

DrupalCon

SEATTLE 2019

APRIL 8-12





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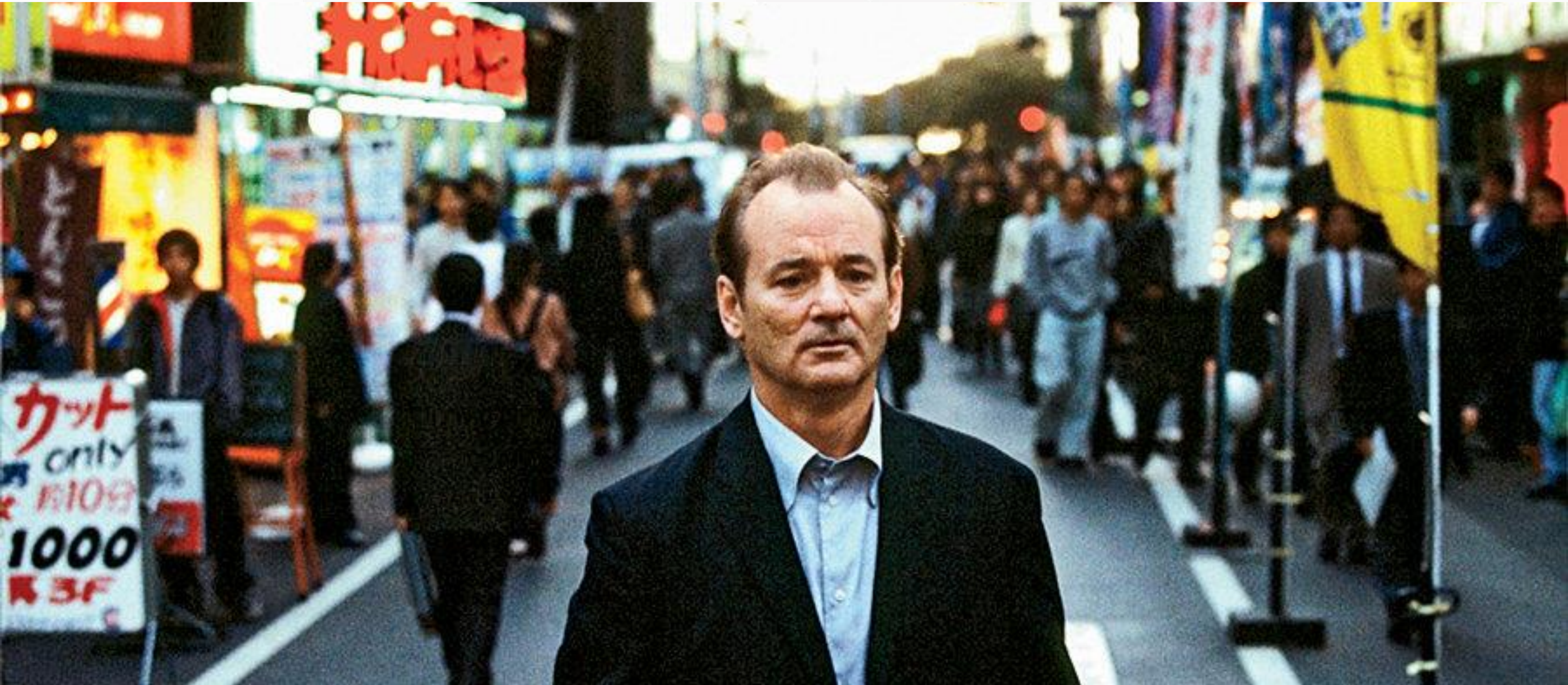
No Longer Lost In Translation

How to convert business requirements into Drupal-speak

Rain Breaw Michaels



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Communication Miscommunication and filling in with assumptions



Miscommunication

You may think you know what is being said, or how you are being understood. But this is a dangerous assumption.



