

Embrace the Unknown

with a UX Toolkit



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About me



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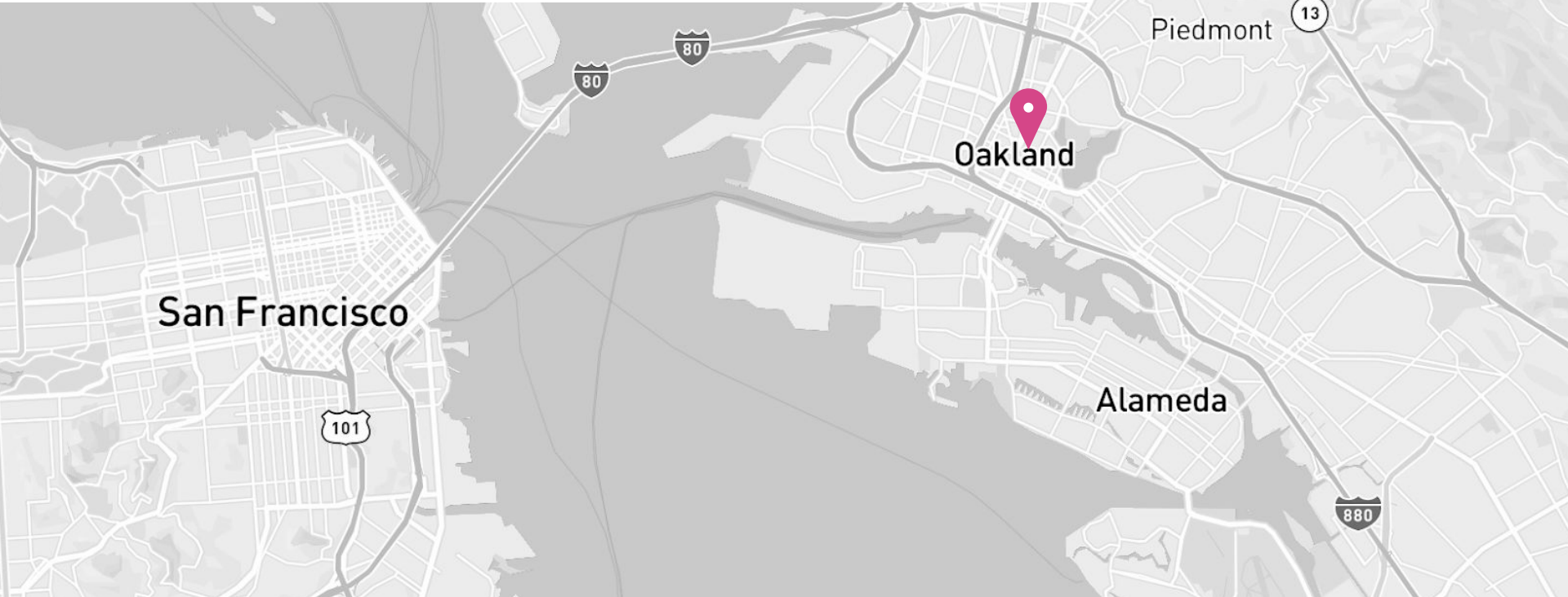
Email crispin@kalamuna.com



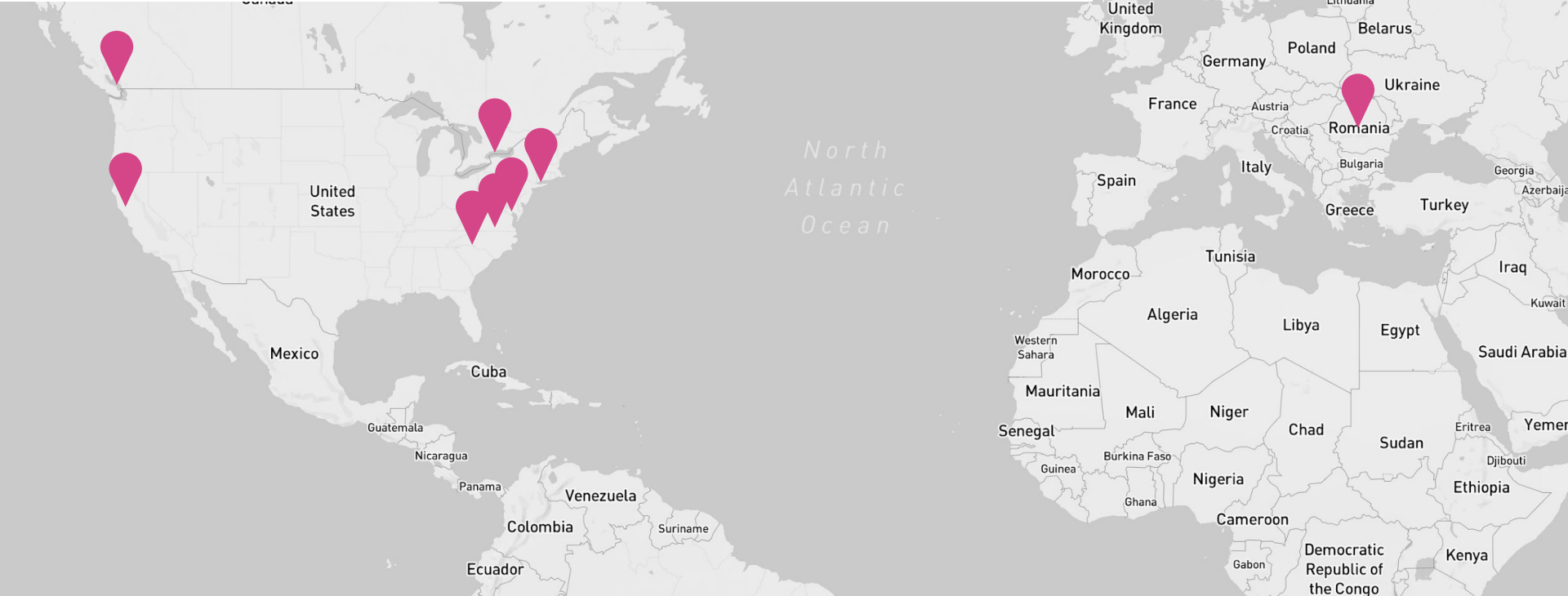
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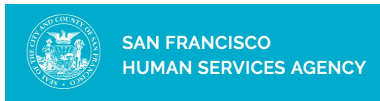
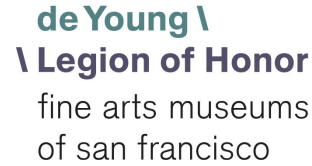
**YOUR
MISSION
IS OUR
MISSION**

