



S&R Test and Learn - UX Design Process Overview

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10/18



Why Are We Here Today?

- Understand how the "Test and Learn" approach will work
- Understand and learn about the benefits of operating in a lean capacity
- Establishing expectations
- View what's changed within our design process
- How will our updated design process work in today's balanced team environment



What Are We Doing in Q4?

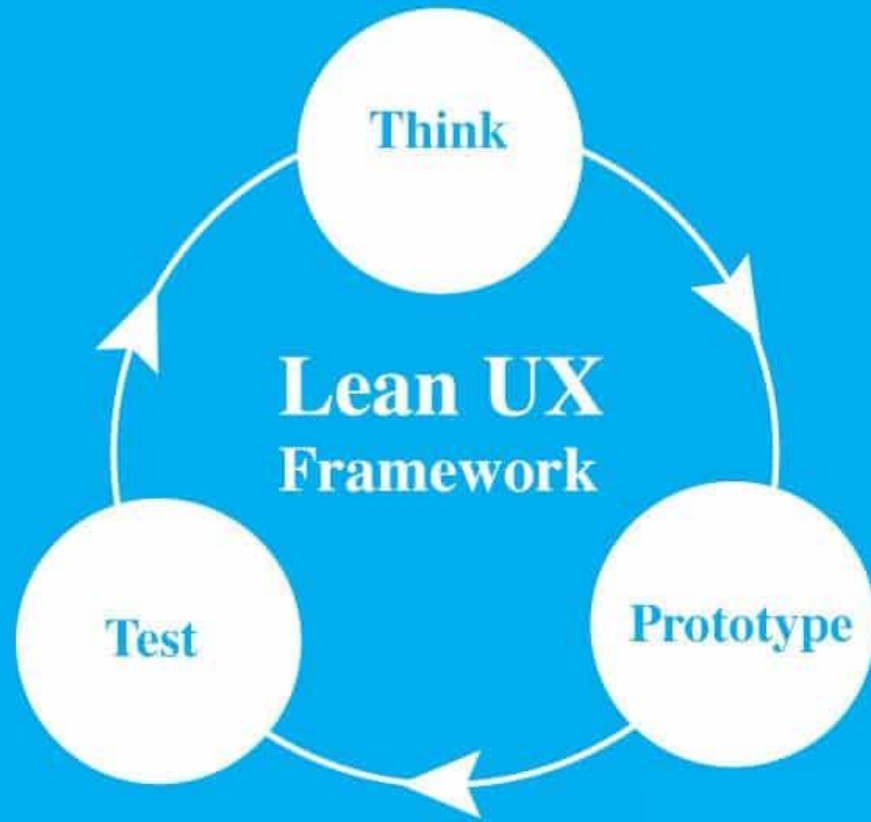
The UX team, is shifting towards a "Test and Learn" approach in Q4. By adopting Lean UX principles and methodologies together will help rapidly design and test solutions to meet the complex challenges we face, and to create solutions that meet our customer and business needs.



But What Is Lean UX?

Lean UX is about bringing the true nature of a product to light faster, in a **collaborative, cross-functional way** that reduces the emphasis on thorough documentation while increasing the focus on **building a shared understanding** of the actual product experience being designed. - Jeff Gothelf





What's Our Goal

The goal is to be **lean, collaborative, and flexible**.
To be able to create and test designs quickly, pivot, and iterate frequently.



The Benefits

- Ensures we are designing and building the right solutions that meet our customer needs
- Quicker validation - Get designs into customer's hands quicker
- Increased visibility and transparency across the spectrum
- Fosters greater collaboration and input
- Fail often, learn, and adapt.
- Easy to pivot



Expectations & Deliverables

UX Deliverables



UX Discoveries

- Maximum 4 weeks long (2 sprints)
- If more required time is required, alignment will be required to further discuss needs, value, and time to accomplish the goal.
- Designers will be Full Stack, adopting lean research techniques



UX Artifacts

- UX artifact delivered at the end of every two weeks
 - This includes:
 - Sketches
 - Designs
 - Wireframes
 - Flow Diagrams
 - Research Readouts
- Deliverables will be broken down within a two-week scope.
 - What solution can you create within a two-week time frame?



