

Mastering the Design Process

Being a great designer is about more than creativity. It means producing designs that provide real business value and to do so while dealing with difficult stakeholders.

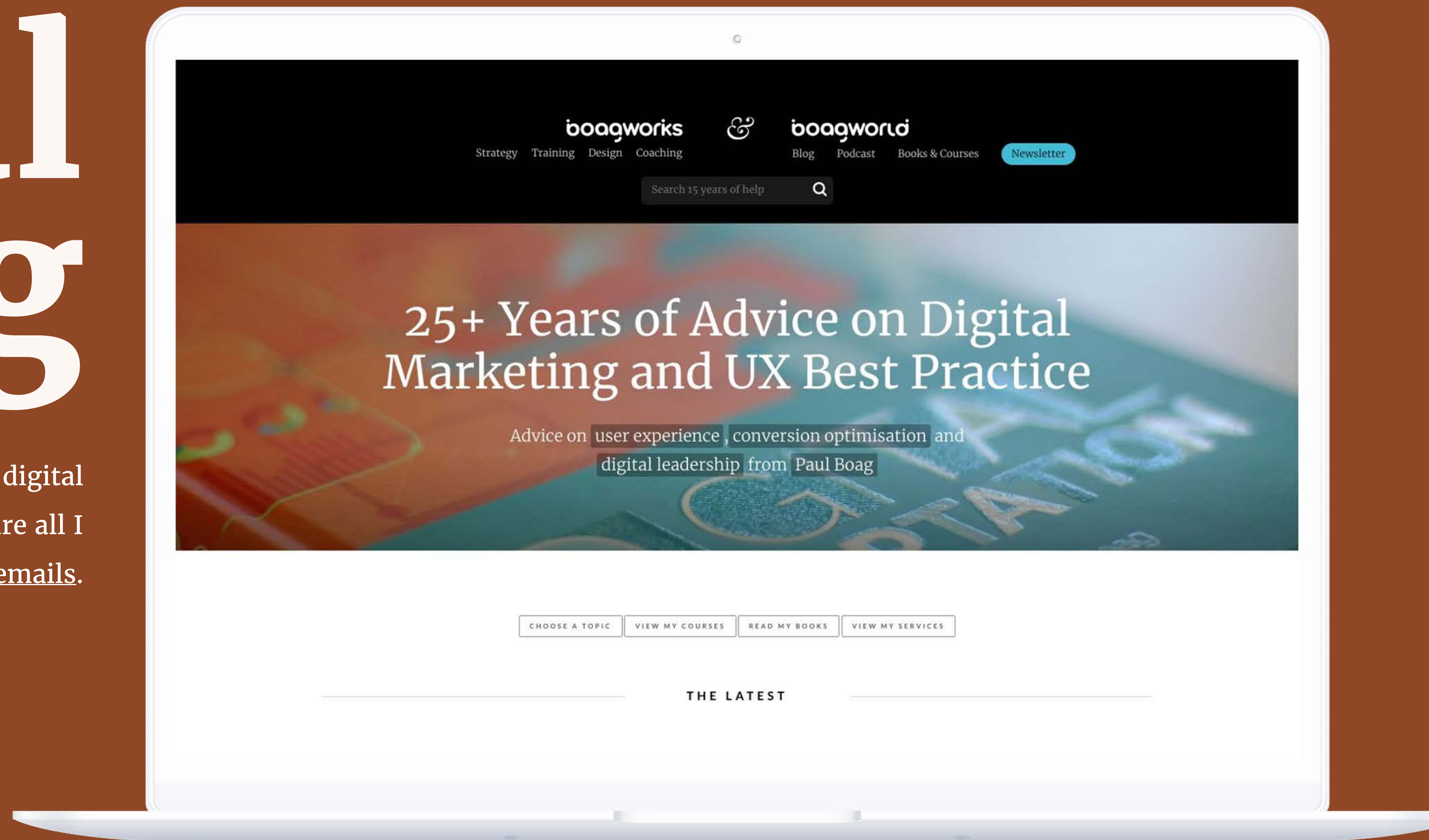
Paul Boag

I have been working in digital for over 27 years, 13 of which involved running an agency and 6 as an independent consultant.

I have worked with clients in every conceivable sector and both multi-nationals as well as small startups.

Paul Boag

I have written 6 books on various digital topics, speak internationally and share all I know through [my blog](#) and [emails](#).



Running a Design Project

Running a design project in the right way is essential for success. In this session, you will learn how to structure your design projects and what to include in each stage.

Why design projects struggle

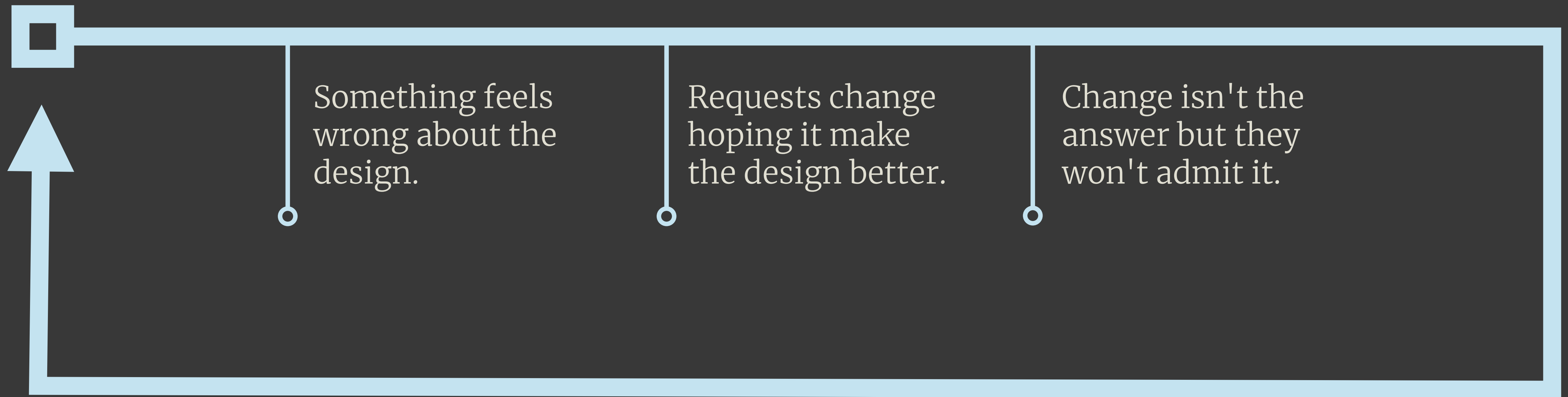
Scope creep

It is not until a client can see the website that they will think of what else can be done and spot what is missing.

Subjectiveness

Design is subjective and each stakeholder will see it differently leading to **endless iterations** and **Frankenstein design**.

Iteration Hell



Avoiding the pitfalls

Introducing objectivity

Design decisions should be made with data, not opinion. Design cannot appeal to everybody, so who should your design appeal to?

Involving the client often

By involving the client often and from the start of the process, we provide a sense of ownership, educate them and help to flush out ideas early.

Providing reassurance

Client's interfere in the design because they don't trust you to deliver. You can build trust with a robust process.

Agreeing design principles

What?

Design principles are a set of short statements about how you intend to make decisions during a project.



Why?

Design principles move the decision-making process away from personal opinion and provide a framework for making informed decisions.

principles.design



gov.uk/guidance/government-design-principles

Design with

d — a — t — a

www.gov.uk/design-principles

Government Design Principles

- | | |
|--------------------------------------|---|
| 1 Start with user needs | 6 This is for everyone |
| 2 Do less | 7 Understand context |
| 3 Design with data | 8 Build digital services, not websites |
| 4 Do the hard work to make it simple | 9 Be consistent, not uniform |
| 5 Iterate. Then iterate again | 10 Make things open: it makes things better |

3

GOV.UK

Let data drive decision-making, not hunches or guesswork.

Start with identifying user needs. If you don't know what the needs are, you won't build the right thing. Do research, analyse data, talk to users.

Start

with user needs

www.gov.uk/design-principles

Government Design Principles

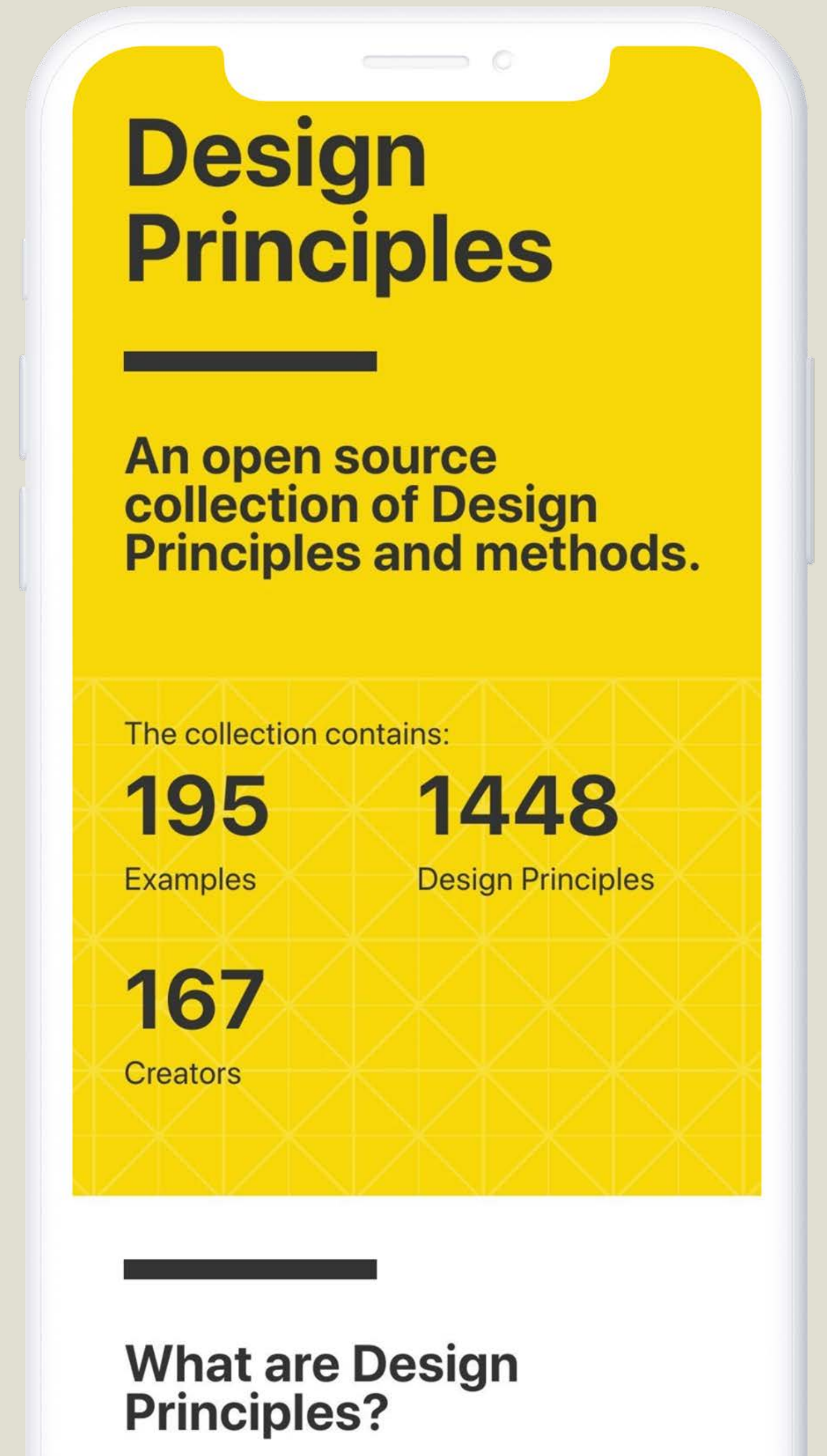
- | | |
|--------------------------------------|---|
| 1 Start with user needs | 6 This is for everyone |
| 2 Do less | 7 Understand context |
| 3 Design with data | 8 Build digital services, not websites |
| 4 Do the hard work to make it simple | 9 Be consistent, not uniform |
| 5 Iterate. Then iterate again | 10 Make things open: it makes things better |

1

GOV.UK

Workshop your design principles

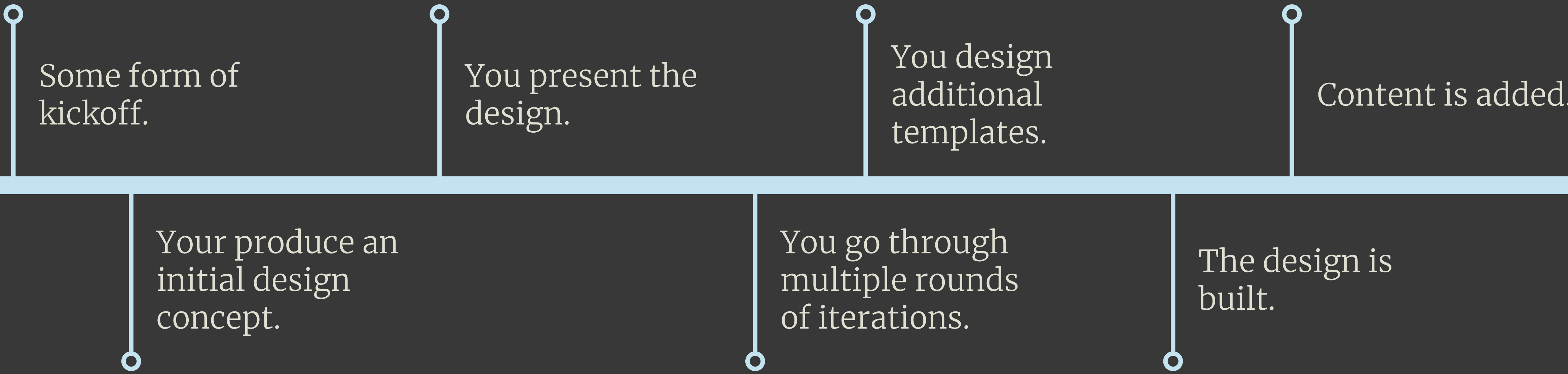
Using the [design principles website](#), create approximately 20–30 design principles cards. Give each stakeholder 5 points to spend by marking cards they like. They can spend all 5 points on one card or spread them over multiple cards. Next, select the top 6 cards for your design principles.



Introducing a better design process

A robust design process reassures the client, and so reduces micro-management. It also better manages the client's expectations and educates them, eliminating scope creep and endless iteration.

Your current process in a nutshell



Some form of kickoff.

You present the design.

You design additional templates.

Content is added.

Your produce an initial design concept.

You go through multiple rounds of iterations.

The design is built.

The problem with your current process

You are forced to design without content.

Clients lack the knowledge to provide quality feedback.

The final site often looks very different from the designs.

The design will come as a surprise.

Iterations are hard to predict and waste time.

The project involves a lot of risks.

An aside about speculative design

What?

Speculative design is the practice of producing unpaid design work for a prospective client to prove your capabilities.

It costs everybody money

It is about selling not delivering

It is wasteful

It is uninformed

It is not collaborative

A better design process

○ Discovery

○ Prototyping

○ Build

○ Live

EACH PHASE IS A SEPARATE PROJECT AND DEFINES THE NEXT

Benefits to stakeholders and clients

Reducing risk

A client can test the working relationship with a supplier on a smaller project. Each phase also validates the viability of the next, reducing committing to one large and potentially flawed project.

Accurate costing

Because each phase scopes the next, they can be costed much more accurately. That allows for tighter control over spending and the allocation of resources.

Reducing failure

Because the project is broken into self-contained phases that are well defined and researched, the chances of building something that generates a return on investment increase considerably.

Discovery

What?

The discovery phase is a period of time (anything from a single workshop to 8 weeks) dedicated to defining the problems being solved and the project's scope.

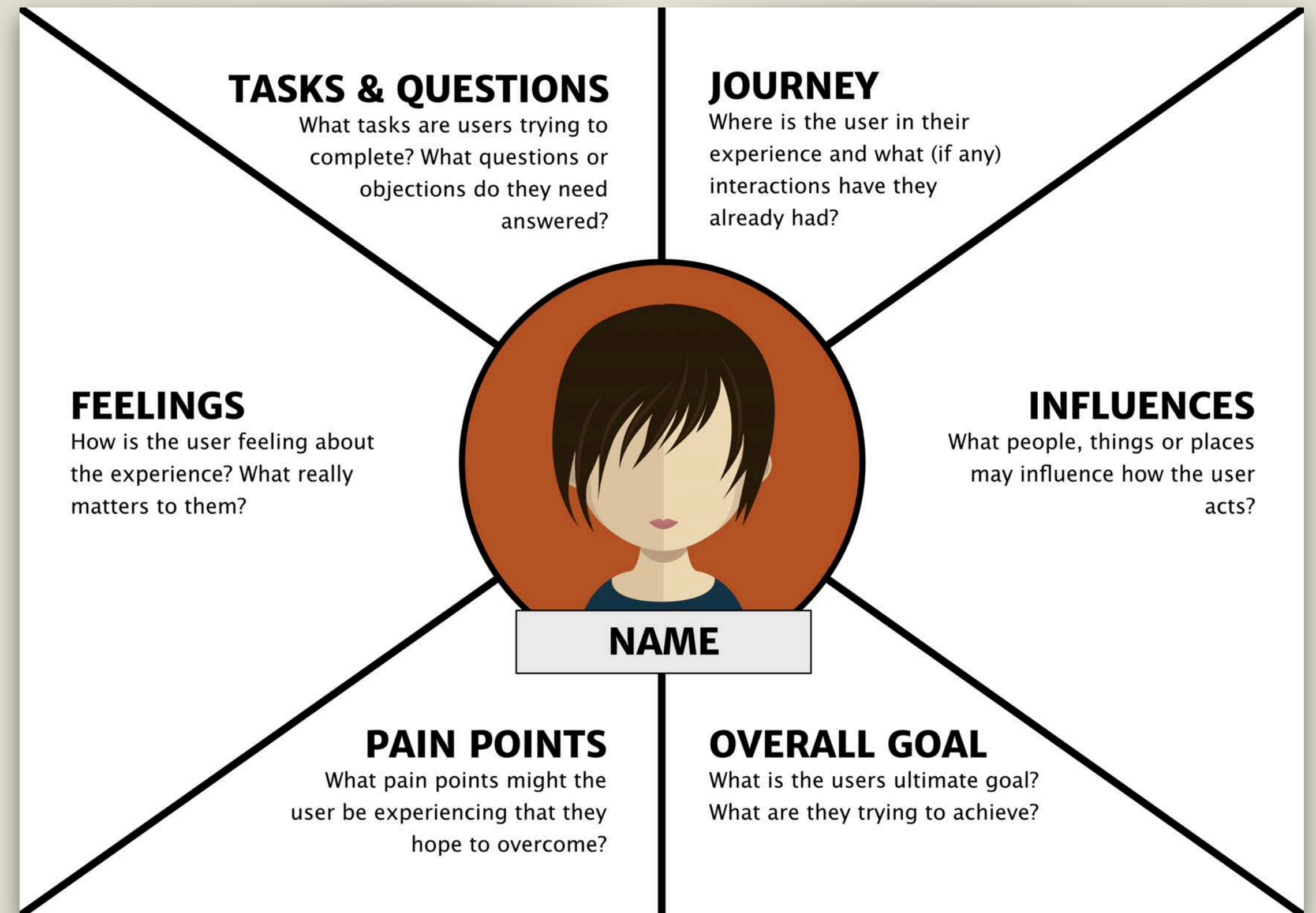
Why?

Carrying out a discovery phase helps reduce scope creep, uncover any constraints to the design, and provide the context for better decision-making during the project.

How?

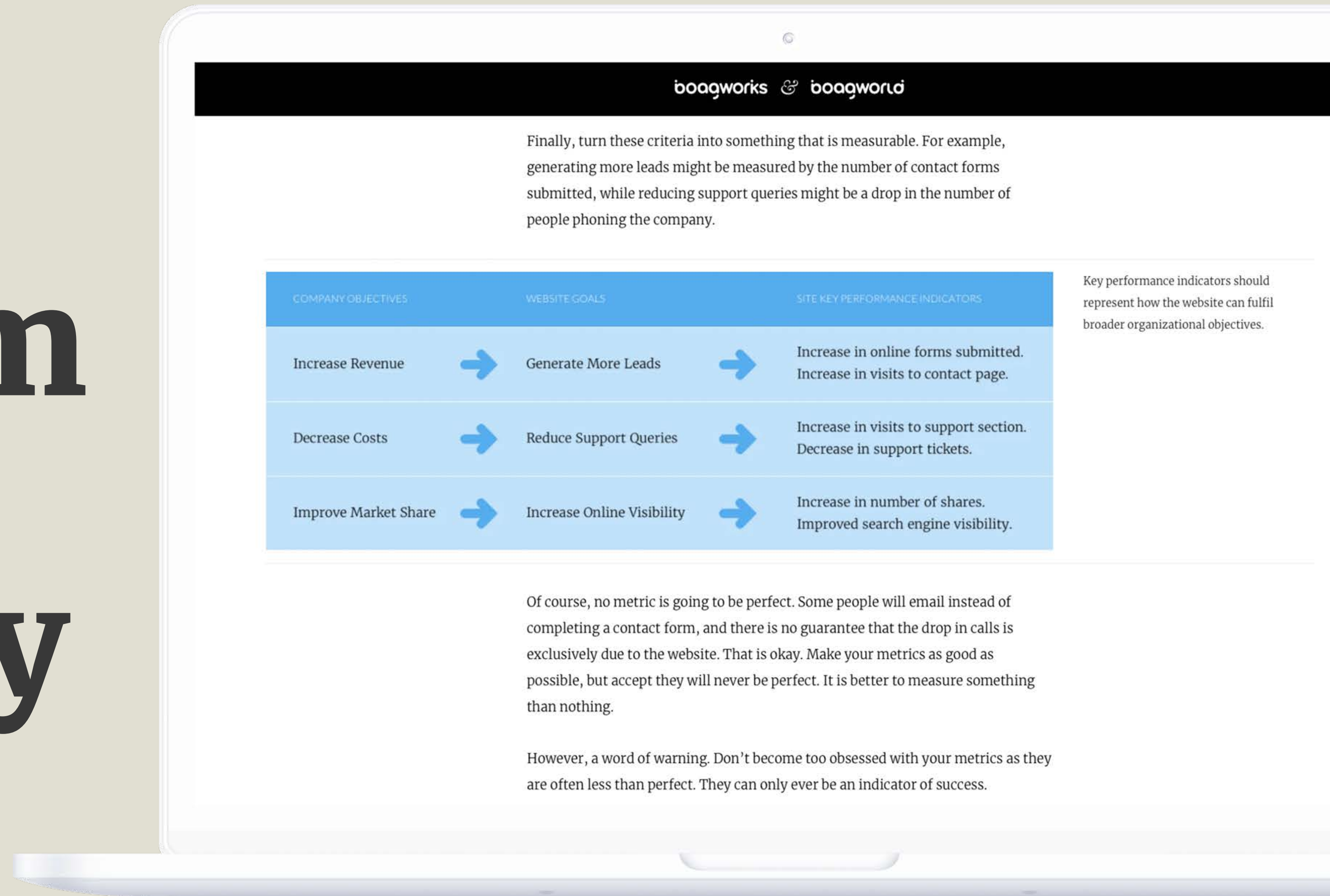
- User research.
- Stakeholder interviews.
- Competitive analysis.
- Research constraints.
- Review existing website/app.

