

The left side of the slide features a decorative vertical bar with a grid pattern, a solid vertical line, and several overlapping circles of varying sizes in shades of blue and purple. The main title is positioned to the right of these elements.

UX DESIGN DELIVERABLES: EXPERT'S CHOICE

**Lilia Manguy, Principle UX Designer & Owner
PurplePurr Studios**

SETTING EXPECTATIONS

- Focus is on choosing deliverables NOT creating them
- Will not be covering prototypes due to scope limitations
- 15-20 minutes for Q & A at the end
- Interactive portion – please participate!
- Not meant to be comprehensive – not enough time
- Twitter hashmark: #UXsxsw

#UXsxsw

A BIT ABOUT MYSELF

- o Began career as an intern at Hotwired.com in 1997
- o Master Information Management & Systems, 2006



- o Agencies



- o Projects



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WHY USER EXPERIENCE DESIGN DELIVERABLES?

Recognize any of these situations?

- Client doesn't understand methodology & findings
- Internal disagreement with your team about best deliverables
- Lack of standardization – reinventing the wheel
- Where do I start?

AGENDA

USER EXPERIENCE DESIGN DELIVERABLES

- I. Definition
- II. Selection & Creation
- III. Presentation
- IV. Tools

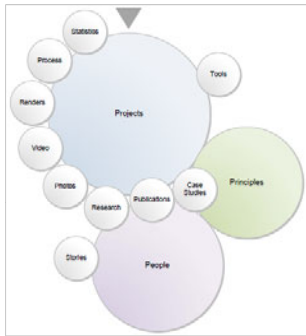
DEFINITION

I. USER EXPERIENCE DELIVERABLES: DEFINITION

- A deliverable is documentation/artifact of the UX design process for the purpose of communicating the result to others
- *Why is it important?*

A deliverable is important because, when executed effectively, it compels your client or team to understand the importance of your findings so they care and want to take action.

UX DELIVERABLES: EXAMPLES



"Help me maximize how my company uses Dynamics."

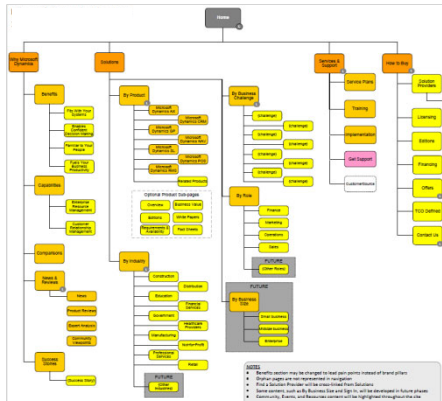
- Is an existing customer
- Looking for a specific data point

Hubert overruns IT functions for a retail company. They purchased Microsoft Dynamics for their point-of-sale systems about a year ago. The company has grown over time and new accounting tasks need to be accomplished. Hubert needs to figure out how to scale the software's functionality.

He calls the Microsoft Dynamics partner and asks him about the issue. Curious about the experience of other users like himself, Hubert also goes online and searches the Microsoft Dynamics site and community pages, looking for users with similar issues. Additionally, he re-reads the product page for Microsoft Dynamics POS and scans the white paper section.

Needs

- Access to community boards
- Product details page
- Research/white papers
- Industry changes and best practices



Work
Principles
Expertise
People

Keynote

PHI Network's interview appears in the National Building Museum (NBM) Online and highlights Patrick's role and insights regarding the NBM's history, because of the architecture firm's role in the National Building Museum's recent award. As a result of the company's commitment to work, architecture, community and education throughout the 75-year history. Read Full Article

PHI Network Profile

Keynote

Experts

Design Leaders

Firm Leaders

Office Leaders

Jonathan Longname
Job Title

Described to think in a competitive marketplace environment. Jonathan Longname Center contributed to the NBM's history.

