Phase 1: Identify user needs

**Carry out research to uncover the needs of your users during this first phase.**

# Understand your users

Carry out different types of user research, with a good sample of users and clear data consent.

**Risk**

If there is not enough user research at the start of the process, the end product is unlikely to satisfy user needs.

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| The project can show that... | Metrics |
| We have engaged with a representative sample of users. | **Yes:** We have a spoken to a good number of users, reflecting a range of different needs.  **Partial:** We have spoken to only a small number of users, and/or those we did speak to don’t represent the full variance of target users. No steps have been taken to remedy this.  **No:** We haven’t spoken to any target users. |
| Supporting materials:   * [The Basics of Recruiting Users for Usability Testing - Interaction Design Foundation](https://www.interaction-design.org/literature/article/the-basics-of-recruiting-users-for-usability-testing) - A guide on how to recruit the right users for your usability testing * [Getting Started Finding the Right Sample Size - Measuring U](https://measuringu.com/samplesize-start/) - Five steps to help you calculate the right sample size for your study | |
| We have employed multiple research techniques, such as user interviews, surveys, and workshops. | **Yes**: We’ve carried out user interviews as well as at least one other research method.  **Partial:** We’ve carried out some user interviews, but the insight gained hasn’t been thoroughly analysed.  **No:** We have not carried out any user interviews |
| Supporting materials:   * [7 Great, Tried and Tested UX Research Techniques - Interaction Design Foundation](https://www.interaction-design.org/literature/article/7-great-tried-and-tested-ux-research-techniques) - An overview of 7 common user research techniques proven to deliver real value to UX. * [When to Use Which User-Experience Research Methods – Nielsen Norman Group](https://www.nngroup.com/articles/which-ux-research-methods/) - Learn when to use a variety of common user research methods * [How to Conduct User Interviews – Interaction Design Foundation](https://www.interaction-design.org/literature/article/how-to-conduct-user-interviews) - A high level overview on how to conduct effective user interviews * [UX Research – Interaction Design Foundation](https://www.interaction-design.org/literature/topics/ux-research) - A definition of UX Research and collection of related content and literature * [UX Research Cheat Sheet – Nielsen Norman Group](https://www.nngroup.com/articles/ux-research-cheat-sheet/) * [User Journey Mapping – David Travis. UserFocus](https://www.userfocus.co.uk/articles/user-journey-mapping-workshop.html) - Guide on how to run a user journey mapping workshop and the benefits of doing so * [User Research - Usability Body of Knowledge](https://www.usabilitybok.org/user-research-methods) - Methods that help designers and project teams gather rich, current insights about the actual user community, and provide input that guides all follow-on activities. | |
| We have used both quantitative and qualitative research methods | **Yes:** We have clear data from quantitative and qualitative research.  **Partial:** We have only some of one research type.  **No:** Our data is only quantitative, or only qualitative. |
| Supporting materials:   * [User Research: a comprehensive guide to quantitative and qualitative UX research methods – Userzoom](https://www.userzoom.com/blog/quantitative-and-qualitative-user-research-methods-complete-guide/) * [Quantitative vs. Qualitative Usability Testing – Nielsen Norman Group](https://www.nngroup.com/articles/quant-vs-qual/) * [Qualitative vs. quantitative user research: the answers you will (and won’t) get from each - Hotjar](https://www.hotjar.com/blog/qualitative-vs-quantitative-user-research/) * [Best Practices for Qualitative User Research - Interaction Design Foundation](https://www.interaction-design.org/literature/article/best-practices-for-qualitative-user-research) | |

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| We have gained appropriate consent for participation in our research and data recording | Yes: We are clear that we have all necessary consent in place.  Partial: Some of our research had to be discarded as we didn’t have the right consent.  No: All of our research had to be discarded as we didn’t have the right consent. |
| Supporting materials:   * [Getting informed consent for user research - gov.uk](https://www.gov.uk/service-manual/user-research/getting-users-consent-for-research) * [Consent form template – Advanced Common Sense](http://sensible.com/downloads/permission-form.pdf) | |

# Design for context

Observe users using their current approaches and contexts

**Risk**

Insufficient understanding of the users’ context(s) of use means the end product is unlikely to be effective in all common usages.

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| The project can show that... | Metrics |
| We have observed users trying to meet their needs using the existing approach(es) and/or service(s) | **Yes:** We have directly observed (live or through video footage) a relevant number of users interacting with existing approaches/services.  **Partial:** We have observed only a small number of users.  **No:** We have not observed any users. |
| Supporting materials:   * [Usability Testing- Interaction Design Foundation](https://www.interaction-design.org/literature/topics/usability-testing) - A constantly-updated definition of Usability Testing and collection of topical content and literature * [Rocket Surgery Made Easy – Advanced Common Sense](http://sensible.com/rsme.html) - A summary of 'Rocket Surgery Made Easy, The Do-It-Yourself Guide to Finding and Fixing Usability Problems' - a reccomended resource for conducting usability testing * [Usability 101: Introduction to Usability – Nielsen Norman Group](https://www.nngroup.com/articles/usability-101-introduction-to-usability/) - A definition of usability - how, when, and where to improve it and why you should care | |
| We understand the context in which users try to meet their needs | **Yes:** We have strong secondary data on how users meet their needs with existing provision.  **Partial:** We have workable knowledge of a primary context, but there are several other contexts we don’t know about or fully understand.  **No:** We have no understanding of the context of use. |
| Supporting materials:   * [Context of Use Analysis – Usability Body of Knowledge](https://www.usabilitybok.org/context-of-use-analysis) – Information on collecting and analyzing information about intended users, their tasks, and the technical and environmental constraints. * ["It Depends": Why UX Is Dependent on Context – Nielsen Norman Group](https://www.nngroup.com/videos/it-depends-ux-context/) - Short video highlighting why context matters * [Optimizing for Context in the Omnichannel User Experience – Nielsen Norman Group](https://www.nngroup.com/articles/context-specific-cross-channel/) – Article explaining why you need to create usable context-specific experiences. * [Prototyping: Learn Eight Common Methods and Best Practices – Interaction Design Foundation](https://www.interaction-design.org/literature/article/prototyping-learn-eight-common-methods-and-best-practices) – Detailed overview of common prototyping methods and testing process | |