The Minimum for a Discovery Phase



Adapting empathy maps for UX design

The Minimum for a Discovery Phase



Finally, turn these criteria into something that is measurable. For example, generating more leads might be measured by the number of contact forms submitted, while reducing support queries might be a drop in the number of people phoning the company.

COMPANY OBJECTIVES		WEBSITE GOALS		SITE KEY PERFORMANCE INDICATORS
Increase Revenue	➔	Generate More Leads	➔	Increase in online forms submitted. Increase in visits to contact page.
Decrease Costs	➔	Reduce Support Queries	➔	Increase in visits to support section. Decrease in support tickets.
Improve Market Share	➔	Increase Online Visibility	➔	Increase in number of shares. Improved search engine visibility.

Key performance indicators should represent how the website can fulfil broader organizational objectives.

Of course, no metric is going to be perfect. Some people will email instead of completing a contact form, and there is no guarantee that the drop in calls is exclusively due to the website. That is okay. Make your metrics as good as possible, but accept they will never be perfect. It is better to measure something than nothing.

However, a word of warning. Don't become too obsessed with your metrics as they are often less than perfect. They can only ever be an indicator of success.

How To Define Key Performance Indicators

Dedicate 10% to discovery

Prototyping

What?

The prototyping phase is where the design direction is established and the scope of the build defined.

Why?

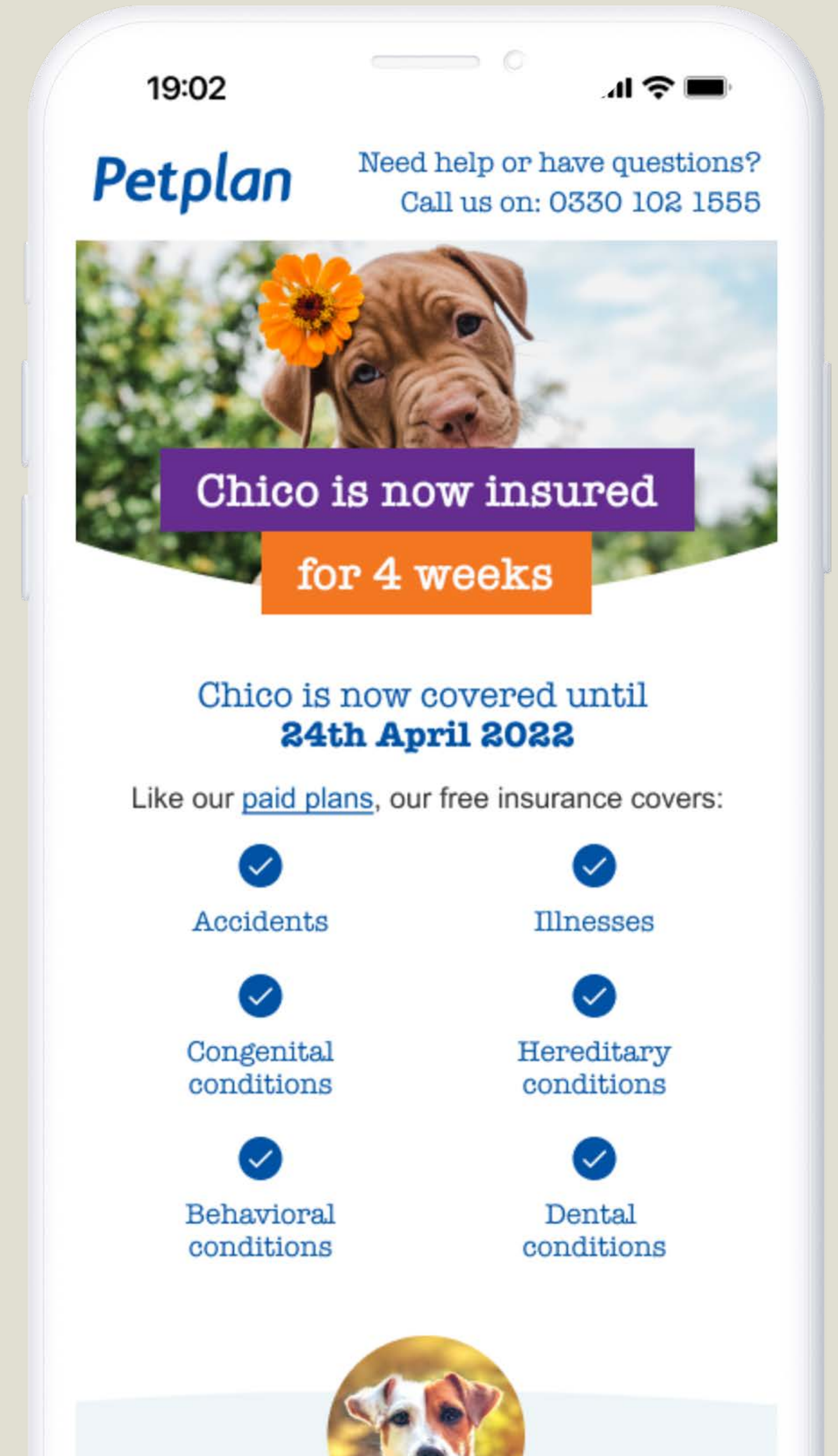
Prototyping allows us to validate the design approach to avoid costly changes during build. It also helps to better define what the build involves for more accurate costing.

How?

- Establish aesthetics.
- Design mockups for key templates.
- Site wireframing.
- Usability testing.
- Aesthetic testing.

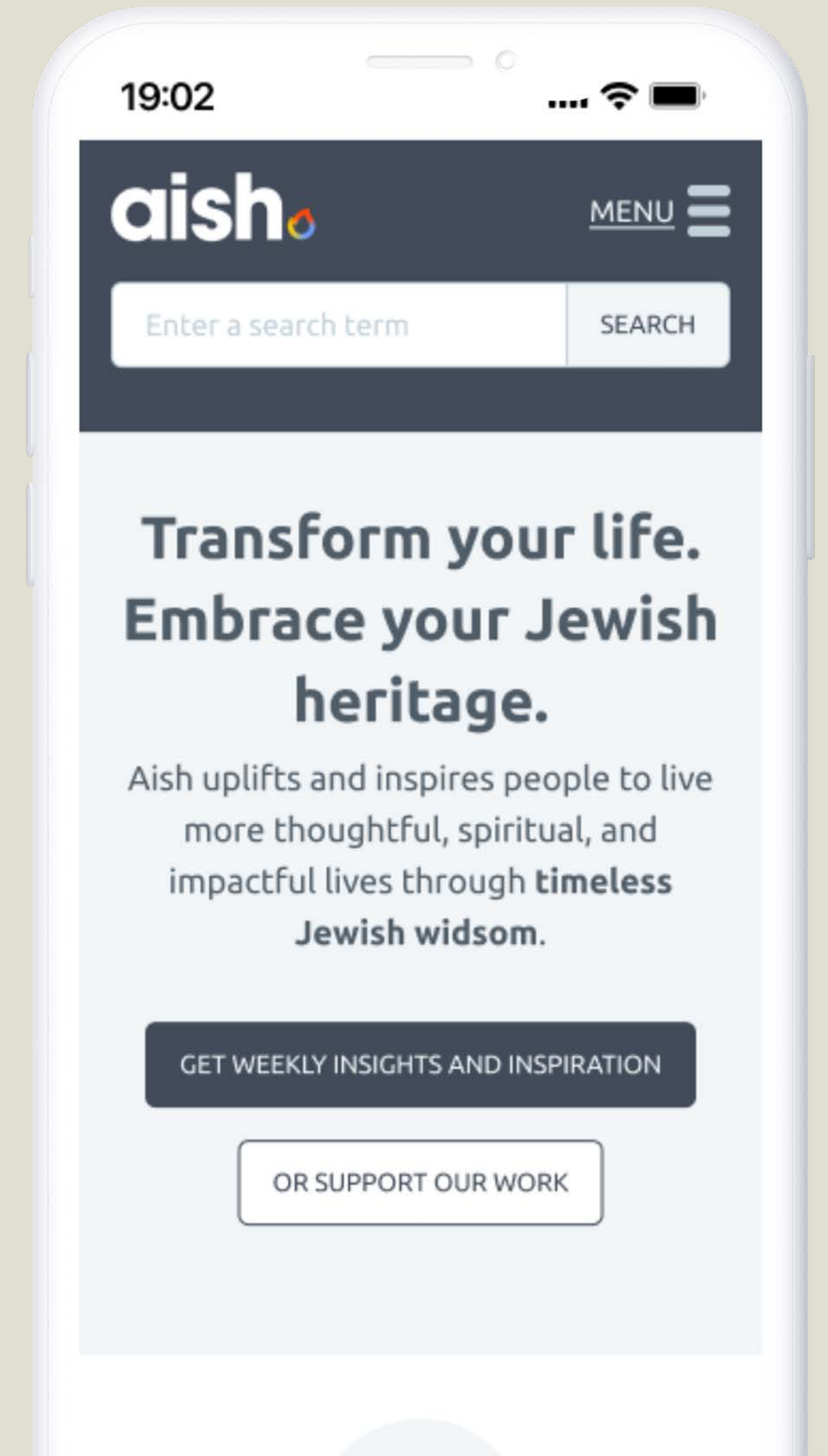
The Minimum for prototyping

High fidelity mockups of critical templates to demonstrate how the website aesthetics, integrate with the site structure.



A navigable wireframe of the website
including draft content and mockups of
proposed functionality.

The Minimum for prototyping



The Minimum for prototyping

Testing aesthetics

Color, typography, imagery, and styling are all perceived differently depending on our experiences. By testing aesthetics, we can save hours of endless debate.

Testing usability

A website will not succeed if people cannot find content, understand the functionality, and comprehend content. By testing usability, you increase the chance of project success.

You don't have the time or money not to test!

Carrying out aesthetics and usability testing may seem like a luxury you cannot afford. However, in reality, if approached in the right way it will save you endless meetings, discussions and revisions.

Testing is the secret to design sign off.

Build

What?

The build stage is where your designs are turned into fully functional websites. It is when the design is finalized to be fully responsive and include states for things like buttons and forms.

Why?

It is better to finalize a design in the browser, where you can see it become fully interactive. Involving the designer in this stage also ensures the design is not undermined during the build.

How?

- Fully responsive design.
- Button and form states.
- Error messages.
- Design systems.
- Animation.
- Usability testing.

The Minimum for build

As an absolute minimum the developer will need to know the various states for buttons, links and forms. They will also need styling for error messages, notifications and form validation.

Input text looks like this

Placeholder text looks like this

Input text looks like this

Input text looks like this

Placeholder text looks like this

Input text looks like this

☐

☒

☐ Label

☒ Label

☐

☒

☐ Label

☒ Label

Make a selection

▼

Make a selection

▼

Make a selection

▼

Make a selection

▼

Button text

Button text

Button text

☐ label

☒ label

☐ This is a piece of either information text or possibly an error message depending on color and context.

☐ This is a piece of either information text or possibly an error message depending on color and context.

Live

What?

Going live should not be the end of the project. Once the website has been launched, it is necessary to monitor user behavior and adjust the design to maximize conversion and engagement.

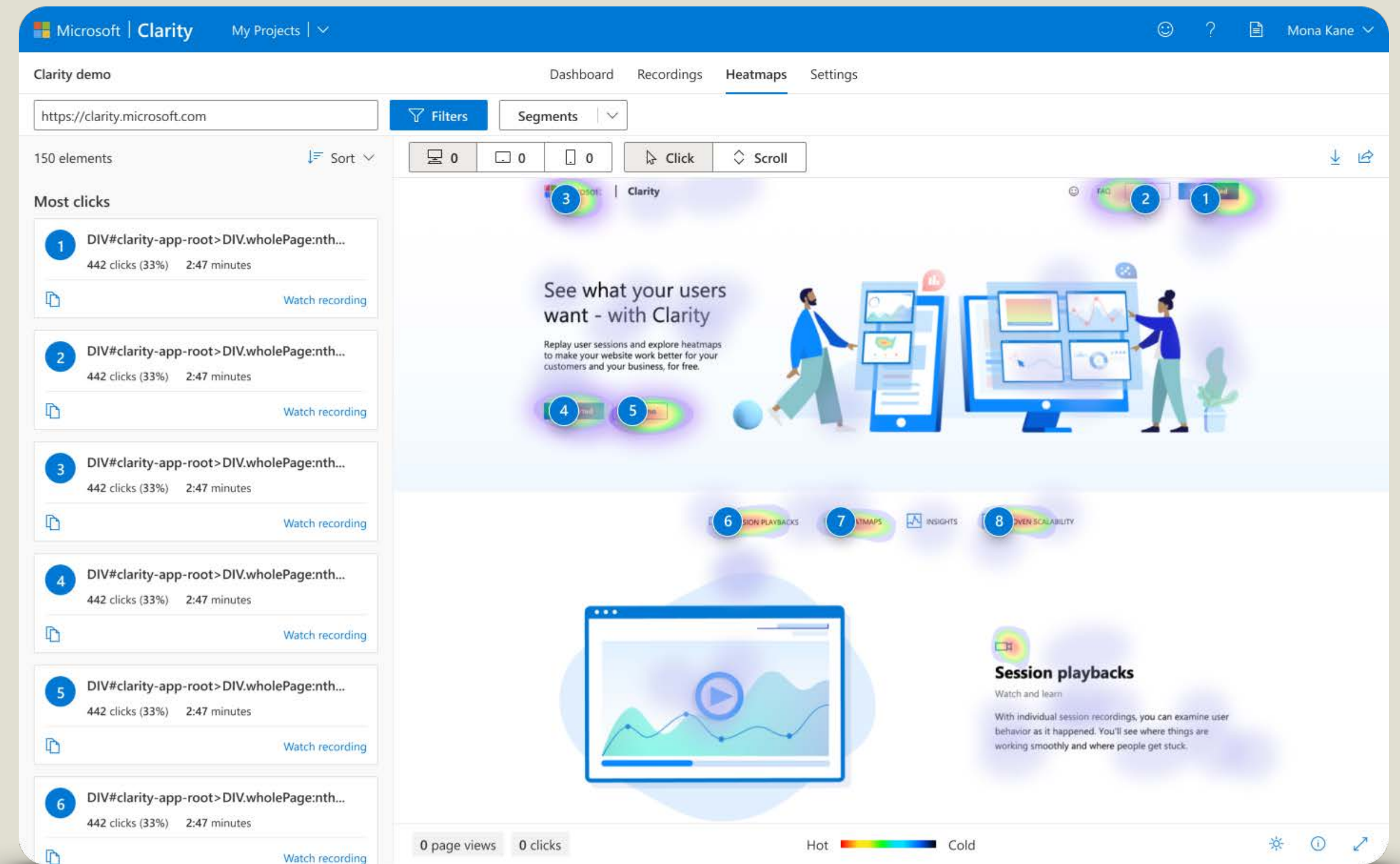
Why?

Until a website goes live we only have theoretical knowledge of how users will respond. The live phase allows us the chance to observe user behavior and make user the design is working well.

How?

- Analytics.
- Session recording.
- Heat maps.
- AB testing.
- Usability testing.

The Minimum for live



Set your 'go-live' milestone about two thirds through the overall project timeline, not at the end. Use a tool like Microsoft Clarity to monitor user behavior and adjust the design to ensure better performance.

Defining the stakeholders role

Why?

Stakeholders often provide irrelevant feedback or attempt to micro-manage the design process. It can be beneficial to define their role and your own to prevent this from happening.

They find problems, you find solutions.

They champion the business needs.

They defend the user.

Before you start checklist

- ✓ Define both your role and that of the clients.
- ✓ Outline the project process and its benefits.
- ✓ Agree on a set of design principles to aid decision making.
- ✓ Carry out as much user research as you can and turn it into empathy maps.
- ✓ Agree on a list of key performance indicators for defining success.
- ✓ Identify and speak to as many key stakeholders as possible.

Questions

I have proposed a very different way of working for many. This will inevitably lead to questions. Either ask them now or email me on paul@boagworld.com.

Producing Initial Designs

This session will explore techniques for engaging stakeholders while maintaining control over the final design.

Techniques to keep in mind when designing

Involve the client

We tend to design in isolation for fear of stakeholders interfering in the design.

However, this is a mistake. Stakeholders are more likely to reject a design they have not contributed to, and the big reveal can turn into an uncomfortable surprise.

Separate aesthetics and structure

Stakeholders can reject an entire design because they don't personally like the aesthetics. By approaching aesthetics and structure separately you focus stakeholders on one thing at a time.

Work with real content

We cannot separate design and content. The design process should begin with the content, how it is organized and how users can easily access it. We should always be working with actual content, not Lorem Ipsum.

Making content findable with good navigation

You cannot design a site's navigation without having a good understanding of what the content is going to be.

How to approach content when you aren't a copywriter

Identify it

Start by identifying the different content that will appear on the site. That includes product descriptions or blog posts and features, benefits, questions, and answers to objections.

Structure it

Content then needs to be structured into a site hierarchy that enables users to quickly find the content they require.

Draft it

Don't wait for stakeholders to deliver content for templates you are prototyping. Draft initial copy yourself to start the discussion and focus stakeholders on the right kind of content.

Agreeing on the value proposition

Strapline

Benefits

Features

Discovering questions, objections and tasks

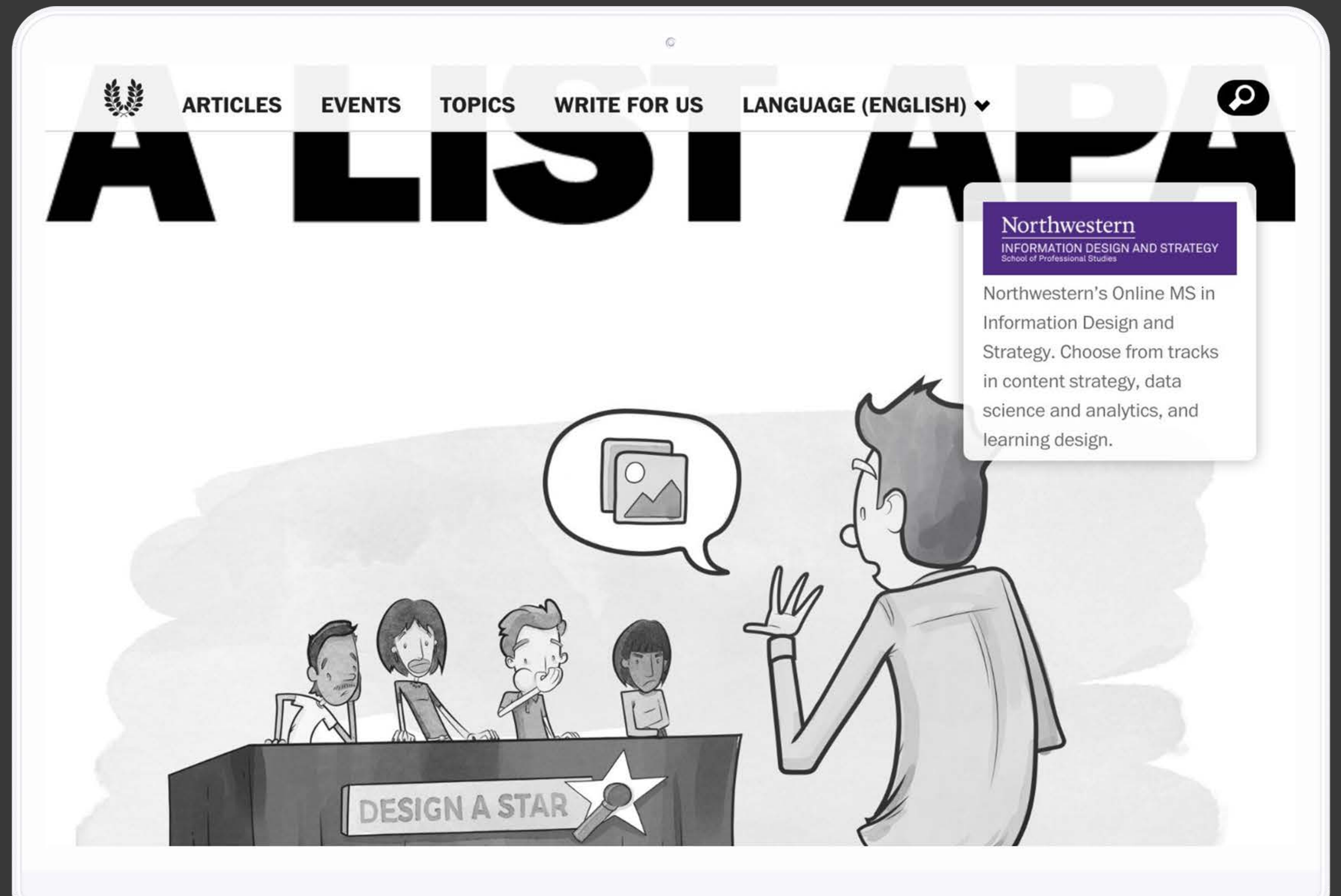
Most content on a website should answer a user's question, address an objection that stops people from acting or enable somebody to complete a task. To structure that content, you first need a list of those questions, objections, and tasks.

How?

- Speak to sales.
- Speak to customer services.
- Analyze search terms.
- Ask users.
- Monitor social media.
- **Run a questions and answers workshop.**

Prioritize your content

Not all questions, objections and tasks are equal. Some matter more to users than others and we need to highlight these. Consider using top task analysis to identify the most important content.





[Card Sorts](#) [Tree Tests](#) [Pricing](#)

[Log in](#)

[Sign up](#)

Card Sorts

Understand and optimize for your users' mental models for free.

