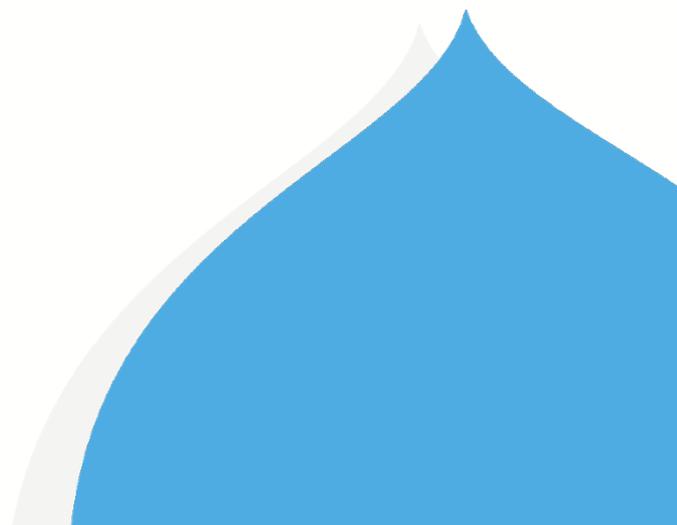


AcQUID

Panic-Free Project Prep

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Purpose

- Discuss detailed steps a partner or customer should take to adequately prepare for a project before it begins
 - Decrease training costs
 - Decrease website revisions
 - Avoid a rushed user interface design and implementation
- Get your client to articulate the problem the new website should be fixing and define an effective solution.

Agenda

1. Clearly Defined Business Goals
2. Target Audiences
3. Scenarios and Tasks per Audience
4. Personas
5. Content Inventory and Editorial Calendar
6. Taxonomy and Categorization
7. Navigation
8. Card Sorting
9. Prototypes
10. Usability Testing

Clearly Defined Business Goals

- **Specific** - Quantifiable business objectives
- **Measurable** - Help the customer determine how they can measure if the goal has been accomplished
- **Attainable** – Can the goal be realistically accomplished?
- **Relevant** - Does their goal match their business needs?
- **Timely** - What is a realistic timeframe to meet their goal?

Examples of Clearly Defined Business Goals

- **Specific** - We would like to increase our sales conversion rate by 25%.
- **Measurable** - With a commerce solution, will the stakeholders be able to see the increase in percentage of sales?
- **Attainable** – If the client implements a new ecommerce solution, it may not be enough by itself to increase the sales conversion rate by 25%, but a combination of a new ecommerce solution and a new marketing strategy may lead to an attainable goal.
- **Relevant** - A goal of adding sharing mechanisms to each product page on the site may align with a business goal of increasing the number of new customers by 10%.
- **Timely** - The end goal may be to increase the sales conversion rate by 25%, but achieving that number within a 4 month site build may be a stretch goal. It is best to think in terms of short-term and long-term goals.

Target Audiences

- Helps the client and vendor understand:
 - What content should appear on the site
 - How it should be presented to the user
 - How the user should interact with the content and functionality on the site
- Limit to 3-5 profiles, or types of users
- Example User Profile:
 - Users will be between 18-80 and will mostly be traveling for business or pleasure. The majority of site visitors will be native English speakers, so the site does not need to be translated into different languages. Some users will be very tech savvy while others may not use the computer or their mobile device often.

Charting Exercise for Target Audiences

Characteristic	Considerations	Examples of Design Implications
Age	Visual Motor Skills	Does the customer need to increase font size or consider what colors to use based on the users' ages?
Language	English not primary language	Does the customer need to change the style in which they've written or labeled the content? Does the customer need to have separate pages for translated content or allow users to select the language they would like the content translated to?
Computer Experience	Domain Expertise General knowledge	If users do not have much computer expertise or do not have much experience with the website's subject, will they need additional documentation, training, or tutorials? If so, where should that information live on the site and how should users be able to interact with it?

Scenarios and Task Analysis per Audience

- Collection of audience-driven behaviors and is based on the user profiles
- Story that describes one or more tasks that a user may want to accomplish
- Identifies real life situations that act as inputs into content, navigation, and layout

Scenarios and Task Analysis Examples

Scenario Example:

If I'm traveling for work, I want to be able to go a travel website and find a flight, book a hotel, and rent a car.

Task Examples:

- To book a flight, I will enter my departing and destination airports and the dates of travel, I will review the available flights and airlines, review the options of flight times, and choose and reserve a flight.
- To book a hotel, I will look up my location, indicate the dates I need to stay, review the available hotels and their features, choose a hotel, and reserve the room.
- To rent a car, I will look up my location, indicate the dates I need to rent a car, review the types of cars available and their prices, review the available features, and choose and reserve the car.

