

Practical UX Strategy Template for Freelancers: 2020 Edition

Discovery Phase

Supposed we are set with the personas we have, these are the questions worth asking ourselves to move forward efficiently.

What are the problems we're trying to solve?

How soon can we verify our assumptions about the solutions?

If we have multiple options for the direction, what are the trade-offs?

For each problem we've encountered, how might the product function if it won't get resolved right away?

REMINDERS:

1. In this phase, we should also lay out the project budget, resources available, existing constraints so we can work on the sprints according to priorities. We can't solve for everything. We can, however, break things down one problem at a time until we've solved most of what's urgent and what's beneficial for both business and product.

Things we can do:

- **Internal stakeholder interviews**
(1-on-1 with the people who will be involved in this) to find out the following:
 - project blockers
 - clarity of vision
 - clarity of direction
 - look for problems in the development early on
 - test the friction of the ideas and solutions floating around
 - get everybody on board to think about the customer experience EARLY
- **Competitive analysis**
- **Feature prioritization**
 - # of participants: 5? at least one for every department (PMs, Devs, Designers, founders etc)
 - How long? 1-2 hours?
 - What is it?
 - Scope out the problems we've uncovered, the personas written and bring them in front of the team. Discuss proposed solutions or ideas. Ideate with the team on features.

Defining Phase

Supposedly we already have the problems mapped out and a couple of other issues that come along with it. What we need to define on this part of the process are the following:

Deliverables

Business requirements

Technical Specs

Design Specs

Customer Journey

User Flow

REMINDERS:

2. Ensure that engineering stakeholders are aware of the product milestones
3. MVP should be locked in, defined before you move forward from this phase

Things we can do:

- **Work on a high level project roadmap with stakeholders**
- **Schedule a pair design session with a few folks from the design team**
- **Map out points on the customer journey that will concern different departments (i.e: CX needs to be aware of given set of product issues, design to make sure onboarding is seamless, PMs to be aware of the possible customer issues on product usability and so on, and so forth)**

Creation Phase

Questions for this phase:

Is the product actually fun?

What are the areas where it can be improved?

Is the gamification working?

Is it beneficial to product/business goals?

Is the design actually working?

Deliverables

Paper wireframes

Interactive prototypes

Product UX writing

Interaction design

Things we can do:

- **Prep for testing**
 - Approved script
 - Task analysis
 - User stories
- **Remote usability testing**
 - Usertesting.com
 - Userlytics.com
 - ethnio.com
- **Internal usability testing**
- **Design critiques**

Post-MVP Phase

Release a *beta* version to a certain % of the users we have
Gather feedback from those users
Iterate and ensure it's fitted for the MVP

Release MVP

Gather early feedback from users

Deliverables

Video interviews

Things we can do:

- **Work with CX on anticipated customer feedback/issues**
 - 1-on-1 weekly calls
 - Daily reports
- **Refine project roadmap** (where we are, what have we achieved so far, what worked, what didn't)
 - Project management
 - Post-mortem
- **More UX Research**
 - Usability Testing
 - User Interviews
 - Surveys
 - Gather reviews on the app store, marketplace, social media
- **Design Evangelization**