Ticket Management - Jira

- All communication, updates, and decision points will be updated in the working ticket.
 - If there is an alignment or meeting outcome, update the ticket
 - If there is a meeting with stakeholders, update the ticket
 - If you reached a design milestone, update the ticket
- Designs and Confluence documentation will be attached to the working ticket
- Designers to break down epics or stories into actionable efforts once the kick-off is complete



UX Sprint Demos

- The UX team will demo the work completed at the end of each sprint.
The goal is to:
 - Gather additional feedback from Eng, DS, and PdM
 - Determine if work is considered done or does it require another round of iterations
 - Validate or align on new scope (i.e., pivot)
 - Create transparency and awareness for balanced team members and leaders



User Research and Usability Testing

- Invitations to attend will be sent to the entire balanced team
- Balanced Team Leaders and Partners are also invited to attend
- Participation by all is highly encouraged
- Watching customers use our solution creates empathy and helps improve how we approach solutions throughout the experience.
- Creates a culture of awareness, user data, and empathy if all attend



How Does It Work?

New Design Process in 7 Steps



#1 – The Kick-off



The Kickoff is a set of initial conversations about a project with the goal of obtaining as much information from the request.

- Gather context and alignment on the problem we're solving
- Understanding what success means
- Blockers or inputs we should consider before starting
- Scope alignment – "What can we deliver in a two-week time frame"
- Discuss or Share Existing Research

The screenshot displays a Figma workspace with a table of product data. The table has columns for Product, Price, Policy, Delivery, Wood Species, Lumber Grade, and Notes. A row with a price of 119 is circled in red. Below the table, there are two sticky notes with questions:

Questions:
1) For multipack, are there any business incentives we should know about prior (ie- are there any discounts associated with multipack or is it simply just quantity?)
-No, just how SKU is bundled.
2) What categories does tableview multipack currently impact? Any future categories we should know about? Is this something IX is trying to implement elsewhere?

On the right side, a video conference interface shows four participants in a grid. A yellow sticky note is overlaid on the top-right video feed, containing text about product experience and pricing complexity.





2. WHAT'S THE SCOPE?

What are we trying to do?

- Define the scope of the project
- Deadline?
- Target Audience B2C/B2b
- etc

5. DEFINING SUCCESS

What are the metrics for success?

- Define success
- Define how the team will measure success: PM, UX, ENG, DS
- Open to redefine based on research and future discovery that may impact default metrics.

1. PROBLEM STATEMENT

What are we trying to do? Why?

- What are the business objectives?
- What are the underlying needs we need to solve?
- Why do we need to solve the problem?
- What's the value?
- How does solving this problem help the customer?

3. WHATS THE RESEARCH?

Do we have any research to help us better understand the problem, pain points, or the problem we'll be solving?

- Place links or info on related research
- Competitive analysis if there is any? If not, do we need to do one?
- Is there any research already available on Baymard?

6. LIMITATIONS?

Are there any limitations we should be aware of?

- Do we have any technical or engineering limitations? What are they and why?
- What are the biggest challenges we'll be facing, especially from a tech perspective and why?
- Time?

4. WHAT ARE THE CUSTOMER PAIN POINTS?

Identify the users pain points in association to the problem we're solving.

7. STAKEHOLDERS?

Who are the stakeholders and or key players we should be aware of?

Sample Kickoff

Copy of Kickoff Information Gathering

WHY ARE WE HERE?

Hypothesis-based Problem Statement
As a customer, I've lost visibility into savings, promotions, etc.

Context
With the launch of Primary Filters and the depreciation of Visual Navigation (VisNav), injected content like "Shop Savings", "Labor Day Event", or "Find a Pro" don't have a home and if integrated into the Primary Filters could cause friction due to being behind a click/touch to get visibility to the customer.

WHAT IS BEING INJECTED INTO VIS NAV CURRENTLY?

These are some of the known injections into the VisNav. We need to obtain the breadth of injected content available to merchants, marketing, etc.

Shop Savings

Events

Let Us Install It For You
Major appliances? Halls Downs

How they get injected into the VisNav

SOLUTION FOR PRIMARY FILTERS MVP

This solution involves only Home Depot events and is incomplete.

Kickoff Information Gathering

VISUAL FILTERING

Who is affected by the problem?

What is the problem?

Where/When does this problem occur?

