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Vision and Strategy

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Goal: Articulate a durable product vision that aligns to mission, market timing, and ecosystem risks.

Defining your Mission: Who do we serve and Why does it matter?

Defining your Vision: For [*who - target*], who need [*why/need*], our [*product*] is a [*category (ex. AI tutor)*] that [*core benefit*]. Unlike [*alternative in the market*], it [*our product's differentiator*].

Strategic Fit and Timing

Examples of Trends Helping/Hurting Now:

- Pedagogy
- AI policy
- Funding/ Affordability
- Assessments
- Teacher time
- Device access

What are some current trends that will impact your product? What will help? What will hurt?

Examples of Ecosystem Risks & Guardrails:

- Accessibility
- Privacy
- Safety/ethics
- Equity impact
- Data interoperability

- Tech integrations/ interoperability

What are some ecosystem risks that may impact your product? What are guardrails you can put in place to mitigate these risks?

Creating a clear narrative

(Later: creating personas)

Defining the problem: Who is affected? How big is the problem and how big is the pain? What are the current workarounds? What are the harms of the status quo?

Show your hand: What insights do you have from user interviews or early pilots? What are clear artefacts that your product should have based on user insights?

Gather evidence of success: What are the measurable indicators of success to watch for in the first 2-3 months?

Starter MVP Doc

MVP Starter

1) First user & job-to-be-done

Who is the very first user (role + context)?

Job-to-be-done: *When [situation], I want to [motivation], so I can [expected outcome].*

Value hypothesis (one sentence):
If we [capability], then [user] will achieve [measurable outcome].

Top 3 short-term success signals (2–4 weeks):

1.
2.
3.

2) Riskiest assumption (pick one)

One-sentence statement of what must be true for this to work.

Why is this riskiest?

Assumptions map (prioritize risk)

Categorize assumptions by Desirability (D), Feasibility (F), Viability (V), Impact/Safety (I).

Assumption	Type (D/F/V/I)	Evidence We Need	Fastest Test We Can Run	Risk Level (High/Med/Low)

Edtech nuance to consider: *procurement timelines; data sharing (FERPA/consent); accessibility (WCAG); curriculum alignment; rostering/grade passback; school IT constraints; equity & privacy safeguards*

3) Minimum Testable Slice (MTS)

Describe the smallest coherent experience that can falsify #2.

User Journey Step	Full Product Idea	MTS in 2 Weeks	What “good” looks like
Discover			
Try			
Use			
Return/Recommend			

4) 48-hour to 2 week test plan

Method(s) we’ll use *(e.g., problem interviews, paper prototype, landing page, small class pilot, A/B messaging)**:***

Method (paper prototype, user interviews, landing page or wireframe)	Participants (aim for min 5)	Recruiting Source	Success Metric and Target	Owner	Date

Usability and Acceptance Checks:

5) Pre-commit pass/fail

We will proceed only if:

(Example: ≥ 3/5 learners complete the key task in ≤ 4 min and say they'd pilot next week.)

6) Evidence log (after running the test)

Observation	Metric Value	Verbatim Quote	Issue /Insight

7) Decision & next 2-week plan

- ☐ Proceed
- ☐ Pivot
- ☐ Pause

Rationale:

Next 2-week goals (max 3):

MoSCoW (Feature Feedback and Ranking)

Candidate Feature	Must/Should/Could/Won't (V1)	Notes

8) How we reach the first 5 users (distribution)

Where they are and how we'll actually get them this week (no abstracts).

9) Willingness to pay / commit

What concrete commitment will we ask for (time, data share, $ pilot fee (not recommended for an early user testing))?

10) Edtech quick gate

(check what applies)

- ☐ No student PII collected; if yes, consent plan is ready.
- ☐ Basic WCAG checks (keyboard nav, contrast, alt text) or N/A for paper test.
- ☐ Data retention & deletion noted; interoperability needs identified (rostering/grade passback).

Summarize:

	Summary
Problem & User	
Riskiest Assumption	
MTS Description	
Evidence (metrics/quotes)	
Decision (proceed/pivot/pause)	
Next Steps	

User Personas

User Persona Creation Worksheet

Purpose: Support both early-stage startups and established product teams in defining, validating, and applying user personas that drive real product decisions.

Goal: Develop up to five personas grounded in data, connected to business goals, and actionable for design, prioritization, and impact measurement.