Jonathan Longname
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Page ID	Level 1	Level 2	Level 3	Level 4	Page Link	Link Type	Document	Details	Notes
1	Home	Home	Home	Home	http://www.compass.com/	Home	Home	Home	
2	Learn & Shop	Learn & Shop	Learn & Shop	Learn & Shop	http://www.compass.com/learn-and-shop/	Learn & Shop	Learn & Shop	Learn & Shop	
3	Learn & Shop	Learn & Shop	Learn & Shop	Learn & Shop	http://www.compass.com/learn-and-shop/	Learn & Shop	Learn & Shop	Learn & Shop	
4	Learn & Shop	Learn & Shop	Learn & Shop	Learn & Shop	http://www.compass.com/learn-and-shop/	Learn & Shop	Learn & Shop	Learn & Shop	

SELECTION & CREATION

II. USER EXPERIENCE DELIVERABLES: SELECTION & CREATION

1. Define the focus for your deliverables
 - Your goals
 - Level of project detail
 - Your audience
 - Their language
2. Map your deliverables to your process and focus
3. Format following best practices

SELECTION & CREATION

1. Define the focus of your deliverables

○ Your goals

- To sell / seduce / convert?
- To change minds?
- To validate an assumption?

○ Level of detail required

- Big picture / overview?
- Complex

○ Your audience

- Familiar with the UX process?
- Need lots of definitions and explanations?

○ Their language

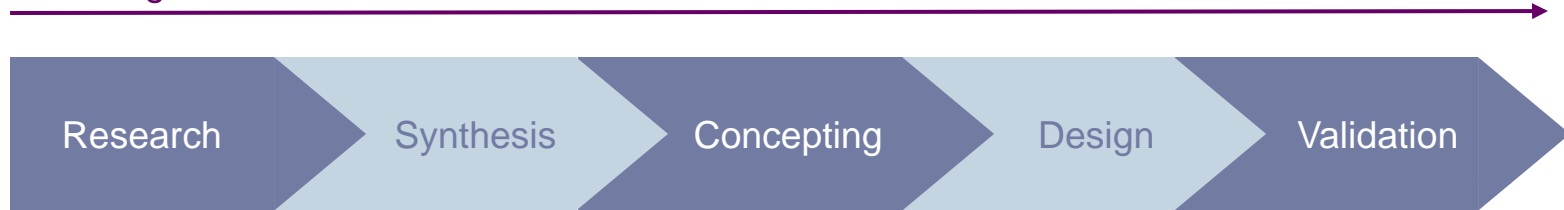
- Analytical – quantitative (statistics, dollars & cents)
- Relational – qualitative (anecdotes, comments & quotes)

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SELECTION & CREATION

2. Choose your deliverables according your process and focus

UX Design Process



- Stakeholder interviews
- Contextual inquiry
- Task analysis
- Site metrics
- Market research
- Competitive analysis
- Site audit / content inventory

- Personas & scenarios
- Functional specs
- Taxonomy

- Concept model
- Mental model
- Mood boards

- Sitemap
- Wireframes
- User flows
- Storyboards

- User testing
- Focus groups
- Surveys

SELECTION & CREATION

EXAMPLE

○ Focus

- Goal: To sell a new interaction model
- Detail: Complex transactions are involved
- Audience: New to UX
- Language: Quantitative – the client responds to profit and costs

○ Your UX Process

1. Competitive analysis
2. Personas & scenarios
3. Interaction flow
4. Sitemap
5. Wireframes

INTERACTIVE PART!

SELECTION & CREATION EXAMPLE (CONT.)

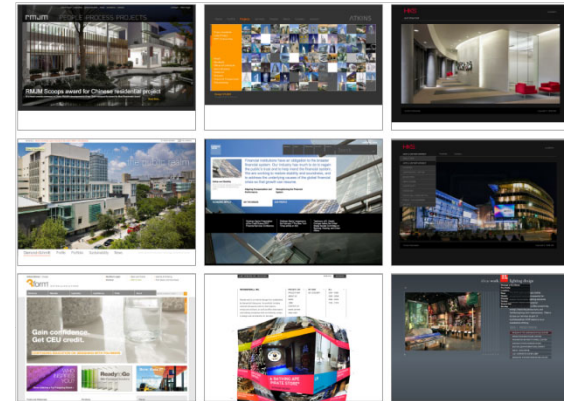
o Focus

- Goal: To sell
- Detail: Complex
- Audience: New to UX
- Language: Quantitative (\$)

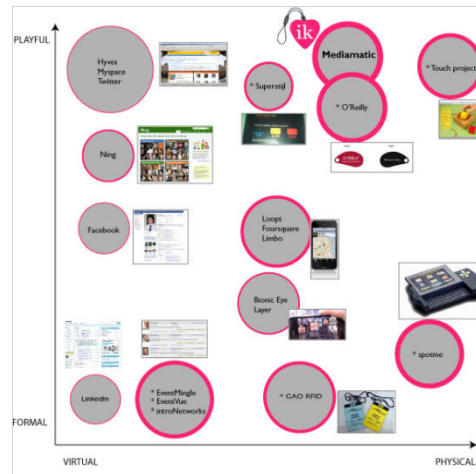
o Your UX Process

1. **Competitive analysis**
2. Personas & scenarios
3. Interaction flow
4. Sitemap
5. Wireframes

B.