Based in Oakland



Also distributed





UCSF

University of California
San Francisco

Berkeley
UNIVERSITY OF CALIFORNIA



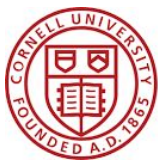
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Bixby Center
for Global
Reproductive
Health

Outline

1. Intro / Context
2. What is a UX Toolkit?
3. What's in our UX Toolkit?
4. How do you build your own UX Toolkit?
5. Where can you learn more about this?
6. Q&A



Some context

The challenge



Every project is a snowflake

Dreams vs Reality









Expect the Unexpected

Collaboration + Consensus

What's in this talk for you?

A dramatic seascape featuring waves crashing against dark, jagged rock formations. The water is a deep blue, and the waves are white with foam. The sky is a clear, pale blue. The word "Confidence" is written in white, bold, sans-serif font across the center of the image.

Confidence

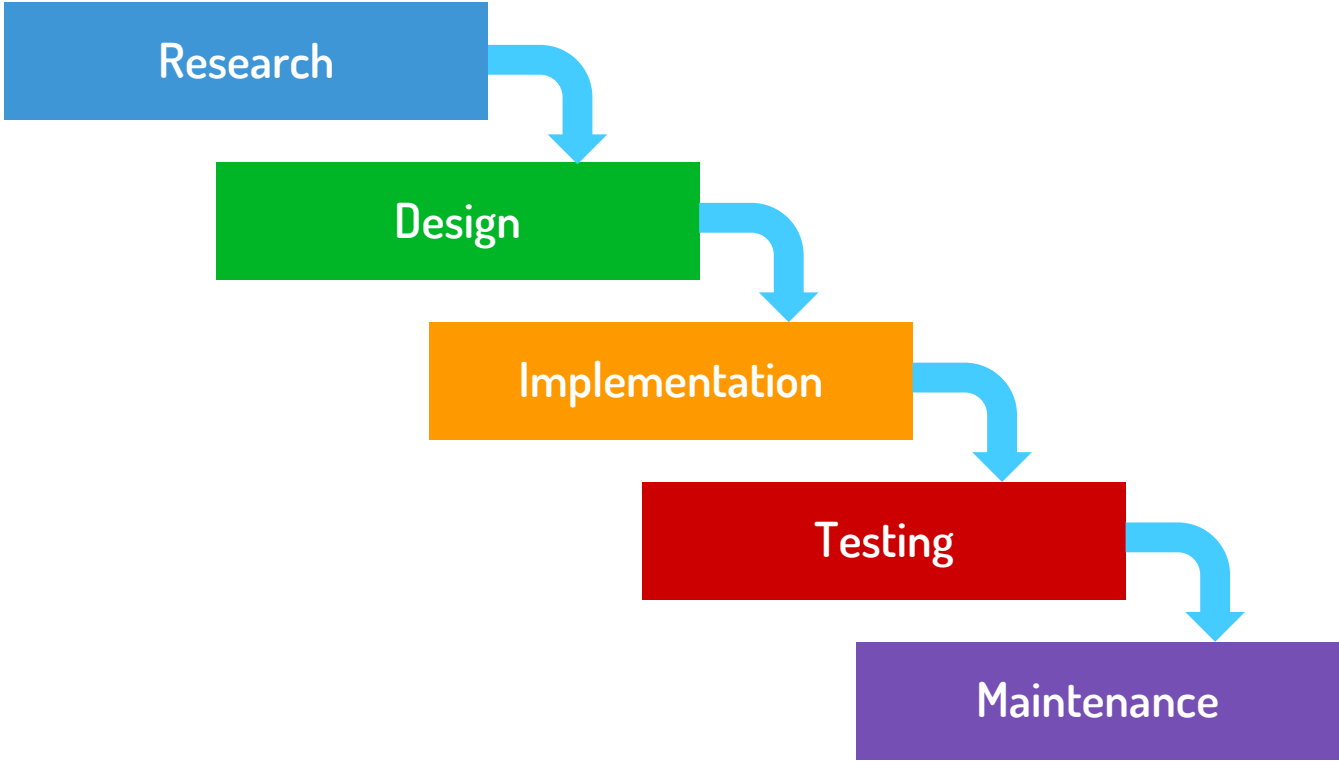
Flexibility





How did we get here?





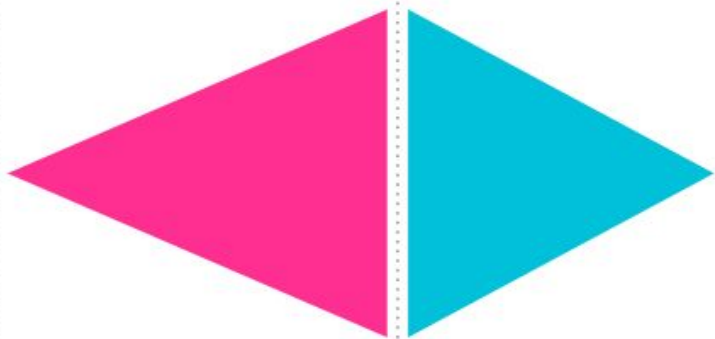


Agile Waterfall

Aka “Wagile”

Understand

Understanding ends in **insight**.



Empathy

Define

Create

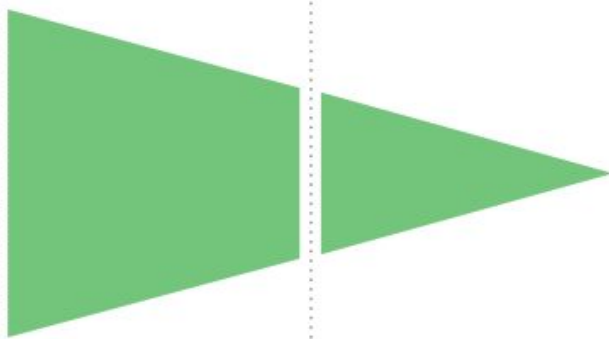
Creation ends in **ideas**.



Ideate

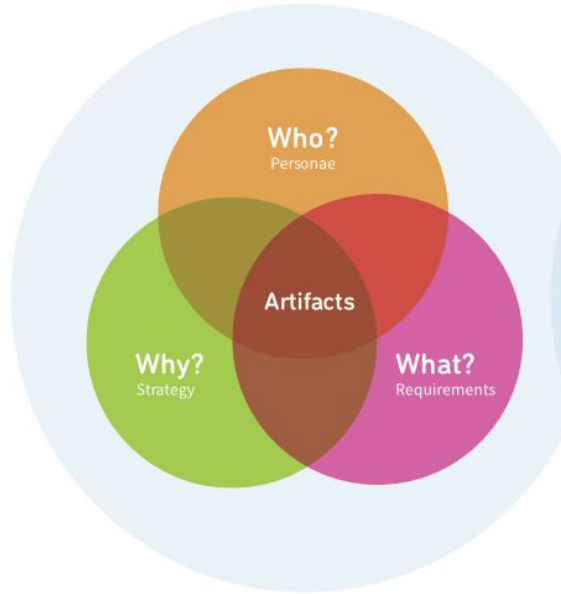
Deliver

Delivery ends in **reality**.

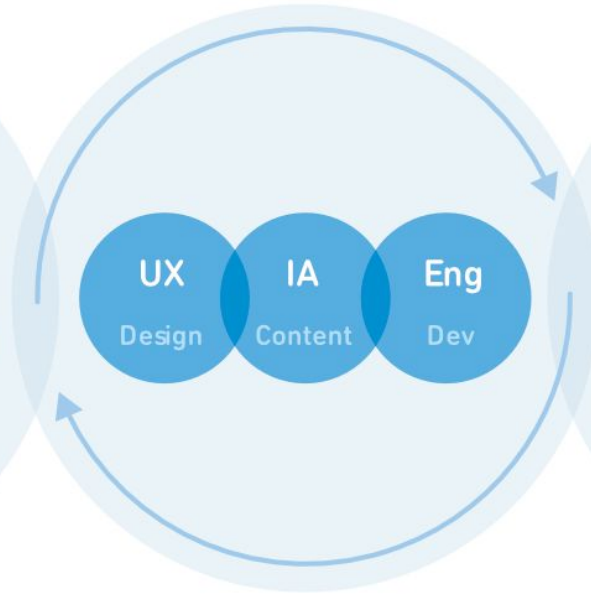


Prototype

Test



Discovery



Design + Implementation



Delivery & Support

What is a UX Toolkit?





