UX Process overview

UX/Design Phase:

- This phase involves thorough research and report generation. Our reports typically take 4 to 6 weeks to complete. These reports are sent to the client for approval before moving to the next phase.

- During this phase, we send the report to the client for approval before moving on to the design stage.

- **Workshop:** We conduct a 3-hour workshop with the client where we present the wireframe and provide a detailed review of the design. The interior pages are created, with minimal changes to the layout at this stage (e.g., color adjustments are allowed, but layout changes are not).

- The goal of this workshop is to refine the UX and finalize the wireframe design, securing the client's approval. We allow one revision of the wireframe, although we aim to minimize revisions.

- **Revisions:** Typically, we allow up to 3 revisions depending on the package the client has selected (e.g., Essential, Enhanced, or Advanced).

- **Accessibility Document:** UX/Design team creates an accessibility document to ensure the design meets the required standards, and this is sent to the client.

- <u>Note</u>: We review it with the development team and refine it before presenting it back to the client

- **Deliverable:** Wireframe & Design approval

Design and Development Process:

1. **Initial Design Review:**

   - Once the initial design is ready, we review it with the development team to make refinements and ensure it aligns with technical requirements.

UX Process overview

2. **Accessibility and Development:**

   o We create an **accessibility document** and compile all design combinations to present to the client.

   o Once the design is approved, it is handed off to the development team for implementation.

   o We do not review the design again until it's completed in development.

3. **Interior Pages:**

   o After the homepage design is approved, we proceed to create the interior pages. At this stage, we generally **do not change the layout**, but we can adjust colors and other design elements.

   o We allow up to **3 revisions** (or fewer, depending on the agreement with the client). Once the client is satisfied, we obtain final sign-off on the design.

4. **Quality Assurance (QA) and Final Design Check:**

   o After the design is implemented, we perform a **QA** to ensure everything functions as expected.

   o The design team then checks the implementation against the agreed-upon design guidelines to ensure consistency and accuracy.

User Acceptance Testing (UAT):

- **Handling Client Feedback:** During the **UAT phase**, if the client requests changes (e.g., adjusting the size of a button or modifying any other design elements), we submit these requests to the development team for implementation.

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- **We prepare questions and scenarios** for the customer to answer questions. These questions will be sent to the PM and then we send it to the customer so that they pick 5 of those questions or test cases we can consider for the UAT phase.

- **Live Revision Workshops**: In cases where the client struggles to understand the prototype or make decisions, we may organize live revision workshops. During these sessions, a designer will work directly with the client to help finalize design choices (e.g., color or layout preferences).

5. **Digital Signoffs**: We transitioned to **digital sign-offs** over a year ago. Once the client is ready to sign off on a design or wireframe, you can simply notify the UX/Design Manager.

   o You can either provide the client's email, and she'll send the digital sign-off request, or she can send it to you for distribution.

   o The sign-off will be completed via Adobe Acrobat, which allows easy delegation to the relevant signatory if necessary.

Important to know:

1. This are part of the studies the Design team follows:

   i. **Discovery Survey:** We get a lot of feedback from the community. This takes around 3 weeks.

   ii. **Keep mapping code:** 2 weeks of data for that report

   iii. **Link for branding access:** For the customer to review the branding and decide what they want.

   iv. **Analytics access:** We ask for access to their site to gather information and data.

   v. The link to these studies are available for reviewing results.

2. Once the Discovery package is sent to the Client then the UX/Design Manager reviews it in 2 weeks to see the feedback received.

UX Process overview

3. Usually, a UX Designer is assigned to the project.

4. We need to link the SharePoint file in the link when tagging the design team.

5. As Project Managers, it is essential to set clear expectations with the customer. We must explain in detail what is included in the package they have purchased, ensuring there is no ambiguity about the scope of services.

6. We have PDF with the design and WF and the client sign it digitally. We do sign off in the WF as we don't want the client to change the layout during the design phase.

7. Once the project is assigned to the PM the Design team start with delivering the discovery package.

Tools used by DT:

- ST tool and now transitioning to Figma tool for wire framing. For Figma, we provide a link where the client can see the proposal and we create a free account for the customer to have access.