[Get started](#)

Run any type of card sort like a pro

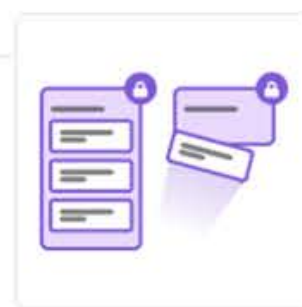
Three techniques to choose from. All optimized for a great participant experience on any device. Instant insights with crystal clear reports.



Open Sort

Participants sort cards into groups **they** create and name.

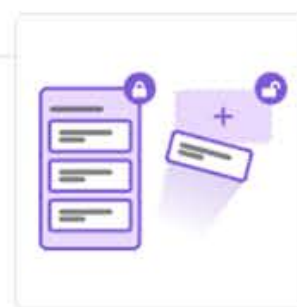
[Participant demo](#) →



Closed Sort

Participants sort cards into groups **you** create and name.

[Participant demo](#) →



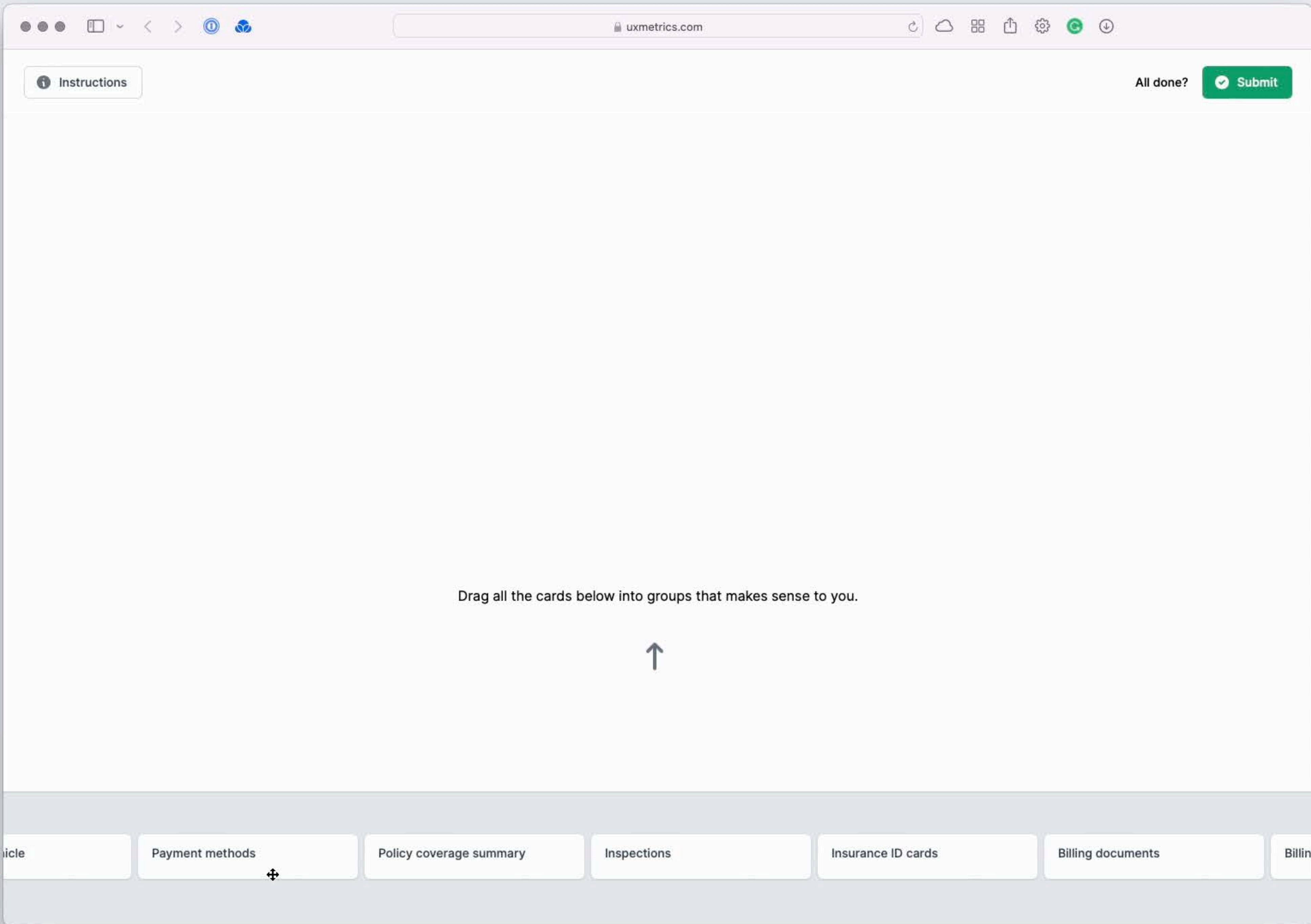
Hybrid Sort

Participants sort cards into **both** types of groups.

[Participant demo](#) →

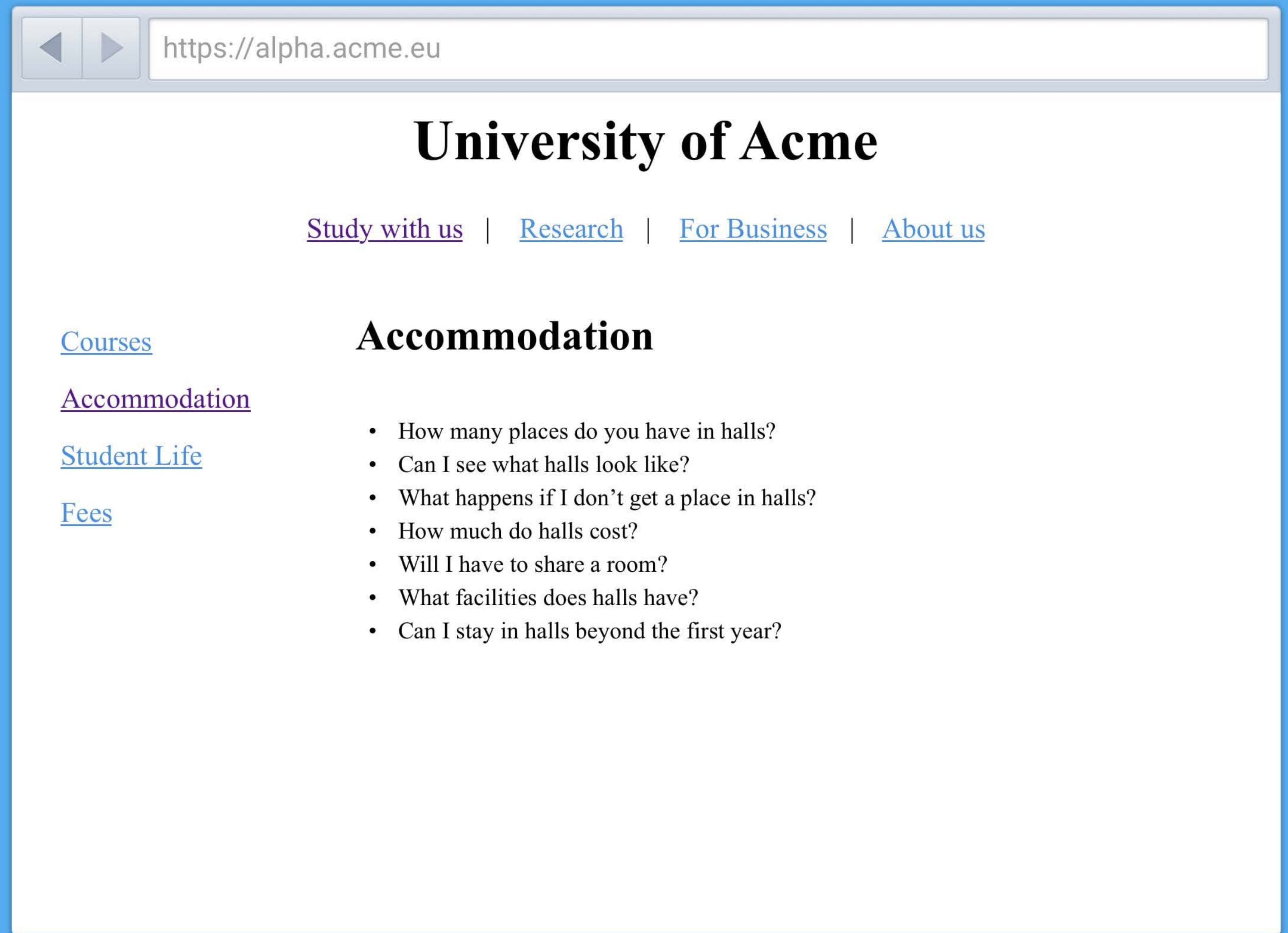
Organize your content

Once we know what content has to appear on the site we need to create a site hierarchy to support it. This is typically done through running card sorting to ensure we watch the user's mental model.



Map content to pages

Take your value proposition, questions, objections, and tasks and organize them into pages based on the results of your card sorting. This task can be very quickly in a tool like [Notion](#).

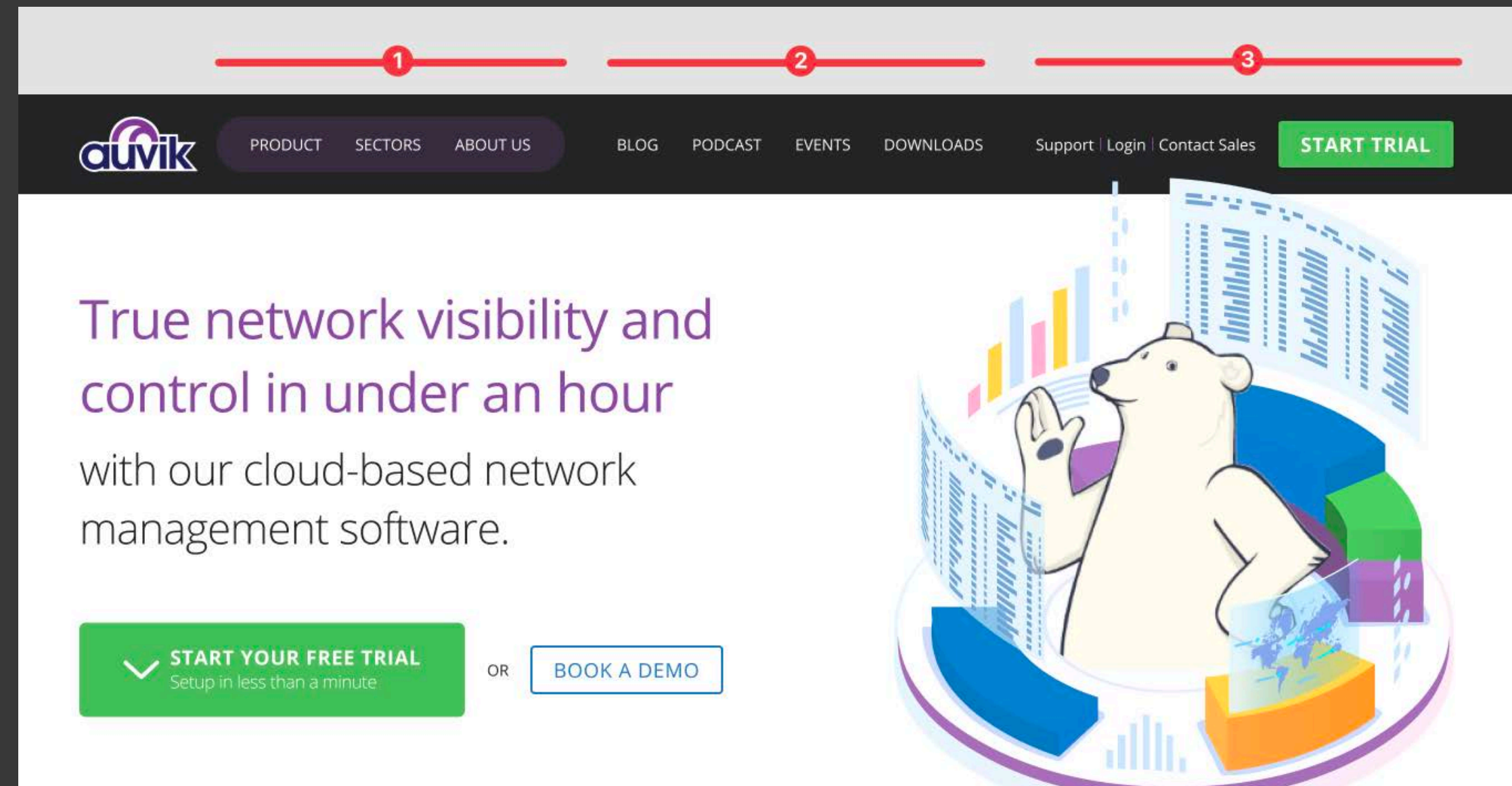


Chunk your content

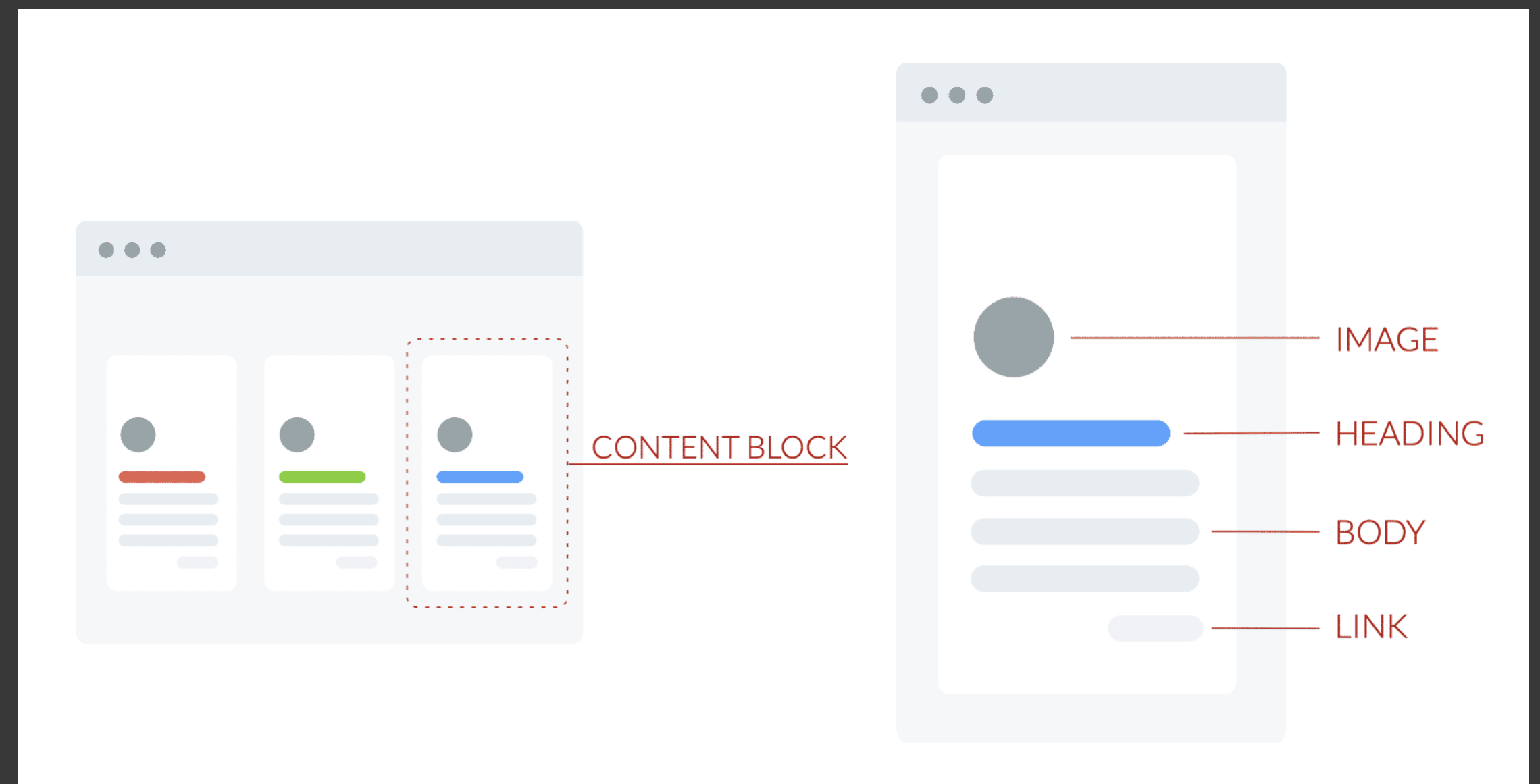
We can only hold four things in our short-term memory, so designers need to break the content down into small 'chunks' to make them easier to digest.

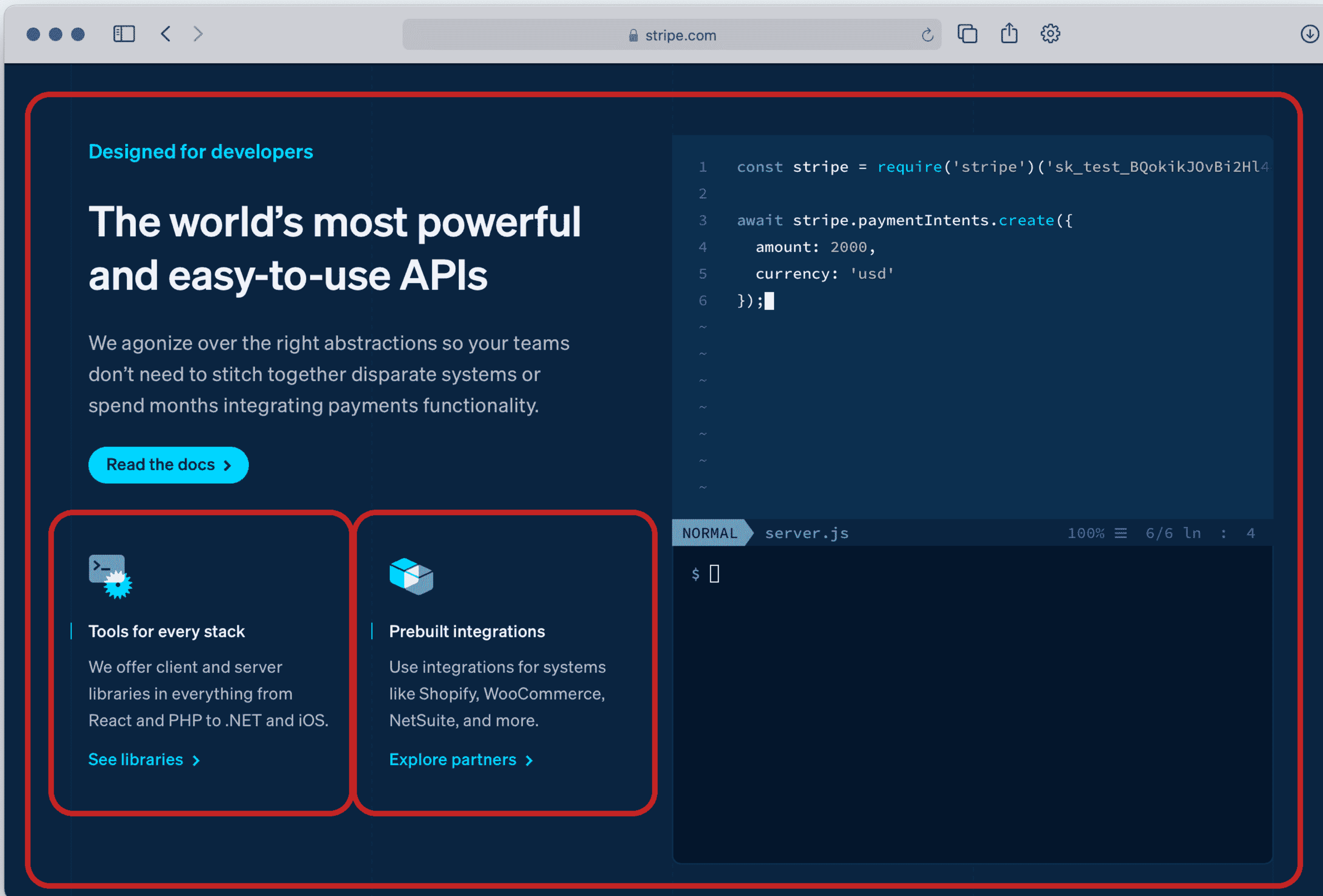
Introducing stakeholders also prevents them making bad content decisions such as too many options and pages of copy.

Chunk navigation and lists



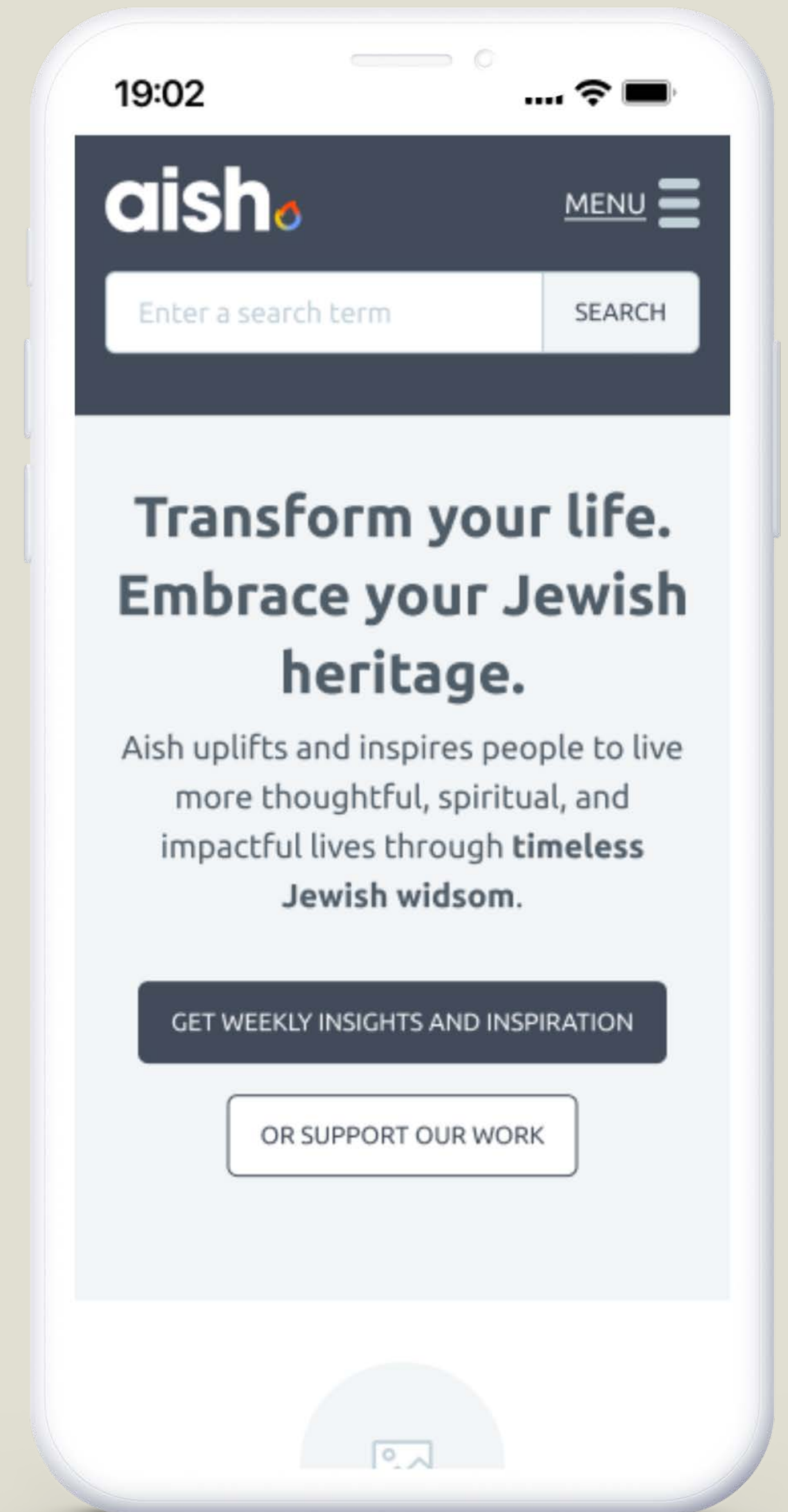
Chunk content into blocks





Wireframing critical pages

Greyscale wireframes are an opportunity to quickly organize content, test layouts, and establish page flow without getting drawn into conversations about aesthetics.