Why does this problem occur?

Why is it important?

Copy of Kickoff Information Gathering

WHAT ARE THE CUSTOMER PAIN POINTS?

WHAT ARE THE BUSINESS PAIN POINTS?

Copy of Kickoff Information Gathering

WHAT IS THE SCOPE?

Copy of Kickoff Information Gathering

HOW DO WE MEASURE SUCCESS?

SOLVED THE PROBLEM?

Frame 8

UX Kickoff Template



Search Events Filters Kickoff Template

Last updated 08/22/2023



2. WHAT'S THE SCOPE?

What are we trying to do?

- Define the scope of the project
- Deadline?
- Target Audience B2C/B2b
- etc

To offer a new home for events, savings, and like-minded promotions that will draw equal traffic or direction from our customers as we do today and that is aligned with parody from our competition

Target Audience: B2C & B2B

1. PROBLEM STATEMENT

What are we trying to do? Why?

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static or improved engagement with these filters

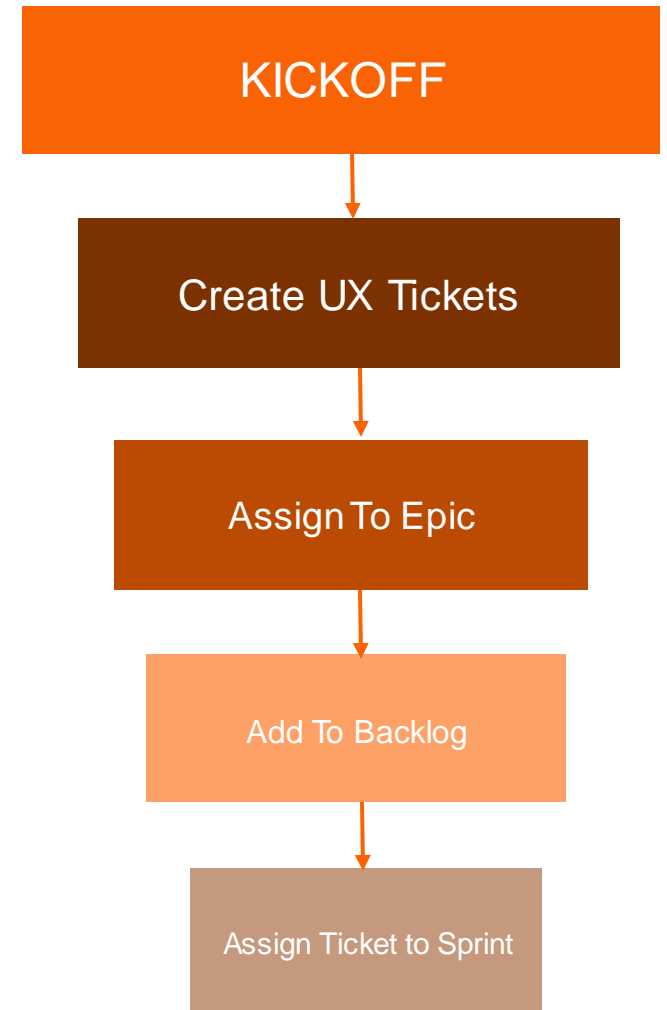
Competitive Parody

Keep the status quo in engagement but do not have any data to validate it

Identify the patterns competitors establish with similar like minded visuals and interactions

#2 – Defining Work Effort

- UX will break up the efforts into actionable stories and place them into the corresponding epic in the Backlog
- What can we deliver in two weeks' time?
- Update Epic if needed
- Estimate efforts
- Ready to assign to a Sprint



2023 Q1 FBR UX Design

Attach Add a child issue Link issue ...

Description

Epic Overview

Context/Background

FBR hasn't been touched in 5 years. Its growth has been stagnant. This container has a lot of opportunity from a facelift.

Customer Problem

I am a home improvement customer, looking to compare products to understand why they are different to make the right purchase for my project.

Some customers are not exactly sure what certain specifications are or how important they are to the purchase

Hypothesis

HMW improve our UX design to help customers differentiate between similar products and feel confident to make a purchasing decision?

Project Goals

Update the UX experience. The current experience has a separate mobile and app experience. It's difficult to distinguish similar and different features.