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0) Product Context & Framing

Before you begin, clarify the context and purpose for creating or revising these personas.

Context	Notes
Product / Feature name	
Lifecycle stage (concept / MVP / growth / mature)	
Core product goal	
Persona sources (research / interviews / analytics / assumptions)	
Decision purpose (e.g., guide roadmap, test adoption, refine UX)	

---

1) Persona Overview (Snapshot)

Use this table to map all five personas at a glance.

Persona #	Name / Label	Archetype	Primary environment	Key motivator / goal	Frustration / barrier
1					
2					
3					

4					
5					

---

2) Deep-Dive Persona Template (use one per persona)

A. Identity Snapshot

Attribute	Notes
Persona name / label	
Role / context	
Decision-making power	
Tech confidence	
Accessibility needs	
Environment (school type, district, org size, etc.)	
Frequency of use / exposure to product	

B. Goals, Jobs, and Pain Points

Top jobs-to-be-done (JTBD)

Pain point	Why it matters	Evidence (quote, data)	Severity (1–5)

C. Motivations & Constraints

Motivation	Example behavior	Product implication

D. Current Workarounds / Tools

Task	Current method / tool	Frustration	Switching trigger

3) Behavioral / Attitudinal Segments

Identify cross-persona patterns to guide feature decisions or UX design.

Dimension	Segment A	Segment B	Segment C
Adoption style	Innovator	Early majority	Late majority
Data comfort	Intuitive	Guided	Analytical
Learning approach	Independent	Collaborative	Structured
Value driver	Cost savings	Time savings	Measurable outcomes
Motivation focus	Autonomy	Recognition	Growth

4) Product Implications

Connect persona insights to roadmap or UX priorities.

Persona	Key product need	Related feature or design pattern	Measure of success	PM decision priority (H/M/L)

5) Validation & Evidence Plan

Outline how you'll confirm or update each persona through data and feedback.

Validation method	Timing	Who to test with	Success metric	Owner
Interviews				

Prototype tests				
Usage analytics				
NPS / surveys				

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6) Team Workshop Extension (Optional)

Facilitate alignment across PM, design, and engineering.

Composite Persona-Feature Map

Mark which features deliver the most value to each persona.

Persona	Feature 1	Feature 2	Feature 3	Feature 4	Feature 5
Persona 1					
Persona 2					
Persona 3					
Persona 4					
Persona 5					

---

7) Reflection & Decision Notes

Use this section to summarize key takeaways.

Prompt	Notes
Which personas are we building for *now*?	
Which personas are deferred for future phases?	

What key assumption about users should we test next?	
Where do we see gaps in evidence or representation?	
How will these personas influence roadmap priorities in the next quarter?	

User Journeys

User Journey Mapping Worksheet

Purpose: Guide startups and established teams through mapping a user journey to identify opportunities, friction points, and product leverage moments.

Goal: Create a visual and narrative map of a key user's end-to-end experience — from awareness to adoption, engagement, and retention — highlighting insights that inform design, prioritization, and impact metrics.

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0) Context & Objective

Before you map, define what you're mapping and why.

Prompt	**Response**
Product / feature name	
Persona / user type	
Core journey goal (e.g., onboard, complete a task, renew)	
Why this journey matters now	
How the team will use this map (e.g., prioritize, design sprint, measure UX)	

1) Journey Scope & Boundaries

Define where this journey starts and ends.

Dimension	**Description**
Entry point (what triggers this journey?)	
Success outcome (what "completion" looks like)	
Time horizon (e.g., one session, one semester, first 30 days)	

Key channels (e.g., web, mobile app, LMS, classroom)	

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2) Journey Stages (High-Level)

Outline the big steps in the journey.

Stage	Description	Primary goal	Key emotion
Awareness			
Consideration			
Onboarding			
Engagement			
Retention / Advocacy			

---

3) Detailed User Journey Map

Use this section to map the detailed flow for the selected persona.

Step #	Stage	User action / behavior	System or team action	Emotion (1–5)	Pain points	Opportunities/ide

						a s
1						
2						
3						
4						
5						
6						
7						
8						

Tip: Capture not just functional tasks, but emotional and contextual factors (time pressure, environment, dependencies, etc.).

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4) Experience Highlights

Use this section to synthesize what you learned.

Prompt	**Reflection**
Where is the user most motivated?	
Where do they get stuck or drop off?	
What moments define success or failure?	
What's invisible to the team but crucial to the user?	
What insights surprised you?	