What pages should you be wireframing?

For example:

Forms

Ecommerce checkouts

Account management

App functionality

Home page

Landing pages

Text template

Interactions

Deciding on page content with stakeholders

User attention point exercise

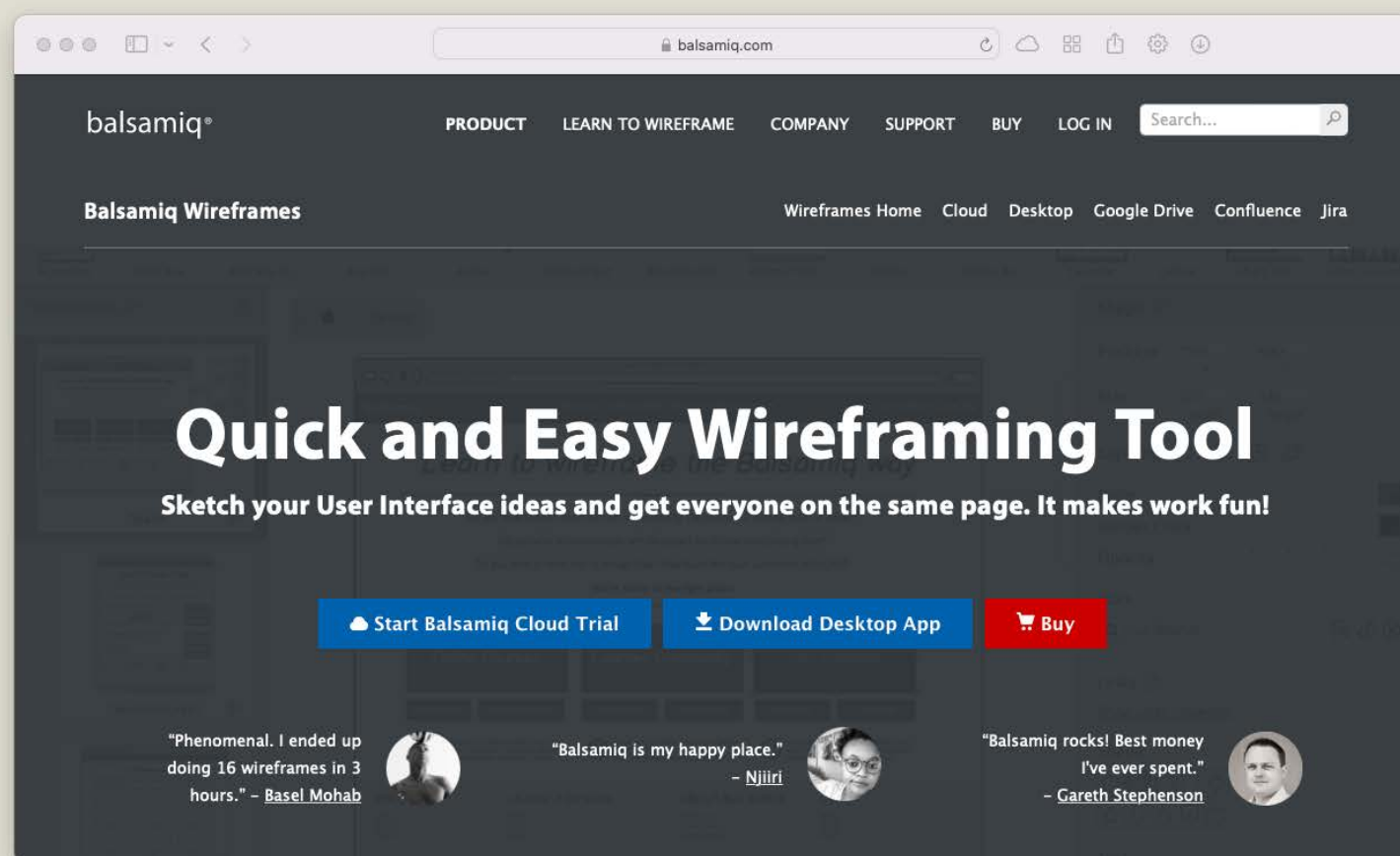
In this exercise, users are given 24 points of user attention to assign to screen elements. The more attention stakeholders want users to pay to an element, the more points it requires — [details available here](#).

Defining your content blocks

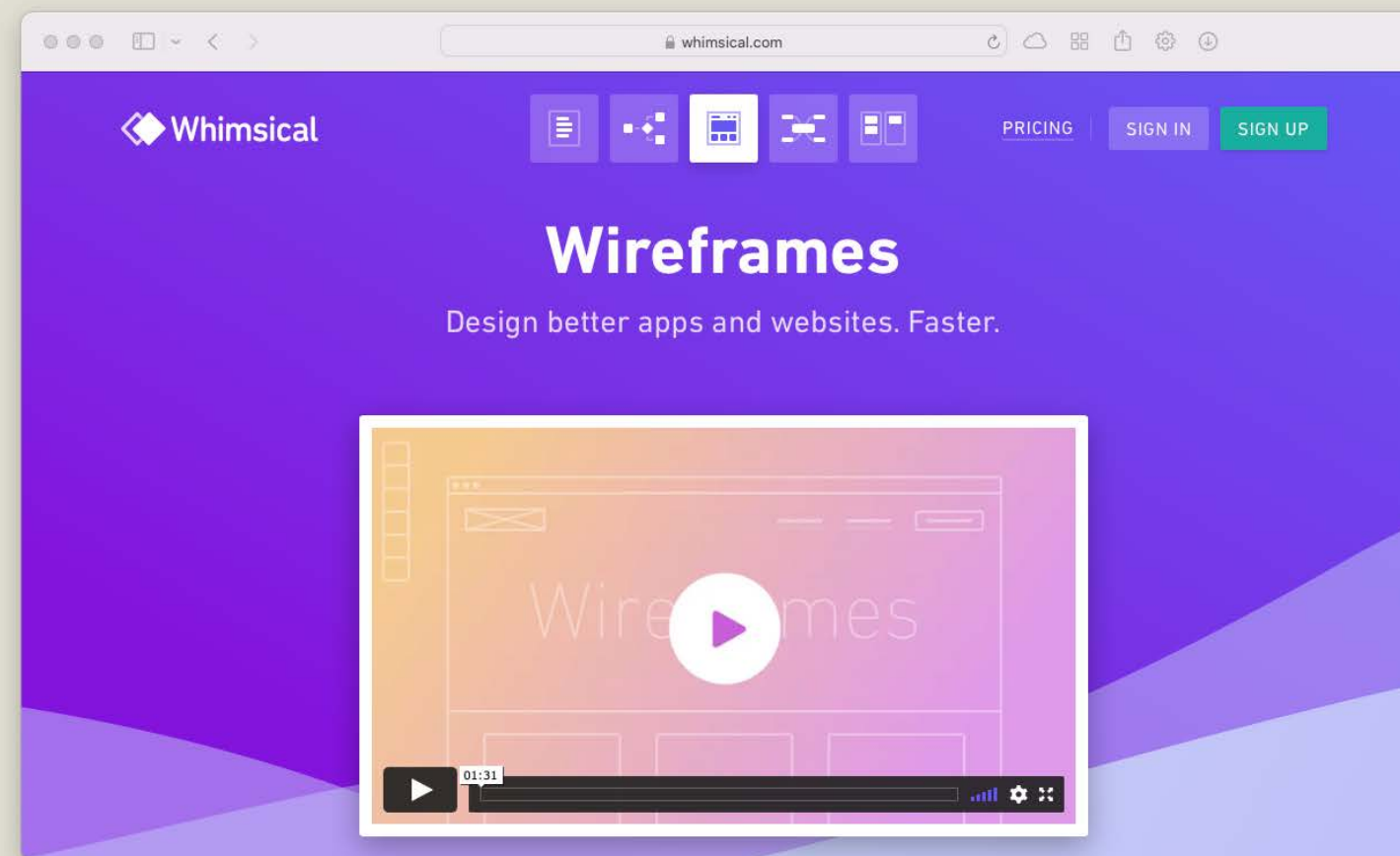
Once you have decided what should appear on a page, begin defining your content blocks. Don't worry about the exact wording; focus on getting the key messages across.

Use the right tool to wireframe fast

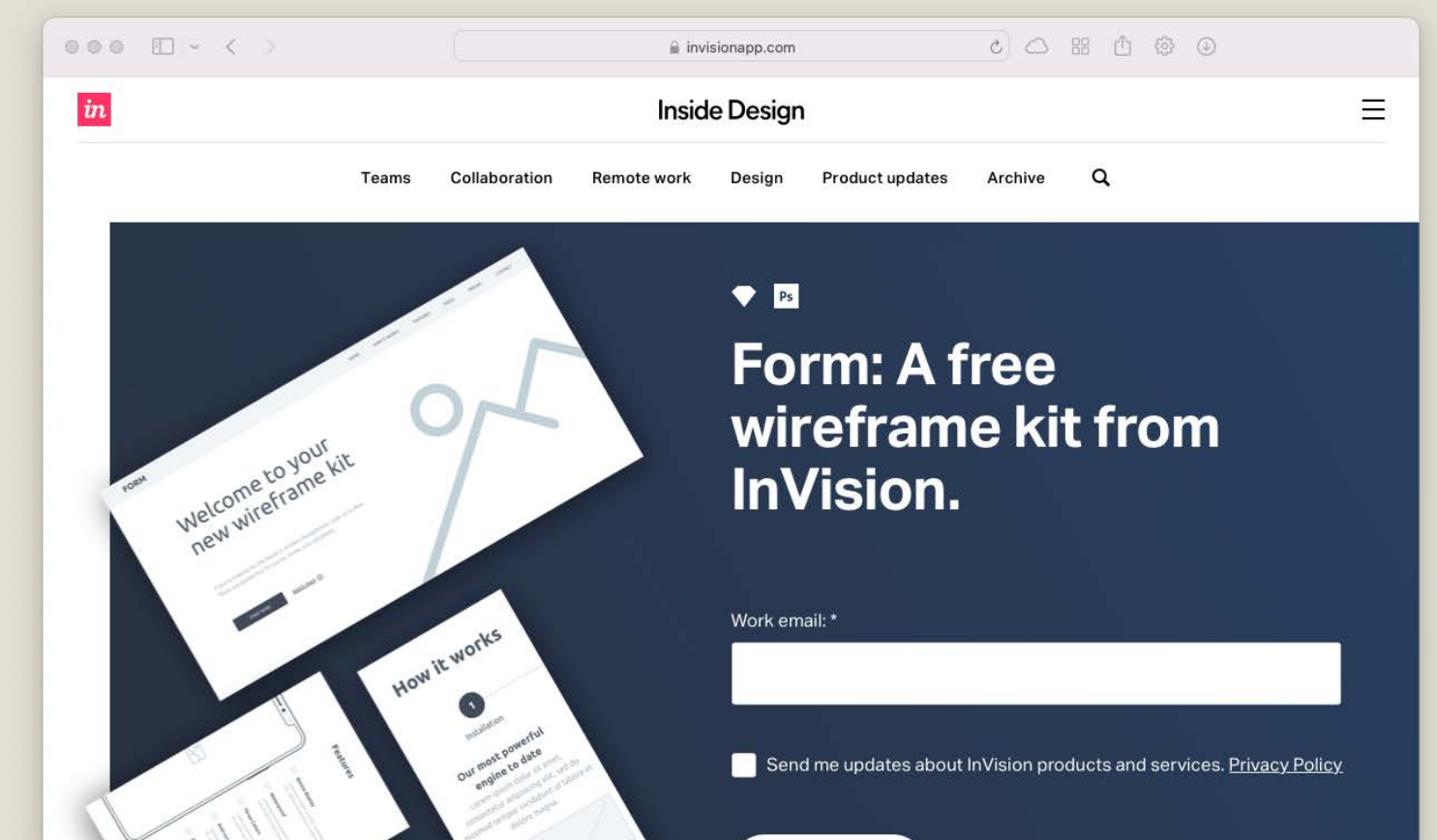
Don't use sketch or Figma for wireframing.
They take too long and you will get sucked
into designing screen elements.



Balsamiq



Whimsical



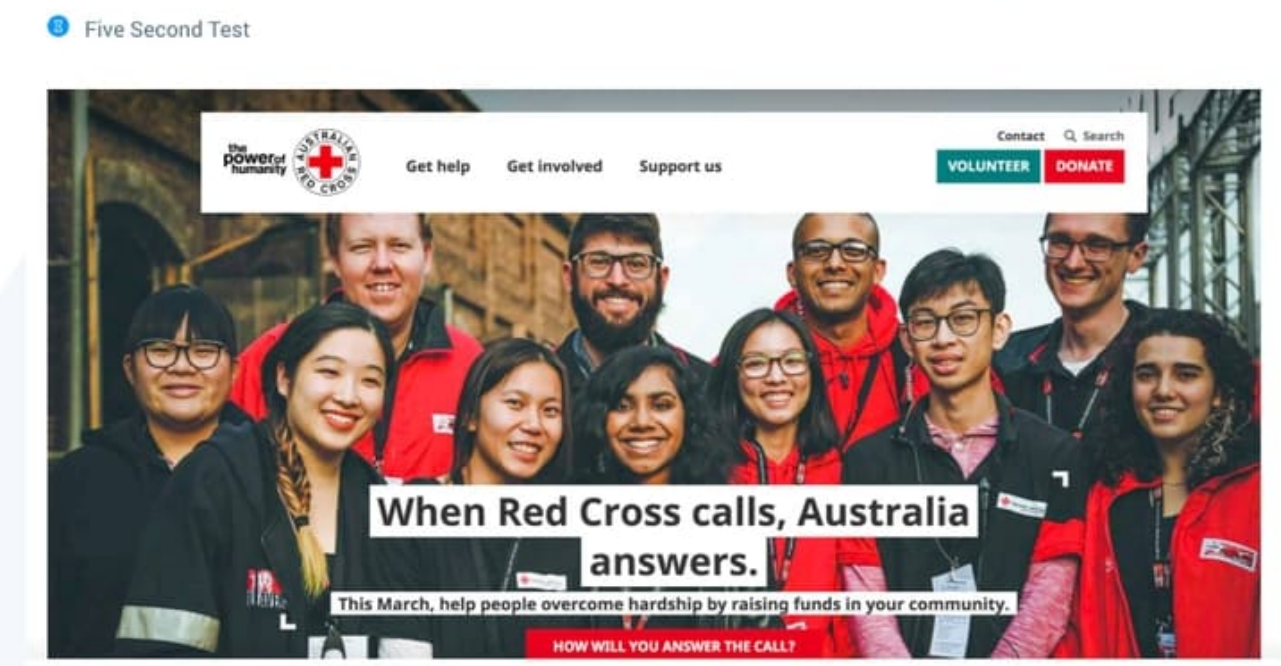
A Wireframe Template Like Form

Run two quick tests on your wireframes

Instead of getting into discussions about page layout and whether users will see your call to action, run a 5-second and first-click test with Usability Hub.

Don't worry about who you test. You can use friends, family or social media followers. Anybody outside of the business.

Five Second Test



Expand image

Please write down all of the main elements you remember from the page you saw.

- ☐ The top bar said "Get involved." I remember people. At the bottom I saw a few ways to help.
- ☐ how to voleteer, donate contact us
- ☐ when red cross calls Australia answer's
- ☐ shop, fundraise, donate blood and there was a fourth option I can't recall

NYU | Alumni

Search

1 Be...
Events | Programs
2 NYU P...
Get Involved >
Give
FAQ & Contact >

NYU Named Top University for Graduate Employability

READ MORE >

Area #1

Benefits

20.9s 20% 10

Area #2

News | Publications

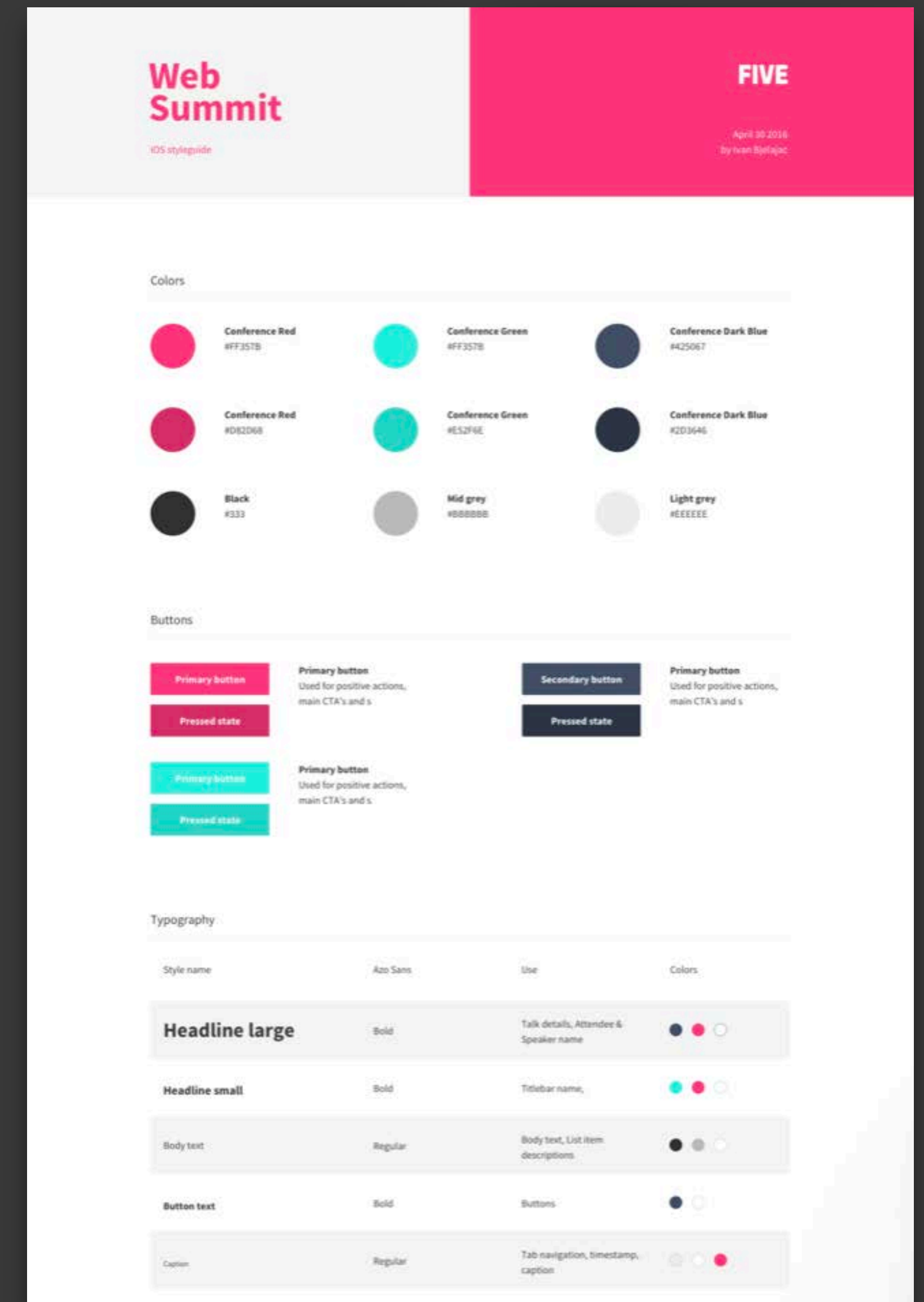
22.0s 54% 27

Introduce your site aesthetic

With the content and layout largely decided, now is the time to tackle the most controversial part of the design process, aesthetics. This is the area people have wildly differing opinions over.

If they have strong brand guidelines you are in luck!

If the company has a style guide, all the discussions about aesthetics have already happened. However, if you believe that the brand is not working, you can prove that through testing.



Define keywords that represent the brand

By defining the exact words we want a design to convey, we can test with users to see if it achieves this goal. This will eliminate subjective debate.



Three ways to define your brand with stakeholders

Famous person exercise

Ask participants to name a famous person who represents the brand. Then ask them why. Make a note of the adjectives that they use to describe the person.

Reception room exercise

Ask participants to describe a reception area for the business. Get them to describe the furniture and other interior decor. Make a note of the adjectives they use.

