

Establishing your

DESIGN STACK

A detailed guide to setting up your Product Design Department

Whether you are an enterprise company establishing your digital roadmap or a newly formed start-up, you can use this guide to set successful user experience and user interface processes.

Requirements

What is your project setting out to accomplish?

In your kick off meeting, set out to have a document ready for your stakeholders and contributors to work off of. What is it that they are wanting to accomplish and translate this into a user statement.

“As a policyholder, I want to see a dashboard that allows me to download documents and pay my bill.”

- What do our users want?
- What are we hoping to achieve?
- Why are we doing this?
- What do we know?
- Who needs to be here?



Data

Don't make assumptions, get to know your users through data.

Find your key datapoints

- Device sizes
- Common browsers
- Top pages
- User demographics

200K

Desktop Users

10K

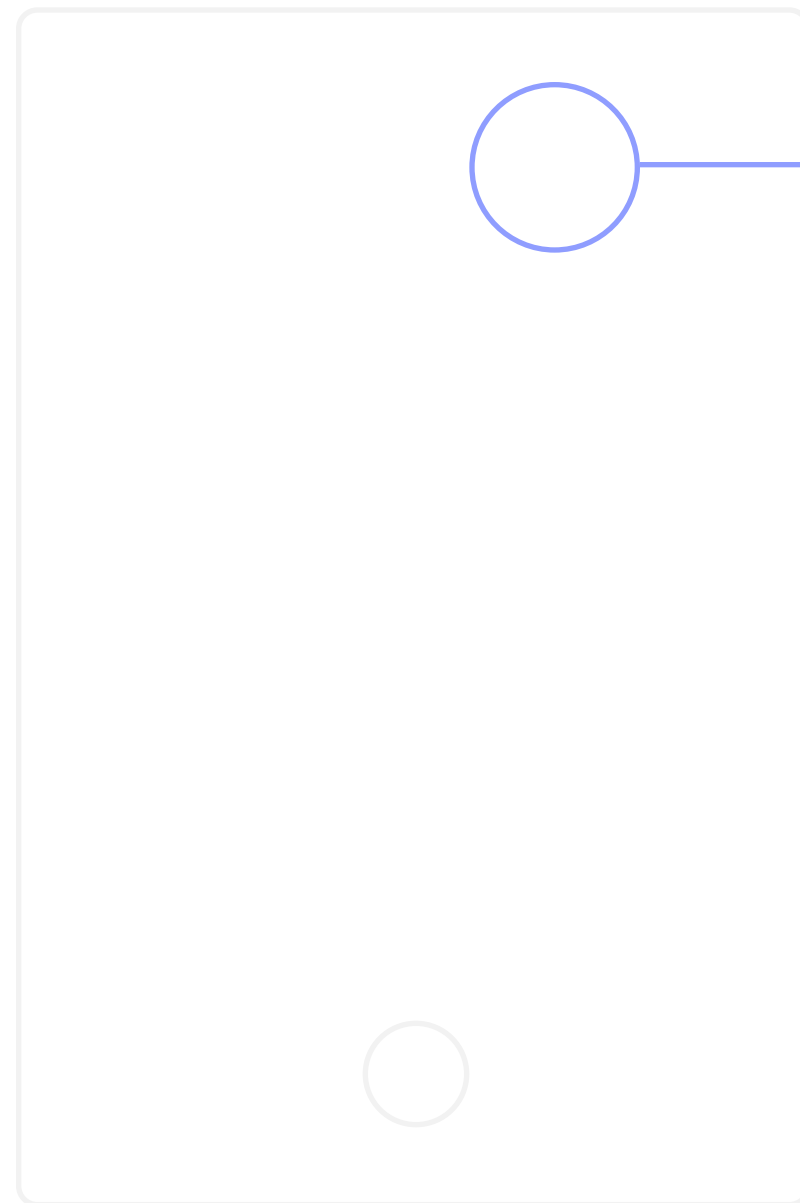
Mobile Users

Use data to guide your baseline decisions, you should not be designing mobile first for a majority desktop only traffic app. Mobile artboards for a responsive site is not a solution. Please stop saying "mobile first".



Swipe

It's been done before, go forth and search out who done it best.



Feature Widget

Someone has likely done this before, whether it's a feature or a toggle button

- ✓ Create an inspiration board
- ✓ What do we admire?

Swipe is a common practice of competitor audits and inspiration. Use the interwebs or even magazines to find some great designs you admire and creating an inspiration board for your new project.