# Design for inclusivity

Carry out an Equality Impact Assessment and be clear on the accessibility needs of your users.

**Risk**

If this isn’t met, not all users will be able to use the end product.

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| The project can show that... | Metrics |
| We have conducted an Equality Impact Assessment. | **Yes**: We have conducted a thorough EIA.  **Partial:** we have conducted a small-scale EIA  **No:** We have not conducted and EIA |
| We have identified and validated the likely accessibility needs of the user group(s) | **Yes:** We are confident we know the likely accessibility needs of our specific target users and this is documented.  **Partial:** We’ve basedaccessibility needs only on national statistics and workplace regulations, rather than validating the needs of our specific target users.  **No:** We haven’t recorded any accessibility needs. |
| Supporting materials:   * [Web Content Accessibility Guidelines (WCAG) Overview – WCAG –](https://www.w3.org/WAI/standards-guidelines/wcag/)This page introduces guidelines and other standards related to web accessibility. * [Accessibility-Interaction Design Foundation](https://www.interaction-design.org/literature/topics/accessibility) – A constantly-updated definition of Accessibility and collection of topical content and literature * [Making your service accessible: an introduction – gov.uk](https://www.gov.uk/service-manual/helping-people-to-use-your-service/making-your-service-accessible-an-introduction) – A full introduction on how to make your servive accessible from gov.uk | |

# Always evidence decisions

Clearly document the insight you’ve gathered.

**Risk**

If this isn’t met, the end product is unlikely to be fully useful and usable.

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| The project can show that... | Metrics |
| We have distilled the insight gathered into a representation of users’ needs, behaviours, attitudes and aptitudes. | **Yes:** We have clear and understandable reports showing user needs. This may include personas, user stories etc.  **Partial:** We have distilled some of the data gathered but it only captures the very high level.  **No:** Data gathered is still in its raw form and difficult to understand. (or we have not gathered any data) |
| * [Affinity Diagramming for Collaboratively Sorting UX Findings and Design Ideas – Nielsen Norman Group](https://www.nngroup.com/articles/affinity-diagram/) - A guide to affinity diagramming - a method used to organize research findings or to sort design ideas in ideation workshops. * [Personas – a Simple Introduction – Interaction Design Foundation](https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them) - Overview on why you should use personas to represent users’ needs | |

# Evaluate continuously

Carefully plan and resource how you will continue engaging with users throughout the project.

**Risk**

Insufficient engagement means user perspective is likely to be diluted or lost.

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| The project can show that... | Metrics |
| We have established a means to engage with users throughout the lifespan of the project. | **Yes:** We have a clearly documented plan for ongoing user engagement.  **Partial:** We have limited plans, or can’t properly show their robustness.  **No:** We have no plans for ongoing engagement. |
| We have time and resource for ongoing user engagement included in our project plan | **Yes:** Specific time and resource is dedicated to this in the project plan.  **Partial:** There is a clear and documented plan to cover this within an existing resource.  **No:** We have not planned how we will resource ongoing engagement. |

# Be consistent, but not uniform

Use EdGEL design standards wherever possible, with at least one team member having a clear understanding of how they work.

**Risk**

Not meeting this means the project won’t meet University design and branding standards, and that the overall Digital Experience across all University services will be fragmented and inconsistent.

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| The project can show that... | Metrics |
| Relevant members of the team (such as lead developer) have a working knowledge of EdGEL or will engage with the EdGEL service to familiarise with the service offering. | **Yes:** The lead developer or other key team member has a strong understanding of EdGEL standards.  **Partial:** The lead developer has a limited understanding of EdGEL but no direct experience; team members not on the development team have a strong understanding.  **No:** There is no full understanding of EdGEL standards within the team |
| An initial identification of likely interface development requirements has taken place. | Yes:  Partial:  No: |
| Design resource requirements (interaction, visual and content) are included in the project plan. | **Yes:** These are fully resourced and budgeted for.  **Partial:** There is some resource for this, but it’s unclear whether it will cover the full requirements for EdGEL.  **No:** There is no resource for design needs. |
| If using EdGEL is not feasible (due to management decision or cost etc), the standards that EdGEL promote are still aligned with. | **Yes:** Developers still have a strong understanding of EdGEL and how the equivalent standards can still be met.  **No:** EdGEL standards are not being used at all. |