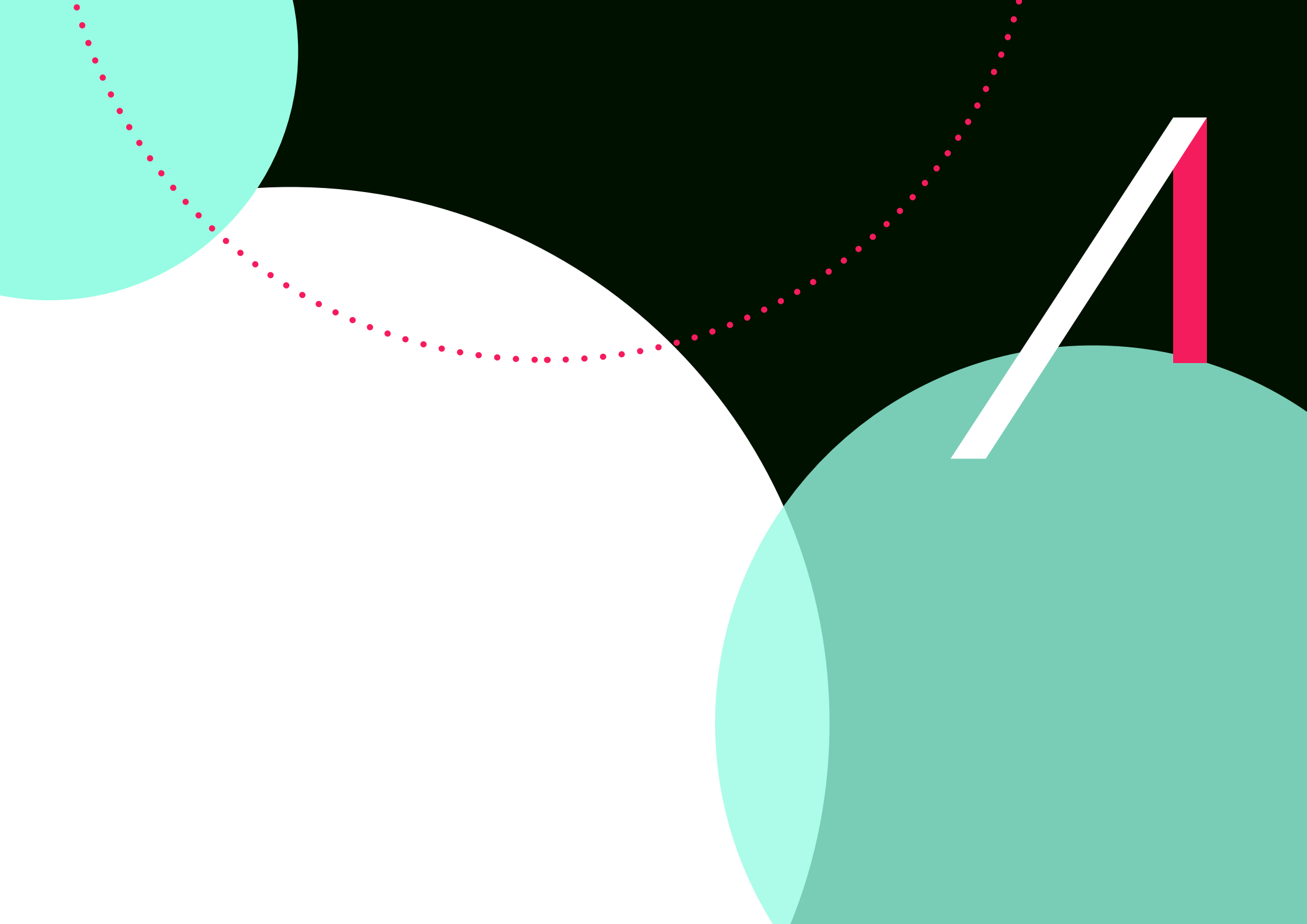


# UX Processes

By

Marie Dare

Senior UX Designer



# Introduction

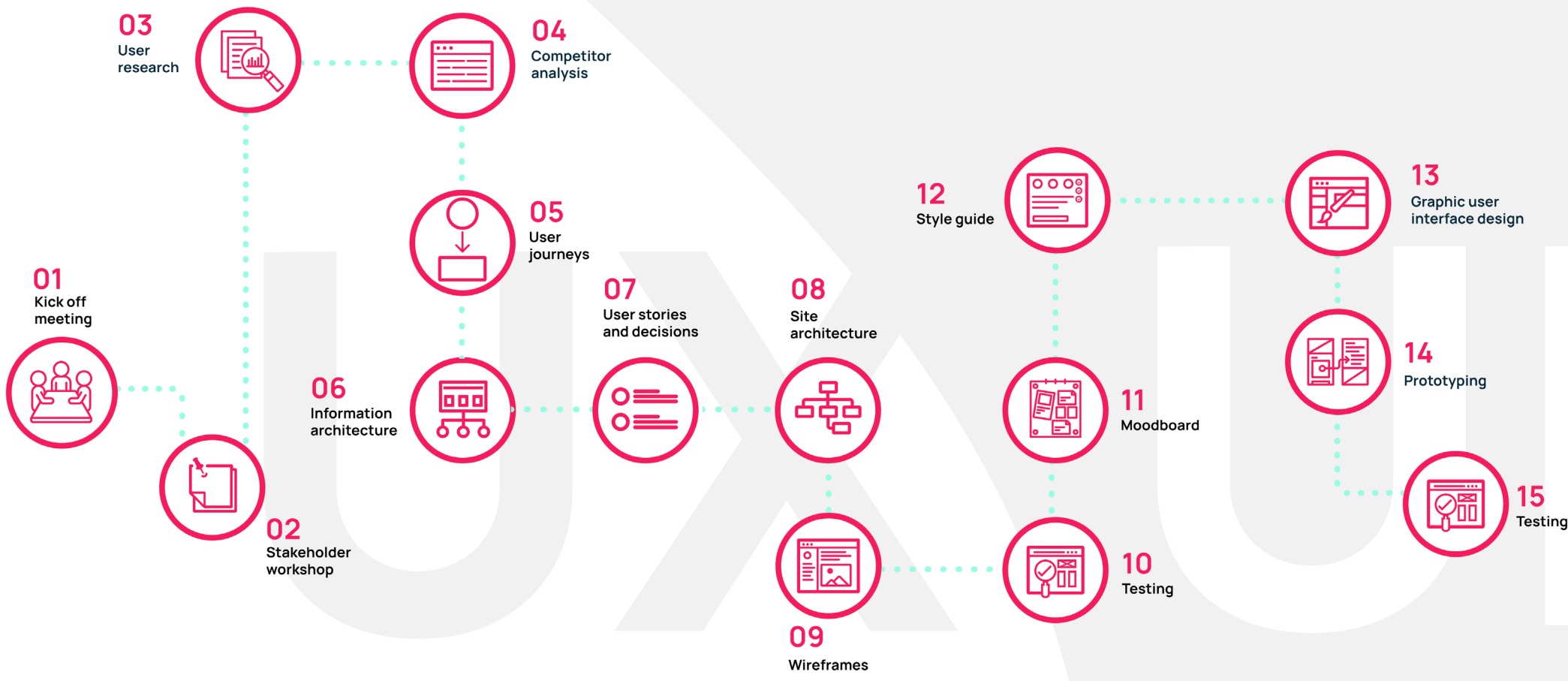
The purpose of this document is to highlight the different stages of the process involved in producing an app or website, up until it is handed over to the development team to build.

The UX part of Product design is one of the most under rated parts of a digital project. It creates the foundations of your product and although it looks like an expensive sector of the project, it will save you time in the longrun when things have been forgotton at the build stage.

Every UX designer will work differently but the main stages of the process remain the same:

- Initial workshop
- User research
- Competitor analysis
- Personas
- User journey and flows
- User stories and decisions
- Sitemap
- Wireframes
- Wireframe user testing
- Moodboards
- Style guide
- Graphic user interface design
- Prototype
- Design user testing

In a project that is successful, no steps of the process are skipped, however there are occasions when parts of the process are required and others not.