Interviews

Establish a template for your company to use to conduct user interviews and assign them out to be conducted on a regular basis.

I want to...

Gathering Insights

- Surveys
- Diverse Subjects

Create an interview template

If you provide an interview sample to other employees, you might get more participation in user research through interviewing. Create a repo for your completed interviews and how to present your findings.



Personas

Organize your thoughts on who you are designing for. Walk through your demographic data to see if there are huge differences such as location, age or gender.



Agent

Ohio

45 Yr

Dan Patterson

As an insurance agent, I want to manage my agency sales goals and user database.

Women

41,643

Men

9,484

Who are you designing for, how will you use these personas be used in UAT and other departments? Don't forget users such as blind, low vision and other mobility device usage.

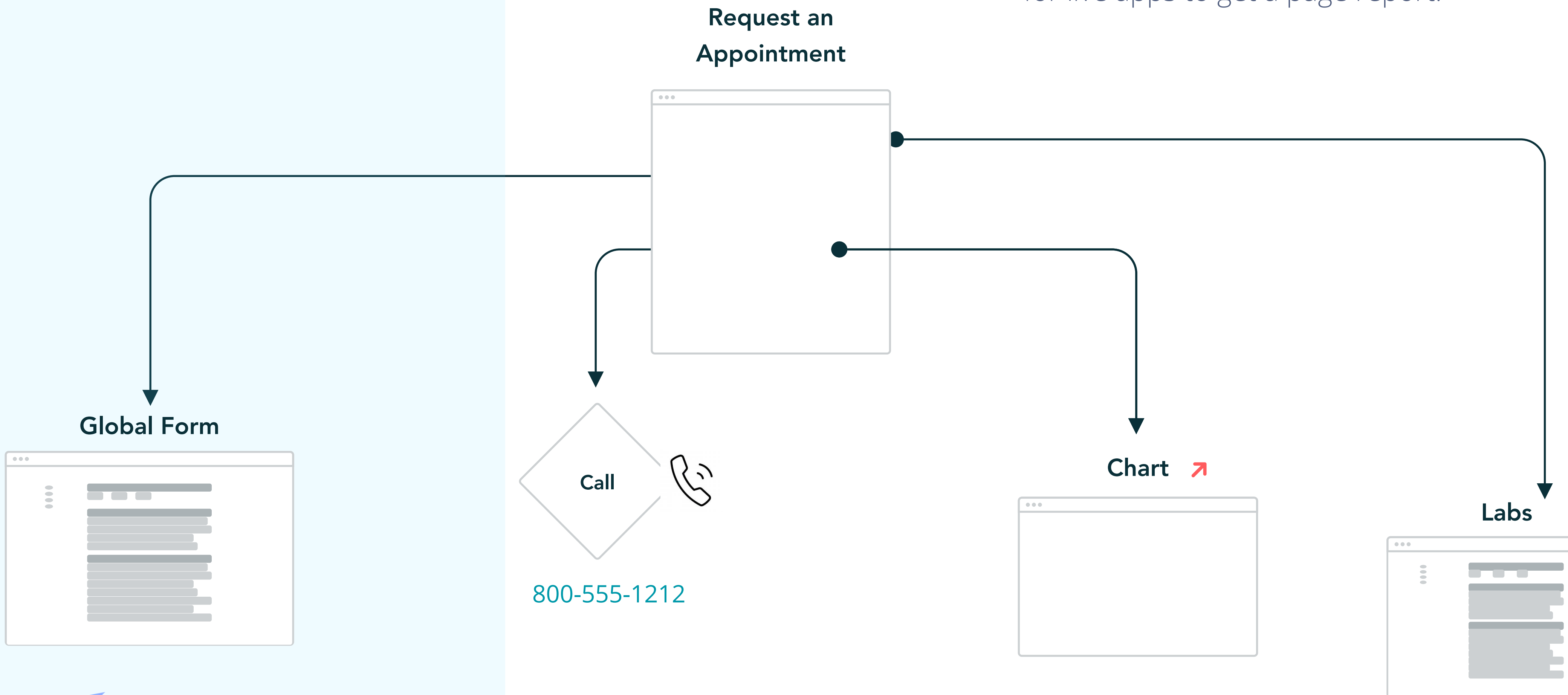


UX Flow

Map out your user flow, take notes of any blockers or items that might need to be addressed.