What is it not?

A UX Toolkit is not...

- a suite of software tools
- a component library or design system
- a box of sticky notes and sharpies

A recipe book



RECIPES

1

App

2

Bread

3

Soups

4

Salads

5

Side Dishes

6

Dinners & Casseroles

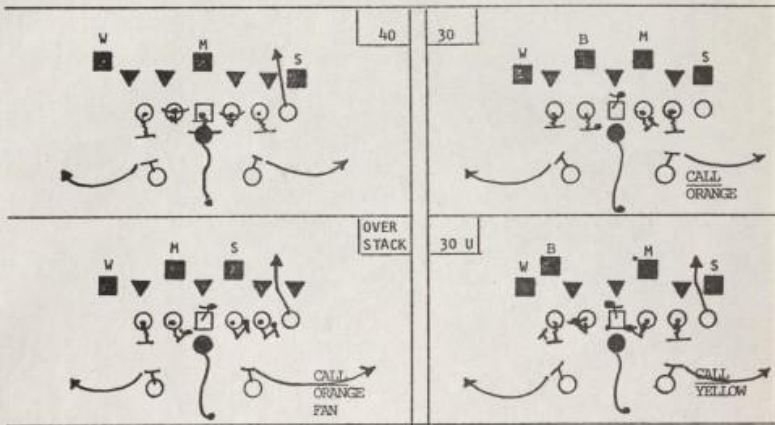
7

Desserts

Drinks

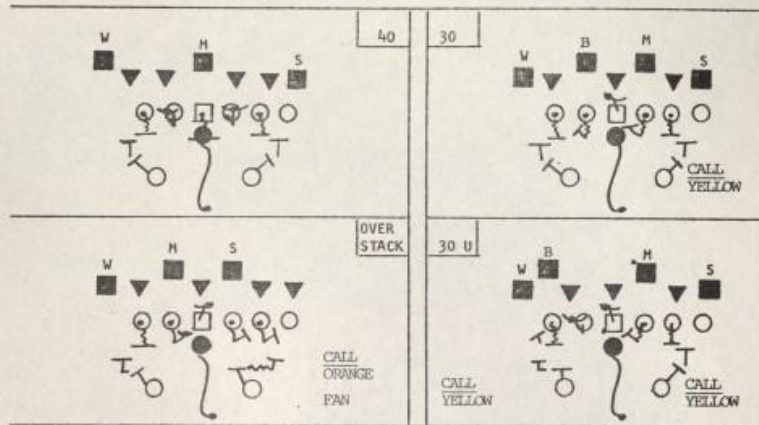
A playbook

REGULAR DROPPACK PROTECTION



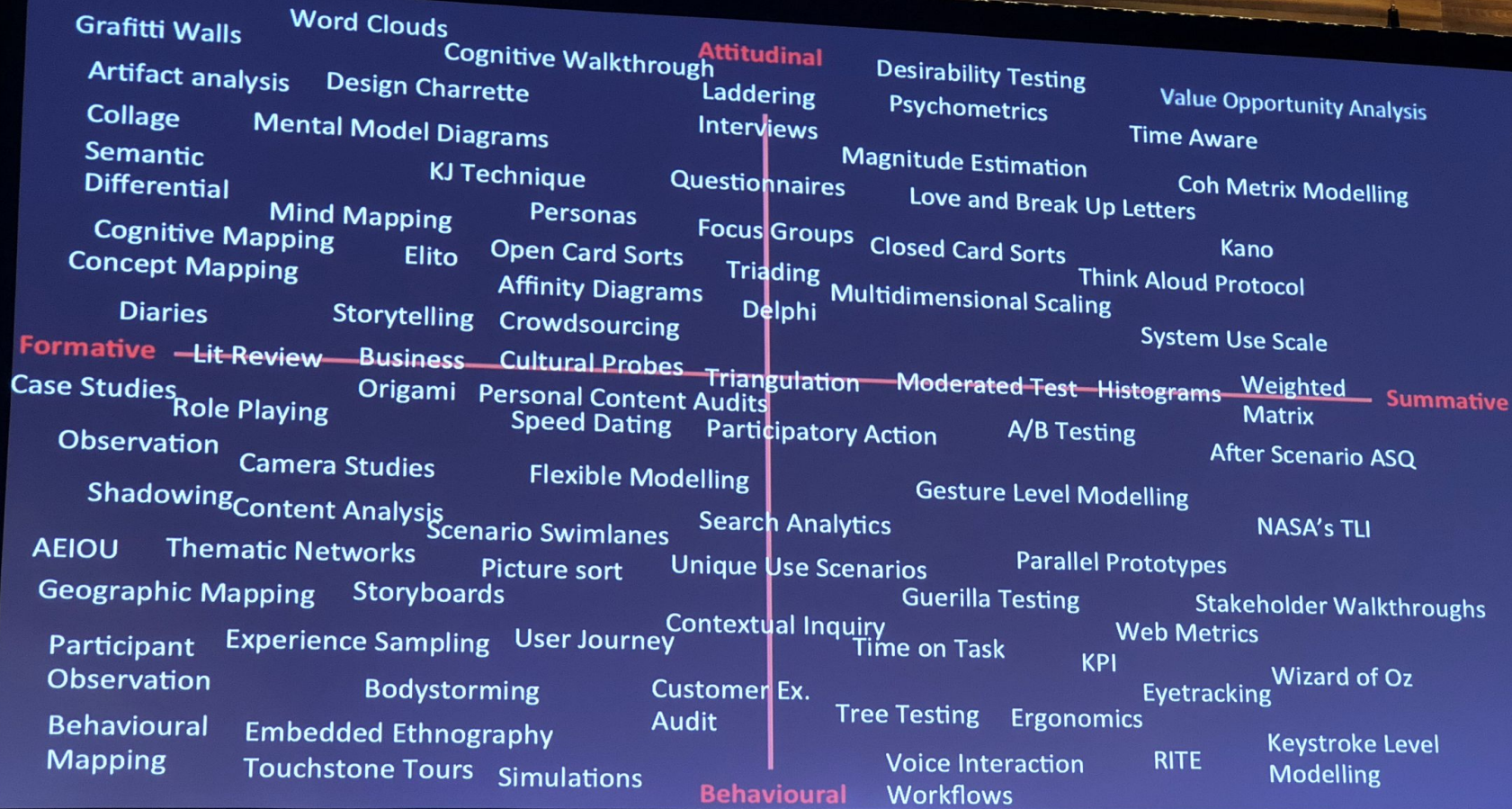
POSITION	CALLS	RESPONSIBILITIES / COACHING POINTS
CENTER	ORANGE	VS. 40 - DROP OFF 1½-2 YDS—CHECK MIKE LBER—BE PREPARED TO HELP ON ANYTHING THAT SHOWS INSIDE. VS. 30 - CALL ORANGE/YELLOW—TAKE CALL SIDE AWAY.
ON GUARD		VS. 40—REG. PASS SET—#DT—"FIGHT HIM ON L.O.S."—DON'T ALLOW PENETRATION. VS. 30—DROP OFF 1½-2 YDS CHK YOUR LBER—WORK TO YOUR OSD.
OFF GUARD		VS. 40—REG PASS SET—#DT—"FIGHT HIM ON L.O.S."—DON'T ALLOW PENETRATION. VS. 30—DROP OFF 1½-2 YDS—CHK YOUR LBER—HELP ON NOSEMAN.
ON TACKLE	FAN	VS. 40—REG PASS SET—DROP OFF 1½-3 YDS—#DE. VS. 30—TAKE SHORTER PASS SET—#DE. VS. OVERSTACK—CALL FAN —REG. PASS SET—# DE.