Brand deck exercise

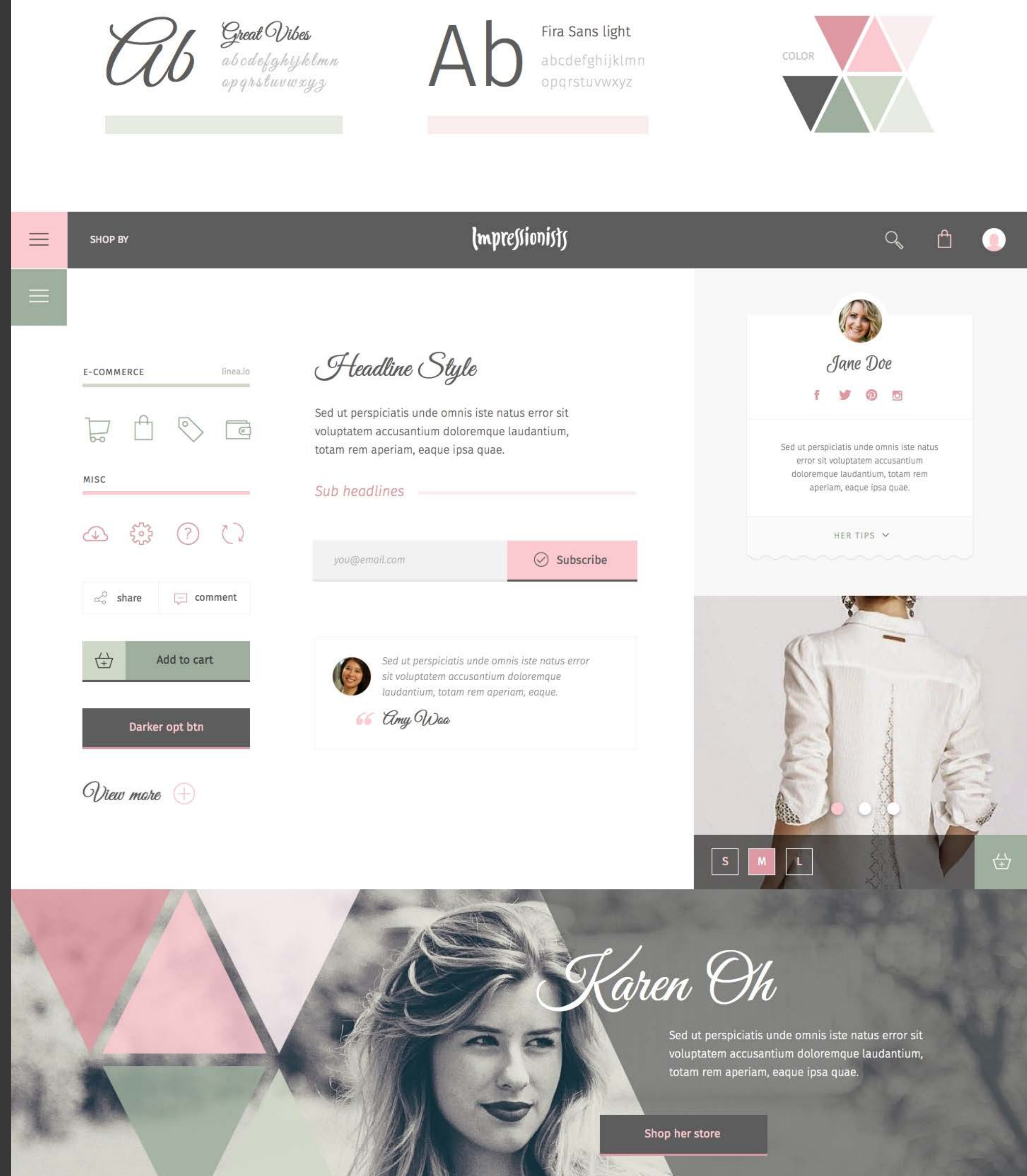
Using a set of [brand cards](#), ask the participants to organize the cards into three piles: things they are, things they are not and others.

See also: [Building a brand using the web](#)

Create style tiles alone or with stakeholders

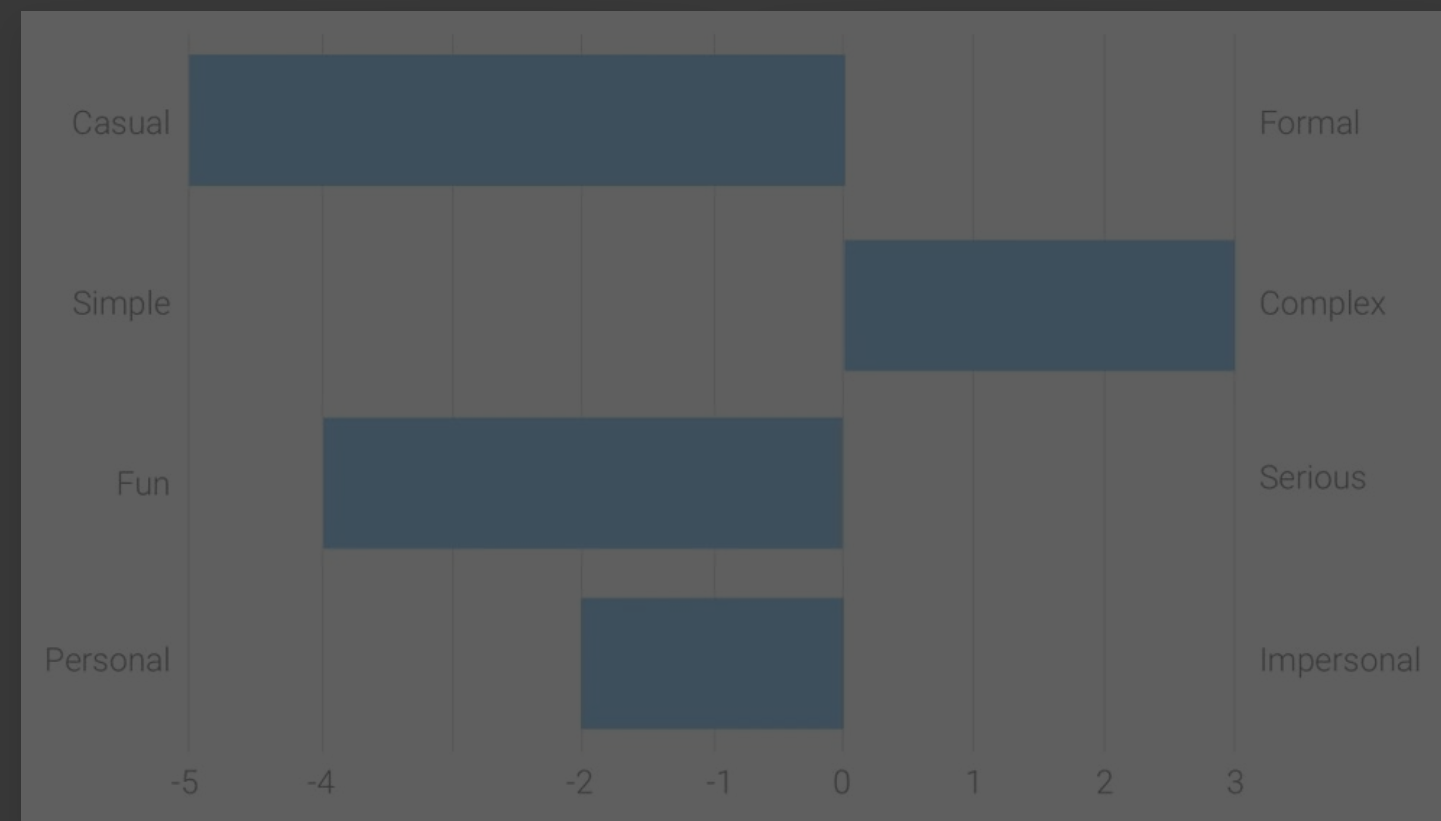
Remember, if a stakeholder is involved in setting the aesthetics they are less likely to reject it and more likely to defend it to others.

- Include imagery from [Google Images](#)
- Use [Picular](#) to research colors.
- Explore typography with [Google Fonts](#).
- Find stylistic inspiration on [Dribbble](#).



Test your style tiles

When testing aesthetics try and test with your target audience.



Which of the following words describe the above image?

☒ Fresh ☐ Approachable ☐ False ☒ Modern

☐ Cold ☐ Distant ☐ Masculine ☐ Classic

☐ Professional ☐ Minimal ☒ Feminine ☒ Light

☐ Personal ☐ Handmade ☐ Childish ☐ Serious

☐ Friendly ☐ Slick ☐ Sophisticated ☐ Charming

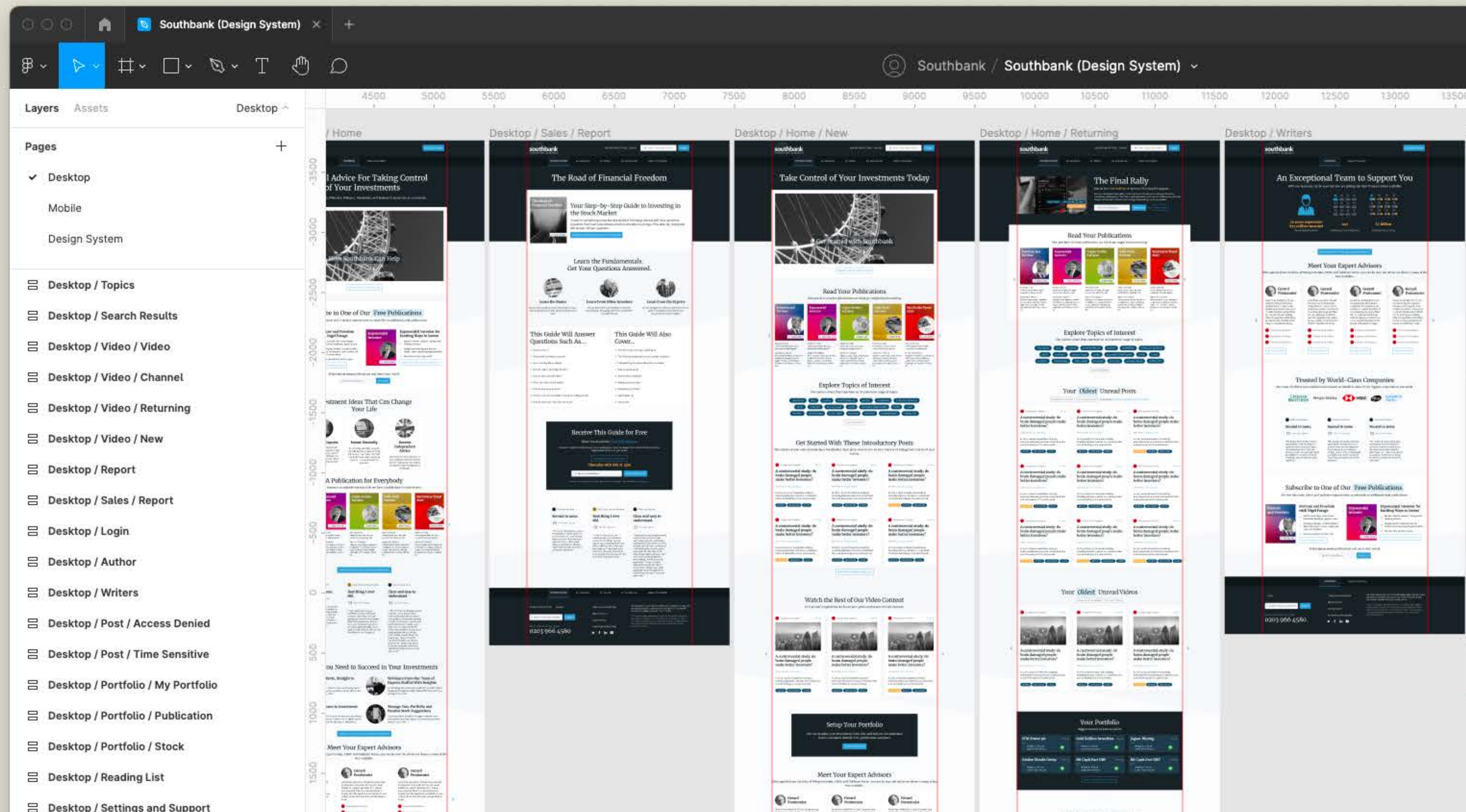
Which of the following sites looks most **approachable**?

The image displays four website screenshots for selection:

- University of Dundee
- A world top 100 university
- The University of Farnborough
- WELCOME TO PORTSMOUTH
- Queen's Award Winner 2017
- University of Strathclyde

Bringing it all together

Once you have tested and approved your wireframes and style tiles, you can now produce the final high fidelity designs.

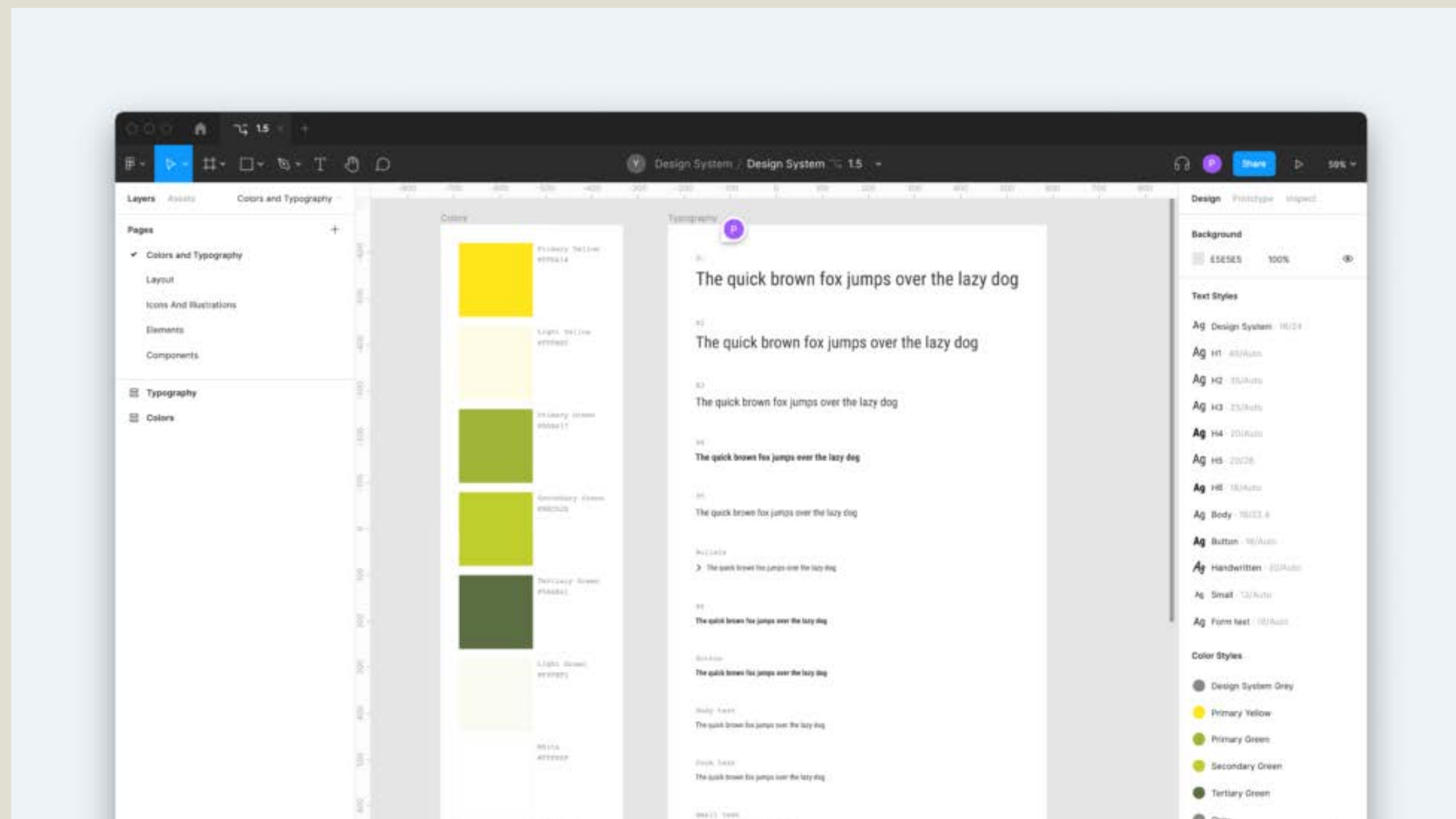


Create a high fidelity mockup

When producing high fidelity mockups that are going to be passed to a developer, keep that developer in mind.

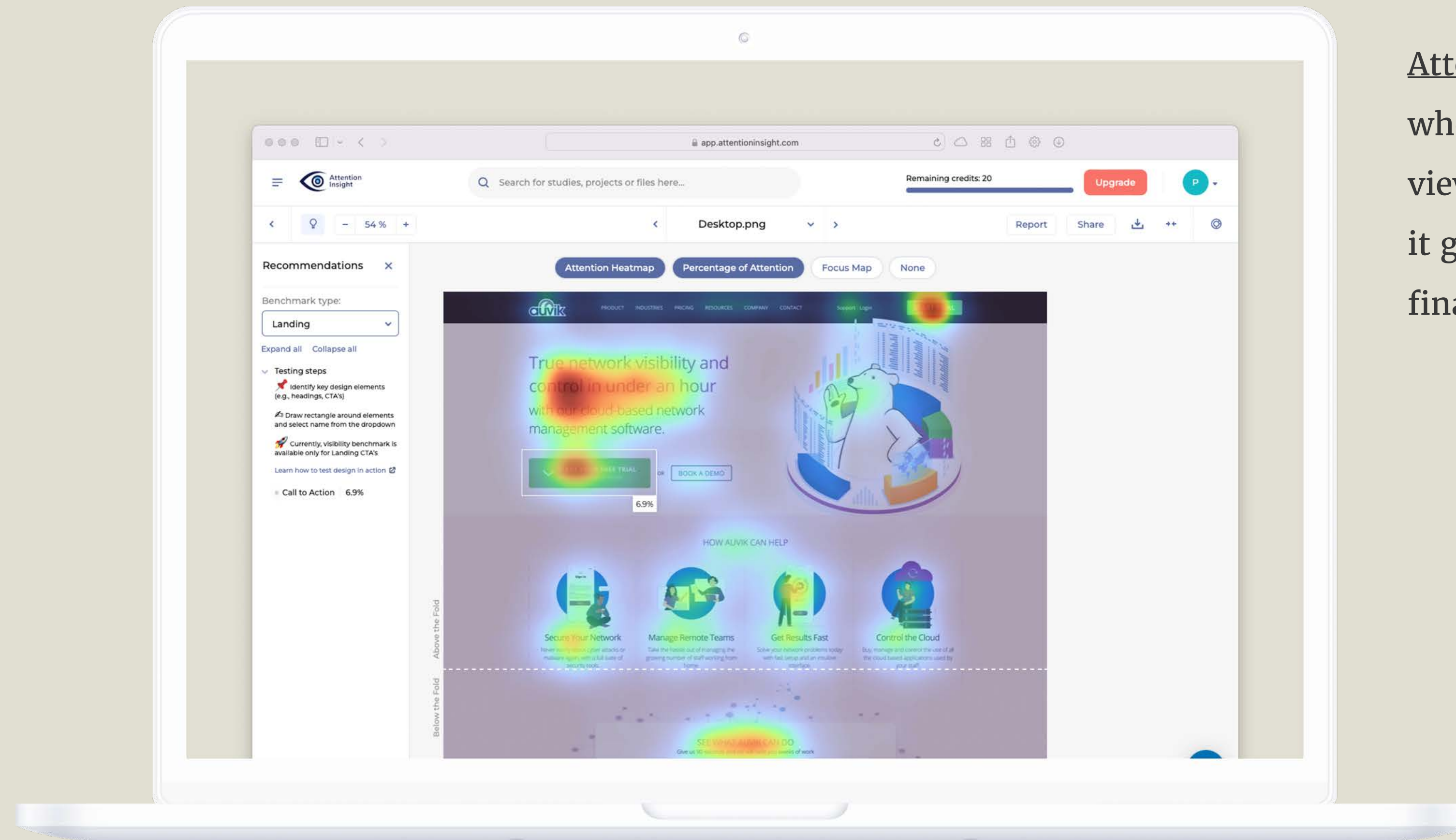
Use styles and components to ensure consistency across your designs.

Don't position elements by eye but instead use features like Auto Layout to position elements.



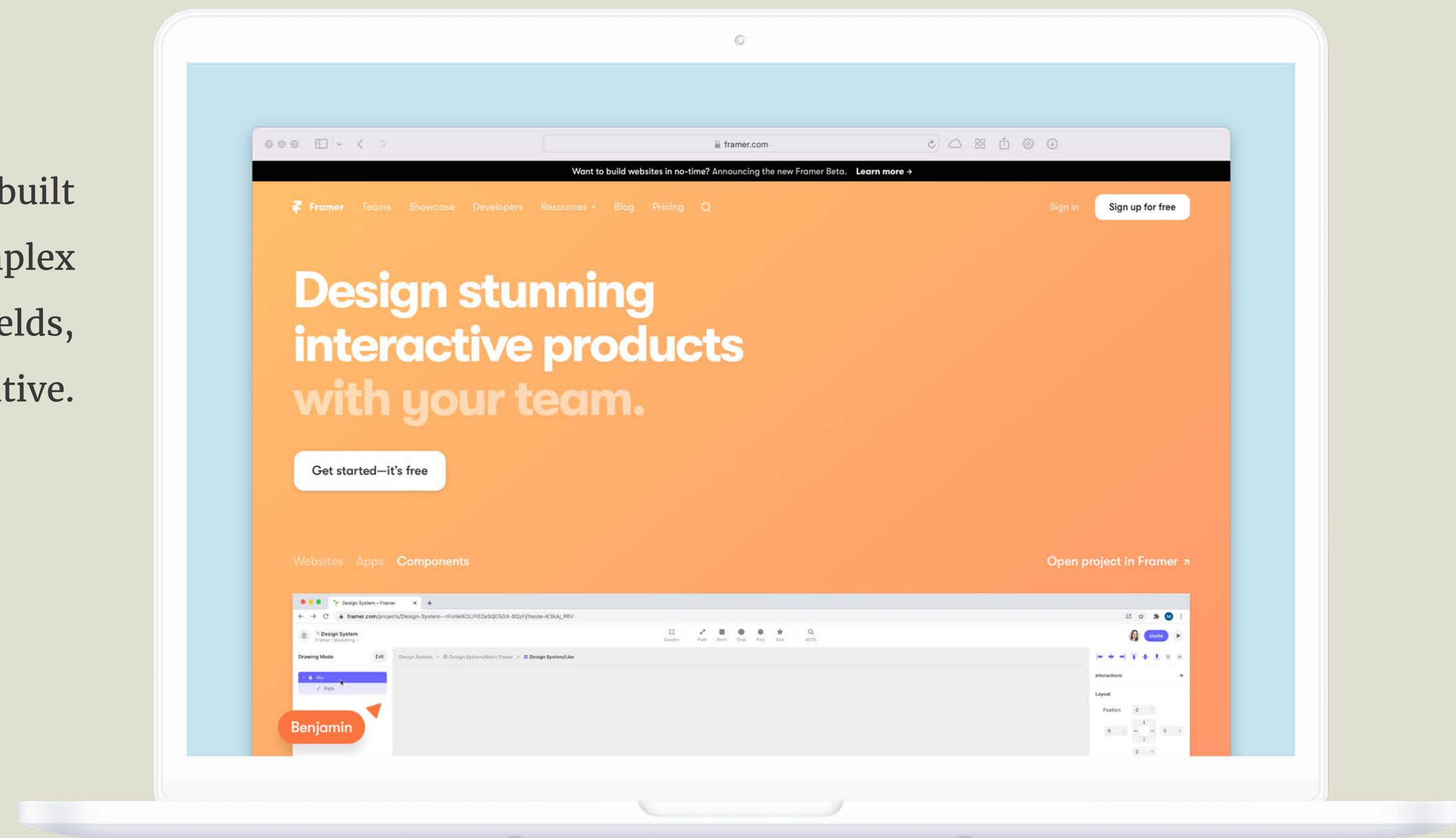
Sanity checking your mockups

Attention Insight predicts where people will look when viewing your design, making it great for sanity checking a final design.