Assumptions are \$\$\$

Assumptions cost time, energy, money, goodwill, because they cause us to miss the mark.



Frustration

No one is happy when things have to be redone because of misunderstandings. No one.



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Rain Brew Michaels, CPWA

User Experience Designer & Advocate

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 rain@sunrainprods.com

IAAP International Association
of Accessibility Professionals
Certified Professional in Web Accessibility (CPWA)



WHERE TO FIND ME



STAUFFERTM

We got the job!

Client requests:



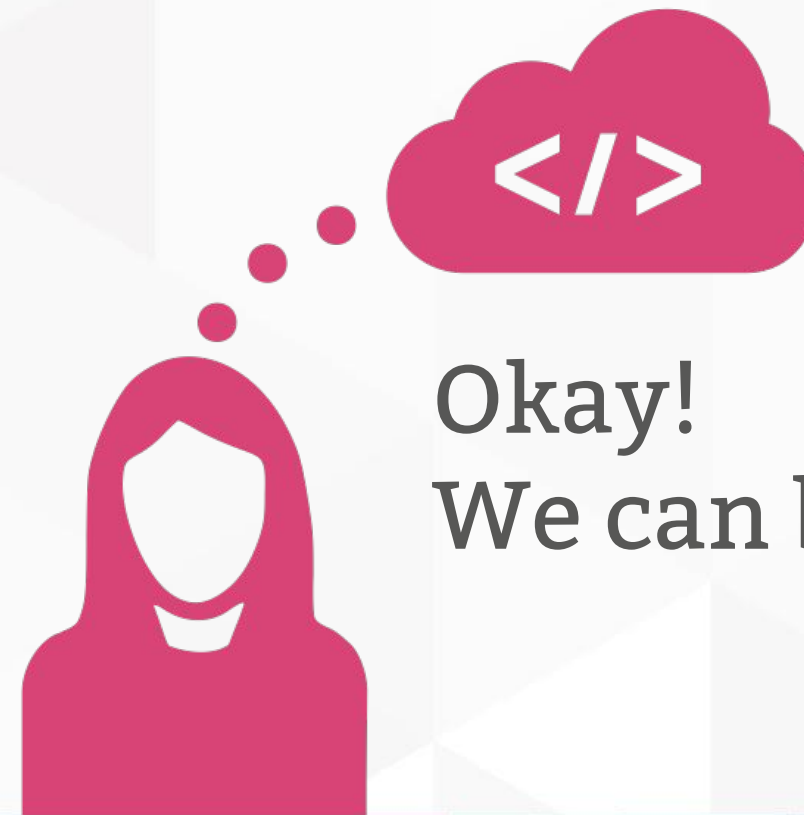
- I want facebook and twitter, but better
- It should be magazine-like
- I think our brand would be better off if we had facets
- Can you just put a module here where we can announce stuff?
- It should be big! Prominent! Full width!

We got the job!

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- I want facebook and twitter, but better
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Okay!
We can build this!



