UX and Product Design Methodologies

Discovery

Communication preferences

Gather requirements

Heuristic Evaluation

Usability Review

Competitive Analysis

Stakeholder Interviews

User Interviews

Business process review

Document requirements

Competitive intelligence

Market research

Design

Personas

Scenarios

Wireframes

User Journey Map

Information Architecture

Interaction Design

Visual Design

Security Plans / Reviews

Marketing plans

Release Timing

Recommendations

Sign offs

Develop

Create Design Assets

Low Fidelity designs

High Fidelity designs

Final Designs

Visual Designs

Style Guides

Mock Ups

Marketing materials

Sales materials

Writing for the Web, marketing and sales writing

Design product identities

Design logos

Hand Off

Deploy

Usability Testing Design

Preference test logo designs

Verification

Design Review

Approval

Go Live

Iterate / Repeat

Post Mortem

Bug Review

Usability Testing

A/B Testing

Collect and analyze customer feedback

Analyze metrics

Iterative design planning

Governance

Store tagged project documents

Post mortem

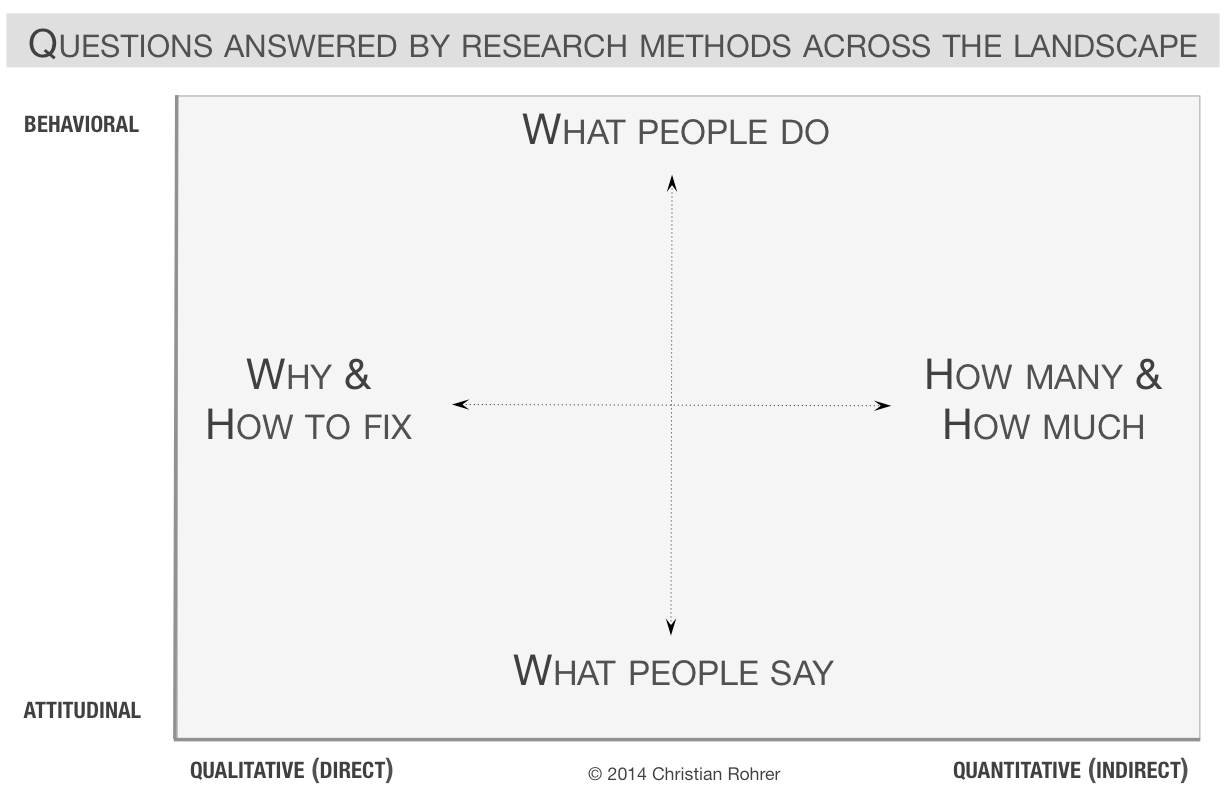
Plan next sprint, phase, or version

User Research Methods Overview

There are about 20 basic methods of user research that generally fall into Qualitative vs Quantitative dimensions, and attitudinal or behavioral.

