

EPISODE 51**[INTRODUCTION]**

*“**TG:** I think it's important to develop your work rhythm as you're progressing in your career. You got to understand how you work best and your method for problem solving. Of course you could use the design thinking process for problem solving as you should, but you've got to understand what you need from your client to provide value.”*

[00:00:27] TG: You're listening to the UI Narrative podcast, the bi-weekly podcast that shares the stories of people of color interface designers and researchers and their contributions towards creating user-centered experiences. And I'm your host, Tolu Garcia. Let's get started.

Hey, guys, it's Tolu here with a quick word from our sponsor. To design great products, a focus on the user is everything. That's true for me and for the teams at Google. Today's sponsor, Google Design, produces original content, like articles and videos to show how Google's products come to life, and to inspire designers everywhere. For example, on design.google, you can learn how Google Maps streamlined a palette of 700 colors down to 25 major and minor tones, or how an R&D team distilled five years of research into a tiny, intuitive, emotionally intelligent radar chip. How cool is that y'all?

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[EPISODE]

[00:00:43] TG: Hey, everyone. Welcome back to the show. On this episode I'll be going over how I lead a UX project. Basically, I'm going over my entire thought process from beginning, middle and end stages of a project. And I'll share the questions that usually

come to my mind at each stage. I think it's important to develop your work rhythm as you're progressing in your career. You got to understand how you work best and your method for problem solving. Of course, you could use the design thinking process for problem solving, as you should. But you've got to understand what you need from your client to provide value. You should learn how to lead a project, because I want you to aim for career growth and not remain a mediocre designer or researcher. And being mediocre isn't limited to those like with little to one-year experience. I'm talking to those of you too with two to six years' experience. I think it's important to understand how the UXers think.

Some of you may not be exposed to this because of the type of job you have. So the project stages I'll go over today will help you improve your problem solving and communication skills by learning how to do it on your own. You don't have to manage people in all cases as a leader senior designer. But regardless of if you want to be a lead on a team, I think this episode, you'll learn how to manage your time on a project which will help improve your workflow and efficiency.

Let's start at the beginning of the UX project. So when I start a new project, I think it's important to come to the project meeting prepared to take action. And this actually will look different depending on your role in the project. And what I mean by that is you might be the only designer or researcher on the team, or you'll be working on a team of designers and researchers. If you're not the person leading the project, you might be assigned your first task. But it's still good to be prepared to ask questions before you begin your work. And I'll be going over questions you can ask your boss or client to understand your project role.

So every time I'm giving a new project, whether it's an existing product or brand new, I go through a series of questions that will help me understand how to define what their goals are, what their product does and is about, what deliverables are needed for the project, collaboration requirements and what I need to get started. So let's break this down.

Here are some questions to define what their goals are and what their product does and is about. Tell me more about what problem your business is trying to solve? Is it a refresh? What's wrong with the current version? Is it a new project? Why is it being created? Are there problems in the current business? Are you having trouble making revenue? Basically,

you should gain a good understanding of what their product does and how it works. You're looking for what the problem is in their own words.

In a lot of cases the client won't be able to identify what the true problem is with their product. And I mean, that's what a product designer's job is, a researcher's job is. So it's good to write down the verbiage that they use to describe their pain points. And I'll talk more later in the episode on how I use a UX audit to identify product problems for the client.

Additional questions I ask are has your team done a project like this in the past? What went well or things you wish went better? Were there any challenges? So you're looking for any red flags with the project management and business management. You can take note on how they talk about the project to see if they are passing the blame around. And this will help you later on while facilitating the meeting. And you might be able to identify some team constraints here too like an early pass at who the stakeholders might be.

More questions, what will success look like for you? What type of metrics are you looking to achieve, like click-through rate, more leads desired by an audience? So listen closely to the words used. And you can use those later on in a presentation to mimic how they understand success. So they may not have an answer for you, but you can guide the conversation to get a general answer. And you'll also have a chance to bring this up during and after the project is finished.

And the last set of questions I have here, are there any challenges that would prevent the project from being successful like industry regulations, brand guidelines? How does the process for this product developed work? Will developers be on the call? Can that be requested at certain stage of the project? So take any notes of any technical constraints mentioned. And if you don't understand why it's a constraint, then ask questions until it makes sense. It's really important for you to understand the technical constraints. So you can make a functional UI.

You may have some influence later on to make some changes depending on the project time and budget. I recommend trying to have at least one call with the developers too. So

you can ask them questions about the way the UI is developed. Sometimes the initial product design looks nothing like what's been developed. But I think it's important to understand why that even happened so you can design something that's functional.

Next, you'll need to define what deliverables are needed for the project. And you can start with – Well, depending on your role in the project, the services may be predetermined by your bosses. But if not, let them know the services that you recommend and the benefits of those services. So this may be something you provide on the first call. Or if you need more time to evaluate everything, it could be on the next call. So here's what it could sound like. I recommend a UX audit. It will help you understand if the new functionality feature is a valuable addition to your product and whether users need it. Besides, you will also know if your functionality is well-perceived by users and whether they experience any difficulty in navigation.