OFF TACKLE		VS. 40—REG PASS SET—DROP OFF 1½-3 YDS—#DE. VS. 30—TAKE SHORTER PASS SET—#DE. VS. 30U—CALL FAN—REG. PASS SET—CHK OGD LBER.
"11"		RUN PATTERN CALLED
H		CHECK OLB: SWING PATTERN, OR RUN PATTERN CALLED
F		CHECK OLB: SWING PATTERN, OR RUN PATTERN CALLED
X		RUN PATTERN
Z		RUN PATTERN
QB		5 TO 7 STEP DROP

MAX






POSITION	CALLS	RESPONSIBILITIES / COACHING POINTS
CENTER	ORANGE YELLOW	SAME AS REGULAR PROTECTION.
ON GUARD		SAME AS REGULAR PROTECTION.
OFF GUARD		SAME AS REGULAR PROTECTION.
ON TACKLE		SAME AS REGULAR PROTECTION. THERE IS A POSSIBILITY OF OUTSIDE HELP WITH THE BACK.
OFF TACKLE		SAME AS ABOVE.
"11"		RUN PATTERN CALLED.
H		CHECK OLB -- THEN WORK TO THE OUTSIDE OF YOUR TACKLE. # OUTSIDE RUSHER.
F		CHECK OLB -- THEN WORK TO THE OUTSIDE OF YOUR TACKLE. # OUTSIDE RUSHER.
X		RUN PATTERN CALLED.
Z		RUN PATTERN CALLED.
QB		5 TO 7 STEP DROP

Tools & Techniques



From "100 UX Research Techniques in 15 minutes" by Dr. Abby Goodrum at Fluxible 2018