---

5) Prioritization of Opportunities

Translate journey insights into product or operational actions.

Opportunity	Evidence (quote / data)	Impact (H/M/L)	Effort (H/M/L)	Owner

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6) Cross-Functional Touchpoints

Identify which teams or functions own key moments in the journey.

Journey stage	Team(s) involved	Dependencies	Risks / blockers	Communication plan
Awareness				

Onboarding				
Engagement				
Retention				

---

7) Metrics & Signals of Success

Define how you'll measure if the journey improves.

Stage	Metric / KPI	Target	Data source	Frequency
Awareness				
Consideration				
Onboarding				
Engagement				
Retention				

8) Reflection & Next Steps

Use this to align the team and document key insights.

Prompt	Notes
What user needs became clearer through this mapping?	
What assumptions were challenged or validated?	

What 1–2 quick experiments could improve the journey?	
Who should review this map next?	
When will we revisit this journey?	

(SUS) System Usability Scale

System Usability Scale (SUS) Worksheet

Purpose: Help startups and established teams systematically measure and interpret the usability of their products using the System Usability Scale (SUS).

Goal: Collect user feedback through a standardized 10-item survey, calculate the SUS score, and identify usability strengths and weaknesses to inform product decisions.

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0) Context & Setup

Before you begin:

- Identify the version or prototype being tested.
- Choose the participant group (e.g., teachers, students, administrators, parents).
- Ensure participants have completed a representative task flow before taking the SUS.

Context	Notes
Product / feature tested	
Product stage (MVP / beta / launched)	
Test environment (in-class / remote / mobile / web)	
Number of participants	
Persona(s) represented	
Test date(s)	

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1) SUS Questionnaire

Each statement is rated on a **5-point Likert scale:**
1 = Strongly Disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly Agree

Instructions for participants:

Please rate the following statements based on your experience using the product. There are no right or wrong answers — we're interested in your honest impressions.

#	Statement	1	2	3	4	5
1	I think that I would like to use this product frequently.					
2	I found the product unnecessarily complex.					
3	I thought the product was easy to use.					
4	I think that I would need the support of a technical person to be able to use this product.					
5	I found the various functions in this product were well integrated.					
6	I thought there was too much inconsistency in this product.					
7	I would imagine that most people would learn to use this product very quickly.					
8	I found the product very cumbersome to use.					
9	I felt very confident using the product.					
10	I needed to learn a lot of things before I could get going with this product.					

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2) Scoring the SUS

Step 1: For **odd-numbered** questions (1, 3, 5, 7, 9), subtract **1** from the user's score.
Step 2: For **even-numbered** questions (2, 4, 6, 8, 10), subtract the user's score from **5**.

Step 3: Add up all adjusted scores → Multiply the total by **2.5** to get the overall **SUS score (0–100)**.

Participant	Total raw score (1–50)	SUS Score (Total×2.5)	Notes / Observations
1			
2			
3			
4			
5			
Average SUS Score			

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3) Interpreting Results

SUS Range	Grade	Usability Interpretation	PM / Design Guidance
90–100	A+ / A	Excellent usability	Maintain UX standards; explore delight factors.
80–89	B+ / B	Good usability	Minor refinements; validate with broader users.
70–79	C	Acceptable	Identify friction points; fix high-severity pain.
60–69	D	Poor usability	Investigate root causes; prioritize redesign.
<60	F	Unacceptable	Conduct full UX audit; test new flow or design.

EdTech-specific considerations:

- Ensure accessibility for diverse learners and instructors (WCAG, screen readers, multilingual UX).
- Include context-dependent testing (e.g., classroom Wi-Fi constraints, student data privacy).
- Cross-validate SUS scores by role — teachers vs. students often experience different usability barriers.

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4) Key Insights & Next Actions

Use this section to summarize findings, prioritize next steps, and plan follow-up testing.

Prompt	Notes
What patterns or issues were most common?	
Which usability problems had the biggest impact on task success?	
Which roles or contexts reported the lowest satisfaction?	
What immediate improvements can be tested in the next sprint?	
How will we re-test after changes (timing / participants)?	

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5) Follow-Up: Integrating SUS into Product Practice

For PMs and design leads:

- Run SUS quarterly or after every major feature release.
- Compare scores by persona or release version.
- Combine with **System Usability Scale + open qualitative feedback** for richer insights.
- Visualize score trends over time in your product analytics dashboard.

