Orcasound OrcaLearn UX Project Brief

Started on: 4/10/2023
Last updated on: 7/17/2023

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.

When Orcasound users, who could be defined as the Concerned Citizen Scientist persona, listen to hydrophones in the listening web app and are best suited to tag SRKW calls during listening events. These tagged calls are then authenticated by SRKW call experts, and in time by artificial intelligence using machine learning. Correctly tagged archived calls can be provided to the AI during the machine learning process to automate the tagging of calls, as well as the identification of a listening event for automatic notification to users to listen.

Orcasound stakeholders have requested that an interface be designed to train Orcasound users how to correctly identify SRKW calls. This interface is known as OrcaLearn.

Historically, the main website (orcasound.net) has presented educational content and links in a "Learn" content page. The redesign of the main website included an updated "Learn" content page but will be replaced by the OrcaLearn web app when it is researched, designed, and developed by Orcasound software engineer volunteers.

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?

Provide a web app that teaches Orcasound listeners to identify Southern Resident Killer Whale (SRKW) calls, clicks, and whistles.

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).

We will know that the project was successful when there is an increase in correctly tagged SRKW calls, clicks, and whistles by humans via the "I hear something interesting" form in the listening web app during listening events.

We will know that the project was successful when those who have been trained by OrcaLearn are able to correctly assess tagged SRKW calls through OrcaHello (https://aifororcas.azurewebsites.net/Dashboard).

Target audience
Describe the target audience for this project.
You can link to your personas.

The target audience is the Concerned Citizen Scientist primary persona, followed by the New/Infrequent User secondary persona.

Personas of interest:
- Primary Persona: The Concerned Citizen Scientist

The Concerned Citizen Scientist is our target persona, as they spend most of their time on the Orcasound listening web-app. They are the persona most likely to be motivated to be trained to identify SRKW calls and would use OrcaLearn to do so.

- Secondary Persona: The New/Infrequent User

The New/Infrequent User may not be an expert in identifying SRKW calls, but as they increasingly visit Orcasound and start using the listening web app and transition to being Concerned Citizen Scientists, they would be encouraged to use OrcaLearn to learn how to identify SRKW calls.

- Served Persona: The Professional Marine Scientist

The Professional Marine Scientist may or may not visit Orcasound, but they benefit from the correctly labeled calls that the Concerned Citizen Scientist tags and confirms from listening events. They use the data from listening events to conduct research, publish papers, and advise on legislation and policies regarding SRKW conservation.

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 a learning web app that focuses on identifying labeled SRKW calls, clicks, and whistles as defined in the Ford/Osborne Southern Resident Call Vocabulary

Call catalogs for reference:
- https://www.orcasound.net/FordOsborneVocabulary/_SouthernVocabularyTable.html
- https://www.orcasound.net/data/product/SRKW/call-catalog/2018-drafts/2018-12-07-spectrum_comparison.html

Based on research, identifying age-appropriate potential users and designing learning experiences for multiple age levels:
- Elementary School Students
- Junior High/Middle School Students
- High School Students
- College/University Students- undergrad, graduate, PhD
- Adults- non-students

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.)

Teaching users to identify other marine ecotypes and acoustic sources, such as humpback whales, human-made sounds such as boats, marine birds, mammals, etc. commonly found in the Salish Sea/Puget Sound region.

Creating user profiles that require authentication

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.]

Teaching users to identify sounds originating from ecotypes and acoustic sources not found in the marine environment, especially the Salish Sea/Puget Sound region.

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

Although any feature or interaction could be designed, functionalities such as user profiles requiring authentication to sign in might be limited by cloud resources available and ability of software engineers to provide solutions based on knowledge of development languages
- Alternate designs that include removal or alterations of proposed designs should be provided
- Please discuss with Principal UX Manager and dev leadership all features requiring special and/or advanced development resources

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?

TBD

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

- Presentation to Principal UX Manager, stakeholders, and other leadership on discovery research conducted
    - o Including methodologies used, process, and findings that impacted design rationale
    - o Design review of OrcaLearn design before usability testing
- Presentation of final design to Principal UX Manager, stakeholders, and other leadership
    - o Includes usability testing process and results that impacted final design rationale
- User stories in GitHub
    - o Assigned to Principal UX Manager

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

Slack channel: #ux-orcalearn

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/11z21uZdmCBCiULqG4NHOr2LJYL1p33-0?usp=drive_link
- GitHub Product Repo: https://github.com/orcasound/product
    - o GitHub project: https://github.com/orgs/orcasound/projects/25

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

UX Project Resources: Link to GitHub wiki here