

## Orcasound Global Navigation UX Project Brief

Started on: 4/7/23

Last updated on: 7/17/23

### Background

*Describe what the project is about, what's its context and background.*

*Describe why it's being carried out. If it's a part of a wider customer journey, link it here.*

The Orcasound web experience needs a global header and footer experience that will cover all web pages and web apps under the Orcasound umbrella. Sub navigation headers and footers may be designed depending on specific navigation needs for web apps, and global navigation may not be present depending on factors such as screen real estate space, information architecture needs, or other circumstances as discussed and decided by UX team members working on specific projects.

The global header and footer navigation bars need to be responsive for 3 device types:

1. Desktop
2. Tablet
3. Mobile

A card sort study was conducted, results were presented at the end of 2020, and a site map resulted that has informed the Orcahome redesign. This site map should be applied to the global navigation of Orcasound, and any additions to the map should be the result of UX Research and/or discussions by Global Navigation UX Team members.

Card Sort Study presentation:

[https://drive.google.com/file/d/1nGo4u-wwU-uHu1FvomgaamAf\\_TYITxgt/view?usp=share\\_link](https://drive.google.com/file/d/1nGo4u-wwU-uHu1FvomgaamAf_TYITxgt/view?usp=share_link)

Card Sort Project Folder:

[https://drive.google.com/drive/folders/19HLL8iPsJKjcCHgsUsIQWJdob\\_rz8-WF?usp=share\\_link](https://drive.google.com/drive/folders/19HLL8iPsJKjcCHgsUsIQWJdob_rz8-WF?usp=share_link)

Discussion from Paul (Senior Dev) about global navigation:

[https://orcasound.slack.com/archives/C01HLLQ0UTG/p1683132028376719?thread\\_ts=1682351727.384929&cid=C01HLLQ0UTG](https://orcasound.slack.com/archives/C01HLLQ0UTG/p1683132028376719?thread_ts=1682351727.384929&cid=C01HLLQ0UTG)

### Objective

*Describe what is the ideal future you want to have once this project is finished. What is the outcome you're looking to get out of this?*

*How does this fit into your team's and/or company's wider goals? (Link them here.)*

*What is the benefit for the business?*

*What is the benefit for the user?*

Design an Orcasound global header and footer navigation bar web experience for desktop, tablet, and mobile that meets the needs of [The Concerned Citizen Scientist](#) and [The New/Infrequent User](#) based on the site map generated from the card sort study run in 2020.

### Key results & Success criteria

*How will you know the project was successful once it's finished?*

*Think KPIs, OKRs, UX metrics, benchmarks, company targets (whatever your company is using).*

The designed header and footer navigation bars will be successful when a qualitative usability testing study results in defining the user experience as "usable" to "highly usable" using both a quantitative metric (e.g., SUS score) and qualitative feedback from study participants. The usability study must cover at minimum desktop and mobile device types.

## Target audience

*Describe the target audience for this project.*

*You can link to your personas.*

The target personae are:

- [The New/Infrequent User](#)- primary persona

Based on the preliminary persona development research conducted in 2020, the New/Infrequent User is most likely to first encounter the main website (orcasound.net), either drop off or continue to the listening web app. More research, beginning with analysis of analytic data, needs to be done to understand the New/Infrequent User's use of the main Orcasound website and their mental model when it comes to global navigation.

- [The Concerned Citizen Scientist](#)- primary or secondary persona

Based on the preliminary persona development research conducted in 2020, Concerned Citizen Scientists don't typically visit the main content oriented website (orcasound.net), but rather go straight to the listening web app (live.orcasound.net). If the global navigation is present on the listening web app, it is unknown if this persona type would ever use it. They most likely would navigate within the listening web app using its navigation. More research needs to be conducted on the Concerned Citizen Scientist and their use of global navigation, if any.

- [The Professional Marine Scientist](#)- tertiary/served persona

It is unknown how much, or if, the Professional Marine Scientist used the main Orcasound website (orcasound.net), or the listening web app (live.orcasound.net). Additional research needs to be done to understand how this persona type interacts with Orcasound, and how the global navigation is understood and used by this persona type.

## The team and stakeholder map

*Define team roles and responsibilities.*

*List stakeholders and describe what level of involvement is needed/expected.*

*Who is the decision-maker (sign off)?*

*[Note: One way of doing this can be a RACI matrix]*

### Stakeholders:

- **Main Orcasound Stakeholder:** Can provide background on who, what, where, why, and how for project requirements, including technical limitations. Limited, as needed, involvement. *Scott Veirs*
- **Principal UX Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. *Brendan Thatcher*
- **Product Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. Facilitates UX work to production in GitHub. *Brendan Thatcher*
- **UX Managers/Other UX, Dev, or Other Leadership:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Principal UX Manager or Main Orcasound Stakeholder. May not be direct reports but can be as needed. *Various*