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ATTENDANCE  
DEPENDS  
ON TIME &  
VALUE

THE REPORT  
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ACADEMIC

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FORMAT THAN  
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TICKETING  
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PEOPLE DON'T  
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IF IT WAS  
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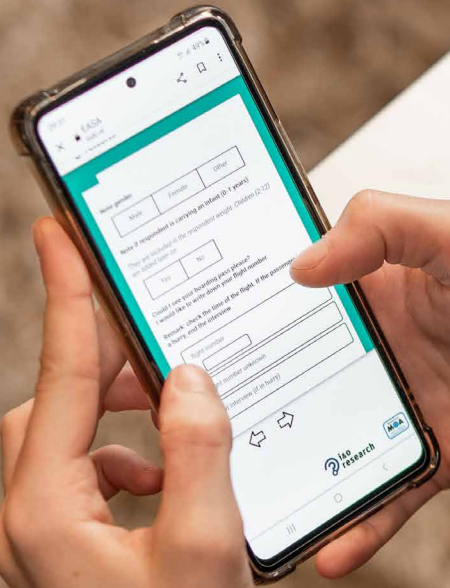
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QUESTION  
I'M NOT

# Initial workshop

This marks the initial phase of the project, with a preceding project kick-off meeting. The briefing, usually conducted as a workshop, is where we start assembling the foundational elements, piecing everything together to form a comprehensive understanding of the overall product. This session, whether conducted in person or remotely based on preference, is estimated to last an hour. If subsequent sessions are necessary, I'll arrange 1-hour slots accordingly.

The primary objective of this session is to grasp all requirements and functionalities. To achieve this, I will pose relevant questions to construct a detailed picture. A significant aspect of this process involves asking “why” – probing into the purpose behind each element to explore potential improvements or alternative solutions.

To facilitate effective communication, it is crucial to be acquainted with all terminologies used in the business to avoid any misunderstandings and ensure alignment. Although we briefly touch on users in this session, detailed personas are covered in the subsequent user research phase.



# User Research / Interviews

This phase involves conducting interviews, ideally with individuals who are current users of the platform. Alternatively, this process may take the form of a survey. In either case, I compile a series of questions pertaining to the platform in question.

For projects focused on enhancing an existing site, I conduct interviews or distribute surveys to the customers of that site to pinpoint areas of concern or improvement. In the case of developing a new product, if feasible, I may target customers of competitor companies to gather insights and enhance the effectiveness of the upcoming product.





# Competitor Analysis

A competitor analysis, also known as a competitive analysis is an important part of my process. It involves identifying competitors within the same industry and thoroughly the products that are the same or similar. This process serves as a valuable benchmark, allowing me to compare their company's strengths and weaknesses against each competitor.

In my role, I engage in a comprehensive competitor analysis that can be conducted at a high level, providing a broad overview, or can delve into specific aspects of their competitors' businesses. This approach enables me to tailor the analysis to meet the specific needs and goals of the business. The goal is to extract insights that inform their strategic decisions and enhance their competitive positioning in the market.



# Sarah Watford

Underwriter

## BACKGROUND

Sarah has been an underwriter for 5 years. She is highly skilled at consulting with clients seeking assistance and troubleshooting.

*"I don't have much time and the aim is to create as many policies as I can throughout a normal day to increase revenue"*

## DEMOGRAPHICS

**Age:** 32  
**Location:** No fixed location  
**Education:** Bsc Business  
**Job:** Underwriter  
**Family:** Single

## GOALS

- Do my job as efficiently as possible
- I want to be recognised for the work I do

## HABITS

- Access same info on a daily basis
- Fast life
- Perfectionism

## MOTIVATIONS

**Data/numbers:** ●●●○○  
**Speed/efficiency:** ●●●●○  
**Coaching:** ●●○○○  
**Recognition:** ●●●●○  
**Access information:** ●●●●○

## CURRENT FRUSTRATIONS

- Very slow system
- Not thought through
- Some functionality on the system is not used
- Have to use short cuts
- Poor data integrity