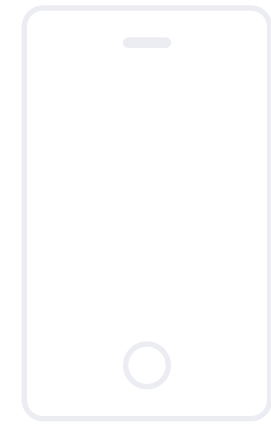
If you make your userflow maps too busy, you may lose your audience. Don't let your work end up in the circular file. Break the mold, you don't need to just use chart software.

- Get creative, make your own.
- Use sidecar or another library that you can customize to match your UI.
- Screaming Frog is a great reference for live apps to get a page report.

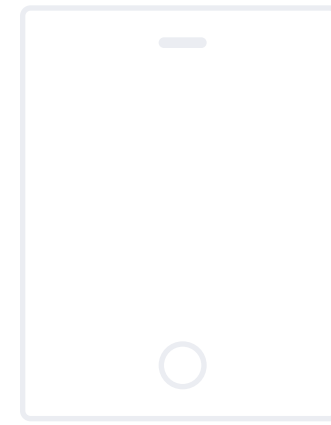


Artboards

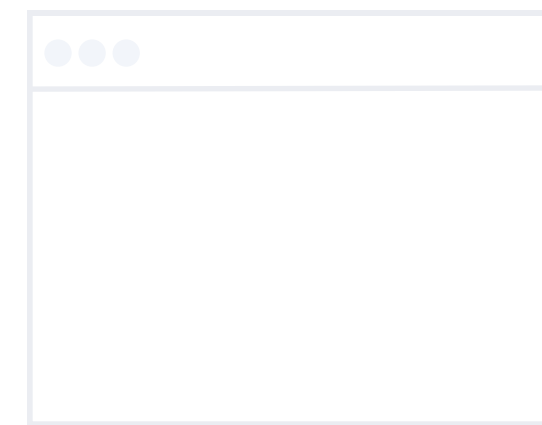
Every organization is different, save yourself some headaches and document what sizes you will deliver for your responsive designs.



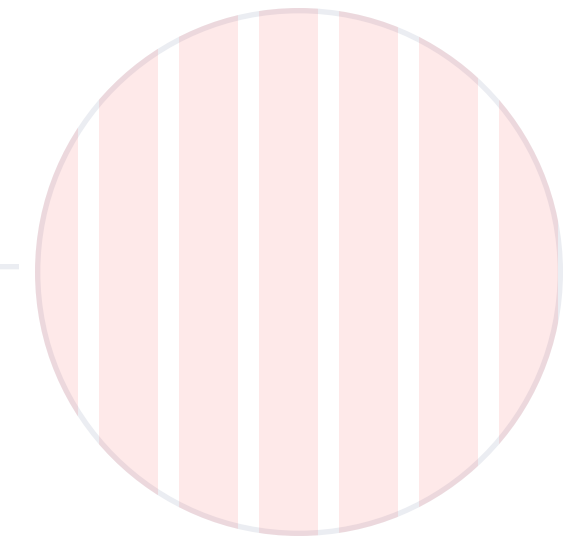
360 x 640



768 x 1024

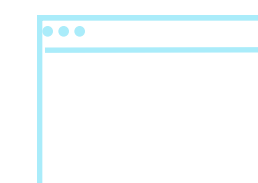


1920 x 1020

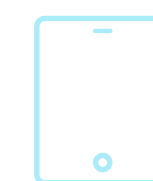


Don't forget your grids

Check the traffic of your sites and apps, why would you spend design and developer time delivering tablet work if you have zero traffic on that device?