Version / Release	Avg. SUS	Change vs. prior	Key UX changes made	Next test date
v1.0				
v1.1				
v1.2				

(UAT) User Acceptance Testing

User Acceptance Testing (UAT) Worksheet

Purpose: Help new or experienced EdTech teams plan, run, and evaluate a UAT cycle, ensuring the product meets user needs, functional requirements, accessibility expectations, and real-world constraints.

Goal: A repeatable UAT process that fits early MVPs, pilots, and mature releases.

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0) UAT Overview & Purpose

Clarify why you're running this UAT cycle and what success looks like.

Prompt	Notes
Product / feature being tested	
Version (MVP, Beta, v1.x)	
Persona(s) included	
UAT goal (e.g., validate functionality, confirm workflows, ensure classroom readiness)	
Success definition for this UAT cycle	
UAT start & end dates	

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1) UAT Participants & Roles

Identify who is involved and what they'll test.

Participant Name	Role (Teacher / Student / Admin / Parent / Other)	Environment (classroom, LMS, remote)	Devices used	Responsibilities

---

2) UAT Scope & Test Scenarios

List the features and workflows included in this UAT.

Scenario #	Feature / Workflow	Description	Preconditions	Priority (H/M/L)	Acceptance Criteria
1					
2					
3					
4					

5					

> **Tip:** Focus early UAT on critical path flows (onboarding, login, core task completion, data+privacy touchpoints).

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3) Accessibility & Compliance Checklist

Include required checks for EdTech products.

Accessibility (WCAG-aligned)

- ☐ Keyboard navigation works for all key flows.
- ☐ Color contrast meets minimum standards.
- ☐ Images / icons have alt text.
- ☐ Video has captions or transcripts.
- ☐ Screen reader compatibility (basic navigation).

Data Privacy & Security (FERPA-aligned)

- ☐ No unnecessary student PII collected.
- ☐ Data storage & permissions match policy.
- ☐ User can delete or modify data when needed.
- ☐ Clear disclosures for data use.

Technical Readiness (Classroom constraints)

- ☐ Works with real classroom Wi-Fi.
- ☐ Loads on school devices (Chromebooks, tablets).
- ☐ LMS integrations function as expected.

Add notes:

---

4) UAT Execution: Tester Worksheets

Create one section per scenario.

Scenario #: [NAME]

Description:

Steps to perform

Step #	Action	Expected Result	Observed Result
1			
2			
3			
4			

Notes & Screenshots

---

5) Issue Logging & Triage

Track problems, classify severity, and assign fixes.

Issue #	Description	Scenario	Severity (Critical / High / Medium / Low)	Steps to reproduce	Owner	Status (Open / In Progress / Fixed / Deferred)

1						
2						
3						
4						
5						

---

6) UAT Results Summary

Summarize what was learned across testers.

Category	Observations / Insights
Functional issues	
UX / usability issues	
Accessibility issues	
Classroom / real-world constraints	
Unexpected user behavior	
Surprising positive moments	

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7) Go/No-Go Decision

Use this section to document readiness for launch, pilot, or next release.

Decision Options

- ☐ **Go** = Meets acceptance criteria; ready for pilot or release.
- ☐ **Conditional Go** = Minor issues remaining; fixes scheduled.

☐ **No-Go** = Major issues prevent launch.

Rationale

Required Fixes Before Launch

Issue	Fix Required	Owner	Deadline

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8) Planning the Next UAT Cycle

Make UAT a repeatable practice.

Prompt	Notes
What worked well in this UAT cycle?	
What should be improved for next cycle?	

Additional personas or roles needed?	
New features or workflows to add next time?	
Target timing for next UAT cycle	

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9) UAT Checklist for Teams

Before UAT:

- ☐ Define goals, scope, and acceptance criteria.
- ☐ Recruit testers representing real personas.
- ☐ Prepare test data and safe environments.
- ☐ Confirm accessibility and privacy requirements.
- ☐ Create clear instructions for testers.

During UAT:

- ☐ Observe users without leading them.
- ☐ Capture all issues, even small ones.
- ☐ Record metrics (time-on-task, errors, drop-offs).
- ☐ Save screenshots or videos.

After UAT:

- ☐ Score issues and categorize severity.

- [ ] Discuss findings cross-functionally.
- [ ] Document Go/No-Go decision.
- [ ] Plan next cycle.