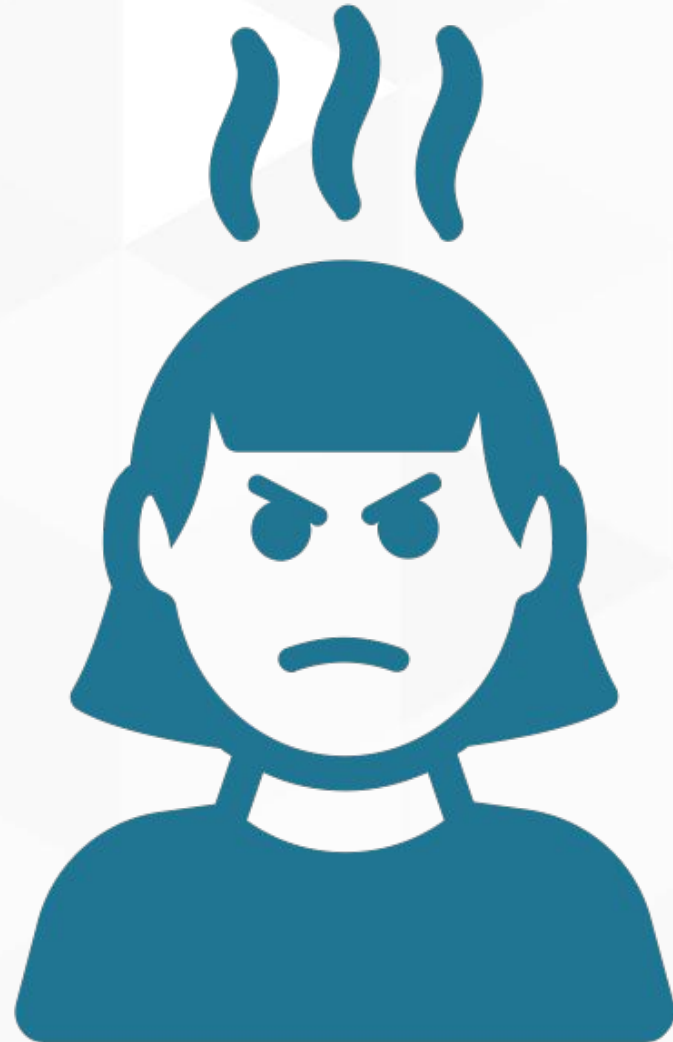
But

...



Reality sets in

Client responds to delivery:



- I want facebook and twitter, but better
 - No, I don't want people to be able to see each other's profiles!**
(are you going to charge me for that anyway?)
- It should be magazine-like
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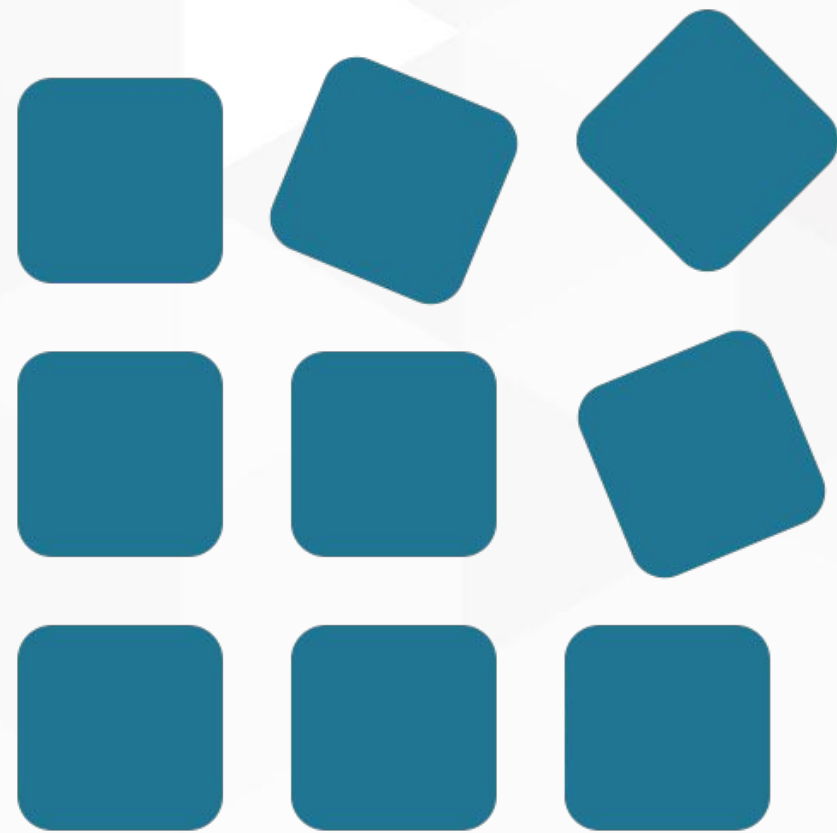
Client responds to delivery:



- I want facebook and twitter, but better
No, I don't want people to be able to see each other's profiles!
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- It should be magazine-like
It looks too much like print.
- I think our brand would be better off if we had facets
There are too many boxes and options in the search area.
(I really just needed people to be able to find their stuff.)
- Can you just put a module here where we can announce stuff?
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Reality sets in

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- Can you just put a module here where we can announce stuff?
- It should be big! Prominent! Full width!
But wait! We need to put related stuff on the side, and can't!