90%



0%

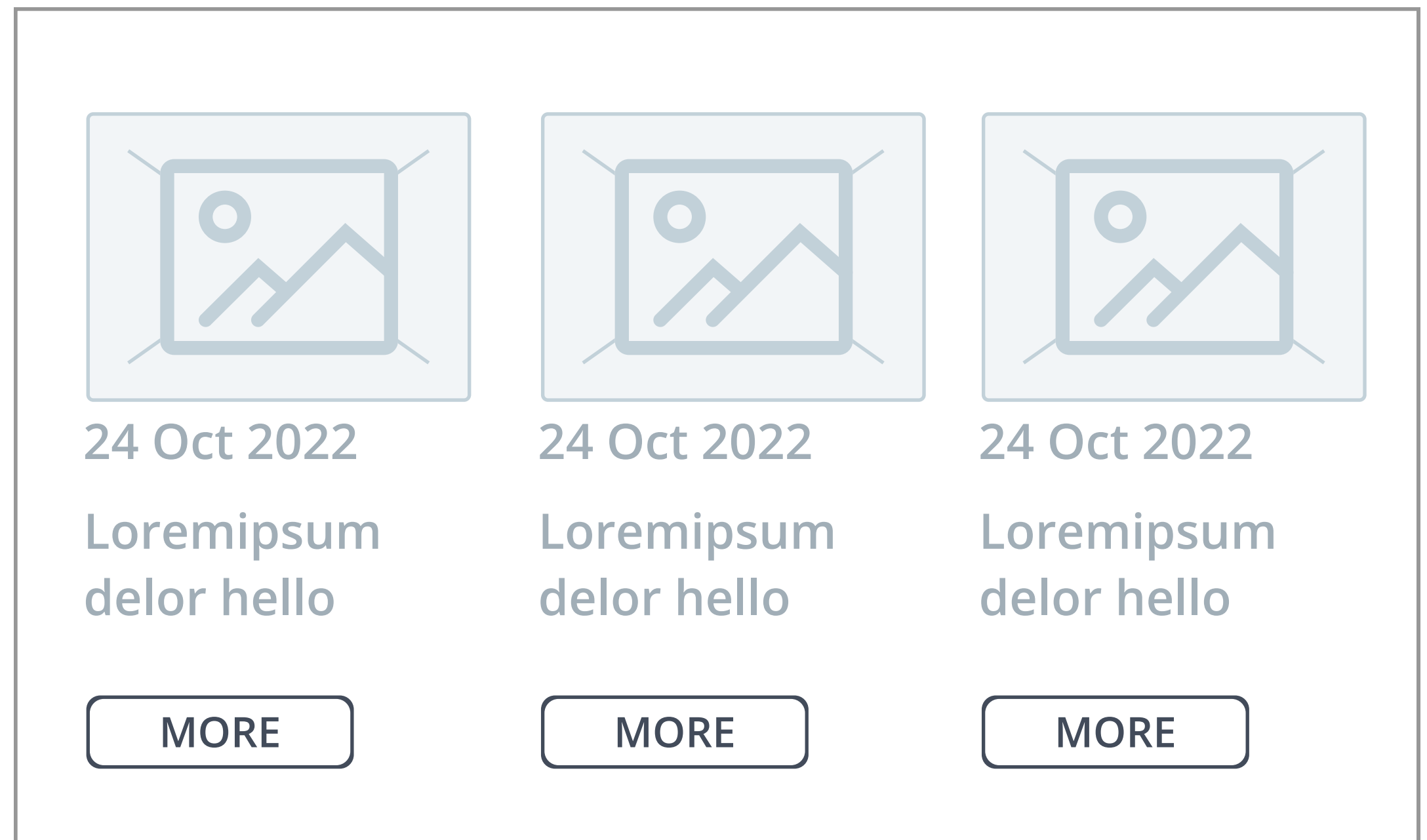


10%



Wireframes

Decide on how you want to deliver wireframes. Some smaller companies may skip this step all together, especially if the production proto was dev'd first.



There are many wireframe kits for free or purchase. It is a good idea to have a library ready to go and approved should you need one.



Library

Your design library may include just UI components or also include branding from marketing, content writing best practices and more. It is what you make it.

Iconography



Typography

HEADING ONE

Forms

Choose size



Buttons

CHECKOUT

Establish your design review process and a document for designs to be added, reviewed, approved and sync'd down. You can do this during your design meetings.



Prototyping

You will set up your wireframes or high-fidelity prototypes in various software. Some use Figma, and some use Sketch with Invision.