Personas

- Represent information from the user and task profiles that were created by assembling the content from the steps above
- Help the team and the customer to focus on current users, missing users, and frequent users.
- Focus on the highest value users and focus on the users that will use the site most and get the most value out of it instead of focusing on the edge cases.

Example of a Persona

The following persona illustrates a user for a travel website

- John is 29 years old and is a full-time employee at a software engineering company. He is high energy and is known as the “go-to” person in his company for any complicated software problems. He travels frequently for work.

Things John wants to know

- Information about previous trips (where he has stayed before)
- Available trip options
- Travel costs
- Frequent flyer information
- Rewards program information

Things John wants to do

- Book travel for himself
- Be able to have a travel agent book for him
- Update and change travel arrangements
- Book air, hotel, and car rental in one transaction

Content Inventory and Editorial Calendar

- Content inventory will assist in determining what content should be on the new site and how content should be categorized/how it should be presented to the site users.
 - Document content status:
 - Remove - content that should be removed
 - Rewritten - content that should be rewritten or edited
 - Moved - content that should be moved from where it lives now
 - Split - content that should be split into multiple pieces of content
 - Create - content that should be created
- An editorial calendar defines the frequency of content creation, review, separation, or removal. The calendar should also list the owner by piece of each piece of content or content section.

Taxonomy and Categorization

- Influenced by all previous steps
- Information will assist the team in thinking about how the content is categorized and about how content items relate to each other/ how they should be presented to the users.
- Remember that sites with regionalization in place may have different taxonomies or categories based on region

Navigation

- Analyze the navigation by doing the following:
 - Is where to go for specific types of information clear to the user from the home page?
 - What are the navigation inconsistencies, such as naming inconsistencies?
 - What are the bottlenecks or the items that seem to confuse users?
 - What are the unnecessary or redundant steps to get to important website pages?
 - Are users forced to go too deep for high-value, frequently accessed content?
- Prioritize the order of their navigation based on the frequency of visits and the importance of the navigation item in relation to their business goals. Consider the business value of highly complex navigation before including it in an Minimum Viable Product (MVP).
- Should navigation be topic-based, user-based, or a combination?

Navigation Examples

An example of a user-based navigation is one that splits users immediately into groups (such as teachers, students, and staff for a school website).

ABOUT UD	PROSPECTIVE STUDENTS	CURRENT STUDENTS	FACULTY & STAFF	ALUMNI & FRIENDS	ACADEMICS	RESEARCH & INNOVATION	ATHLETICS
Leadership & Mission Experience UD History Facts & Figures UD Community	Success After UD Undergraduate Admissions Graduate Admissions Professional & Continuing Studies Online Programs	Academic Calendar	Careers Employee Resources	Give Alumni	Colleges Library Programs	Research News	BlueHens.com

Navigation Examples

An example of a topic-based navigation is one that splits content into groups based on topic (such as department store product types like Jewelry, Kitchenware, and Sporting Goods).

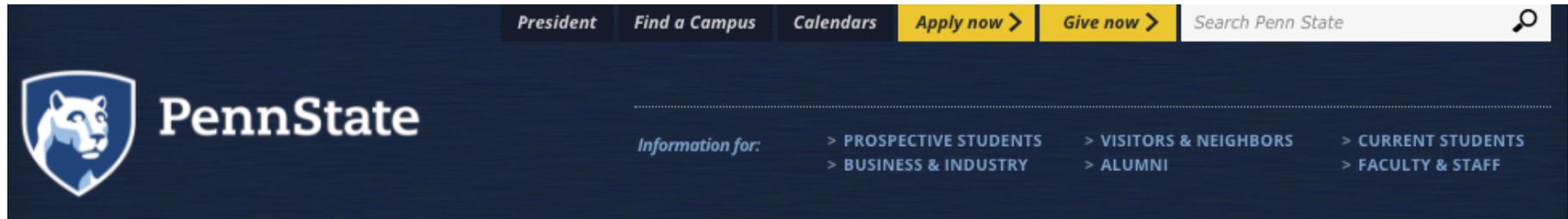


RECOMMENDED FOR YOU



Navigation Examples

A combined navigation may employ both techniques, first moving users into a subsection of the site by topic, and then by audience type.



The image shows a dark blue navigation bar for Penn State. At the top right, there are links for 'President', 'Find a Campus', 'Calendars', 'Apply now >', and 'Give now >', followed by a search bar labeled 'Search Penn State' with a magnifying glass icon. On the left is the Penn State logo (a shield with a lion's head) and the text 'PennState'. Below the logo, the text 'Information for:' is followed by a grid of audience-specific links: '> PROSPECTIVE STUDENTS', '> BUSINESS & INDUSTRY', '> VISITORS & NEIGHBORS', '> ALUMNI', and '> CURRENT STUDENTS', '> FACULTY & STAFF'.