Examples

	I want to...	Gather user requirements	Decide what to focus on	Generate ideas and designs	Evaluate a design or product	Measure UX	Compare different designs or products
 User Research	Task Modeling	✓	✓				
	Personas	✓	✓				✓
	Contextual Inquiry	✓	✓				
	User Interviews	✓	✓		✓	✓	✓
	JTBD	✓					
 UI Design	Card Sorting	✓		✓			
	Prototyping			✓	✓		
 Evaluation	SUS				✓	✓	✓
	HEART				✓	✓	
	Usability Testing				✓	✓	✓



Handrail's UX Guide

(<http://www.handrailux.com/ux-guide.php>)



Pages

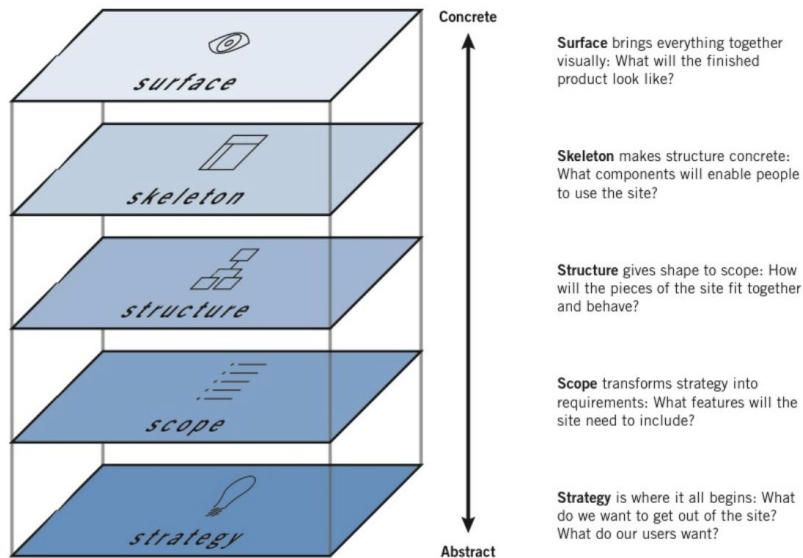
PAGE TREE

- Search the Toolkit
- UX Lab: Request Service
- › Getting Started
- ▼ **UX Process and Methods Overview**
 - Planning Methods
 - Research Methods
 - Usability Research Methods and Tools: Overview
- › Usability Testing
- › Content Development
- › Build
- › Templates
- › Resources

UX Process and Methods Overview

Created by Lisa Gayhart on Jan 18, 2018

The 5 elements of UX provide us with a structured overview of UX.



Design Process	Elements involves	Methods	Resources
1. Plan your project	<ul style="list-style-type: none"> The strategy Plane 	<p>Brain storming, group discussion can be used to generate ideas for your project. What is your project ? Why do people need it? The following methods can also be handy:</p> <ul style="list-style-type: none"> UX Questionnaire UX Project Plan Listening Tour Opportunity Workshop Project Brief Strategy Workshop 	
2. Build hypothesis with Conceptual design and User research	<ul style="list-style-type: none"> The strategy plane The scope plane 	<ul style="list-style-type: none"> Conceptual design, what concept can be similar to the design of the application in real life? what is the high level description of your application. Journey map will be used in early user research. It can be used to generate users' information behavior, habits etc. User research in this stage focus on the context of the application. Value proposition, what value can your application provide to the user and our society? <p>Other methods include:</p> <ul style="list-style-type: none"> Learn Plan Guerilla User Research Proto-personas Heuristic Markup Comparative Assessment 	<ul style="list-style-type: none"> Journey Mapping
3. Plan information architecture	<ul style="list-style-type: none"> The scope plane The structure plane 	<ul style="list-style-type: none"> Functional and non-functional requirement, is list of high level system requirement that are developed to define the features of the application. UX designer use this list to communicate with programmers and define the scope of the application. Functional features can be features such as : enable user to search for the content by keywords, record user's input. Non-functional requirement can be : creating a pleasant navigation experience, the color tone of the application should be positive and bright. 	<ul style="list-style-type: none"> Persona Scenario

University of Toronto Library's UX Toolkit

(<https://connect.library.utoronto.ca/display/UXTOOLS/UX+Process+and+Methods+Overview>)