### UX Team Members

- **Team Lead/Co Lead:** Schedules, leads, and sends reminders for weekly team stand up meetings. Can be an individual contributor (IC) as well. Writes or delegates the writing of user stories in Github when design is sent to production. Reports to Principal UX Manager.
- **UX Researchers (IC):** Plans, conducts, and reports on UX Research for project. Accesses Research Operations program to recruit participants for studies. Reports to Team Lead/Co Lead. *Various*
- **UX Designers (IC):** Designs based on user research as reported by UX Researchers. Reports to Team Lead/Co Lead. *Various*

- **Other UX Roles As Needed (IC):** Content Strategists, UX Writers, and any other UX-oriented roles who contribute their core competencies as needed. Reports to Team Lead/Co Lead. *Various*

#### Dev Team Members

- **Front End, Back End, Full Stack Devs:** Assigned issues by Team Lead/Co Lead or designate to develop design work. Uses established frameworks that meet the needs of technical specifications.

**\* Note:** Any team member can transfer roles at any time. There is full support for exploring different roles for professional development. Please communicate role changes with teammates and leadership as needed.

#### Scope

##### What's in scope

*Describe what definitely needs to be worked on and why.*

- Designing highly usable header and footer navigation bars using the sitemap generated by the card sort study

##### What might be in scope

*Often, there are those 'maybe areas and topics' — list them and describe conditions under which they could be included (e.g., if we have time, if we find out enough evidence in user research, etc.)*

- Including additional sitemap pages/web apps based on conversations with the Principal UX Manager and Orcasound Stakeholders

##### What's not in scope

*Describe what the design team should not challenge (e.g., hard technical constraints, change of CMS, major design overhauls during a platform migration project, etc.)*

*[Note: I use this one more as a guide to understand which topics will be hard to change, which things shall be taken as project constraints, and what the business values as a status quo. However, in practice, if you make some key discoveries which could significantly help the product and you have a really strong rationale for them, everything can be challenged.]*

- Including navigation elements or sitemap pages not discussed with the Principal UX Manager and Orcasound Stakeholders
- Designing non-global navigation for Orcasound web-apps

#### Dependencies

*Are there any other teams, people, technology, or anything else that the success of this project is dependent on? Describe them.*

- An Orcasound user-centric sitemap
  - Orcasound users are
    - New/Infrequent Users
    - Concerned Citizen Scientists
    - Professional Marine Scientists
    - Other, as yet unidentified personae and sub-personae
- Orcasound Content Strategy volunteers

#### Risks

*List risks and caveats that need to be considered.*

*E.g. What are the risks to the success of this project? What would happen if we don't meet the deadline?*

- If the global navigation bars are not consistent throughout the Orcasound web experience, UX Designers will spend unnecessary time designing navigation bars that don't align with the entire website and web apps, and developers will not produce a final product that provides a cohesive navigation experience

## Deliverables

*List tangible artifacts that this project is expected to deliver.*

- UX Discovery Research Proposal and Findings Presentations (if needed)
  - May include updating the sitemap by running a new card sort study
  - Discovery Research may not be needed- please discuss as a team whether research needs to be done or not
    - Prepare a formal presentation to the Principal UX Manager and Orcasound Stakeholders at a Tuesday all-UX Team Stand Up
      - Presentation should pitch whether research needs to be done or not, and if so, what research the team plans to run
- Design presentation of final navigation header and footer for desktop, tablet, and mobile to the UX team, Principal UX Manager, other stakeholders, leadership, and devs at a Tuesday all-UX Team Stand Up
- Design of full navigation headers and footers using Figma
  - Designs for desktop, tablet, and mobile
  - Redlined features, interactions, etc. as needed
- User stories in GitHub
  - Assigned to Principal UX Manager

User story template here (please download- it is a Word Template file):

[https://docs.google.com/document/d/16CaKvAQzBrSvKle0ieSUCQpYvCCXp8v/edit?usp=share\\_link&ouid=110838499857425540356&rtpof=true&sd=true](https://docs.google.com/document/d/16CaKvAQzBrSvKle0ieSUCQpYvCCXp8v/edit?usp=share_link&ouid=110838499857425540356&rtpof=true&sd=true)

## Ways of working

### Communication

*What communication tools will you use and what for? (Email vs Slack vs JIRA vs Zoom, etc.)*

Slack channel: [#ux-navigation](#)

### Shared data

*Where is the project space/folder and all the materials relevant to the project? Does everyone have access? If not, who will make sure everyone has it?*

- Project folder: [https://drive.google.com/drive/folders/1SpWct2xYedMGXLkhJKcAdP4nR1mUqY9i?usp=drive\\_link](https://drive.google.com/drive/folders/1SpWct2xYedMGXLkhJKcAdP4nR1mUqY9i?usp=drive_link)
- GitHub Product Repo: <https://github.com/orcasound/product>
  - GitHub project: <https://github.com/orgs/orcasound/projects/20>

### Additional notes

*If there is something else, specific to this project, state it here.*

UX Project Resources: Link to GitHub wiki here