A.



C.

	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		

D.

	Peers ThinkTank	CXO Round Table	Session with a Consultant	Session with a Performance Coach
Have access to an outside perspective	⊕	⊕	⊕	⊕
Receive multiple feedback	⊕	⊕	No	No
Receive perspectives from peers (in a similar position)	⊕	⊕	No	No
Get feedback from everyone in the session	⊕	No	N/A	N/A
The feedback received are always supported by personal examples	⊕	No	No	No
Get feedback in writing from the subject matter expert (after the session)	⊕	No	⊕	No
Receive a complete transcription of the session within a couple of days of the completed session	⊕	No	No	No
Confidential	⊕	⊕	⊕	⊕
Anonymous	⊕	No	No	No
Participants can be anywhere in the world	⊕	No	⊕	⊕
No commuting	⊕	No	⊕	⊕
Amount of relevant and applicable information received	📁	📁	📁	📁
Time needed	🕒	🕒🕒	🕒	🕒
Cost	\$	\$\$	\$\$\$	\$\$\$

SELECTION & CREATION EXAMPLE (CONT.)

o Focus

- Goal: To sell
- Detail: Complex
- Audience: New to UX
- Language: Quantitative (\$)

o Your UX Process

1. Competitive analysis
2. **Personas & scenarios**
3. Interaction flow
4. Sitemap
5. Wireframes

A.

The Greenhorn	The Casual User	The Teaser	The Business User	The Power User	The Hacker
JOHN	EMILY	AKIKO	STEPHAN	ROBERTO	REKY
Profile: Probably the single biggest segment of mobile users. Want simple. Turn on their mobile, did a number and talk to their intended party. Don't care about anything other than the mobile being able to be used as a phone, and possibly contacts.	Profile: Take advantage of most phone features, but not all. Use the phone to make calls, use the contacts, send text messages, and text pictures, and take photos. Their mobile is always with them.	Profile: Texting is far more popular than calling. Will spend and receive thousands of text messages per month. Rarely use their phones for calling. Want a clean looking interface with the fastest possible input.	Profile: Wants a phone that is simple, but functions as an intelligent smart device. Want to read email and call back the sender with the least amount of effort. Need "Pusher" mail server integration, including BlackBerry and Exchange.	Profile: Will use almost all of the built-in functionality. Will also extend their phone's functionality with additional software. Will flip through every menu option and change settings.	Profile: Cares more about customization. Want to make changes to every aspect of the phone. Being to making bits and bobs about hacking the phone. Contribute to the open source community.
Scenario: I didn't get my first phone until 2002. My daughter bought it for me. I didn't find it was necessary but since then, I have a with me at all the time and use it more than my home phone.	Scenario: My phone has to look cool. I personalize it with photos, charms, and ring tones. Talk on it everywhere, so my phone adds to everything I do. It has to work too. I usually taking pictures and recording videos. My phone is my favorite accessory.	Scenario: I prefer texting than calling because it's more fun and creative. My friends and I probably text each other around 40 times a day. We'll have text to order food. It's far more interesting and less stressful. I don't have to worry about disturbing people on the line with my talking. I love it.	Scenario: My mobile is my life. Without it my business would suffer. I take conference calls while driving down the 405. If someone text me, I need to ring them without making my own voice heard. I need to be able to take my mobile everywhere, I need to be able to take the last thing I need to do to break after one drop.	Scenario: I'm addicted to new toys. I get the latest gadgets as soon as they arrive on the market. I upgrade my phone every 6 months. I guess you can say this is almost a quest for me. Or an addiction? I just love to explore the latest and how it can make life fun.	Scenario: As soon as I heard about an open source phone, I jumped on it. I created two apps for the phone and am working on the testing solution. I probably should spend more time at my job, but this is far more fun. Of course, I am my phone for calls and texting too.

B.