Project Requirements

UX

- run a design sprint
- create Figma file

Engineering/Data Science

- attendance to the design sprints

What Does Success Look Like?

100% Done

<input checked="" type="checkbox"/>	HHR-1980	Plan FBR Design Sprint	1		DONE
<input checked="" type="checkbox"/>	HHR-1505	FBR Design Sprint	2		DONE
<input checked="" type="checkbox"/>	HHR-2270	<input checked="" type="checkbox"/> HHR-1505: FBR Design Sprint	3		DONE
<input checked="" type="checkbox"/>	HHR-2173	DONE 2 Medium	3		DONE
<input checked="" type="checkbox"/>	HHR-2093	Why We are redesigning our FBR experience. This container hasn't been touched in over 5 years and has a great opportunity for a facelift. We will revisit our customer proble...	2		DONE
<input checked="" type="checkbox"/>	HHR-1994	Jira Open preview	2		DONE
<input checked="" type="checkbox"/>	HHR-2054	FBR Medium-High Fidelity Comp	3		DONE

Refined Epic



UX Stories



#3 – Solutioning – Solving The Problem Together

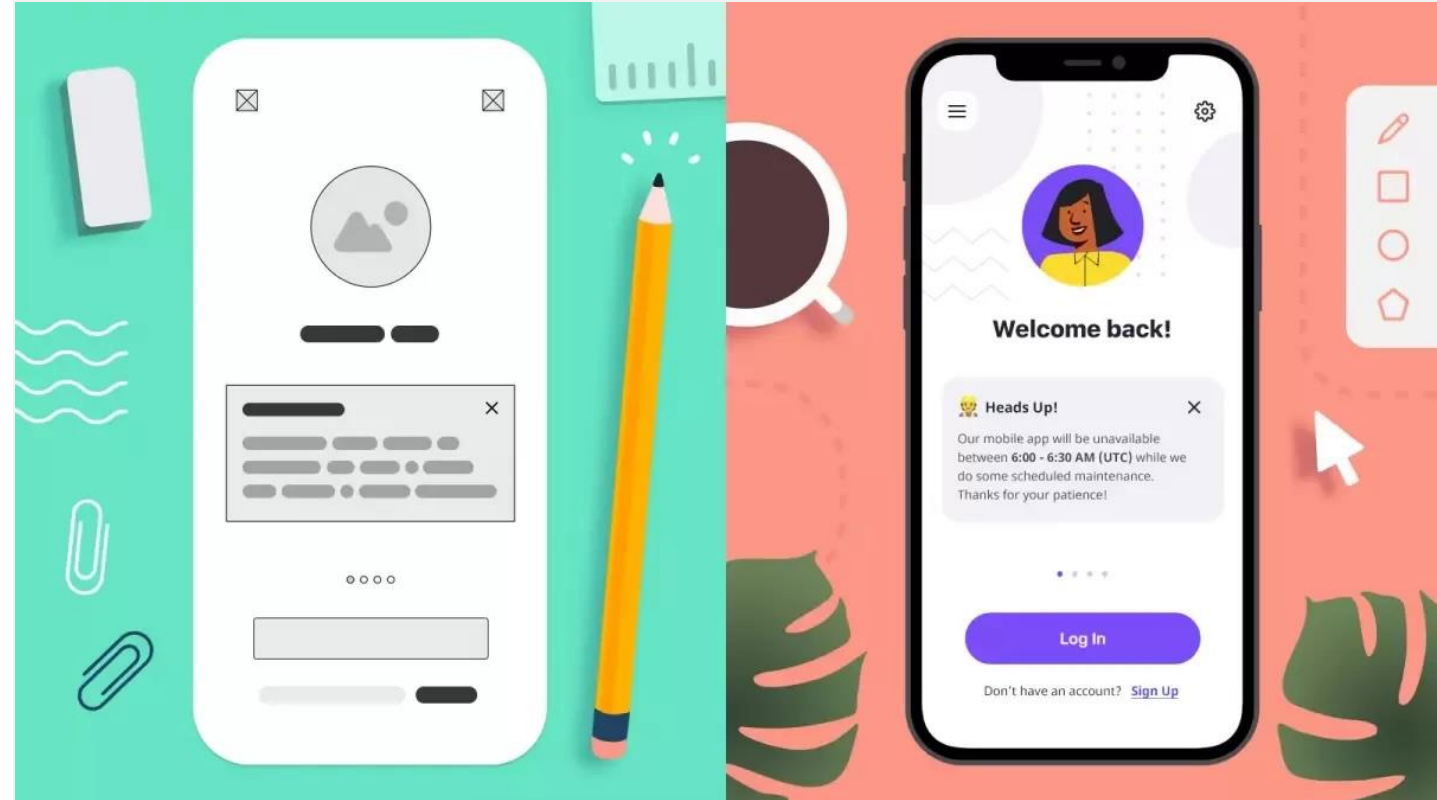


- **Collaboration** is Key... **Essential**.