UX Project Checklist

Research	Competitive Analysis See how others solve similar problems and try to not reinvent the wheel. Read more	<input checked="" type="checkbox"/>	Data analysis Do you have all the useful data you need? Try to have a look at funnels, clicks, page views, performances... Read more	<input type="checkbox"/>	User feedback Always speak with Customer Care team! Don't have one? Check your old surveys or videos, what your customer says? What do they actually do? Read more	<input type="checkbox"/>
Plan	User stories Have you done personas yet? If not DO IT NOW. Ok, now use them to write down user stories and scenarios. Read more	<input type="checkbox"/>	User flows Create your user's flow based on the scenarios you created, you can use it later to review the journey and create wireframes on top of each step. Read more	<input type="checkbox"/>	Red routes Define red routes for your product and you'll be able to identify, prioritise and eliminate any usability obstacles on key user journeys. Read more	<input type="checkbox"/>
Explore	Brainstorm & sketch Find a war room, fill it with markers and drinks, get together and sketch, discuss, vote, disrupt, have fun! Read more	<input type="checkbox"/>	Wireframe Add some details and structure to your ideas, reuse patterns and create pages on top of your user flows so you'll not leave anything behind. Read more	<input type="checkbox"/>	Prototype You can start creating paper prototypes and continuously iterate to more functional ones. Use sketches, HTML pages or static images, then just get some people and test. Read more	<input type="checkbox"/>
Communicate	IA Understand your users, your data structure and your channels. How can you organise your navigation and content in a clear and consistent way? Read more	<input type="checkbox"/>	Language Follow your brand personality, keep in mind users' culture and language, the context of your product and make sure they understand you. Read more	<input type="checkbox"/>	Accessibility You don't need to add extra functionality or to duplicate any content. The key is simply to assess the requirements of those with different skills and limited devices. Read more	<input type="checkbox"/>

What's in our UX Toolkit?

UX Activities for the Discovery Phase

- Stakeholder interviews
- User interviews
- Surveys
- Guerilla research
- Comparative analysis
- Analytics analysis
- Clickmaps and scrollmaps
- Content audits
- User Types
- Persona scenarios
- Journey mapping
- User story mapping

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UX Activities for the Design Phase

- Content mapping
- Card sorting (open or closed)
- Tree testing
- Sketching workshops
- Wireframing
- Low-fi prototyping
- Moodboarding
- Style Tiles
- Responsive HTML (aka High-Fi) prototyping
- Usability testing

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UX Activities for the Implementation Phase

- Accessibility testing (manual + automated)
- Usability testing (moderated + unmoderated)
- User feedback testing (moderated + unmoderated)
- A/B testing

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How to roll your own

Start with what you know

Do your homework

Learn and grow as you go

**Every challenge is an
opportunity**

Document everything

Don't be afraid to hack

Where to learn more



Jon Lax

Follow

It's a daily operation

Jul 25, 2016 · 14 min read

Great Products Don't Happen By Accident

Using playbooks for designing and building products

These are the slides and speaker notes from a presentation I gave on July 21, 2016 at the Design & Content Conference in Vancouver, B.C..

**How do you
do what you do?**

Creating a UX Design Library

Version 1 prepared in August 2010 by Nathan Curtis (nathan@eightshapes.com)



Chapter Reference

Small markers refer to chapter numbers in Modular Web Design



What is the library?

In this case, a design library refers to a collection made up of a combination of **patterns, components, page types, grids, typography, editorial guidelines, color, and code**. However, a library may reach more broadly to include **rules, guidelines, and toolkits** to improve how teams build experiences.

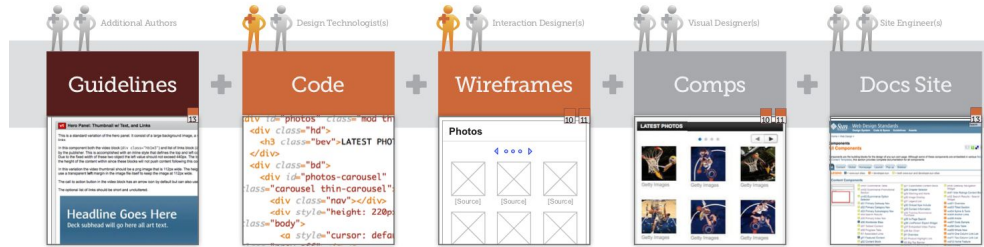
Who leads the effort?



A dedicated **librarian** serves as a leader, coordinator, evangelist, and teacher of the library's activities during the build process as well as when the library is adapted over time.

What gets built by who?

■ Required ■ Recommended ■ Optional



The composition, review, & publishing of documentation that describes the system, how and when to use each part, and contains many real examples.

Standardizing, modularizing and packaging of HTML, CSS, & JavaScript components and page type samples supported by stable styles & namespace.

The creation of page template and libraries (such as sterels) used for the rapid production of design schematics.

The creation of pixel-perfect page templates and asset libraries (likely, in separate files) used for the faster production of comps.

Implement a web platform for assets, guidelines, process, & collaboration.

How much should we (relatively) invest in each part?

■ What Teams Instinctually Think ■ What We Usually Recommend



Why Invest More?
Design assets, templates, & tools cannot be successfully and appropriately used without good instruction on how to apply each piece. Prioritizing the most important docs is key.



Why Invest So Much?
With a stable foundation of markup that you can expect everyone to use and you can distribute and version over time in a predictable way, **you win**.



Why Invest More?
With a stable, standardized system, "designers" (including non-designers doing design) should be able to use tools to rapidly visualize pages & gain consensus faster with ideas aligned with the library.