Megan

Personas
Megan is a 20-year old first-year student at UC Berkeley and has yet to decide on her major, though she is considering business. She moved to Berkeley from Southern California where her parents reside in Pasadena. Upon starting school, she immediately decided to join a sorority (Kappa Beta Phi) to meet new friends.

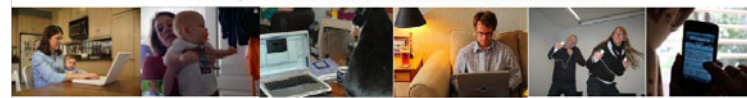
She has decided to take an administrative part-time job at Haas to supplement her allowance and support her shopping habits. Since her new friends at Kappa Beta Phi are also very fashion-conscious, she is somewhat concerned about buying trendy, brand name clothing that would help her look good in front of her peers. (Her new "Family" may think of her. Megan is very active in her sorority; she is often planning for and attending various sorority events on campus when she is not working at Haas.

Before she went away to college, her parents gave her a cell phone, which she uses to make plans with her friends as well as keep in touch with her family. Although she uses the phone quite frequently, she is not as familiar with its data options and has not quite gotten the hang of text messaging yet. Megan's computer skills are intermediate; she owns an iPod, and she uses the internet moderately for research and fun. She does not use the web to shop online, as she prefers to browse and sees shopping as a fun activity to get together with friends when she has time.

Goals:

- o to buy things that look good (wearing trendy clothing, etc...)
- o to avoid products that may not be "cool" among her Berkeley peers - this can mean not they are environmentally-friendly or clear of stores like

The Specialists



C.

Who they are:

- Show female
- Moderate enthusiasm for/knowledge of technology
- Moderate device ownership and tech-savvy
- Uses tech to get things done, have fun, and pass the time
- Find many distractions both at work and play, and thus often multi-tasking (frequently conversing on IM, email, text, phone and in-person)

How they talk about tech:

How likely they are to:

Engage:

Adopt:

Where they are:

- Forbes
- LinkedIn
- BusinessWeek
- THE WALL STREET JOURNAL
- Facebook
- COMPUTERWORLD
- LAST.COMBANY.COM
- Abut.com

How they consume media:

Media Type	Usage
Business Sites	10%
News Websites	10%
Search	10%
Mobile	10%
Other	10%

D.

First Time Visitor vs **Return Visitor**

Registered vs **Not Registered**

Need Education vs **Don't Need Education**

Average Player (Not on leader board) vs **Power Player (On leader board)**

E.

Hubert oversees IT functions for a retail company. They purchased Microsoft Dynamics for their point-of-sale systems about a year ago. The company has grown over time and new accounting tasks need to be accomplished. Hubert needs to figure out how to scale the software's functionality.

He calls the Microsoft Dynamics partner and asks him about the issue. Curious about the experience of other users like himself, Hubert also goes online and searches the Microsoft Dynamics site and community pages, looking for users with similar issues. Additionally, he re-reads the product page for Microsoft Dynamics POS and scans the white paper section.

"Help me maximize how my company uses Dynamics."

- Is an existing customer
- Looking for a specific data point

Needs

- Access to community boards
- Product details pages
- Research/white papers
- Industry changes and best practices

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"User Experience Design Deliverables: Expert's Choice" - Lilia Manguy

SELECTION & CREATION EXAMPLE (CONT.)

o Focus

- Goal: To sell
- Detail: Complex
- Audience: New to UX
- Language: Quantitative (\$)

o Your UX Process

1. Competitive analysis
2. Personas & scenarios
3. **Interaction model**
4. Sitemap
5. Wireframes

A.

The deliverables include:

- A hierarchical tree diagram showing a central node branching into several sub-nodes.
- A grid-based wireframe with various content blocks and labels.
- An interaction model diagram showing a flow between different states and actions.
- A task flow diagram with steps: 1) Select Mode, 2) Select Task, 3) Complete Task, 4) Select Final Options.
- A 'Home Base (Selling)' diagram with a central hub and surrounding nodes like 'Customer', 'Merchant', 'Non-Customer', 'Returns', and 'Gift Cards & Services'.
- A detailed flowchart with nodes like ENTER, FIND, FILTER, SCAN, RADIATE, SAVE, BUY, ABANDON, and SCANNING.

B.