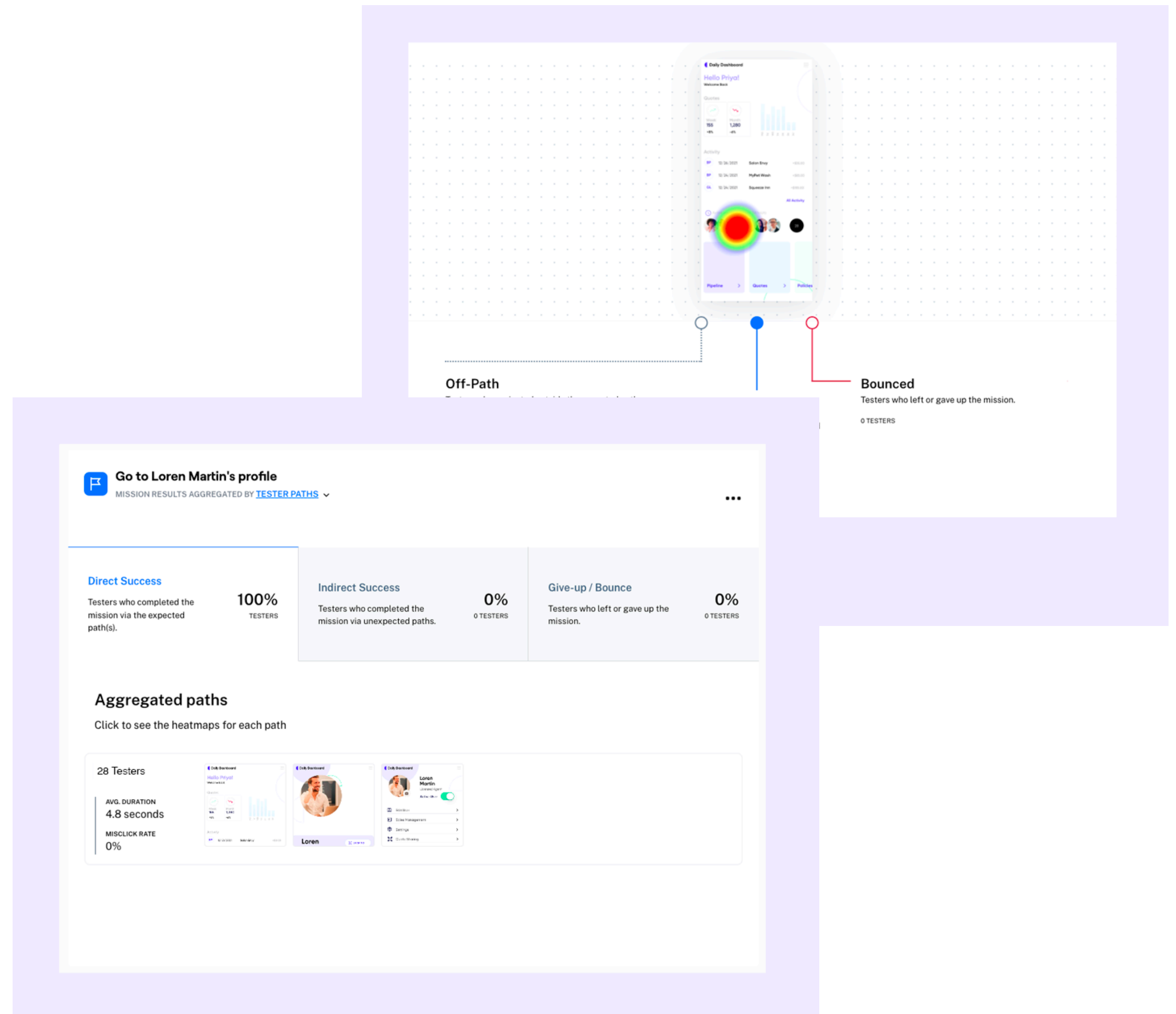


Some companies may use both Figma and Sketch. Many organizations have legacy design files and the design department might not take the time to update all screens. Just go with it!



Maze

Once you have your prototype ready, get to testing it. You will be surprised at the user friction that you can find.



All of our designs are perfect right out the gate right? Well you may want to test them just in case. Maze offers a few free projects at a time and can offer helpful insights on to the plausibility of your new app flow.

Heatmaps

Whether you choose Mouseflow, Hotjar, Crazy Egg, Log Rocket or any other heatmapping and recording tool - you will want to implement one.



- Find where your fold is hitting for most users
- Use the rage clicking feature to identify friction
- Create a repo where you can keep these insights to refer back to them

Security alert! Yes these tools are difficult to implement if you have a login page or security concerns. It's worth it to work with your IT department to pick one that works for your needs.



Checklist

From hot mess to organizational success.

- Why are we doing this?
- Persona creation
- Metrics on common users
- Gather data screen sizes and devices (mobile, desktop, browsers)
- Interview template
- Interview repo for storing completed research
- Set up Hotjar, Mouseflow or other screen recording software
- Swipe and competitive analysis
- Establish your UX flow chart standards
- Establish your wireframe library and process
- Define your artboard sizes, breakpoints and pixel grid standards
- Create your design library and cadence for updates
- Set your accessibility design and testing guidelines
- Establish your prototyping standards and review cadence
- Set a regular organization wide UX review schedule





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