- Solutioning is not Design
- Problem Solving is Solutioning
 - Gathering Input from all partners
 - Identifying Technical Limitations upfront
 - Building solutions aligned w/ Technical capabilities
 - Solutions easier to estimate due to upfront technical estimations or involvement
- ~1-4 hours needed per each sprint to help solution.

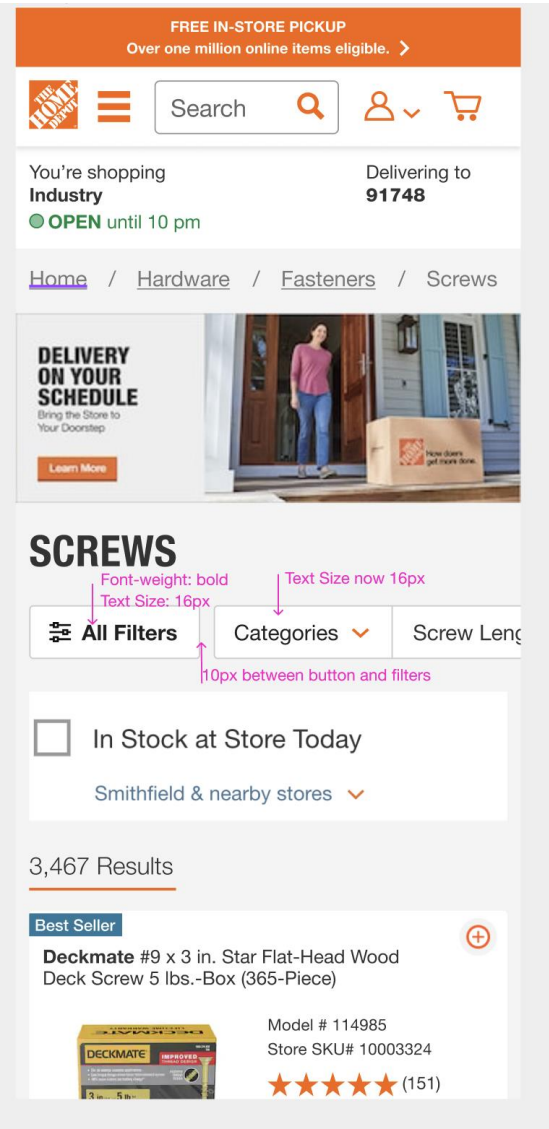


#4 – Design

- Take concepts and proposed solutions into a 1st iteration of the design concept.
- Designers will schedule touchpoints to showcase progress and gather feedback.
 - Each time we meet, balanced team should ideally be present to review and discuss.
- Designers will document Jira with updates on outcomes and statuses after each touchpoint.
- Version controlling designs with each iteration
 - Versions will be identified in Figma, Jira, and Confluence



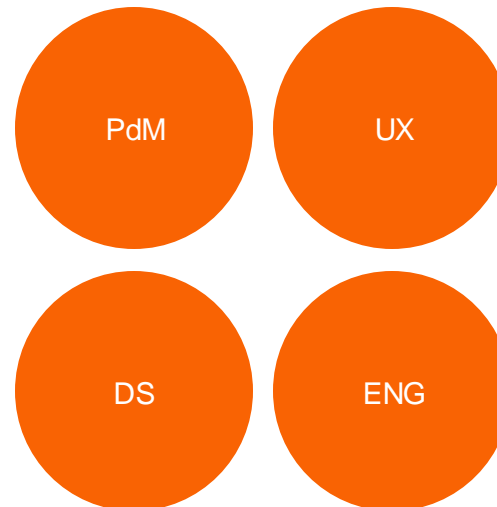
#5 – Design Reviews



- Balanced team required to be present
- Discuss and Challenges from all disciplines pov
- Feedback and input is needed
- Collaboration is key