The screenshots show a user interface with a chart and various controls. The sequence of actions is:

1. View chart (Click on 'View to Read Charts')
2. Switch to Weekly view (Click on 'Weekly')
3. Pause game (Click on 'Pause')
4. Click on 'View to Read Charts'
5. Read info on how to play, and click on 'Return to your chart'
6. Click on 'Return to your chart'

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SELECTION & CREATION EXAMPLE (CONT.)

o Focus

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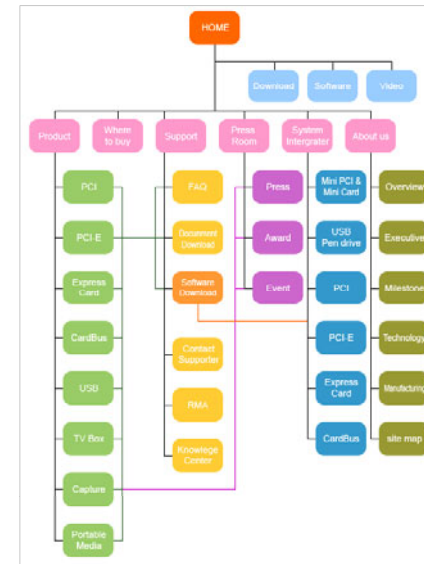
o Your UX Process

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A.



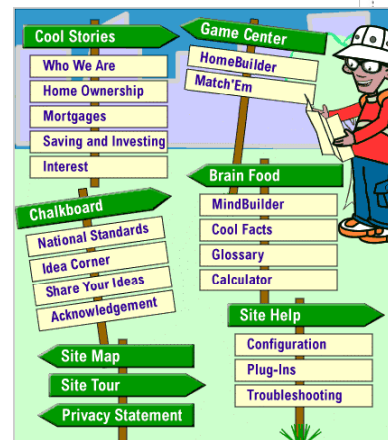
B.



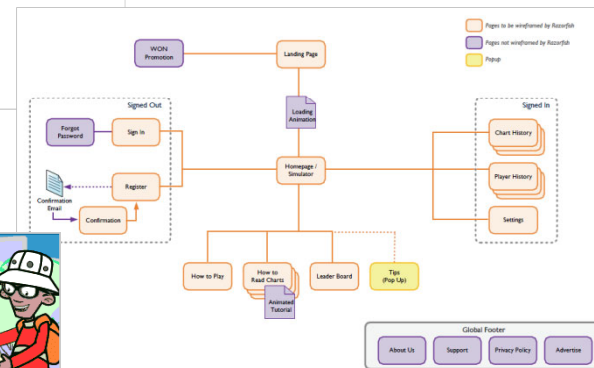
C.



D.



E.



"User Experience Design Deliverables: Expert's Choice" - Lilia Manguy

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SELECTION & CREATION EXAMPLE (CONT.)

o Focus

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- Detail: Complex
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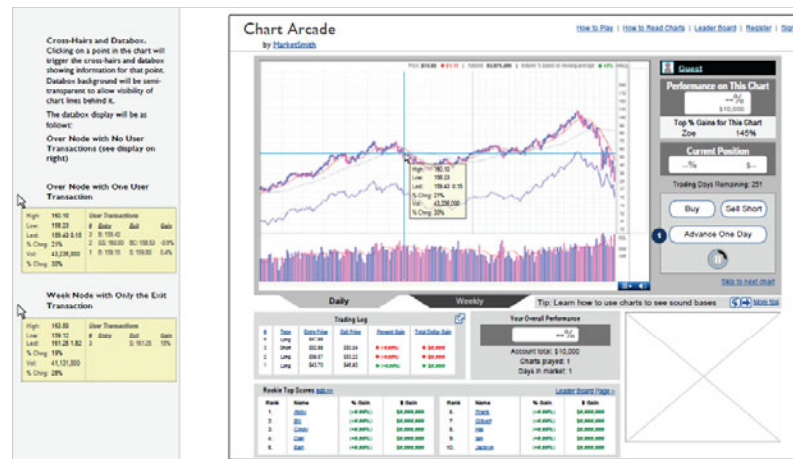
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A.



C.

