

# PROJECT GOALS

Project Name

---

Brief Overview

---

---

---

---

---

Goals and Expected Outcomes

---

---

---

---

---

Target Audience

---

---

Brand Guidelines

---

---

---

---

Timing

---

---

Technical Requirements

---

---

---

---

Related Activities








































---

---

---

# DELIVERABLES WORKSHEET

Project Name \_\_\_\_\_

| Complexity  |   |   |   |   | Tool/Method           | Days, Scope/Amount                                | Description/Use   |
|---|---|---|---|---|-----------------------|---|---|
| Short cycle   | Holistic alignment  | Scale or team   | Highly interactive  | Unknown or mismatch   |                       |   |   |
|   |    |    |   |    | Bus. Owner Interviews | <input type="checkbox"/> <input type="checkbox"/> | Knowledge transfer of business requirements                                   |
|   |    |   |   |   | Bus. Req. Workshops   | <input type="checkbox"/> <input type="checkbox"/> | Clarify project goals   |
|   |    |    |   |   | Personas              | <input type="checkbox"/> <input type="checkbox"/> | Creation of key user archetypes to aid in scenario definitions                |
|    |   |    |    |   | Storyboards           | <input type="checkbox"/> <input type="checkbox"/> | Time representation of environment, goals, and emotional context              |
|   |    |    |   |   | Scenario Workshops    | <input type="checkbox"/> <input type="checkbox"/> | Multi-disciplinary scenario generation, prioritize user scenarios             |
|   |    |   |   |   | Usability Testing     | <input type="checkbox"/> <input type="checkbox"/> | Product validation, test preparation and execution                            |
|    |   |   |   |    | Guerrilla Testing     | <input type="checkbox"/> <input type="checkbox"/> | Informal customer reviews, public sprint demos                                |
|   |   |   |   |    | User Monitoring       | <input type="checkbox"/> <input type="checkbox"/> | Immersion research in live environments to capture customer behavior          |
|   |   |   |   |    | Competitor Review     | <input type="checkbox"/> <input type="checkbox"/> | Contrast and compare competitor products and services, gain key insights      |
|   |   |   |   |   | Analytics             | <input type="checkbox"/> <input type="checkbox"/> | Instrumentation creation and evaluation to capture customer behavior          |
|  |   |   |   |  | Surveys               | <input type="checkbox"/> <input type="checkbox"/> | Survey creation and customer response collection, analysis, informs direction |
|  |   |   |   |  | Expert Review         | <input type="checkbox"/> <input type="checkbox"/> | Review of product by expert to uncover key usability issues                   |
|   |  |   |   |  | Task/Goal Modeling    | <input type="checkbox"/> <input type="checkbox"/> | Model of user interactions for each user goal                                 |
|   |  |   |   |  | Customer Journey      | <input type="checkbox"/> <input type="checkbox"/> | Visualization of UX flow before, during, and after product consumption        |
|  |  |  |  |  | Info. Architecture    | <input type="checkbox"/> <input type="checkbox"/> | Organization of information to aid in discovery and consumption               |
|  |   |   |   |   | Sketches              | <input type="checkbox"/> <input type="checkbox"/> | Low fidelity, hand drawn UX designs, agile environment                        |
|   |  |  |   |   | Wireframes            | <input type="checkbox"/> <input type="checkbox"/> | User flow, task and content navigation system interactions                    |
|   |  |  |  |   | Prototypes            | <input type="checkbox"/> <input type="checkbox"/> | Working prototypes to enable more tactile and realistic user feedback         |
|   |  |  |   |   | Visual Guidelines     | <input type="checkbox"/> <input type="checkbox"/> | Detailed design templates, guidelines and specifications                      |
|   |  |   |  |   | Visual Design         | <input type="checkbox"/> <input type="checkbox"/> | Visual language refinement, brand expression                                  |

# INTERVIEWS CHECKLIST

Project Name \_\_\_\_\_

## Project Team

- ☐ Project Manager
- ☐ Project Sponsor
- ☐ Designer
- ☐ Developer
- ☐ Tester
- ☐ Content Producer

## Business Drivers

- ☐ Executive Officer
- ☐ Financial Officer
- ☐ Technical Officer

## Support Team

- ☐ Call Center Manager
- ☐ Call Center

## Product Owners

- ☐ Director
- ☐ Manager

## Associates

- ☐ Sales
- ☐ Partner Producer
- ☐ Franchisees

## Marketing Team

- ☐ Marketing Officer
- ☐ Campaign Coordinator
- ☐ Art Director

# INTERVIEW PROMPTS

Project Name \_\_\_\_\_

Who \_\_\_\_\_ Role \_\_\_\_\_

Perspective of current customers

---

---

---

---

Perspective of the products

---

---

---

---

Importance of the project

---

---

---

---

Current customer experience

---

---

---

---

Best product and why

---

---

---

---

Expected outcome/how measured

---

---

---

---

Future customers

---

---

---

---

About the competition

---

---

---

---

What would make it a success

---

---

---

---

5-year vision

---

---

---

---

Customer loyalty

---

---

---

---

Related projects which effect this

---

---

---

---

## USER TESTING

Project Name \_\_\_\_\_

Test Goal Initial Benchmark

Initial Benchmark 

Expert Competition ☐

Gather Requirements ☐

Reveal Problems ☐

Compare ☐

Benchmark ☐

Customer ☐

Innovation ☐

## Method Checklist

Formal

☐ Lab ☐ Remote

## Resources, Capabilities

Issue Note Taker

☐ Catering

Test Facility

☐ Video Capture

☐ Observer Facilities & Monitors

☐ Observer Q/A Tool☐ Eye Tracking

## Location & Logistics

Start Time:

Finish Time:

User Errors:

System Errors:

## Test Plan

## Persona Counts

\_\_\_\_\_

## Pre-Test Questions

## Test Objectives

## Recruitment Instructions

Session Dates \_\_\_\_\_

### Slot Times

# of Standby

Ideas to fix problems encountered:

# HEURISTIC EVALUATION

Scenario # \_\_\_\_\_

Total score \_\_\_\_\_ of 100

| Usability Area  | Comment | Score (0-10) |
|---|---------|--------------|
| Visibility of the status system                         |         |              |
| Match between system and real world language            |         |              |
| User freedom matches expectations                       |         |              |
| Consistency and standards, follow common conventions    |         |              |
| Error prevention  |         |              |
| Recognition rather than recall, all actions visible     |         |              |
| Flexibility and efficiency of use, accelerators         |         |              |
| Aesthetic/minimalistic design no irrelevant information |         |              |
| Error recovery  |         |              |
| Help and documentation                                  |         |              |

# STORYBOARD

Storyboard name \_\_\_\_\_

Scenario # \_\_\_\_\_

|                                     |                                     |                                     |                                     |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> |
| <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> |
| <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> | <div></div> <div></div> <div></div> |

## SCENARIO

Number

## Persona

## Background

## Script



# PERSONA

Name

## Background

## Keypoints

## Personal Goals

## Pain Points or Needs

Narrative