President Find a Campus Calendars Apply now > Give now > Search Penn State

 PennState

Information for:

- > PROSPECTIVE STUDENTS
- > BUSINESS & INDUSTRY
- > VISITORS & NEIGHBORS
- > ALUMNI
- > CURRENT STUDENTS
- > FACULTY & STAFF

Card Sorting

- Entails grouping topics into categories that make sense to users
- Assists in designing or evaluating the information architecture of a site
- Helps determine what naming conventions may confuse users as well as identify how users expect items to be grouped together.
- [Index cards in person or by using an online tool such as OptimalSort](#)

Card Sorting Example

 View instructions

 Leave a comment

Finished

What to do when my cell phone has been broken or stolen

The email address to use for BananaCom help

BananaCom's freephone number

Career opportunities at BananaCom

Purchase a cell phone online

Change my home internet plan online

BananaCom's contact phone number

International calling rates for my home phone

Step 1

Take a quick look at the list of items to the left.

We'd like you to sort them into groups that make sense to you.

There is no right or wrong answer. Just do what comes naturally.

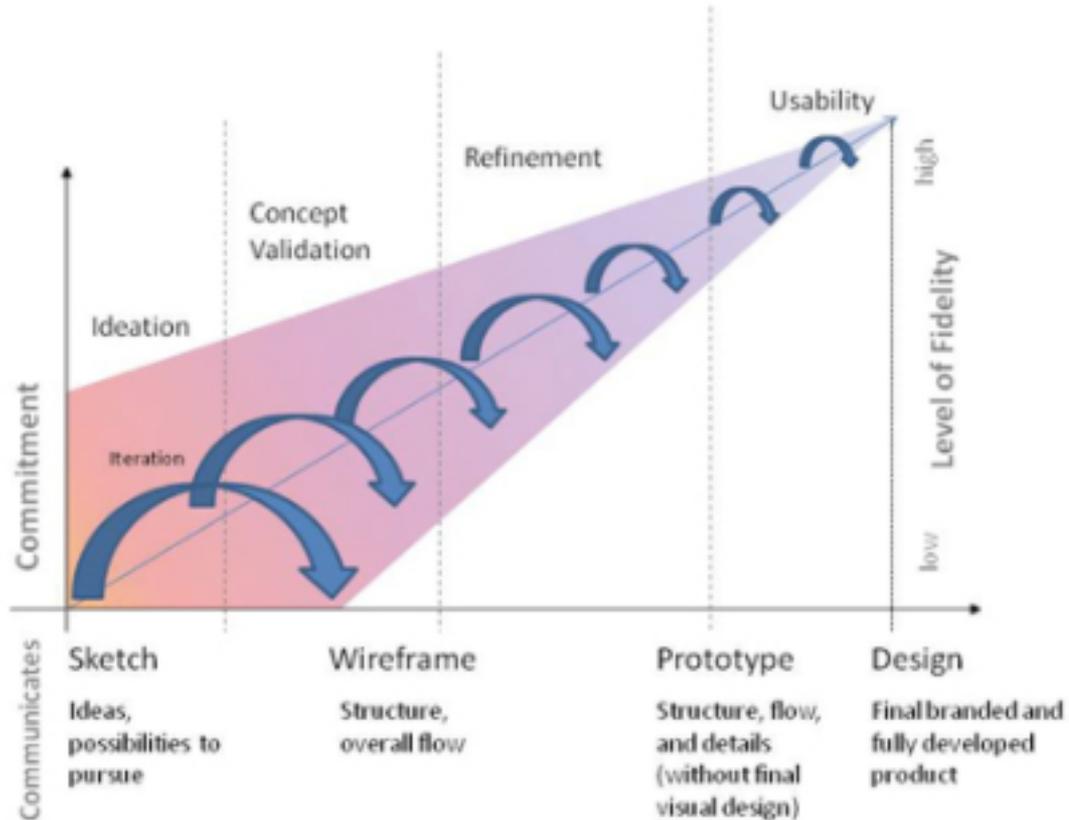
Step 2

Drag an item from the left into this area to create your first group.

Prototypes

- Allow the development team to understand the scope and to estimate the level of effort for the project
- Functionality that appears simple to the design team may include a lot of complexity from a technical perspective
- Can be improved or simplified with redesign prior to development work starting
- May help the customer if they plan to conduct usability testing

Prototypes



Usability Testing

- Determine whether the navigation, information architecture, and interactive elements are intuitive and usable for users
- Determine the participant's overall satisfaction with the website.
- Conduct tests using in person testing, remote testing, or sites such as [usertesting.com](https://www.usertesting.com) or [Open Hallway](https://www.openhallway.com)

Questions?



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Thank You