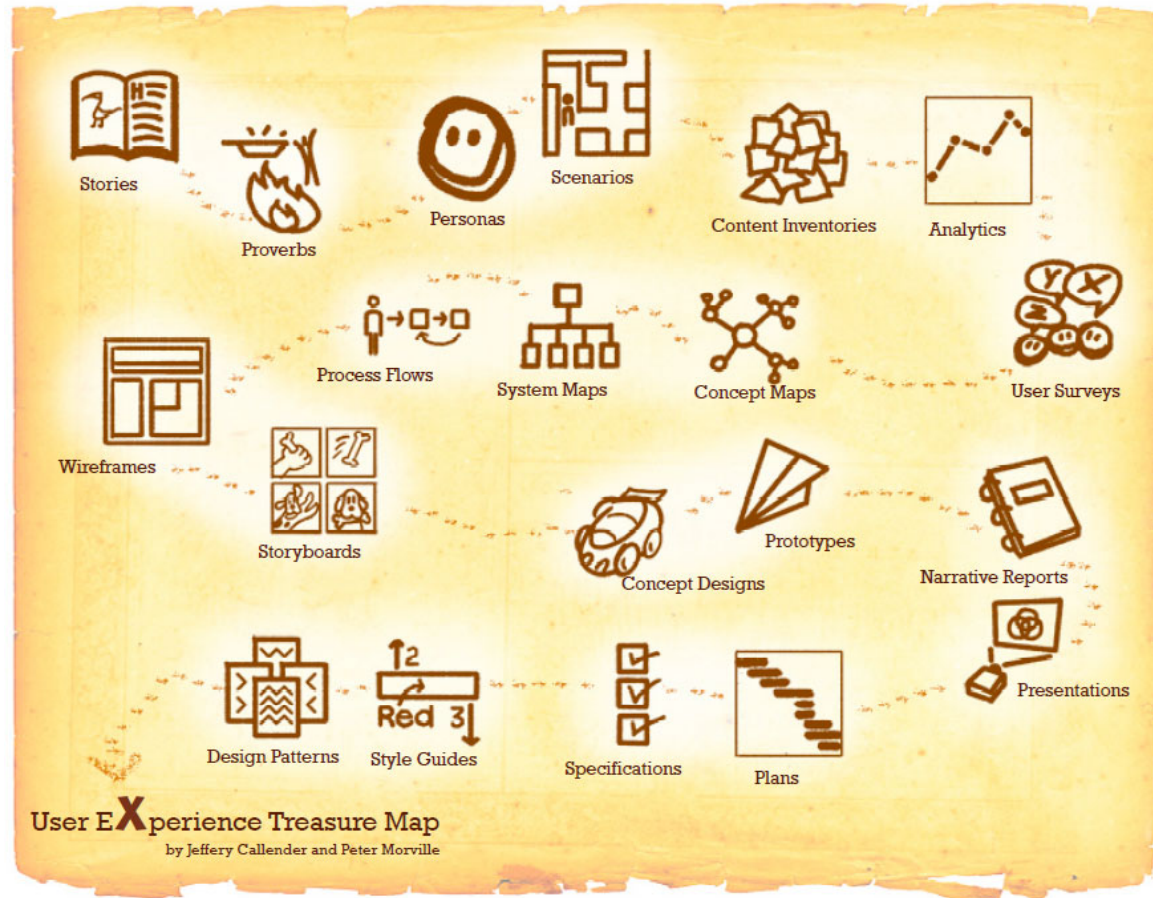


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Want more deliverable examples?
GOOD RESOURCES

SELECTION RESOURCES

Peter Morville's User Experience Treasure Map




<http://semanticstudios.com/publications/semantics/000228.php>

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SELECTION RESOURCES

Nathan Curtis's "Instant Deliverable Mix"




Instant Deliverable Mix


Prepared by:
Nathan Curtis
nathan@eightsapes.com
April 12, 2008
For the 2008 IA Summit, Miami, FL

Cook up your own deliverable in less than 3 minutes!

Page Patterns are predefined...



in a layout to enable designers to place artwork (e.g., wireframe) and compose annotations in a consistent and effective deliverable page.



Create Your Own Recipes

Recipes use page patterns to predefine your deliverable structure by pages and chapters. Outline once but use it repeatedly, each time adding whatever special ingredients necessary.

Even better, review your recipes with your deliverable's intended consumers ... before you get started. That way, expectations are set.