Balanced Team

REQUIRED



Supporting Team

OPTIONAL



+



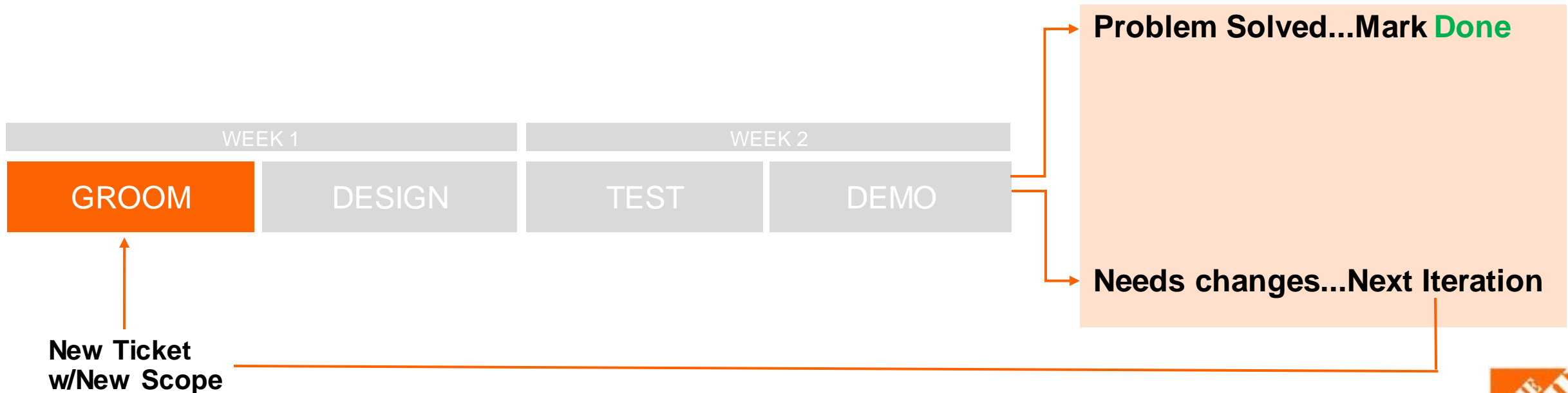
#6 – Sprint Demo

- ⑩ Review work completed in the sprint
- ⑩ Discuss and offer feedback together as a team.
- ⑩ Are we ok with this version, or do we need to iterate or pivot?
- ⑩ Share concerns or technical limitations
- ⑩ Additional insights or comments shared are heard by all team members
- ⑩ Fosters greater transparency and collaboration



#7 - Done

- Determine if effort is complete or do we need to iterate again?
 - Iteration will require a new ticket
 - Based on request, scope and or problem statement may need to adjusted accordingly
 - Designs will be baked based on version #
- Update Jira ticket, epic, and confluence



How does it impact our balanced team's workflow?



Operating in Today's Team Environment

- ⑩ No major changes from a workflow perspective
- ⑩ Product, Engineering, and Data Science, will be required to collaborate more during our **solutioning**, **design review**, and **sprint demo** sessions
 - ⑩ This will reduce spikes
 - ⑩ Ensures we are designing a solution that is technically feasible
 - ⑩ Creates vested interest in ensuring the overall experience
- ⑩ Introduction of **Sprint Demos** at the end of each sprint
- ⑩ Future benefit: If we all adopt a lean approach, we could apply similar concepts throughout the rest of the disciplines.



Notable Callouts



Call Outs

- ⑩ What happens if the UX work is not completed at the end of the sprint?
- ⑩ Collaboration emphasis is crucial
- ⑩ Testing – How can we rapidly build design solutions?
 - ⑩ Testing frequently with actual customers is the dream goal
- ⑩ Standups
 - ⑩ Required for all balanced team members to be connected or dialed-in
 - ⑩ Do Not place meetings over stand-ups
- ⑩ Can we build a design after the two weeks – yes
- ⑩ Usability testing will be conducted with 5 users or less
- ⑩ Revisit and Refine working agreements if needed



Q&A



Thank You