Compliance Readiness Worksheet

Compliance Readiness Worksheet

Purpose: Help early-stage and established EdTech teams understand, evaluate, and prepare for core compliance requirements related to student data, accessibility, safety, and interoperability.

Goal: Build a repeatable, high-level compliance checklist and readiness process that supports responsible product development and smoother district procurement.

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0) Product Context & Compliance Scope

Prompt	Notes
Product / feature name	
Version / stage (beta, MVP, pilot, launched)	
Primary users (students, teachers, admins, parents)	
Data handled (student PII, behavioral data, analytics, content submissions)	
Markets targeted (K–12, higher ed, district, afterschool, tutoring)	

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1) Data Privacy (FERPA, COPPA, state-specific laws)

Student Data Handling

- ☐ We collect only the minimum necessary student data.
- ☐ We have a clear data inventory (what we store, where it lives, who has access).

- [ ] Data retention periods are defined and documented.
- [ ] Users (or districts) can request data deletion.

Parental Consent (COPPA for <13)

- [ ] We have a mechanism for obtaining parental consent when required.
- [ ] If relying on school consent, we provide districts/institutions with required documentation.

Privacy Policies

- [ ] Our public privacy policy is up-to-date, readable, and accurate.
- [ ] We specify how data is collected, used, shared, and stored.
- [ ] All third-party vendors we use are listed and compliant.

Notes

2) Security Readiness (Basic, not deep SOC-2)

Requirement	Status (Yes/No/Partial)	Notes
Data encrypted at rest and in transit		
Access controls in place (role-based, least privilege)		

Regular security patches & updates applied		
Multi-factor authentication for admin users		
Incident response plan drafted		
Backups & disaster recovery plan		

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3) Accessibility Compliance (WCAG 2.1 AA)

Core WCAG Requirements

- ☐ Color contrast passes standards.
- ☐ Keyboard navigation works throughout.
- ☐ Alt text exists for meaningful images/icons.
- ☐ Forms and interactive elements have proper labels.
- ☐ Captions/transcripts for video or audio.
- ☐ Screen reader compatibility tested.

Classroom Accessibility Considerations

- ☐ Usable on Laptops
- ☐ Usable on Mobile
- ☐ Works in low-bandwidth or spotty Wi-Fi conditions.
- ☐ Simple login pathways (SSO preferred).

Notes

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4) Safety, Responsible AI, & Content Policies

Area	Requirement	Status	Notes
AI-generated content	Explainable + guardrails documented		
Harmful content	Filters & moderation in place		
User reporting	Users can flag issues		
Bias checks (AI models)	Basic evaluation completed		
Age-appropriate design	UX adapted for minors		

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5) Interoperability & Integrations

Rostering & LMS

- ☐ Supports SIS integrations.
- ☐ Integrates with common LMSs (Google Classroom, Canvas, Moodle, Open edX, D2L, Coursera) where required, whether through API, SCORM, or LTI.

Data Exchange

- ☐ Export options for districts (CSV, API).
- ☐ Grade passback works reliably.

Notes

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6) Terms of Service, Agreements & Procurement Readiness

Requirement	Status	Notes
Terms of Service written in clear, non-legal language		
Data Protection Addendum (DPA) available		
Signed agreements with vendors/subprocessors		
Pricing transparency for districts		
Point of contact for compliance questions		

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7) Privacy, Accessibility, & Cybersecurity Documentation Checklist

- ☐ Privacy Policy (public)
- ☐ Terms of Service
- ☐ Data Protection Addendum (DPA)
- ☐ Accessibility Conformance Report (ACR/VPAT) draft or plan
- ☐ Security policy (internal)
- ☐ Subprocessor list

- [ ] Data flow diagram or description
- [ ] Product architecture & vendor list

Notes:

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8) Compliance Gap Analysis & Priority Plan

Gap / Risk	Impact (H/M/L)	Effort (H/M/L)	Owner	Timeline

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9) Procurement & Pilot Readiness

Prompt	Notes
Can we confidently answer district compliance questionnaires?	
Do we have documentation ready for procurement teams?	
Are there any blockers for running a classroom pilot?	

What assurances do we provide (privacy, accessibility, security)?	

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10) Next Compliance Milestones

Milestone	Target Date	Owner
Draft FERPA compliance statement		
Draft or update Accessibility (ACR/VPAT)		
Complete vendor security review		
Quarterly privacy policy review