Why does
this happen?



The client doesn't speak Drupal



The client doesn't speak Drupal

Or... if they do, we could be in trouble...

The client is (probably) wrong



The client is (probably) wrong

No, really. I mean it.

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No, really. I mean it.



Client

The expert in their problem...
or... at least... that they have a problem, and what they are unhappy with

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No, really. I mean it.



Client

The expert in their problem



Vendor

The expert in the solution

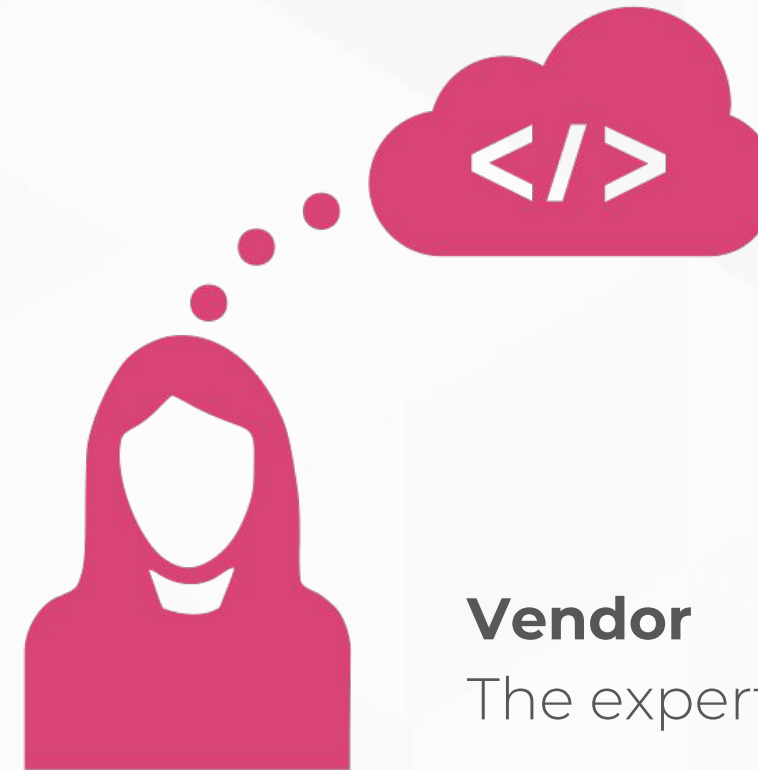
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Client

The expert in their problem



Vendor

The expert in the solution

But the client really, really wants to help you, so they'll describe what they think their needs are in terms of solutions instead of problems.

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Translating into Drupal-speak

Avoid making any assumptions

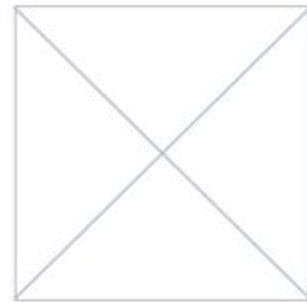
Avoid making any assumptions

“We’d like a custom block on the home page where we can highlight a couple things.”

Avoid making any assumptions

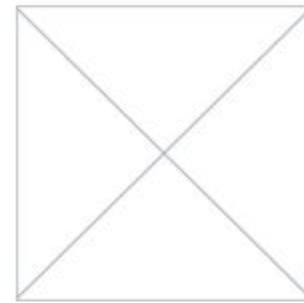
“We’d like a **custom block** on the home page where we can highlight a couple things.”