Creating a high fidelity prototype

Figma has excellent prototyping tools built in. But if you want to do more complex animation or require interactive form fields, then Framer is an excellent alternative.



Testing your high fidelity prototype

There is little point of creating a high fidelity prototype unless you are going to test it with users.

Remote Usability Testing

Test a prototype with a small number (no more than six) users to see if they can complete critical tasks. Normally carried out over Zoom.

Unfacilitated Usability Testing

Testing a prototype with a larger number of users by asking them to complete critical tasks. Watch back session recordings or review aggregated data with a tool like [Maze](#).

Doing the design checklist

- ✓ Identify and draft your content.
- ✓ Run card sorting to create a site hierarchy.
- ✓ Create wireframe for critical pages and test.
- ✓ Produce style tiles based on agreed keywords and test.
- ✓ Break aesthetics and wireframes together in mockup or prototype.
- ✓ Sanity check your final design with a last round of testing.

Questions

I have covered a lot of ground in this section. No doubt you have questions around the details. Either ask them now or email me on paul@boagworld.com.

Presentations and Feedback

In this session, we explore how to handle stakeholder feedback and how testing can help maintain control over a design once stakeholders get involved.

Take the time to prepare before presenting

By preparing thoroughly, you will go in more confidently, which will **give stakeholders confidence**.

Preparation will **prevent you from being surprised** by questions or objections from stakeholders.

By having a plan, you will **remain in control** of the process and avoid being reduced to a pixel pusher.

Prepare by involving stakeholders

Understand

The more a stakeholder is involved in the design process, the more they will understand the decisions made.

Own

By involving a stakeholder in the process of creation, they feel ownership over the final design, making them less likely to reject it.

Defend

If a stakeholder feels a sense of ownership over a design, they are more likely to defend it when speaking to colleagues.

A reminder of how to involve stakeholders

Defining content

User attention point
exercise

Defining brand
keywords

Style tiles

Other collaboration options



Book Jacket Exercise



Six-up Exercise

Why and How You Should Create Wireframes With Others

Identify possible objections

The chances will be that you can make some educated guesses about problems or changes stakeholders might raise in the presentation. Make a list of these and jot down some thoughts about how you might answer them so you are not required to think on your feet during the meeting.

Common objections

Move it above the fold.

It is an understandable misconception that users do not scroll, based on research carried out by Jacob Nielsen in 1994. However, even by 1998, he noted that this behavior had changed.

It doesn't wow me.

It doesn't particularly wow me either, but we are not the target audience. The design tested well with our audience, and I would advise against designing for us rather than the people we are trying to attract.

People won't see...

It scored very highly when we ran the design through an eye-tracking algorithm. However, you might be right in the real world, so we could test further if you have the budget and time.

Speak to stakeholders individually if you can

Why?

Speaking to stakeholders individually allows you to tailor your message to their areas of responsibility and makes them feel listened to.

When speaking to **marketing**, present the design in terms of engagement and lead generation.

When speaking to **sales**, focus on lead quality and quantity.

Talk about reduced call volumes and other cost-saving benefits when speaking to **finance**.

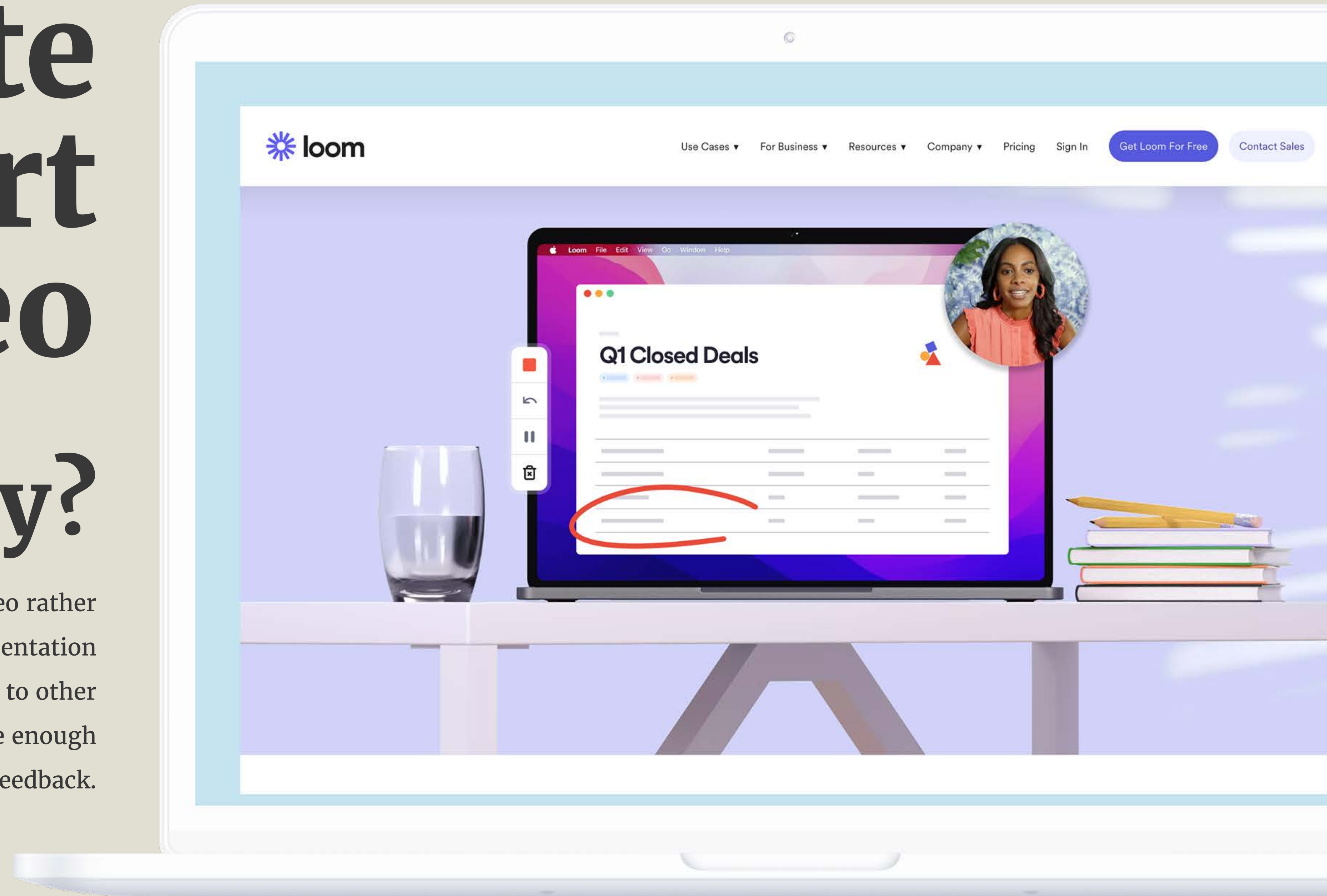
When speaking to **IT**, emphasize the ease of build and maintenance.

Appeal to the selfish gene

People don't care about users or even business objectives.
They care about how the design will help them.

Create a short video Why?

Providing stakeholders with a video rather than a mockup after your presentation means that if they pass it on to other people, those people will have enough context to provide valuable feedback.



How to prepare a video of your design approach

Keep it short — no more than 20 minutes.
Ideally nearer 10.

Cover the same basic information as in
your main presentation (more on that
later).

Ask for structured feedback (more on that
later).

Nail your presentation

If you have followed the advice about speaking to stakeholders individually and involving them in the creation process, presenting the final design should be nothing more than a formality.

Nevertheless, there are things you can do to reduce negative feedback.

Before showing the design recap the following

Decisions

Recap what decisions have been made already. Cover areas such as brand keywords, value proposition, success criteria, and content.

Collaboration

Revisit the design assets you produced together, such as style tiles or the user attention points exercise.

Testing

Cover all the testing that has been done including card sorting exercises, 5 second tests and first click tests.

Why Recap?

Triggers the commitment bias

If we agreed to something previously we do not like to be seen to change our minds.

The methodology provides reassurance

By showing you have a process and clearly explaining it before showing the design, you give stakeholders more confidence in your approach.

When Presenting

Reference previous work

Point out where the design reflects the style tiles, wireframes and other decisions made with the stakeholder. This will trigger the commitment bias.

Preempt objections

Do not wait for stakeholders to express an objection. Once they have objected out loud, they will be unlikely to back down, especially in front of a group or if they are particularly senior. Nobody likes to be proved wrong.

Emphasize testing

Emphasize how the design reflects the testing done and show the heat map captured using Attention Insights.

Downplay sign off

Sign-off makes stakeholders feel that a design has to be perfect before proceeding. That tends to encourage them to micro-manage the process. Better to remove sign-off or at least downplay it.

Ending your presentation

Do not ask for immediate feedback

Give people time to digest the design before providing feedback.

Instead focus the conversation on any questions they have about the design process.

Gathering feedback the right way

If you ask stakeholders for feedback when you present, this will lead to conversations about how to fix the design. Unfortunately, you will then lose control over the design process, and it will turn into **design-by-committee**.

Fortunately, there is a better way.

How to avoid feedback during your presentation

Don't leave enough time.

Tell people you want to give them time to digest the design.

Suggest people consult with others.

Say you will send them specific questions.

Focus on questions around the process.

Email stakeholders post presentation

Send the video you prepared along with your structured questions.

Asking specific questions focuses
stakeholders on what matters and avoids
them getting sucked into expressing their
personal opinion.

**Never ask
"what do you think?"**

What questions you can ask?

Does the design support the needs of the users it is aimed at?

Does the design achieve the organizational objectives?

Do you believe users will associate the brand keywords with the design?

Does the design incorporate the stylistic elements defined in the style tiles?

Does the design reflect the wireframes that were previously created for critical pages?

Does the design communicate the value proposition agreed at the outset of the project?

Are there any additional considerations we need to take into account as we move into the build phase?

A common mistake I see designers and project managers make is to ask for a single point of contact who collates and provides all the feedback.

You want all feedback to come directly to you because that allows you to question feedback, judge its importance, and ultimately decide what to act upon.

Control the narrative

Be the single person who has the whole picture and take control.

Common objections

Move it above the fold.

It is an understandable misconception that users do not scroll, based on research carried out by Jacob Nielsen in 1994. However, even by 1998, he noted that this behavior had changed.

It doesn't wow me.

It doesn't particularly wow me either, but we are not the target audience. The design tested well with our audience, and I would advise against designing for us rather than the people we are trying to attract.

People won't see...

It scored very highly when we ran the design through an eye-tracking algorithm. However, you might be right in the real world, so we could test further if you have the budget and time.

Handling disagreements

Ask why

Word objections as
questions

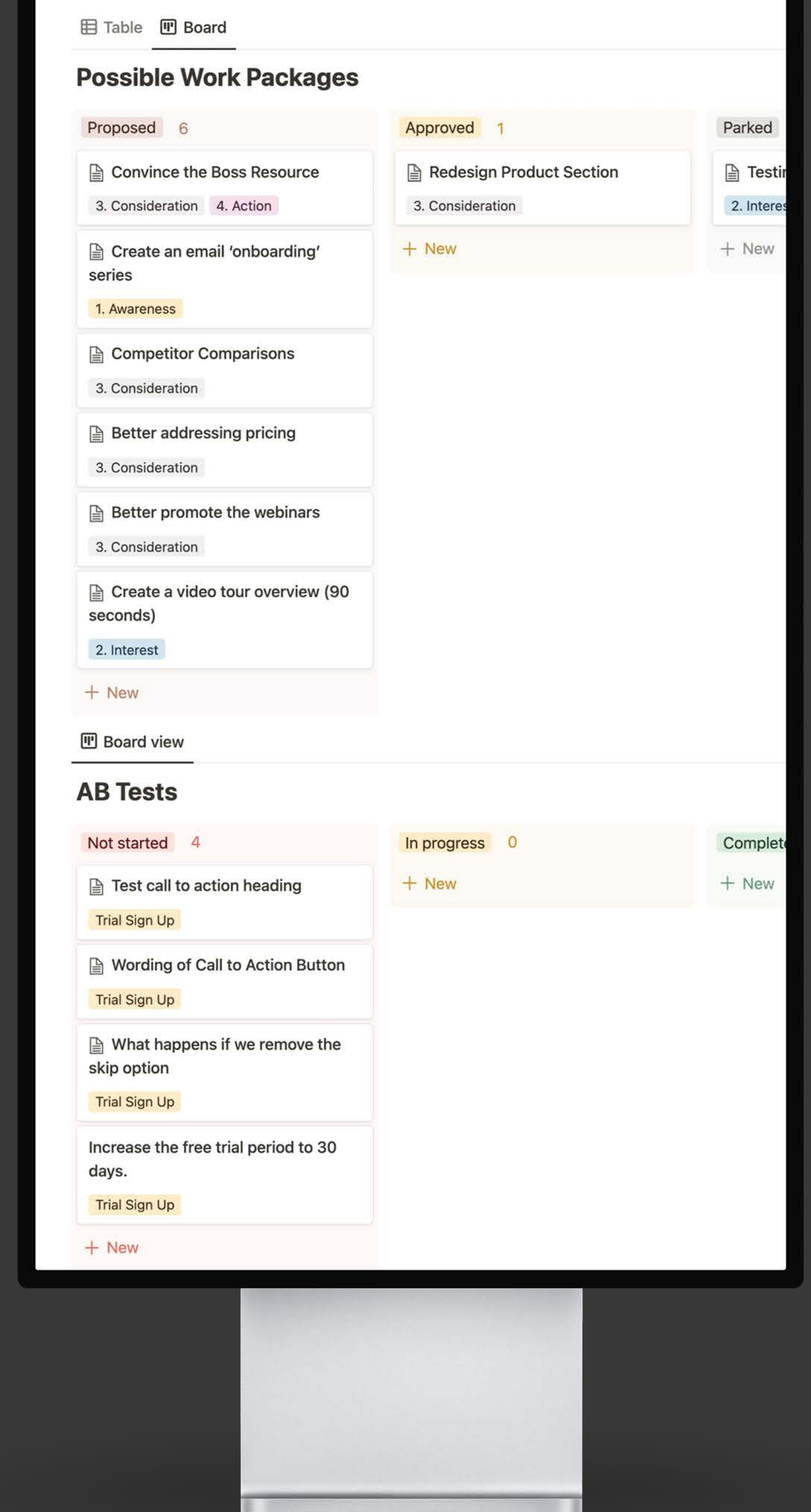
Suggest testing

Move to post launch
optimization

Handling scope creep

Scope creep is not inherently bad. Digital allows us to be adaptable if the project is run in stages. However, where it is impossible or inappropriate to accommodate we need a strategy for dealing with it.

Create a backlog of post launch work packages and test scenarios



Never say no, ask questions instead

We could do that but it would add 2 months to the timeline, is that feasible?

We estimate that would cost an extra \$2,000. Do you have a budget for that?

What feature should we drop to make this happen?

Would you prefer to deal with this post-launch or push back the launch date?

We would need a business case to justify that. Is this something you can put together?

Presentation and feedback checklist

- ✓ Prepare a video presentation up front.
- ✓ Brainstorm objections and possible answers
- ✓ Attempt to speak to stakeholders individually before presenting.
- ✓ When presenting, heavily reference previously agreed work.
- ✓ Gather structure feedback after the presentation, not during.
- ✓ Channel all feedback via you and challenge by asking questions.

Questions

Perfecting your presentation and feedback process takes practice. However, if you have questions I am happy to answer them either now or [via email](#).

Ensuring Your Design flourishes

In this session, we explore how you can ensure your design survives and prospers by working alongside developers, using design systems and optimizing the site post launch.

Working with a developer

All team members must work closely on a web project, but the designer/developer relationship must be incredibly close.

When the final website doesn't reflect the design it is almost always because of a failure in this relationship.

Don't forget to design with developers in mind

Create components that the developer can reuse.

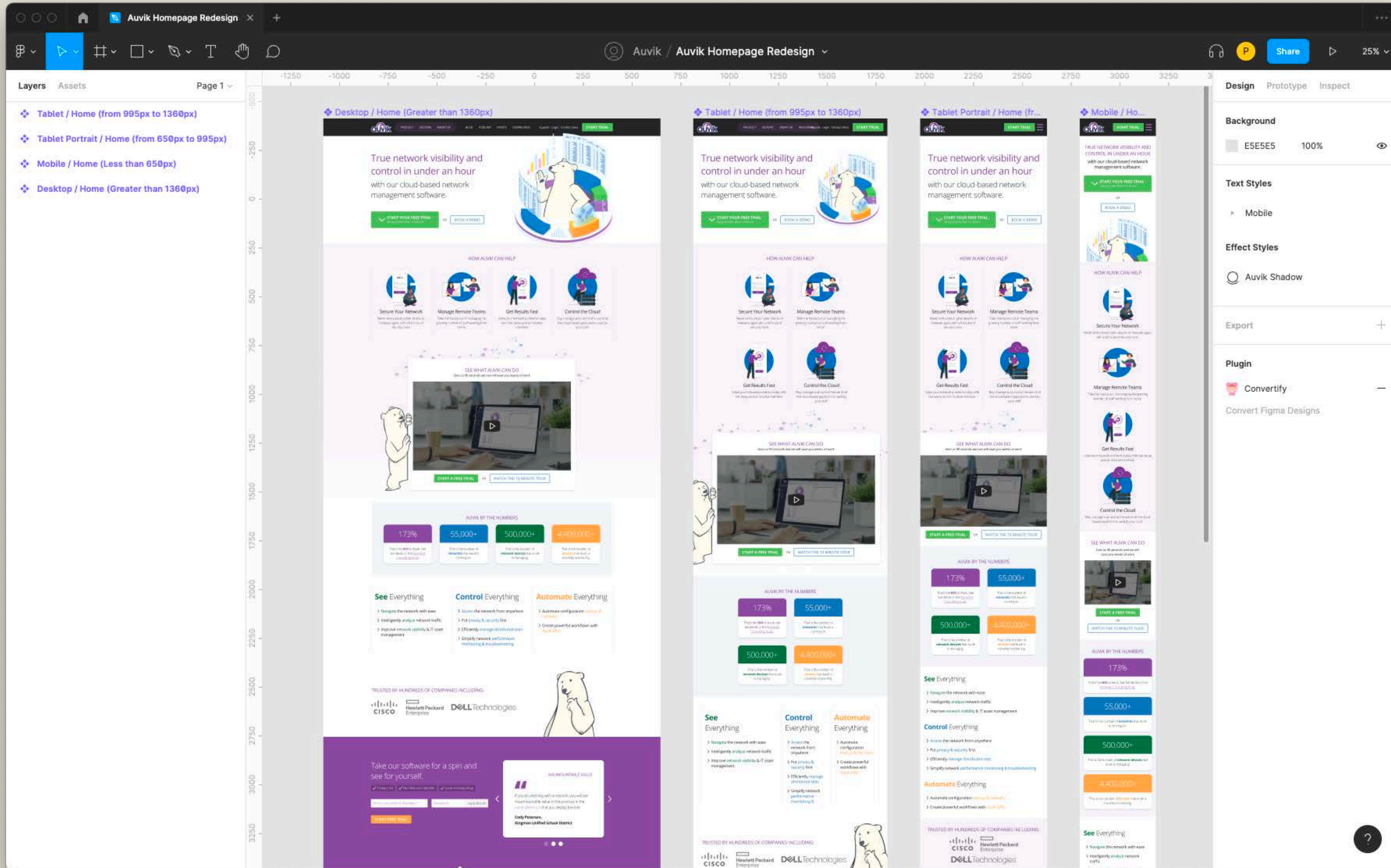
Design with auto-layout to replicate the CSS box model.

Make use of color and typographic styles to ensure consistency.