Qualitative methods gather research about behaviors / attitudes directly – like User Interviews.

Quantitative methods gather research through indirect methods, analysis & surveys – like Clickstream Analysis or A/B Testing.

Testing provides differences between what people say they want and what they actually choose when presented with a choice –

* Attitudinal
* Behavioral

*Qualitative* research techniques are better at why or how to fix problems, and feeling level issues, while *Quantitative* research is better at how many and how much – analysis boils down to math.

What is important is deciding what the development and design team needs to know to create a better product, and the need helps determine which kinds of testing to perform.

Product user testing I find to be the most exciting because you can hear and see actual users interacting with it. There are 4 classic forms, which I learned from doing user testing with my friend Kelly Franznick, the truly kind co-founder of Blink in Seattle, Washington.

Patient, calm, cool, observant, a natural born teacher, Kelly explained “how and why” as he formally tested a Fortune 50 firms product design that I knew needed redesign – but not only for the reasons I already understood.

Later he showed me more of his techniques while we were testing a brand-new application for a large insurance firm. The PMs, designers, developers and companies all profited from Blinks usability testing, but I feel I benefited the most.

Of the 20 basic types of user research methods I have performed the following 14 types:

1. Usability-Lab Studies
2. Ethnographic Field Studies
3. Participatory Design
4. Focus Groups
5. Interviews
6. Usability Benchmarking
7. Moderated Remote Usability Studies
8. Concept Testing
9. Customer Feedback
10. Desirability Studies
11. Card Sorting
12. Clickstream Analysis
13. A/B Testing (aka “multivariate testing”)
14. Email Surveys (or via Survey Monkey)

From a List of 20 Basic Types of Research Methods from <https://www.nngroup.com/articles/which-ux-research-methods/>

UX Research Testing performed for the following organizations

Amazon

Bank of America

Boeing

Capital360 Bank

Comcast NBC Universal

Costco

Intel

Juniper Networks

LAUSD

Microsoft

Motorola Solutions

Premera Blue Cross

State of Washington

University of Washington

Visa

Processes

## Research

Gather Product Requirements

Collect and Document Stakeholder Needs

Metrics -

request metrics collection be established

test metric collection efforts

analyze metric collection results

Surveys –

write survey questions

announce and give surveys

collect and analyze survey input

collect and collate user surveys conducted in person

design email polls

interpret user input and move it into user journey map

perform statistical analysis

cluster qualitative studies

review clusters

Interviews –

conduct contextual inquiry to see and document what users do

conduct and attend bi-weekly meetings

collect feedback and input on designs

from stakeholders across the globe

including night or early morning hours

interview client stakeholders via video conferencing

collect user feedback on versions

organize and conduct stakeholder interviews

do phone and in-person interviews

Roles –

plan and create personas

implement reviews based on personas

do ethnography data collection and analysis

perform heuristic analysis

* optimality
* completeness
* accuracy/precision
* timeliness

write user stories

research corporate needs from existing documentation

conduct card sorting meetings

create experience maps

create empathy maps

document service blueprint needs and processes

create portal to display database information and all related IT based on interviews