Exactly what the client requested:



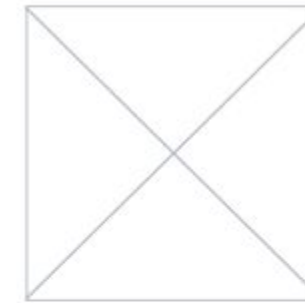
Lorem

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Ipsum

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Delor

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Custom block. 3 hard coded divs in the block. Custom CSS. It all works... but...

The client needs more functionality

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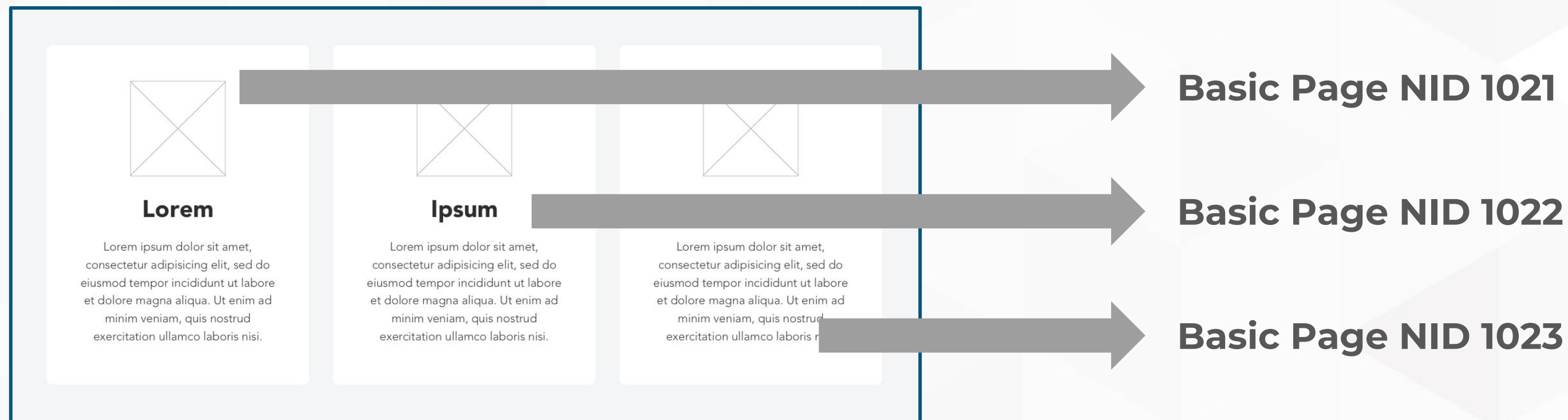
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The client needs more functionality

They start solving the lack of this functionality themselves:

- They want each of the custom divs in the block to link to an individual full page with more details

So they create individual Basic Page nodes for each feature, and manually link them up



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- They want each of the custom divs in the block to link to an individual full page with more details
So they create individual Basic Page nodes for each feature, and manually link them up
- **There are new features each week**

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So they create new pages and then manually update the block each week



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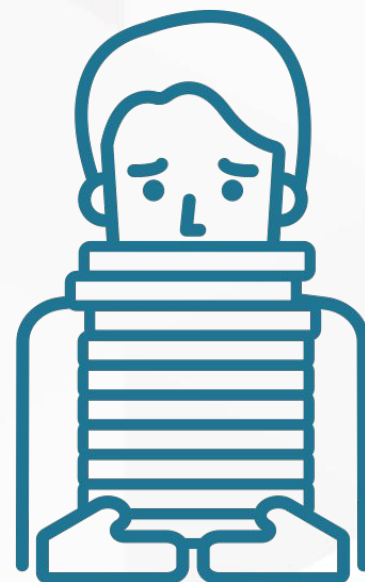
- They want each of the custom divs in the block to link to an individual full page with more details
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 - So they create new pages and then manually update the block each week
- **They want people to somehow get to the old “features” if they want to (some kind of archive)**

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So they create another Basic Page node that they manually update to add paragraphs and links to each detail page of the features



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“Drupal isn’t friendly”





What should have
been built?