Or you could say I recommend a UI brand redesign. It will elevate your business and build recognition and loyalty. Customers are attracted to brands that share similar values with them. When you showcase what you value through branding, customers will develop an emotional connection to you. With the user-friendly interface and easy navigation, the user decreases search time and increases edification, fulfilling their needs in a fast and efficient way. In turn, the brand increases sales volume, improves customer loyalty and minimizes costs and resources.

One more example, I recommend a design system. Gives your team the ability to replicate designs quickly by utilizing pre-made UI components and elements. Teams can continue to use the same elements over and over reducing the need to invent their wheel and, thus, we're seeing an unintended inconsistency. So I think you get the point now. After you come to an agreement with services, then you need to ask them if there's an example that they've seen that they like. So give them an example of what you're expecting as far as like how they should go about providing examples. So you can guide them in a way for how to look for good examples. And they most likely won't have an answer for you on this. So I think just some good homework to give them for your next meeting.

Next you'll need to define collaboration requirements. So how will you share feedback and who will need to be involved for development to progress is really important. Who are the stakeholders in this project? Slack or email, meetings intervals, like 30 minutes, one hour. How often do you want to meet? Every week, every couple weeks? Project timeline. How long do you have, right? That's really important. So you may not get complete answers here. And the roles of the people might change during the project. So I think it's good to revisit these questions until you have the answers you need. But that could change as the project continues.

So all these questions are very important for maintaining a reliable source of communication. So take some time to understand like who does what and take notes of who said what. It'll be resourceful to keep a track record of who is owning whatever task. And if you have a project manager on your team, this should most likely be their job too. So ask them for help in meetings to document this.

So the last step here in the beginning of the project is you need to define what you need to get started. So ask who will send you existing brand guides, color palettes, logos, screenshots, or access to products if they have like a test flight for your mobile device. And confirm at the end of the call that the assigned person will reach out after the call. So clarify that you have what you need to make your next step. And sometimes it means you follow up with someone after the call. So when you end your first call, you should know what you're doing next and what they will provide you the next call. And yeah, that's all the steps for leading the beginning of the project.

Let's take a short break

[BREAK]

[00:11:14] TG: So one of the top questions I get about product design is how do I stay inspired? And the other day I decided to take inventory of what I'm doing routinely. The biggest thing that stood out to me was how I'm always investing time to understand products that are advancing in design and technology. Today's sponsor, Google Design, produces original content like articles and videos to show how Google's products come to life, and to inspire designers everywhere.

On Google Design, you'll get to know how the products used by billions actually get made. And hear from designers behind some of your favorite products like Chrome, Google Maps, and Nest. Head over to design.google to get inspired. That's design.google. Or follow them on Twitter and Instagram @GoogleDesign.

[EPISODE CONTINUED]

[00:12:07] TG: All right. Let's get into the next one, the middle of the UX project. So after I have those kickoff calls, the order I typically think things through is like how do I identify the product problem for the client? How do I want to present work for feedback? How much time do I need to dedicate to the task? Should or can I delegate any of my tasks? And how do I maintain keeping my client happy?

So the first one is how to identify the problem for the client? So there're multiple types of problems a business could have with their product. And some of them may be out of your control. So you need to identify what problem you can solve to provide value. Your client or boss mentioned product or business pain points in your initial meeting. So it's good to list out what the problem statement is for the project.

You can start by identifying common problems by doing like a UX audit which examines information architecture. So looking at the content structure. How does the flow of a page read? Do the navigation systems help users understand where they are, what they found, what's around, and what's to expect? For visual design type hierarchy, what styles belong to headers, buttons, body copy, et cetera? UI patterns, what patterns are they using? Are they being used in the correct way? Are they being consistent? Grid, what rules are being used for margin and padding? Iconography, are they being consistent? Color, are they accessible? Are they even necessary colors? And compatibility, so how would this translate to a different OS? iOS versus Android, desktop? Seeing if it needs to be responsive for website. And once you've identified all the problems in the product, you can start thinking about how to go about the problem solving.

Some of the questions I ask myself there, what can be done differently? What can be improved? What's unnecessary? And what should be user tested? And can I test the

current design? So I'm going through the defining and ideating steps of the design thinking process here while evaluating the UX audit that I've done. So after I'm done with that extensive process, and just speeding it up here, I have my thoughts and designs put together. So then I start to think about how do I want to present work for feedback. And if there's any of you that are a bit confused with what that design thinking process is like, I do have an episode called UX Design Process. Check that out.

All right. So let's talk about the first presentation. So I think it's important to wow them and open their imagination to what is possible. So I like to present a few initial designs as a teaser with the UX audit data I've gathered. And I also like to mimic some of the business words that they use. So I'm speaking their language. It's also to leave a good first design impression and get them excited about working together on the project, because they can see what we're capable of creating. And I call it a teaser, because in a perfect world, it would meet all their needs, but there will be some constraints brought to their attention after they see this initial concept. So all right, I've wowed them with the initial designs. But now we got to get them to focus on what they want created. And in my experience, showing them concept designs early makes them arrive at an MVP decision faster. So seeing the concept design persuades them to decide what's more important for their next feature release, because they'll see everything that's wrong with the concept that they don't want there. So yeah, I like to focus the rest of the presentation. I'm convincing them to make product decisions so we can use our design and research time wisely and understand how we can provide value immediately for users. So I take them through an MVP, which is a minimal viable product chart. And I'll link one in the show notes. But this will help them prioritize our focus and task.