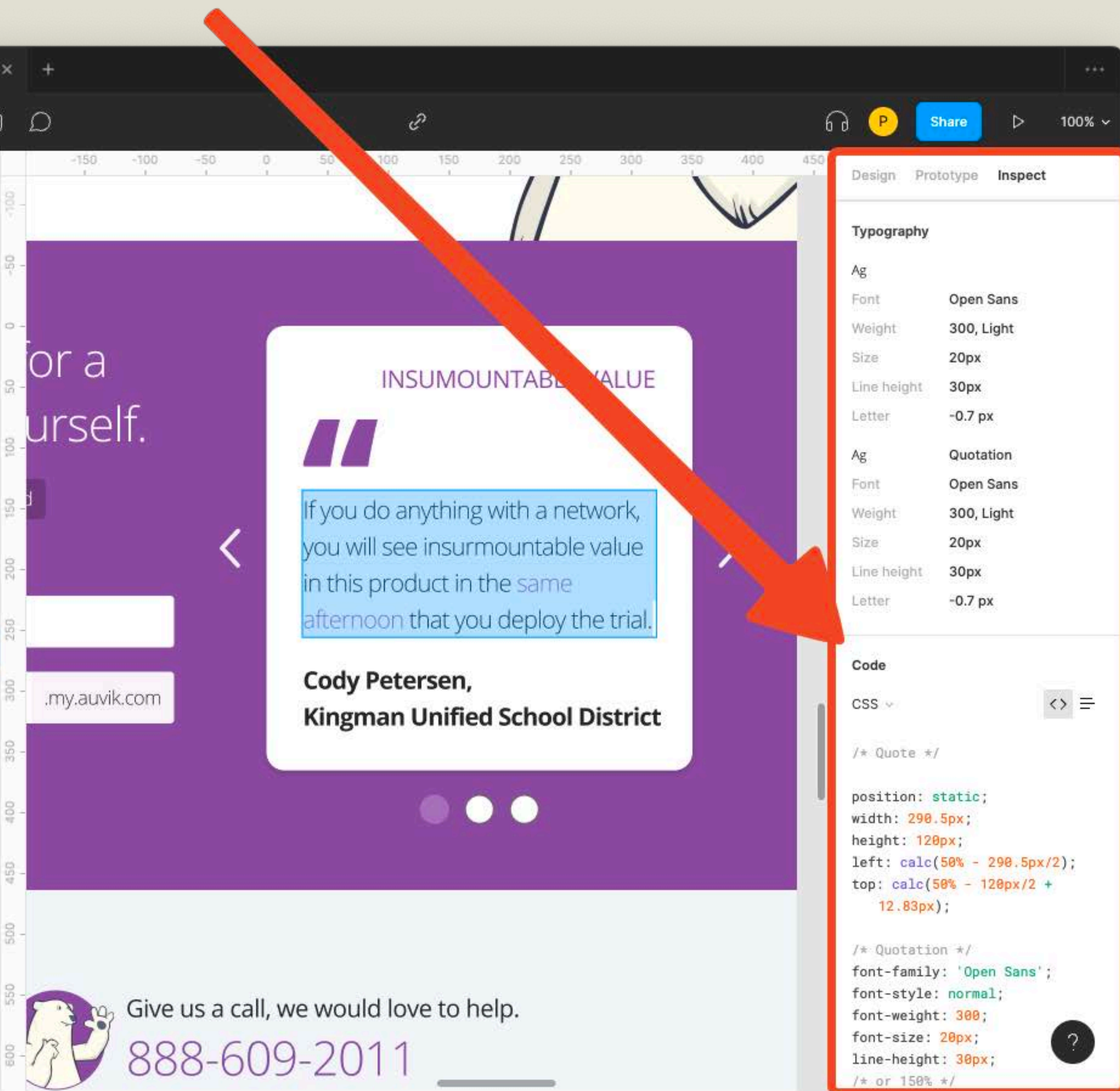
Create the states for buttons, links and forms.

Provide error messaging.

Consider responsive breakpoints.



There are more than 2 breakpoints. Design breakpoints around the content, not the device.



Use a tool
with an
inspect
mode

Be flexible for the sake of performance

Fonts

Fonts are big unless you pick a specific type of font called variable fonts. Avoid too many different fonts (2 max) and limit the number of font variations.

Imagery

Avoid purely decorative images. Instead, ensure they help explain the content. Avoid complex images with a lot of detail. If appropriate, go for vector illustrations.

Javascript

If you add interactive elements or design delimiters, ensure that the website still works without them, as Javascript can be slow to run on mobile devices.

Work collaboratively with the developer on design delighters

What?

A design delighter is an interactive or visual element that although not necessary to use the site, enhances the experience.

How?

- Accordions.
- Animation.
- Carousels.
- Interactive guides.
- Wizards and configuration tools.

Why?

A developer will have a much better idea of what is possible and what fits within the project's budget.

**Never show a design to
the client before the
developer!**

And while I am at it...

Let go of pixel perfect design

The developer will not be able to reproduce your design exactly as you envisioned it.

The final design is a collaboration between
the designer and developer.

That means you need to involve the
developer early in the process.

And you need to be available to collaborate
with the developer during the build.

A collaboration

The ultimate example of this collaborative
relationship is a design system.

Consider creating a design system

What?

A design system is a set of components and styles that you can use to help ensure consistency across a website.

Why?

Although particularly useful on larger websites, a design system will help designers and developers quickly create new templates on a website of any size.

When?

Ideally, you would start planning a design system as soon as you start working on the design. However, it can also be applied after the website has gone live.

Critical parts of any design system

Styles

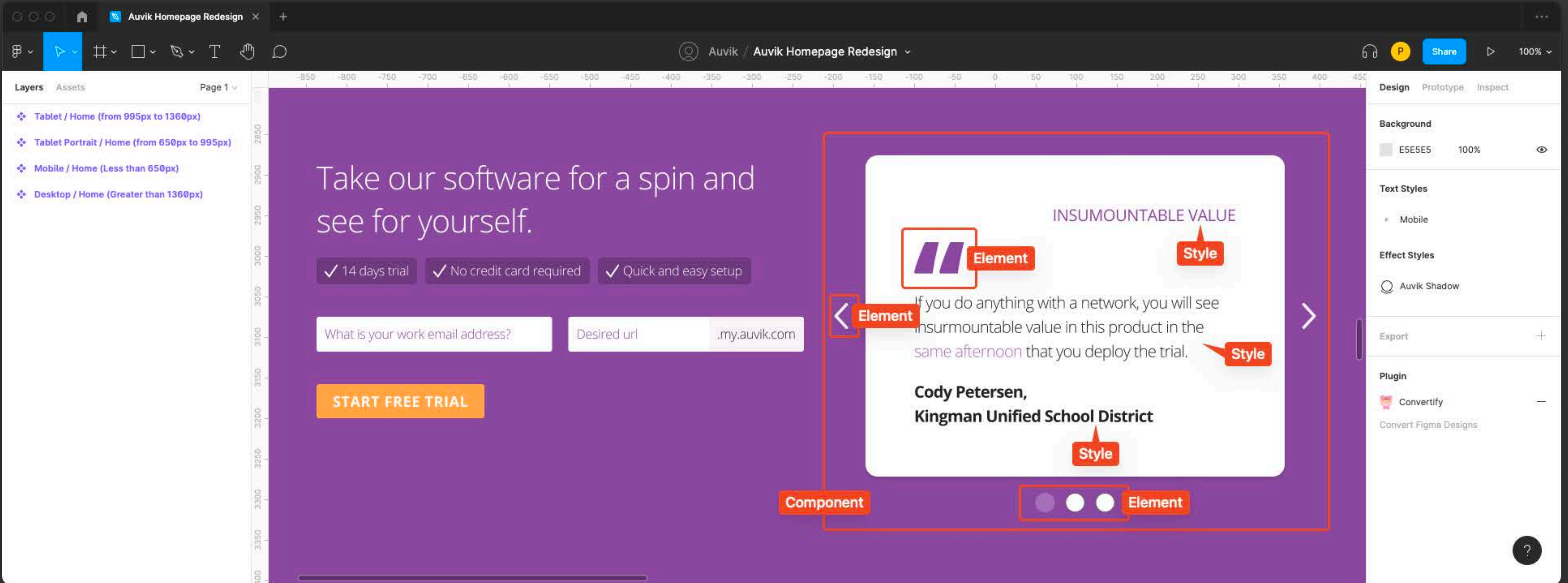
Styles include typographic styles for things like headings, quotations, links, and a color palette.

Elements

Elements include the fundamental building blocks of any website. These include things like buttons, form fields, navigation, and icons.

Components

Components are more complex aspects of the UI that are made up of multiple elements. For example, a header component could contain elements such as a search box or navigation.



Organizing your design system

Start Simple

Your design system can start as nothing more than a few styles and essential elements. Then add header and footer components and grow from there.

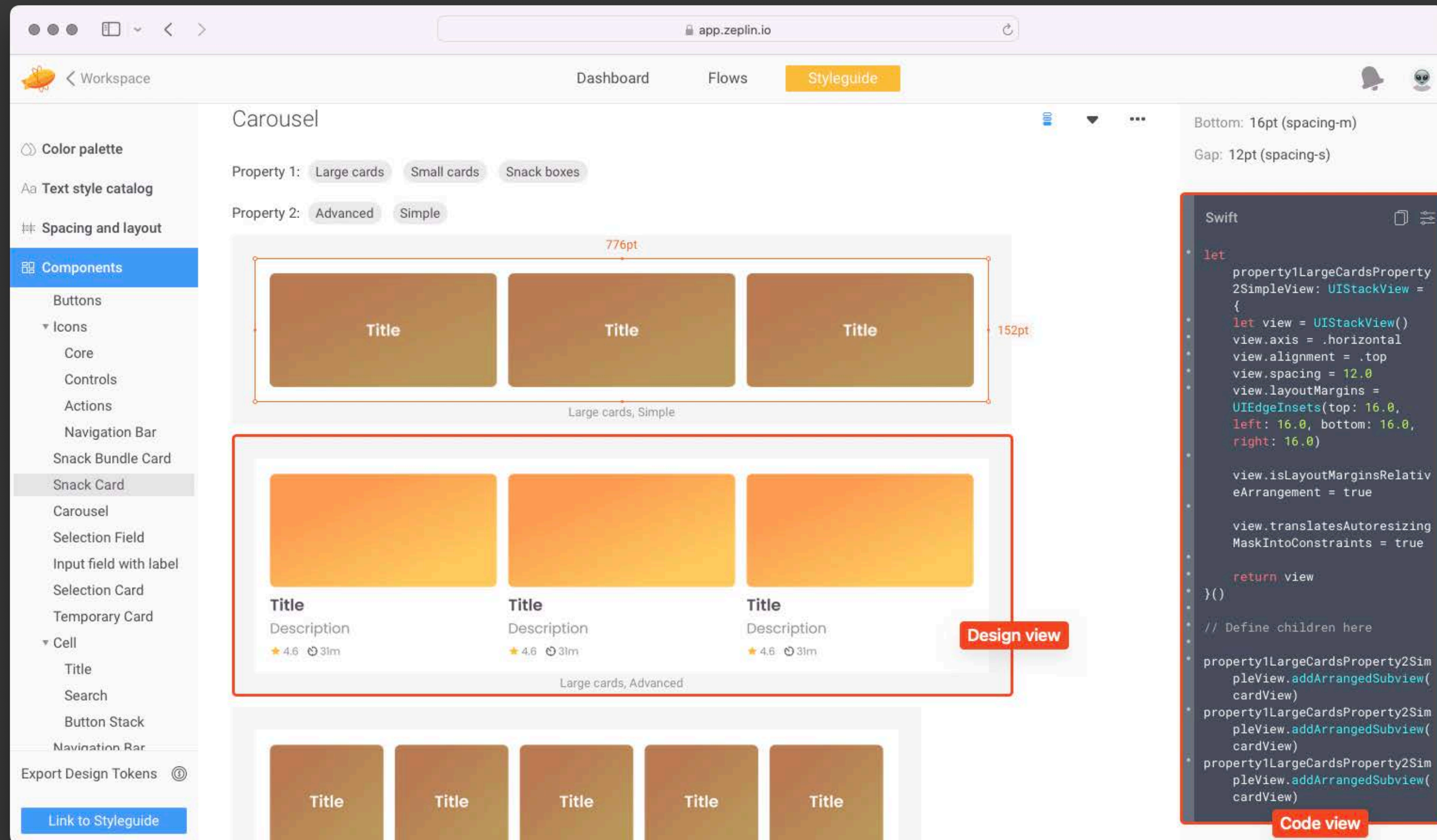
Don't overthink

Try and strike a balance between not having too many components and entirely abstracting them. For example, it is okay to have separate news and events listing components even though they are similar.

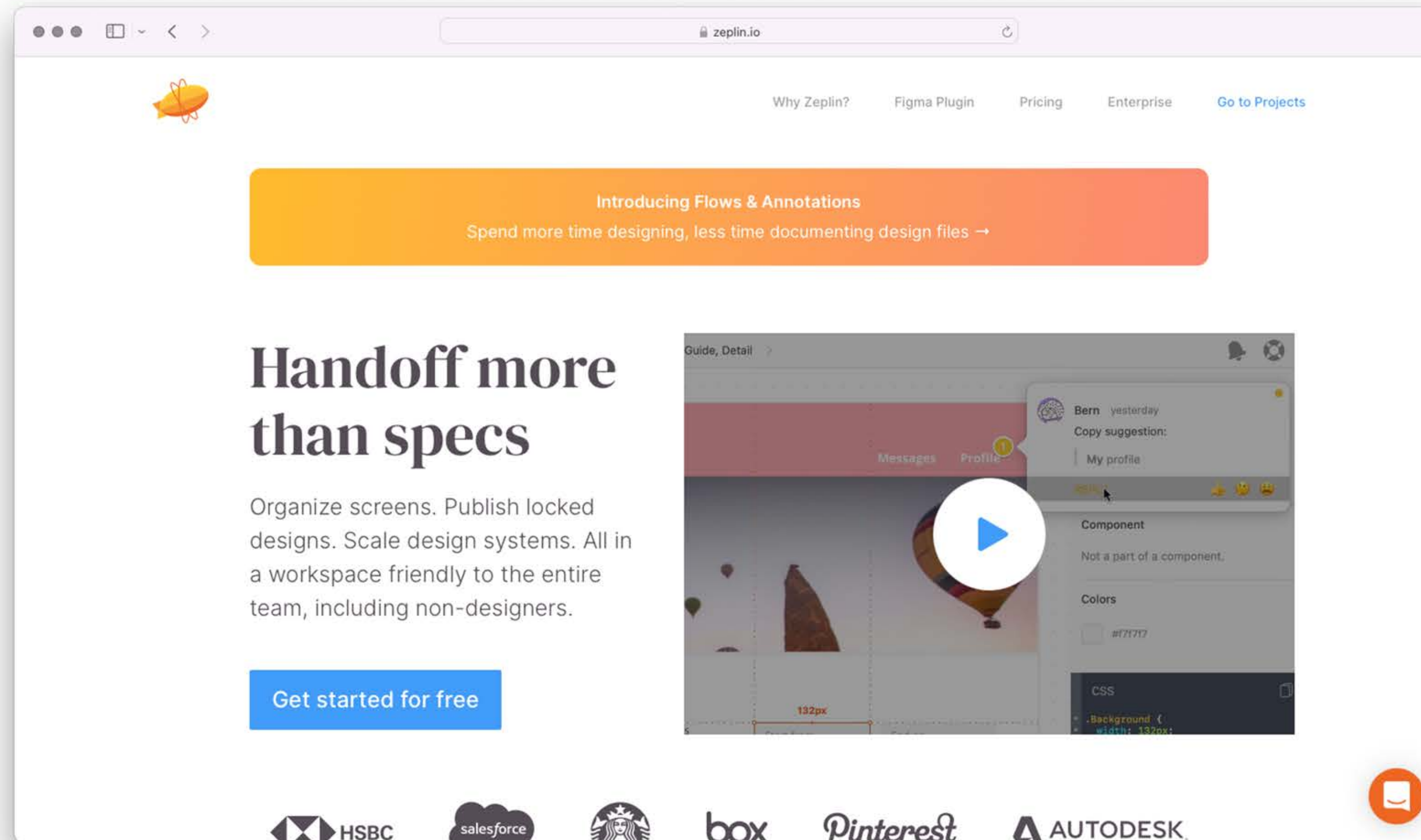
Stay flexible

Your design system should evolve. Add new components as required, but also seek to combine components when your system starts to become bloated.