## DAY TO DAY TASKS

- Viewing customer policies
- Access policies the most

# Personas

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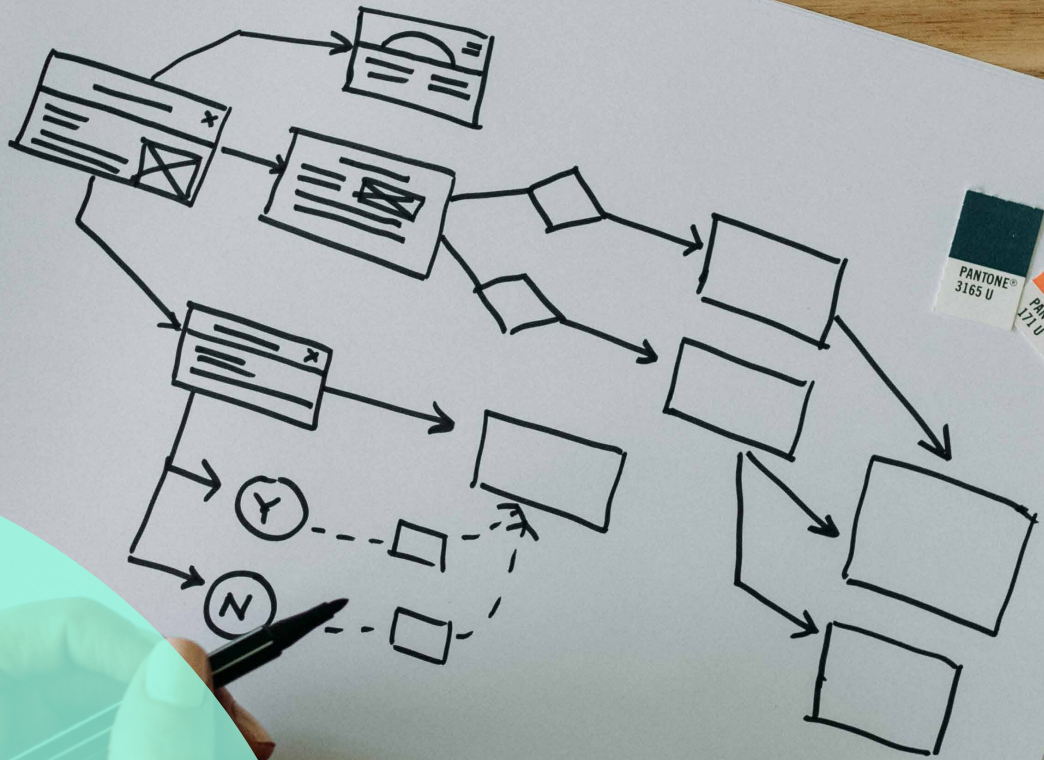
Personas are designed to create reliable and authentic representations of your main audience segments for future reference. These representations should be crafted based on the research in the earlier part of the product design process. It's crucial to bear in mind that the effectiveness of personas is directly tied to the thoroughness of the underlying research. Successful personas should:

- Represent a significant user group for your website
- Articulate and concentrate on the primary needs and expectations of the most crucial user groups
- Provide a clear insight into the user's expectations and their likely interactions with the site
- Assist in identifying common features and functionality
- Portray genuine individuals with distinct backgrounds, goals, and values

## Benefits of Personas

Personas contribute to directing decisions related to site components by introducing a practical perspective into the discussion. They also offer a swift and cost-effective means to test and prioritize features during the development process. Moreover, they can assist in:

- Evaluating new site feature ideas for stakeholders and leaders
- Guiding information architects in developing well-informed wireframes, interface behaviors, and labeling
- Aiding designers in shaping the overall aesthetics of the website
- Assisting system engineers and developers in making decisions based on user behaviors
- Enabling copywriters to tailor site content appropriately for specific target audiences



# User Journeys and flows

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A user journey is like the path a user takes to do something on a website. When designing websites, user journeys are important to find different ways to help users reach their goals quickly and easily.

User journeys outline each step needed to achieve a goal.

User journeys depict the step-by-step path a user takes to accomplish their goal. This process usually includes navigating through different website pages and decision points that lead the user from one step to the next. The user journey serves as a tool to visualise the common path a user might follow to achieve their goal. Following this, the journey is reworked to establish an 'ideal' user experience that is free from frustration. The outcome is commonly illustrated as a flow diagram outlining each page and decision point throughout the entire process.

## Working from the personas

To craft authentic user journeys, it is crucial to start by recognising users through a process known as user profiling. Each user is associated with a specific task or goal on the website, whether it involves buying a product, discovering opening hours, or canceling a direct debit at a bank. Users possess a requirement they aim to fulfill, and the sequence of steps they undergo to meet that requirement is termed a user journey.

## User stories

Priority	Area	Who	I want to be able to...	Reason
MVP	Clients	Staff member	View a list of all clients within the portal	I can find a specific client
Release 2	Policies	Staff member	Search for a client by keyword	I can find a specific client quickly
Release 2	Policies	Staff member	Filter the client list by client type	I can find a specific client quickly
Release 2	Policies	Staff member	Filter the client list by date	I can find a specific client quickly

# User stories and decisions

Now that we have gathered all the necessary information, the creation of stories typically takes place, usually when tickets are generated. In this phase, I will compile a list of every feature in an Excel document. This serves as a guide for developers, outlining the features they need to plan and allowing the client to approve all features.

