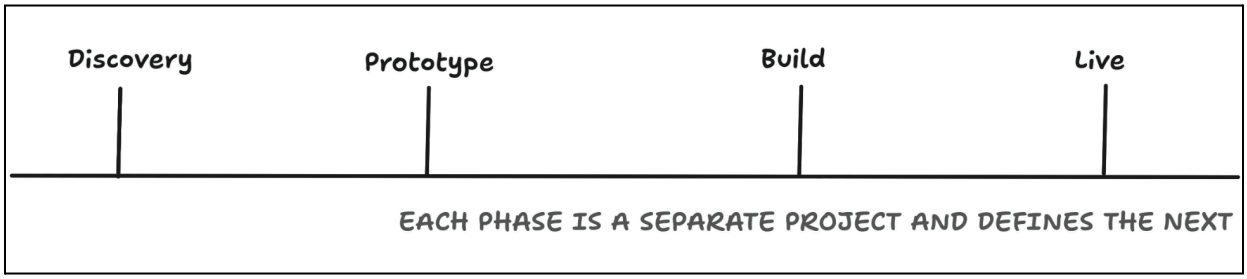
De-risking and efficiency. The process I start from to manage projects

Félix Dorn

Introduction: 4 phases.



How this process benefits you.

— It reduces risk

because we can test our working relationship with by-phase billing. Each phase also validates the viability of the next, reducing commitment to one large and potentially flawed project.

— The chances of generating a return on investment increase considerably

because the project is broken into self-contained phases that are well defined and researched.

— It allows for tighter control over spending and the allocation of resources

because each phase scopes the next, they can be costed much more accurately.

What your role in this process often looks like

— You find problems. I find solutions.

— You champion the business needs.

— You defend the user.

Discovery.

From a single dialogue to 8 weeks dedicated to defining the problems and the scope to reduce scope creep, uncover constraints and provide the context for better decision-making.

What often happens during discovery:

- Agree on objectives
- Making a resource plan
- Collecting additional project requirements
- Interviewing stakeholders
- Drafting project scope statement
- Getting buy-in and approval from stakeholders
- Competitive analysis
- User research
- Uncover constraints
- Review existing website/app

Common deliverables

A defined project scope.

An appropriately-detailed scope built collaboratively and understood by everyone.

— To prioritise.

We rule things in and out of scope, at a pretty granular level, to manage your budget. You are empowered to make key decisions while understanding what the implications of your changes will be.

— To have confidence in timelines and budget
Too often, poorly scoped projects “bake in” uncertainty around timelines and deliverables which then can extend to stakeholders and create a lack of confidence before the work has even begun.

— To confidently plan work contingent on the project.
Such as launching products or campaigns

A consensus on design principles.

— Design principles guide decision-making.
They are a set of short statements about how we intend to make decisions during a project

— To streamline the process.
Design principles move the decision-making process away from personal opinion and provide a framework for making informed decisions.

— We all commit to them.
We can workshop the design principles, start from existing ones you may have, or I can bring my own, but we all commit to sticking to them before moving forward.

— I suggest the following ones:

1. Start with users needs
2. Design with data
3. Iterate, iterate, iterate.
4. Do the hard work to make it simple
5. Be consistent, not uniform.
6. Understand context.

Prototyping.

We establish the design direction and the scope of the build and validate them to avoid costly changes during build.

What often happens during prototyping:

- Establish aesthetics
- Design mockups for key templates
- Site wireframing
- Usability testing
- Aesthetic testing

Common deliverables

High fidelity mockups

— To demonstrate how the website aesthetics integrate with the site structure.

Navigable wireframe

A navigable wireframe of the website including draft content and mockups of proposed functionality

Aesthetics testing

Color, typography, imagery, and styling are all perceived differently depending on our experiences. By testing aesthetics, we can save hours of endless debate

Usability testing

A website will not succeed if people cannot find content, understand the functionality, and comprehend content. By testing usability, you increase the chance of project success.

You don't have the time or money not to test!

Carrying out aesthetics and usability testing may seem like a luxury you cannot afford. However, in reality, if approached in the right way it will save us endless meetings, discussions and revisions.

Build.

Designs are finalized to be fully responsive and turned into fully functional websites and include states for things like buttons and forms.

What often happens during build:

- Fully responsive design
- Button and form states
- Error messages
- Design systems
- Animation
- Usability testing

Live.

We only have partial knowledge of how users will respond until the website goes live. Once the project is launched, it is necessary to monitor user behavior and adjust the design to maximize conversion and engagement.

What often happens during live:

- Analyze analytics
- Check session recordings
- Review heat maps
- AB testing
- Usability testing
- Tweaks