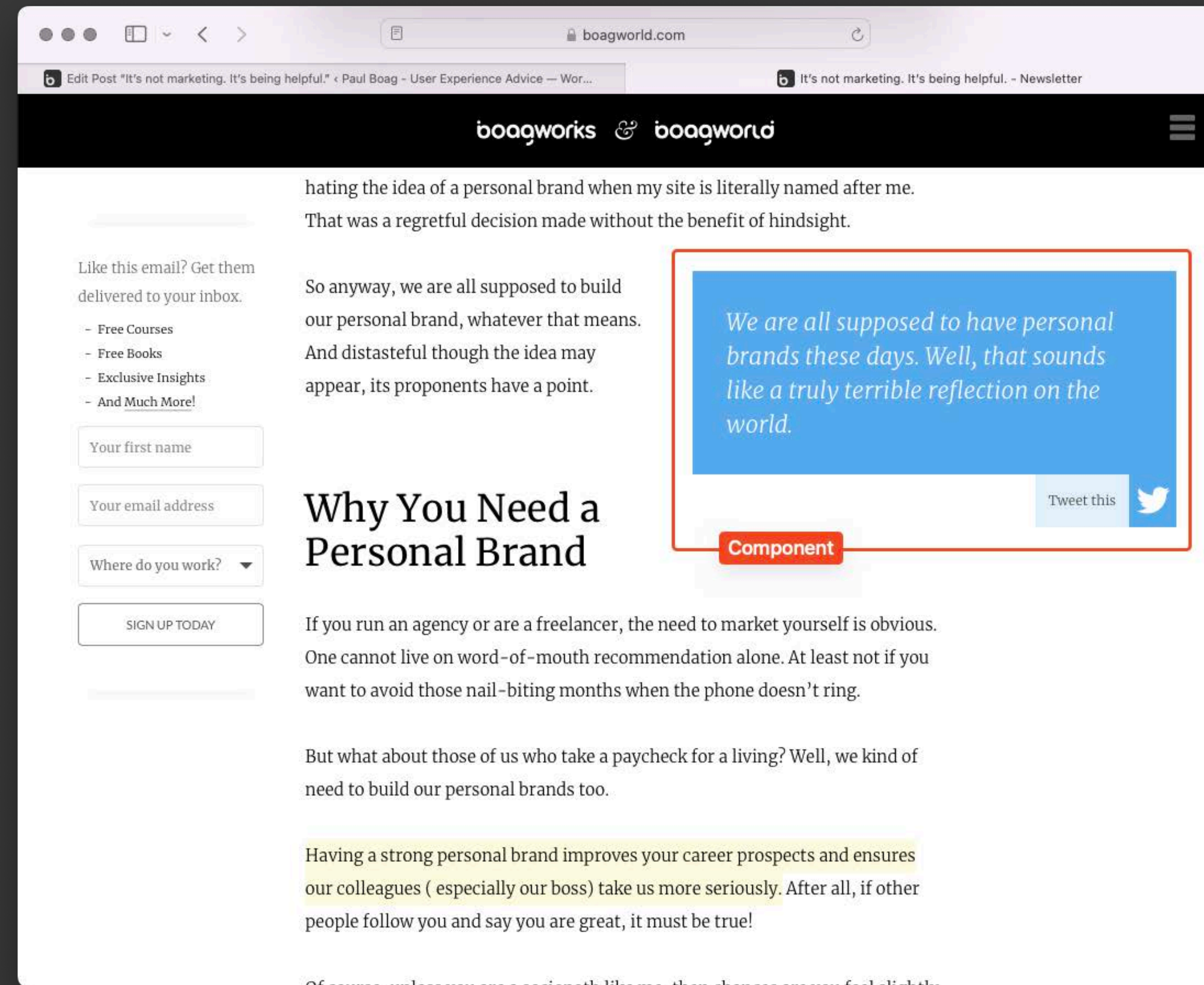
Both design and code



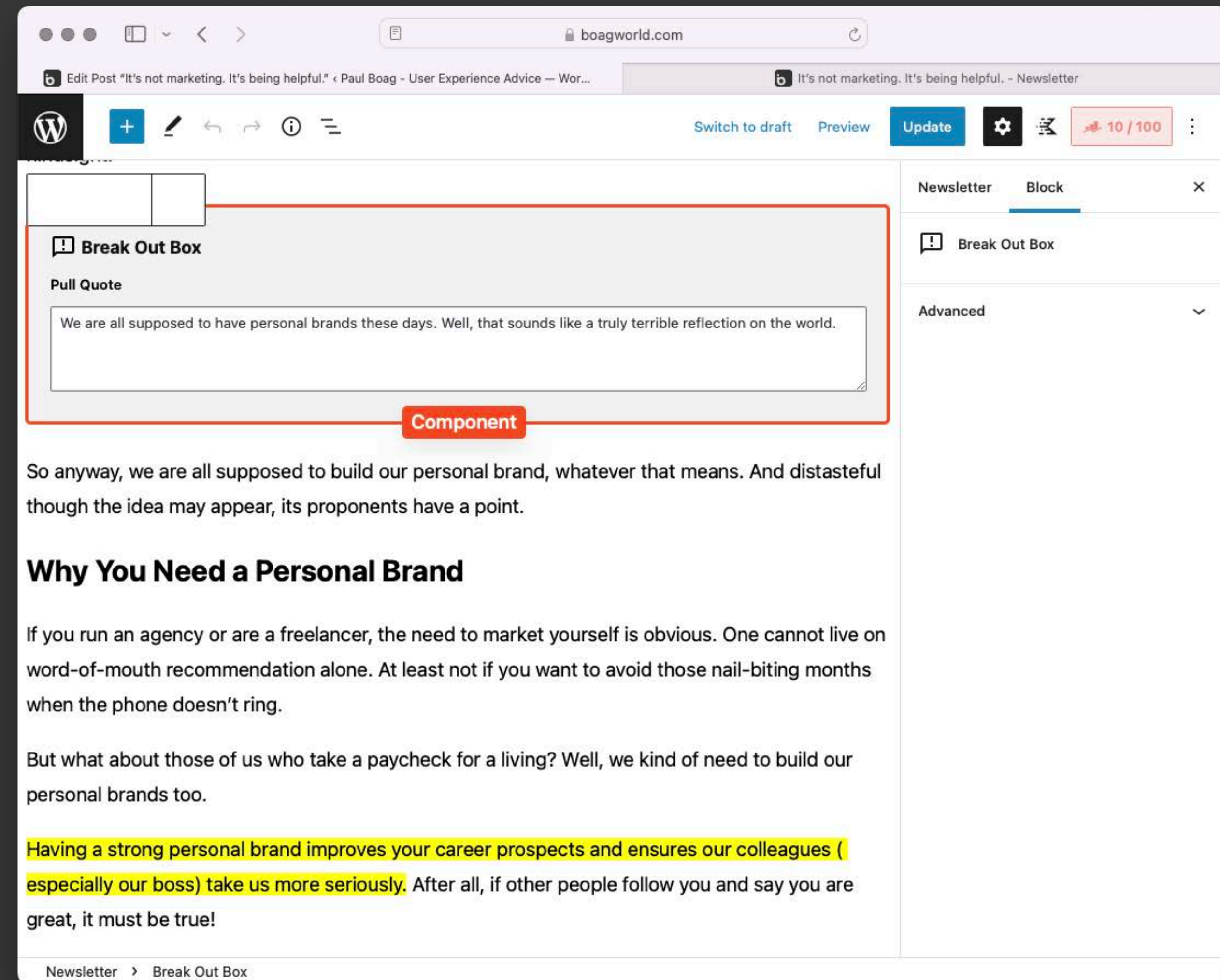
zeplin.io



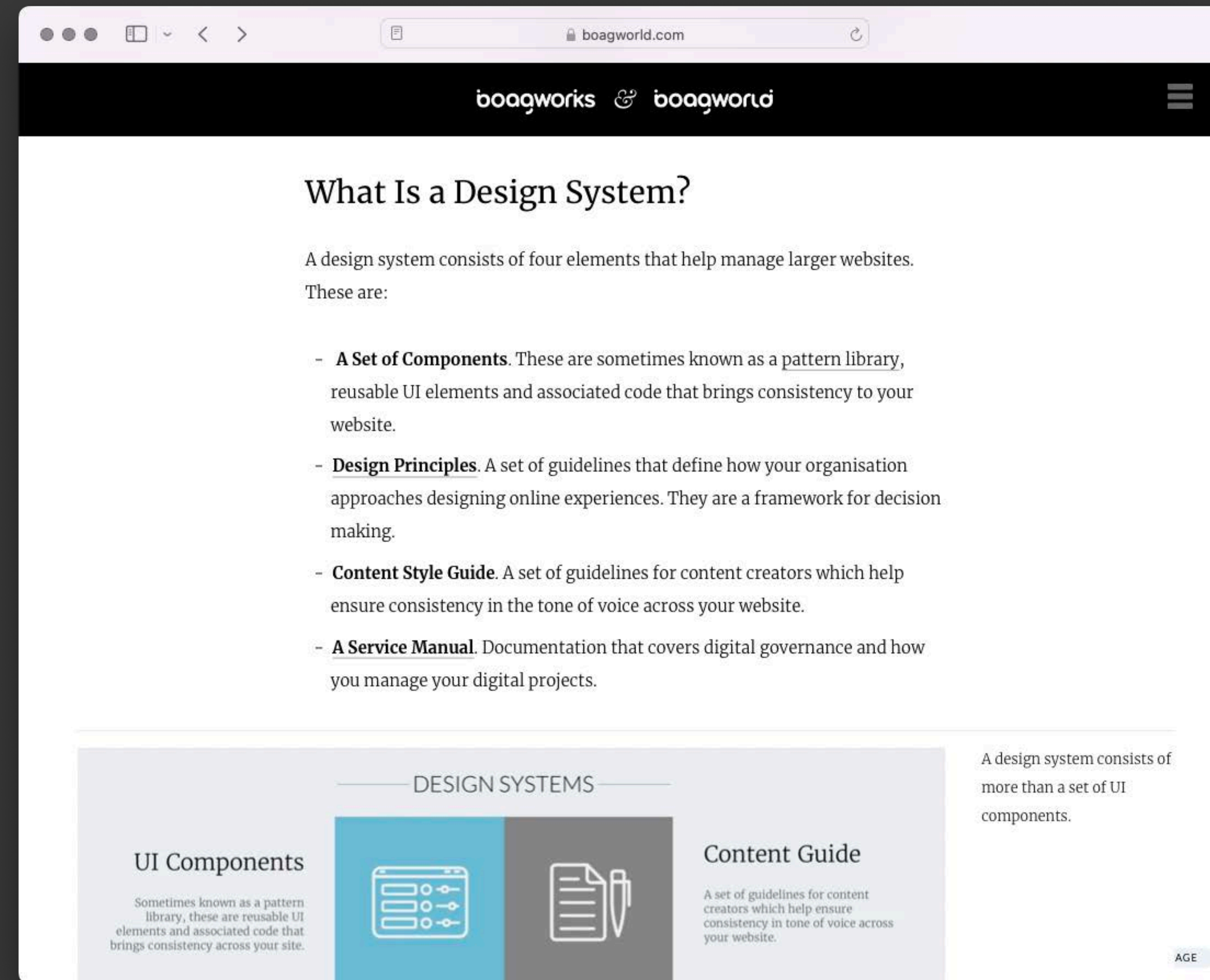
Empower your content creators



Empower your content creators



Expand your design system

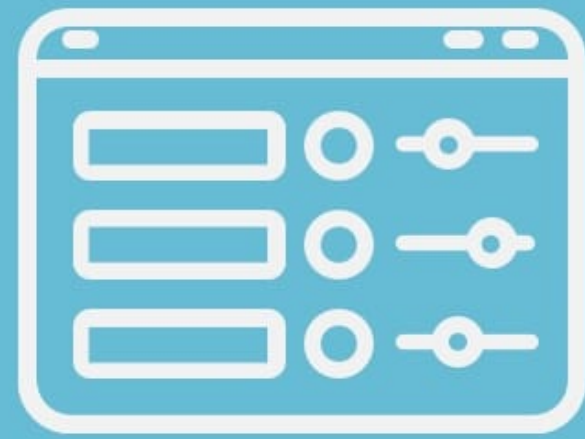


boagworld.com/boagworks/design-system/

DESIGN SYSTEMS

UI Components

Sometimes known as a pattern library, these are reusable UI elements and associated code that brings consistency across your site.



Design Principles

A set of guidelines that define how your organisation approaches designing online experiences. They are a framework for decision making.



Content Guide

A set of guidelines for content creators which help ensure consistency in tone of voice across your website.



Service Manual

Documentation covering digital governance and how digital projects are managed.



Optimize your design post launch

No design is perfect at launch, no matter how much testing you do beforehand.

Nothing beats watching real users carry out natural interactions to learn how to improve your design. That is why post-launch optimization is so important.


articles.uie.com

CENTER
CENTRE * UIE

UX Strategy Playbook All You Can Learn Jared Live Articles Podcasts

ARTICLES

The \$300 Million Button



by Jared M. Spool

Editor's note: Thanks to Yannick Primel, you can [read this article in French](#); thanks to Uwe Keim, you can [read this article in German](#).

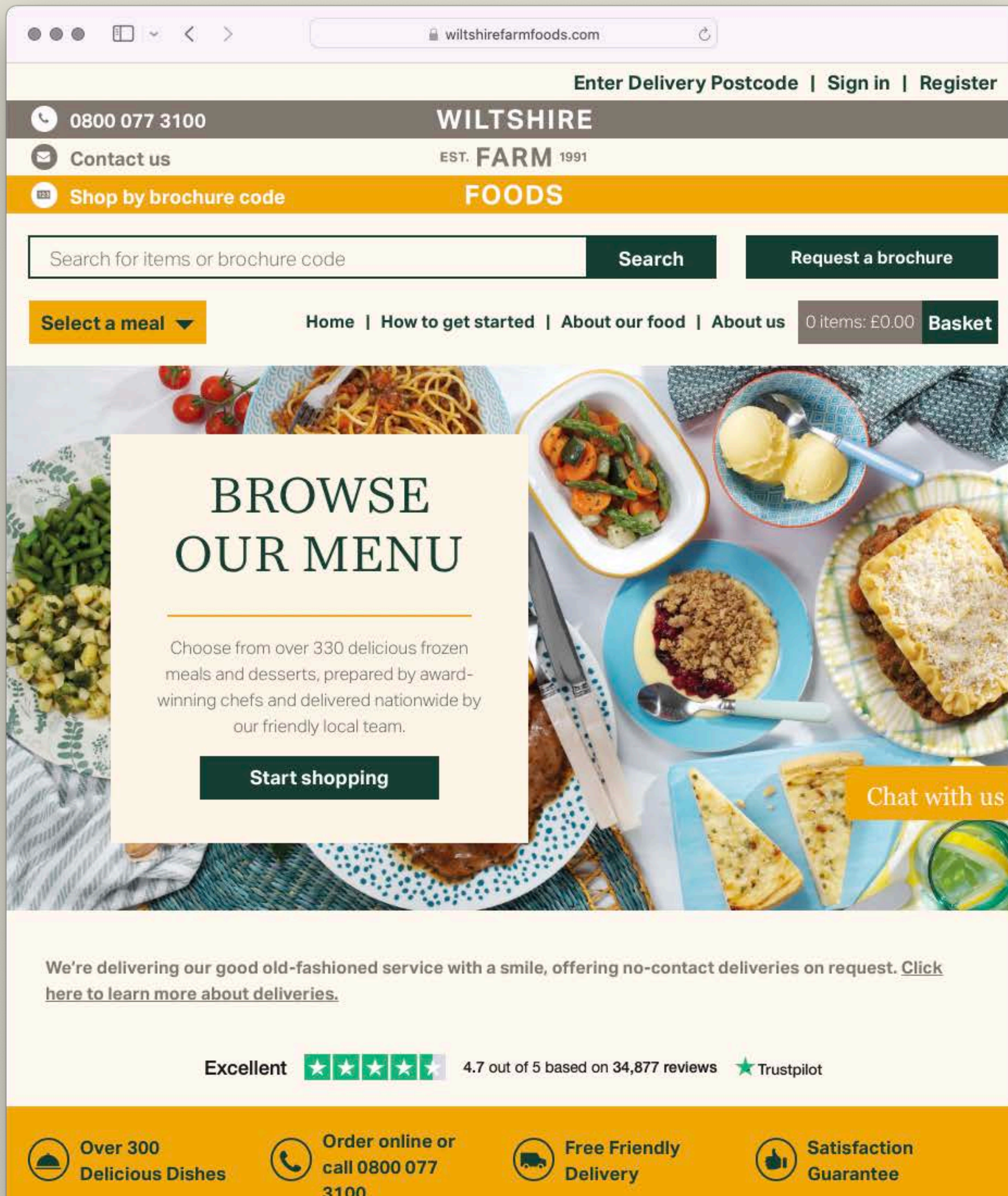
[While Luke Wroblewski was writing his well-received book, [Web Form Design: Filling in the Blanks](#), he asked if I could think of an example where a change in a form's design made a noticeable difference in business. "You mean like \$300 million of new revenue?" I responded. "Yes, like that." said Luke. So I wrote this article, which he published in his book.]

How Changing a Button Increased a Site's Annual Revenues by \$300 Million

It's hard to imagine a form that could be simpler: two fields, two buttons, and one link. Yet, it turns out this form was preventing customers from purchasing products from a major e-commerce site, to the tune of \$300,000,000 a year. What was even worse: the designers of the site had no clue there was even a problem.

The form was simple. The fields were *Email Address* and *Password*. The buttons were *Login* and *Register*. The link was *Forgot Password*. It was the login form for

Watch and Learn



A 100 fold
increase in 5
years.

Preparing the ground for optimization

Start Early

From the very start of the project, talk about post-launch optimization. Add at least some into your timeline, but emphasize this will be ongoing work.

Create an idea list

Start an ideas list at the beginning of the project
– a place to collect possible post-launch features and improvements. This list will not only encourage thinking about what happens post-launch it will also help with scope creep.

Post launch optimization process

**Identify Drop Out
Points**

**Identify the Problem on
the Underperforming
Page**

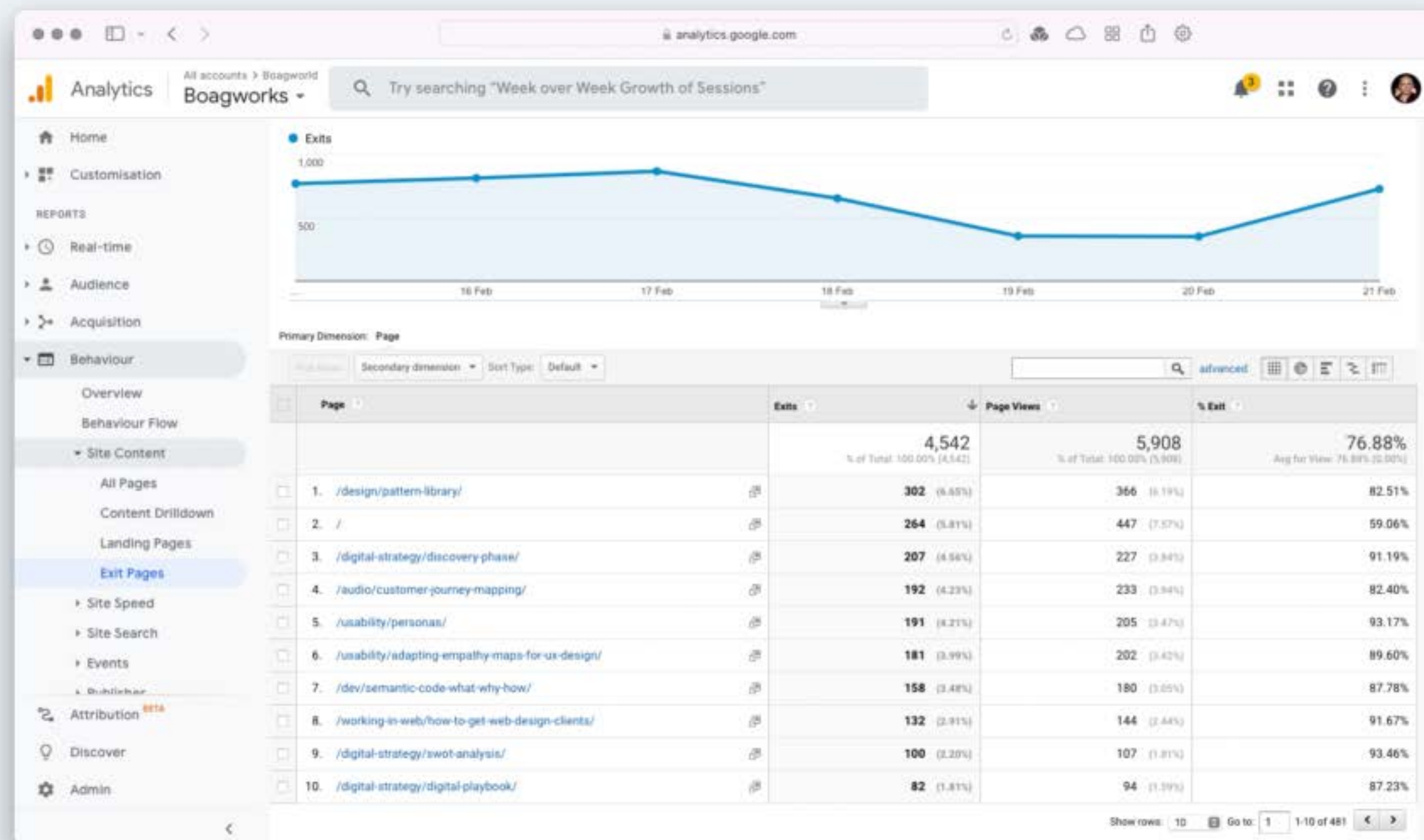
Test the Solution

Rolling Out a Solution

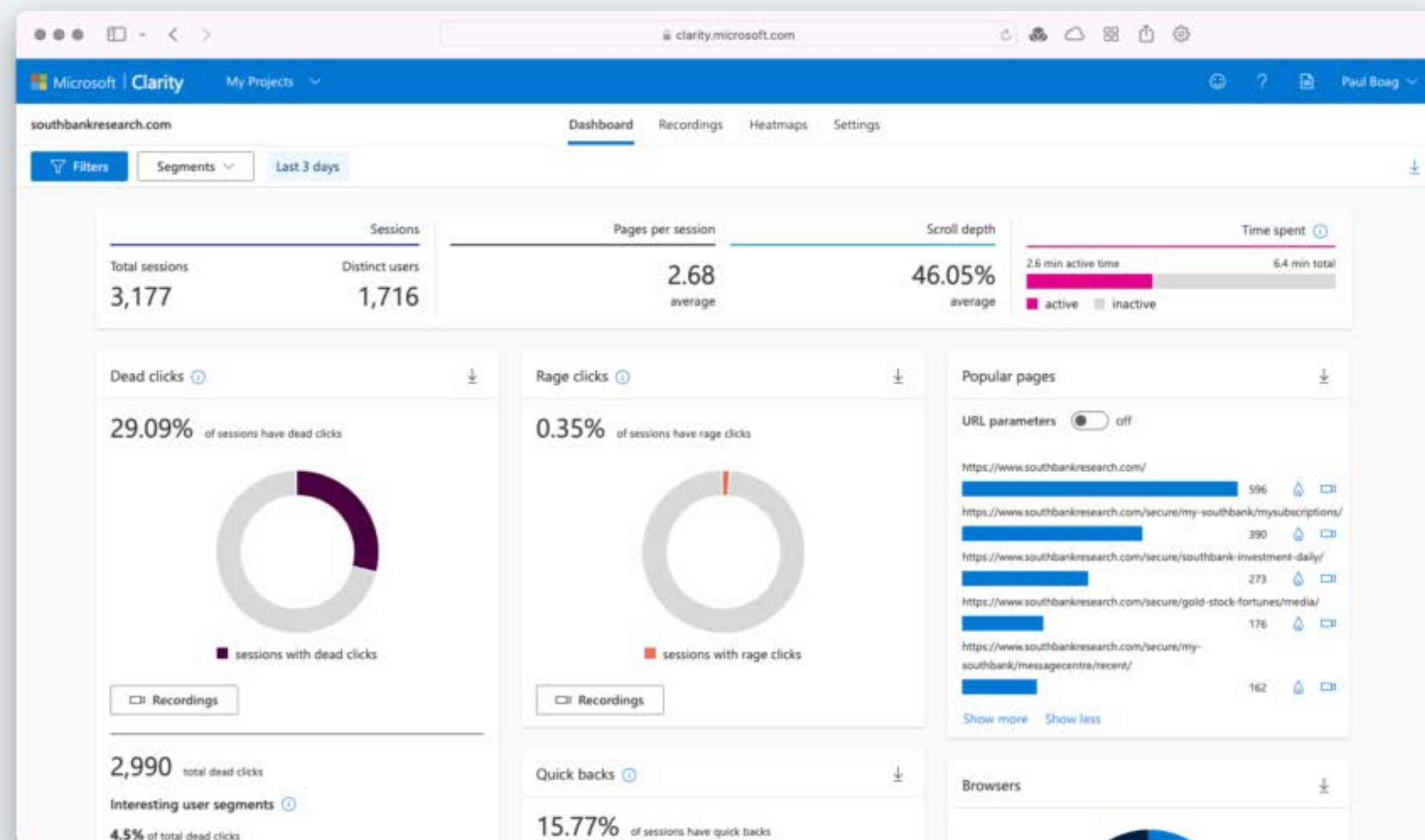
Rinse and Repeat

Identify Drop Out Points

In Google Analytics pay attention to pages with a high **bounce rate** or are ranked highly as an **exit page**.



Identify the Problem

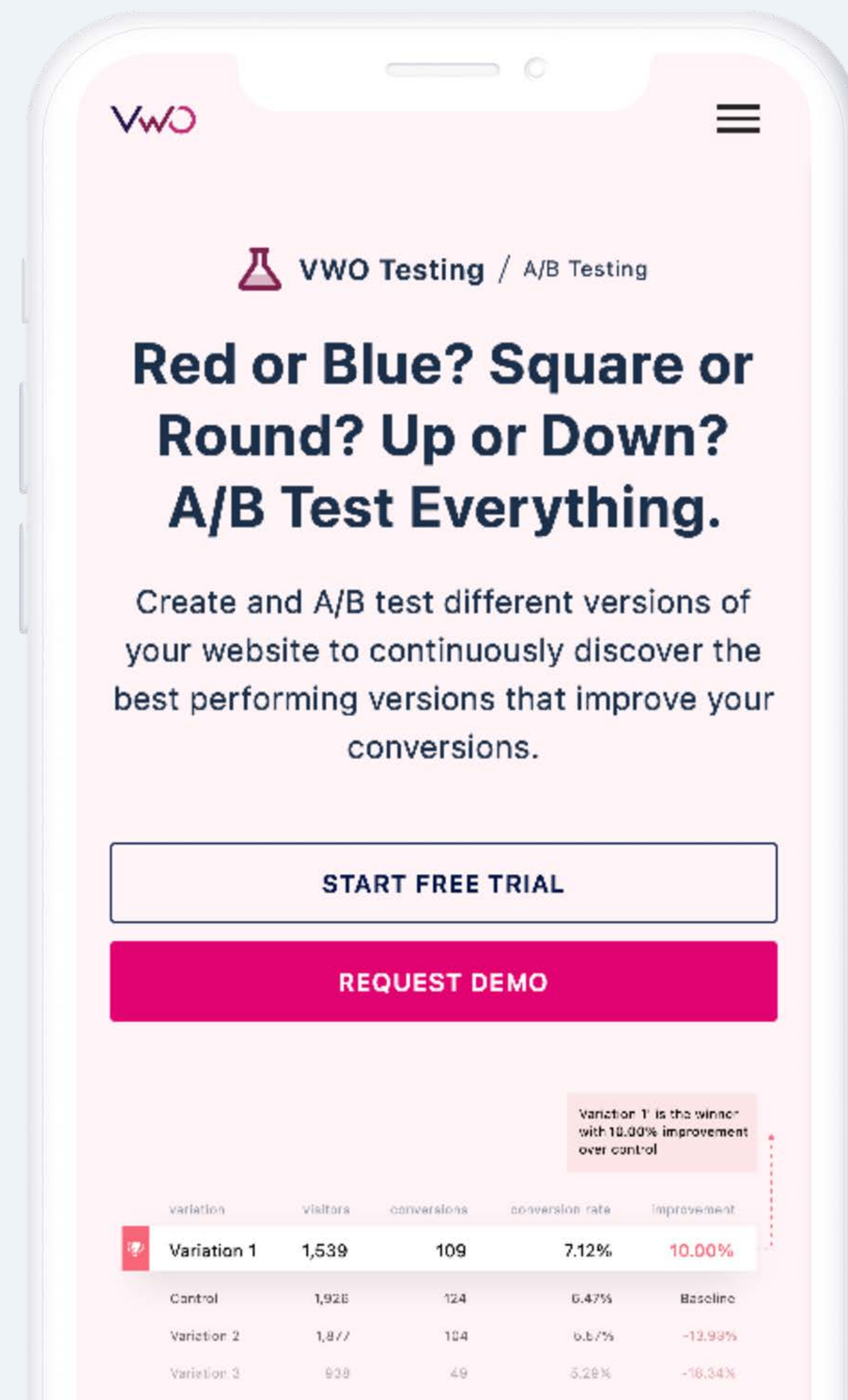


- **Did users not see something?**
Use heat maps, session recordings and eye tracking software.
- **Did people not understand something?**
Look for rage clicking, clicking non-clickable elements, or triggering validation errors on forms
- **Did we not convince them?**
Use an on-exit intent surveying asking why they did not act.

Test the Solution

Small

If the change is something small like updating some text or changing the color on a button, the best approach is to use an AB testing tool like VWO.



Large

If the change is more significant, you will need to create a prototype of the new approach and run some facilitated usability testing to ascertain its potential.

**Launch and repeat
forever**

Your final checklist!

- ✓ Consult with the developer as you design.
- ✓ Never show a design to a client before showing the developer.
- ✓ Create a simple design system as you work on a design.
- ✓ Build a more robust design system for larger websites.
- ✓ Start talking about post-launch optimization early.
- ✓ The work of site optimization should be an ongoing cycle.

Questions

Last chance to ask me questions live today.
Alternatively you can ask questions anytime
[via email.](#)