Find your ingredients in the Page Pattern Library:

METADATA	STRATEGY	RESEARCH	STORYBOARDS	WIREFRAMES	VISUAL DESIGN
Cover with Description	Key Themes	Callouts, Large Visual	Two-by-Two Plot	6x1 Board, Thumbnails	Intro & Chunked
Cover, Multiple Authors	Key Themes & Visual	Callouts, Standard Visual	Comparative Table, Stars	3x1, Screenshot Flow	Inspired By
Sign Off	Creative Brief	Open Questions	Comparative Table, Checks	4x2, Comics	Mockup with Intro
Change History, Basic	Alternative w/ Pros & Cons	Research Approach	Findings	4x2, Comics w/ Descriptors	Basic Annotations
Change History, Table	Recommendation	Quotes by Topic	Recommendations	Project Plan	Photography Don'ts
					Icon Tables
					Color & Type
					Color
					Component Design Specs
					Page Design Specs
					Grid & Gutter Spacing
					Grid & Names
					Component Variation Spec
					Property Table
					Embedded Flow
					Editorial Notes
					Two Variations
					Three Variations

Truly Instant? Use Recipe Scripts

Automate deliverable production (or at least starting points) via a combination of:

XML + **Script**

```

<!-- Recipe for Page Patterns Library -->
<!-- This recipe is used to generate a deliverable -->
<!-- It is a combination of a page pattern and a recipe -->
<!-- The recipe is a collection of page patterns -->
<!-- The page pattern is a collection of page patterns -->
<!-- The recipe is a collection of page patterns -->
<!-- The page pattern is a collection of page patterns -->
    
```

Software Capabilities

Page patterns can be utilized in many different information architecture software tools. In all cases, simply drag a pattern onto a page and begin authoring content and artwork. But the features you use depend on the tool.

- ID Adobe InDesign CS3 Snippets (primary)**
A snippet is a block of text that is placed into the document via drag-and-drop or menu.
- Object Library (secondary)**
A panel in the workspace from which you can drag-and-drop.
- OmniGraffle & Microsoft Visio Stencil**
A panel in the workspace from which you can drag-and-drop.

Rationale

- Generate typical content far faster
- Create consistent, predictable page structure
- Share common layouts with peers
- Establish expectations for deliverable content

Use When

Place a page pattern onto your page at the outset of authoring content for that page. Better yet, use page patterns from the deliverable's outset, planning your outline and clarifying delivery with your audience(s).

Page Patterns = Backgrounds

A background (in Visio, referred to as canvas in Omnigraffle and master in InDesign) enables you to utilize the same structure, document metadata, and other page elements across pages.

Backgrounds enable you to create a few, representative backgrounds for simple templates, but reasons you wouldn't use the feature for page patterns include:

- Backgrounds are not intended for page specific editing; page patterns are for actual content
- The massive number of objects in a 60+ page pattern library would bloat template file size
- Separating page patterns from document templates eases creation, maintenance, and distribution of page pattern libraries

<http://www.nathancurtis.com/wp-content/uploads/2008/PagePatternPoster.Final.pdf>

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FORMATTING DELIVERABLES

SELECTION & CREATION

3. Format your deliverable following best practices

Product Category — page title

NOTES:

When page loads, the first item in the carousel is selected, and its corresponding information is displayed below. The carousel accommodates one or more items.

- 1 Item can be checked for comparison with another item. 'Compare' link triggers comparison functionality.
- 2 Selected series in carousel
- 3 Carousel scrolling mechanism
- 4 Compare button
- 5 Series description
- 6 'Shop' button goes to notebook series page
- 7 Demo opens in a pop-up or overlay

Annotations:

- Annotations 1-7 point to specific UI elements in the wireframe.
- Annotations 8-10 point to the footer elements: client logo, project name, and agency/business logo.

Page Content:

Product Category

United States

Buy online or call: xxxx xxxx

Products | Learn | Promotions | Support | About

SEARCH

Home > Home Notebooks

Print | Share

Compare items

CQ60-400 series CQ61-300 series **CQ71-400 series** CQ61-400 series CQ71-300 series CQ71-400 series

CQ71-400 Notebook PC series

Sleek and stylish by design, this 43.9 cm (17.3-inch) 16:9 ratio this notebook features a unique Imprint design in a glossy black finish.

