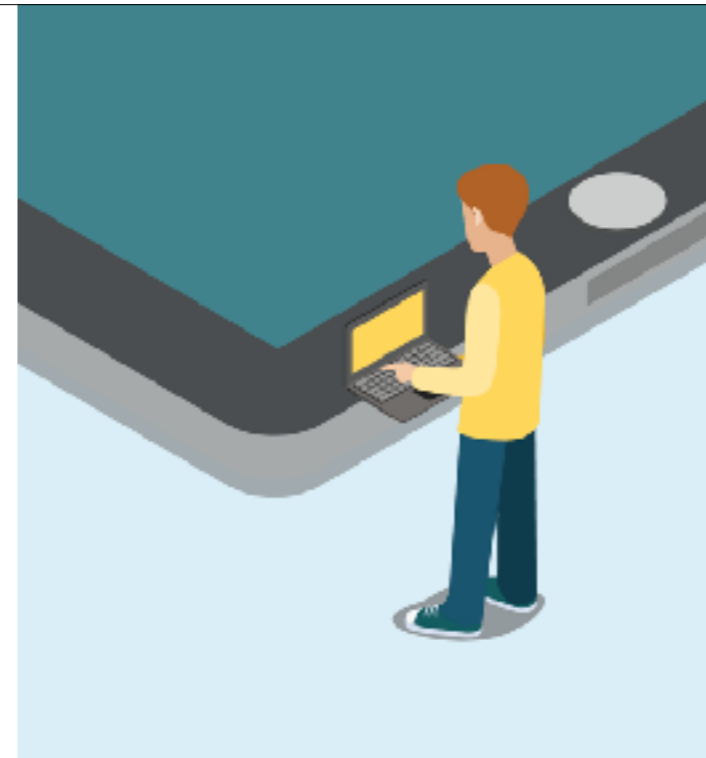
Depending on your goal, these prototypes can be representative or high-fidelity. If you're testing out a workflow, maybe a bare bone wireframe prototype will do the job. If you're using this prototype for more details user testing, more details and higher fidelity will be required.

But use narrative because it's more memorable. And stay focused, balance the details.

PROTOTYPE SUCCESS SCENARIOS

The Steps:

- Pick a success scenario and prototype
- Critique against 6 principles of usability
 - Functionally correct
 - Error tolerant
 - Efficient to use
 - Easy to learn
 - Easy to remember
 - Subjectively pleasing
- (with informal user testing)



This could be its own presentation but once you've built the prototype (we like to use Axure or Adobe XD depending on needed fidelity).

Test your prototype against these 6 principles of usability with informal user testing.

Deliver and Test the Design

step 7 of 7

Ken - through end.

TOOLS FOR UX

- 3M VAS
- Adobe XD
- Zeplin.io



3M VAS

- HEAT MAP EYE TRACKING
- DEVELOPED FOR ADVERTISING
- CLOUD SERVICE
- REAL-TIME RESULTS



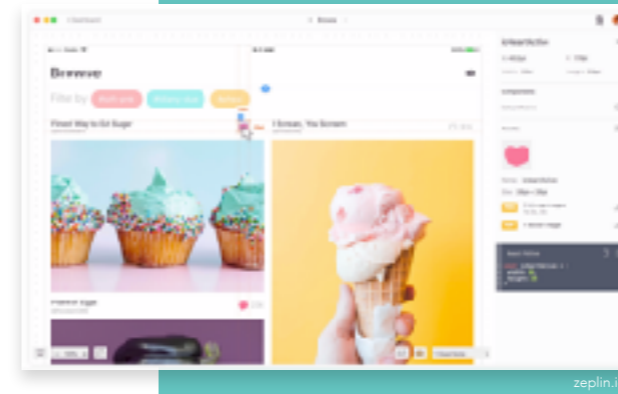
ADOBE XD

- ESTABLISH A VISUAL LANGUAGE
- HIGH FIDELITY SCREENS
- PROTOTYPING



ZEPLIN.IO

- COMMUNICATE DESIGN COMPS
- GENERATES CODE SNIPPETS
 - CSS FROM COLORS, TEXT STYLES AND LAYERS
 - HTML IMAGE ELEMENTS FROM LAYERS
 - MANY EXTENSIONS...



THANK YOU

Please Ask
Questions!



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