Also, it's just better to get straight to the point by doing this exercise with them because it's more overwhelming for the client if you're just saying like how everything is wrong. They can get a bit frustrated. But you're doing that, but it's not helping them prioritize where to begin. So doing this little exercise, MVP chart, which I'll have linked in the show notes, is a great way to get started on what to focus on.

So the MVP chart will help ask questions like how crucial is it that a business solves this problem? And how realistic is it to design and build a solution? I list out all the business

opportunities. But at the end of the day, the company will decide what's best for them with their time and budget on the project. And the product direction may not be what you prefer, but you can still make a great product by using UX foundational skills. And who knows? After your presentation, you may be able to influence some change for fixing some of the technical constraints. And they may decide they may want to put like more money into this project or extend the deadline. So hopefully by the end of this meeting or the next meeting the client will agree what features are most crucial to work on. Oh! And you should have a habit. I'll keep saying this, at the end of each meeting, clarifying what's expected for the next meeting.

After the initial presentation call, I decide on how much time I need to dedicate to task. Establish a good time management for completing your task. So plan out a schedule for how many tasks you want to tackle each week based on the project deadline. I know sometimes it can be hard to judge the speed. You should go when there's a lot to do. But the way I like to think about this is what's the big problem, the median problem and the small problem? So I always start with the biggest ones first because those are usually the most noticeable and transformative for the product. Then I start to tackle the other ones as time permits. It goes into like the MVP. Some are going to be nice to have. They're kind of fit in there. But it really just depends on time. So also just make sure you don't overestimate what you can deliver.

I say this because your first idea is usually not the best you can do. Like, come on, be real. So account for that by patting the deadlines. Don't promise a week if you need to, okay? Of course, you'll be continuously iterating as you conduct user testing and receive feedback. But you should leave room for error. Give some space to think and rethink.

Something else I consider is if I should delegate any of my tasks. So if it's too much work for you to deliver quality work by the deadline, then you need to delegate some tasks. Also consider leaving room for discussion. An ideation with your team as you delegate task. And I know a lot of you may not have you know team members to delegate too, but maybe you have like a project manager. Let them schedule the meetings or send the emails and help take notes.

The last thing I want to mention about the middle of the project is how to maintain keeping your client happy. So I'll say this again because some of you might have had me on mute. You might have turned the volume down. So turn it back up. Aye? You listening? Because I think it's pretty important to manage client expectations. You should end each meeting with what they should expect next call. And don't over-promise. For example, if you want the client to provide feedback for something, give them a deadline. And if they miss the deadline, check in. Also try your best to build a working timeline with developers based on their design sprints. So sometimes the development schedule doesn't align with the design timeline. So just communication helps a lot there to make sure that you are meeting the needs of the product deadline.

Stay consistent with the value you deliver. So not every presentation needs to show several designs, but they do need to show value and progress. So get in the habit of putting everything in a presentation and preparing before each call. Also adjust how you communicate with the team based on their needs and yours. You might need to email or Slack in between meetings to get updates, file transfers, or just some clarification on something. And then the last thing I want to add here is to document your progress so you can show off the growth of the product. And this could look like quantitative or qualitative data from user research. Or it could just be like a design evolution from your ugly ass design is the beginning to this magical, beautiful unicorn that you created now.

So this will be useful for your portfolio. And also, too, it's just building report in client meetings. Clients love reflection of seeing like how progress is going, because sometimes when they're just spending so much money on something they can feel a bit like, "Oh, where are things going with this?" But when they can see that progression, it puts a smile on their face.

All right, so now let's talk about when you reach the end of the project. So see if there's any data the team can share that you can add to your portfolio, like downloads, site visits etc. And yeah, that's it, y'all. I made this short and sweet. I wanted it to be easy to remember. That's pretty much the end of this episode. Hopefully this will help you have a framework for leading UX projects. If anything, it will save you some time, because you can rinse, repeat and modify this process.

And I want to leave you with this quote, “Design is the intermediary between information and understanding.” And that's by Hans Hoffman. You can always email me at hello@uinarrative.com. Or DM me, y'all, on Instagram @uinarrative or Twitter @uinarrativeco if you have any questions about this episode. I really would love to know if you found this episode useful. It's a topic I've been thinking about providing as like a guide or something for free. Let me know what you think of this episode and podcast by tagging me @uinarrativeco on Twitter. I'd love to hear from you. And talk to you in two weeks, friends.

[OUTRO]

[00:22:52] TG: Thank you for listening to the UI Narrative podcast. If you like what you hear, make sure to show this podcast in love by commenting and subscribing where you listen. You can find me on Instagram and Facebook @uinarrative, or Twitter @uinarrativeco. I also respond to emails at hello@uinarrative.com. Talk to you later. Bye.

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