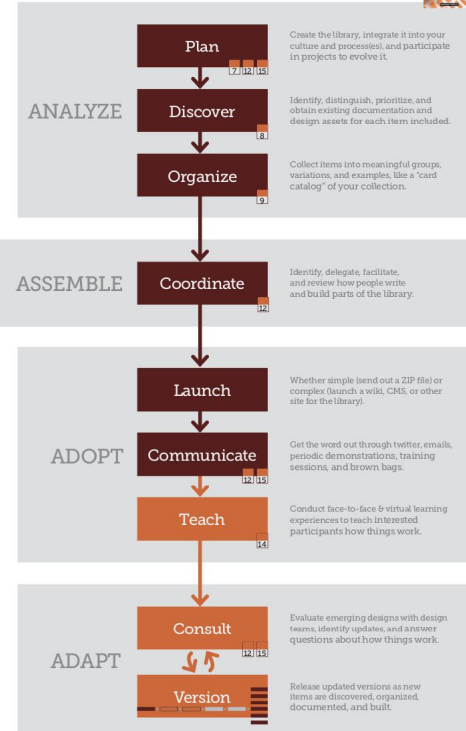


Why Invest Far Less?
Sourcing the art - and then making files organized and usable - is a total pain. Instead, a few pixel-perfect, full-page templates and grids, a good color palette, and access to copy the most common shapes and styles should do it.



Why Invest More?
Some teams don't have the environment, skill, or approval to build one. It's unfortunate, but distributing communications via PDFs and ZIP files is better than nothing at all.

How does it get built?



Plan
Create the library, integrate it into your culture and processes, and participate in projects to evolve it.

Discover
Identify, distinguish, prioritize, and obtain existing documentation and design assets for each item included.

Organize
Collect items into meaningful groups, variations, and examples, like a "card catalog" of your collection.

Coordinate
Identify, delegate, facilitate, and review how people write and build parts of the library.

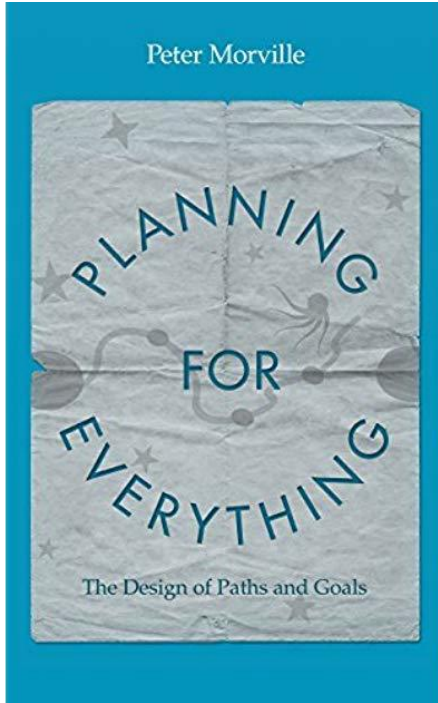
Launch
Whether simple (send out a ZIP file) or complex (launch a wiki, CMS, or other site for the library).

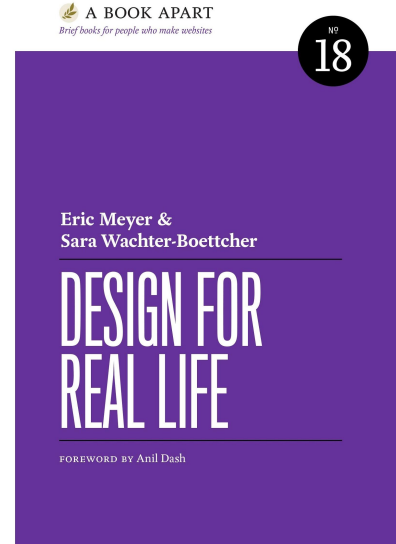
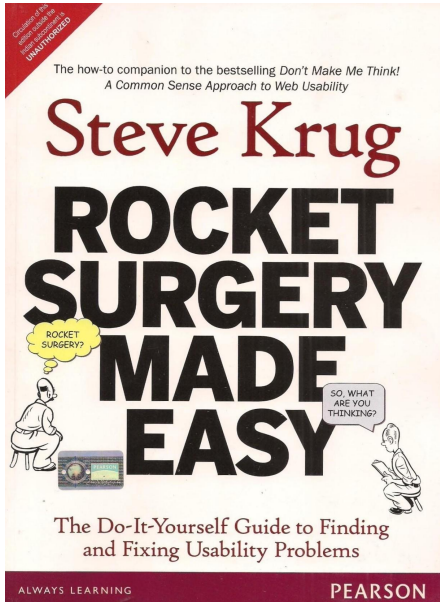
Communicate
Get the word out through twitter, emails, periodic demonstrations, training sessions, and brown bags.

Teach
Conduct face-to-face & virtual learning experiences to teach interested participants how things work.

Consult
Evaluate emerging designs with design teams, identify updates, and answer questions about how things work.

Version
Release updated versions as new items are discovered, organized, documented, and built.







Thank You!

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Q & A

Photo credits

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