Dimensions: 43.9 cm (17.3-inch)

Starting from £ 323 inc VAT

Shop Series 2

View product demo

Product Awards
How to Buy
Disclaimer
EU REACH Declarations
Forums
Biogs

client logo

Website Redesign

Product Category

Copyright 2010

12 Mar, 2010

Page 1 of 1

agency logo

client logo project name copyright date page number

uncluttered; lots of white space

your agency/business logo

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SELECTION & CREATION

3. Format your deliverable following best practices (cont.)

page title

1

2

3

Fold 600px

Client: My.Client	UX: Lilia Manguy	Date: March 12, 2010
Project: Website Redesign	Filename: IA_deck.vsd	Page: 2 of 2

annotations

Annotations

- 1 Expanding sub-nav displays secondary-level pages
- 2 Hero area photo automatically refreshes every 5 seconds
- 3 Sub-menu is displayed upon rollover

client logo

client logo

your agency/
business logo

disclaimer:
Wireframes DO NOT imply
final grid, rather purpose of
page and key assets and
global navigation

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III. USER EXPERIENCE DELIVERABLES: PRESENTATION

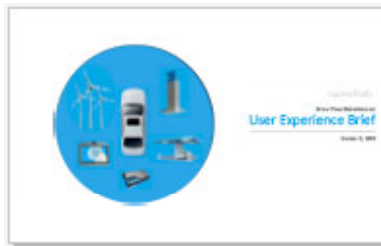
- Tell a story with your deliverables: the UX Brief
- *What is a User Experience Brief?*

A user experience brief is detailed explanation of your user experience design strategy written in a narrative style.

- *Why is it important?*

A user experience brief is important because it fills in the holes that a collection of deliverables doesn't address.

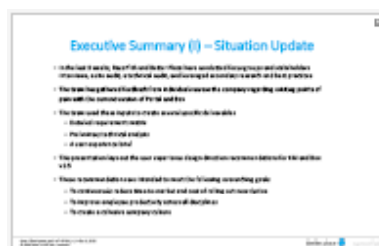
USER EXPERIENCE BRIEF: EXAMPLE



Cover



TOC



Intro / Problem Statement



Deliverable: Stakeholder interviews



Deliverable: Concept model



Deliverable: Wireframe



Deliverable: Wireframe



Deliverable: Wireframe

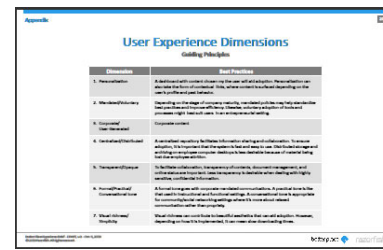
USER EXPERIENCE BRIEF: EXAMPLE (CONT.)



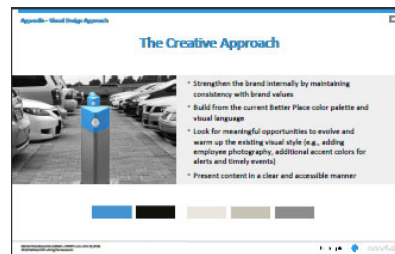
Next Steps



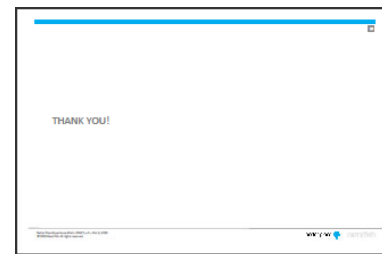
Appendix



Supplemental Info



Supplemental Info



Thank You
(+ contact info)

IV. USER EXPERIENCE DELIVERABLES: TOOLS

- Software
 - Omnigraffle (Mac)
 - Visio (PC)
 - InDesign (Mac & PC)
- Features
 - Shape Libraries
 - Background templates
 - Multiple pages

SUMMARY

○ DEFINITION

A deliverable is an artifact of your user experience design process that, when most effective, compels your intended audience to take an intended action

○ SELECTION & CREATION

- Define the focus of your deliverables
- Map to your UX process
- Format according to best practices

○ PRESENTATION

Tell a story with your deliverables: the UX brief

○ TOOLS

Omnigraffle (Mac), Visio (PC), InDesign (Mac & PC)

RESOURCES

- Semantic Studios - <http://semanticstudios.com/publications/>
- Nathan Curtis - <http://nathancurtis.com/>
- Boxes & Arrows - <http://boxesandarrows.com/>
- Adaptive Path: <http://www.adaptivepath.com/>

Thank you!

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