Each feature is supposed to link to an individual node with more details, so they create Pages and manually link them

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Need:

A predefined **entity** following a specific pattern.

Content type / Term / etc.

(specific choice depends on further requirements)

There are new features each week, so they create new pages and then manually update the block each week

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Need:

A view with a block display.

Showing newest, sticky, promoted to first,
or items in a nodequeue
(again, specifics require further analysis)

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Need:

A **view** with a **page display**.

How many items, pager, exposed filters, etc. also all need to be determined in further analysis



How to figure this out before
building the wrong thing?



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Ask why

Ask why

Try to understand the **goal**, not the specific request

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Try to understand the **goal**, not the specific request

- What motivated this request?
- How will you know if this request succeeded in solving the need?
- How will you be maintaining [feature] over time?
- What will it be 1 year from now?
- Is there other content in your site that needs to be connected or linked to this in some way?
- Can you tell me the story of how you imagine people interacting with [feature]?

Re-state goals back to the client



Re-state goals back to the client

Validate the plan before building it

Re-state goals back to the client

Validate the plan before building it

- Is the team solving the right problem?
- Will the client be able to maintain the solution?
- Can the client afford the solution?
- ... (followup) Is the solution worth the ROI for the client?
- Clickable wireframes and/or paper prototypes are excellent for this process

A couple common examples of how needs fit into Drupal

By understanding how Drupal works, you can begin translating

Client Language	Drupal Language	Why
Regularly updated items	Categorization or specialized content type	Updates to custom blocks or the like are highly error prone and can be difficult
Control the formatting with custom CSS	Pre-styled classes in the block formatting selector list in wysiwyg	Injected or inline custom CSS will quickly erode the professionalism and accessibility of the site, and you'll be blamed for it
User X should be able to edit only Y and Z	Permissions, node access, authentication, user roles	Controlled access, one area where Drupal really shines
Control the order	Nodequeue or similar	Sticky is hard to maintain
Page for me to list links with descriptions	A view (with some kind of entity type designed for this)	Manually updating an aggregate list in page is prone to error and frustration
Simple ways to customize pages	Paragraphs or layout builder with predetermined options	Always limit options or it will become difficult and/or messy



How to make this
easier for your team

Project Leads must understand Drupal



Your project manager and user experience lead don't need to be Drupal Ninjas, but they do need to understand how Drupal works.

These individuals are the front lines in deciphering client-speak, and communicating it to the developers.

They are also the people communicating back from the development team to the client.

A translator must understand both languages.

Options to educate non-coders

You don't need to be an engineer to understand Drupal



Become an Acquia Certified Site Builder

The test itself is primarily about understanding the vocabulary and how Drupal works



Attend a Drupal Global Training Day

These happen internationally 4-5 times a year. You can even host one, and then have your PMs, etc. join!



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Finally: Ask the basic UX questions

Basic UX Questions

(Don't skip these!)

- How might we _____? (not technical, but more big picture)
- Why would we _____?
- What will happen if we _____?
- What will happen if we don't _____?



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even on the most simple asks



“

I just don't know what
I'm supposed to be.

”

Charlotte in Lost in Translation

Rain Brew Michaels, CPWA

User Experience Designer & Advocate

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Join us for contribution opportunities

Friday, April 12, 2019

Mentored Contribution

9:00-18:00
Room: 602

First Time Contributor Workshop

9:00-12:00
Room: 606

General Contribution

9:00-18:00
Room: 6A

#DrupalContributions



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What did you think?

Locate this session at the DrupalCon Seattle website:

<http://seattle2019.drupal.org/schedule>

Take the Survey!

<https://www.surveymonkey.com/r/DrupalConSeattle>

Thank you!