advise on web-based ADA-compliance

Test, Analysis, Advise

Test

plan user acceptance testing

advise unit testing

conduct remote user testing around the world simultaneously

collect benchmarking results

Bugs

configure bug reporting software

test & report bugs

review and stack rank bugs assign values

analyze bugs

guide regarding global test planning

Search

test search

advise on changing search output

Security

advise on Web and mobile application security

advise on spending to preclude security issues

research and hire security test team

review test team results

Choose Features

design and conduct A/B multivariate testing

analyze and advise on product features

stack rank product requests and requirements

stack rank features

set strategic goals in a variety of settings and needs

edit application specification documents

perform market analysis

advise on and revise technical specifications

Manage -

Act as UX facilitator and advisor -

create communication preferences list

communicate status with clients

attend scrum and stand ups

act as stand up lead for agile meetings

plan environmental (server) timing

review service level agreements

request support of SLA agreements

Manage Teams

evaluate resumes

interview job candidates

hire candidates

review employees

move employees to other jobs based on enhanced skills

Instruction

make presentations

train employees to make sales presentations

train people how to interview

Teach

UX / UI design to developers / PMs / junior designers / managers

information architecture to students

color theory

empathy and compassion theories

marketing techniques and how to research them for analytics

security issues

Review and Invent New Research & Design Techniques -

Stay up to date with new techniques, or speak on them

read sites and published research

Be open to new possibilities

take classes, attend conferences

social networks, attend meet-ups

Puget Sound SIGCHI, UX Book Club, UX Professionals Association, etc.

Design

Use results of research observations and artifacts documentation create designs

Update existing software designs based on user surveys and input from interviews, written feedback and test

Information architecture -

* structure information architecture
* create information architecture frameworks
* wireframe information architecture
* seek feedback on IA
* integrate IA with lo-fidelity wireframes
* integrate IA with Search
  + - * test, iterate
      * seek user feedback on
        + usability, findability. clarity

create hi and low fidelity wireframes

create prototypes in a variety of visual software

create designs for information graphics

script text display

research image and text display methods

imagine original design ideas

utilize scripting and coding capabilities to support design methods in new ways

conduct design critiques and post mortems

document and post artifacts to group site

localize websites

Product identity and marketing

* design product identifiers
* create logos
* choose color palette
* strategize and define visual feeling, select photos
* draft content
* strategize marketing

Design Examples <https://www.wonderlane.com>

ecommerce platforms

order specification end-to-end recycling lifecycle of secure handheld devices

cloud security

early warning web based / smart watch compatible notification system for servers

engaging digital workplaces

partner portal

design federated search

advise on development of database output design

roadmap planning software

corporate intranet sites

visual coding software

bug tracking software

high end credit card user dashboard & support request specifications

online help support

attendance system

Please read more details below:

Vertical Domains

I’ve done consulting & product / program management in user experience product innovation strategy, research, content, marketing, design for Cloud security

Portals, for partners and customers

Dashboards

Education and Intranet site design

Enterprise architecture

4 global sales forecasting apps $93B+ USD

Mobile / responsive apps

Roadmap

Business intelligence database

High end credit card registration and activation

Windows product activation, security, & anti-piracy

Social media; groups and members directory

Planning, UML

CRM and ERP

eBook

Knowledge base management

Telecommunication

Research; public education attendance and data visualization

Information design

Gamification

AI data bot

Search | SEO | Federated search software services

Ecommerce

Spec'd and designed ecommerce applications for Microsoft and Amazon

Managed teams creating approx. 50 ecommerce sites from 1999 – onwards\Marketing & branding

Social media; groups and members directory

Streaming media, audio & video

Customer identity

Cell technology

​Pre-sales presentations, staff training​

Vehicle reservation and ticketing

Server Notifiers

Desktop applications

Insurance applications

Geo-location

Technical Writing; code of conduct, terms of use

Order management and processing

Employee purchase plan / home use plan

Admin toolkit & controls

Support software – incident tracking

Broadcasting and cable television

SDLC Systems Development Life Cycle Process

One of the largest issues in design is defending one’s ideas and supporting research as required as an investment in product design. I feel that learning is the chief skill to pursue.

Hope this information is helpful, thank you,

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