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.

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 - A guide on how to recruit the right users for your usability testing • Getting Started Finding the Right Sample Size - Measuring U - 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 - 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 - Learn when to use a variety of common user research methods • How to Conduct User Interviews – Interaction Design Foundation - A high level overview on how to conduct effective user interviews • UX Research – Interaction Design Foundation - A definition of UX Research and collection of related content and literature • UX Research Cheat Sheet – Nielsen Norman Group • User Journey Mapping – David Travis. UserFocus - Guide on how to run a user journey mapping workshop and the benefits of doing so • User Research - Usability Body of Knowledge - 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 • Quantitative vs. Qualitative Usability Testing – Nielsen Norman Group • Qualitative vs. quantitative user research: the answers you will (and won't) get from each - Hotjar • Best Practices for Qualitative User Research - Interaction Design Foundation	

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
- Consent form template – Advanced Common Sense

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.

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 - A constantly-updated definition of Usability Testing and collection of topical content and literature
- Rocket Surgery Made Easy – Advanced Common Sense - 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 - 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 – 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 - Short video highlighting why context matters
- Optimizing for Context in the Omnichannel User Experience – Nielsen Norman Group – Article explaining why you need to create usable context-specific experiences.
- Prototyping: Learn Eight Common Methods and Best Practices – Interaction Design Foundation – 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.

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 based accessibility 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 –**This page introduces guidelines and other standards related to web accessibility.** • Accessibility-Interaction Design Foundation – **A constantly-updated definition of Accessibility and collection of topical content and literature** • Making your service accessible: an introduction – gov.uk – **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.

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 - 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 - 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.

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.

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.