At this stage, we understand the complexity of the product and can determine which features can be developed initially. If the client has provided a budget, this is an opportune moment to identify key features for the minimum viable product (MVP) and establish a preliminary roadmap for subsequent releases.

The user stories are very granular. An example being:

Priority: MVP

Area: Policies

Who: Staff member

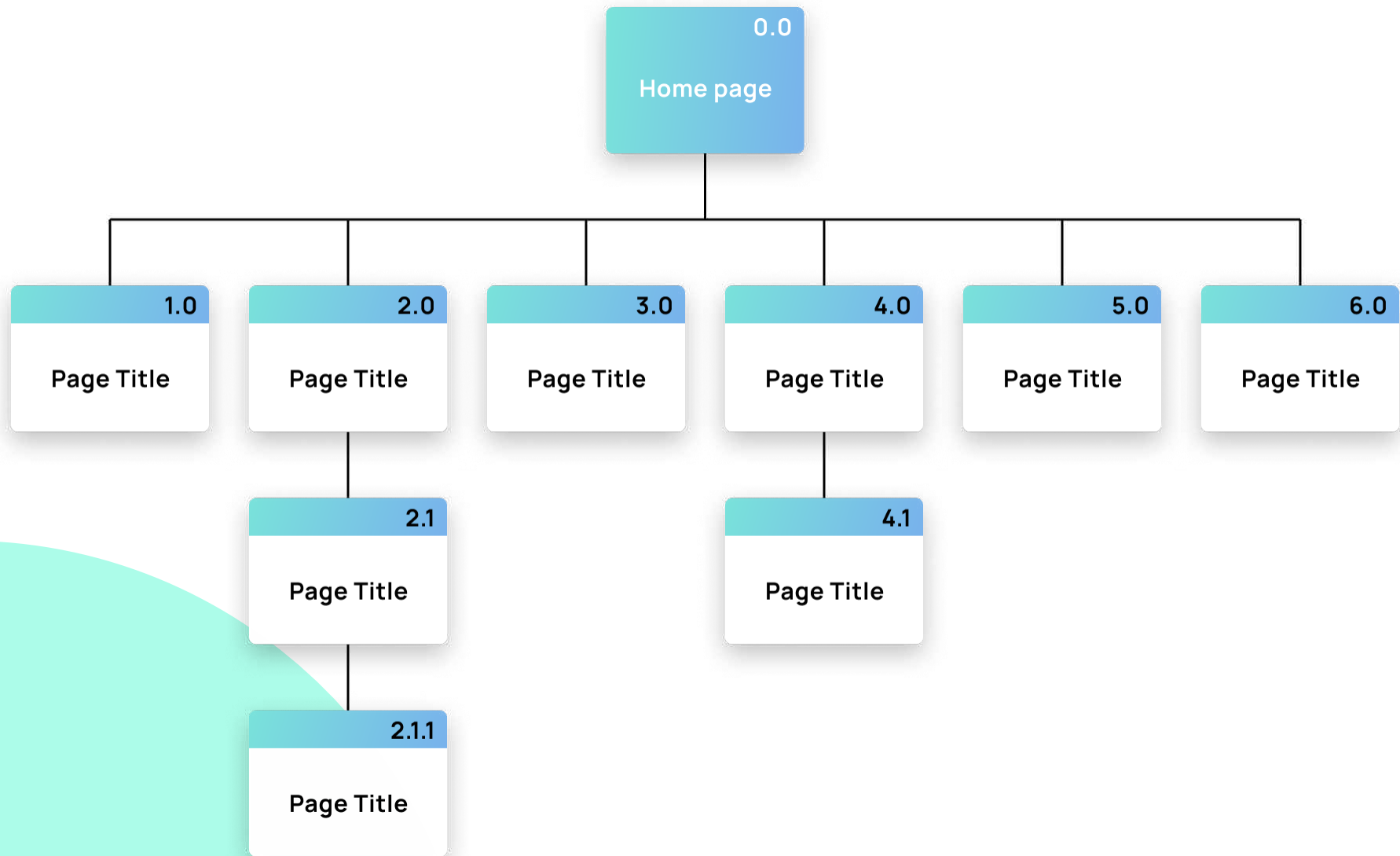
I want to able to: Filter the complaint list by date

Reason: I can find a specific claim quickly

Each feature is agreed as:

- MVP - Important and has to be in first release
- Release 2
- Release 3

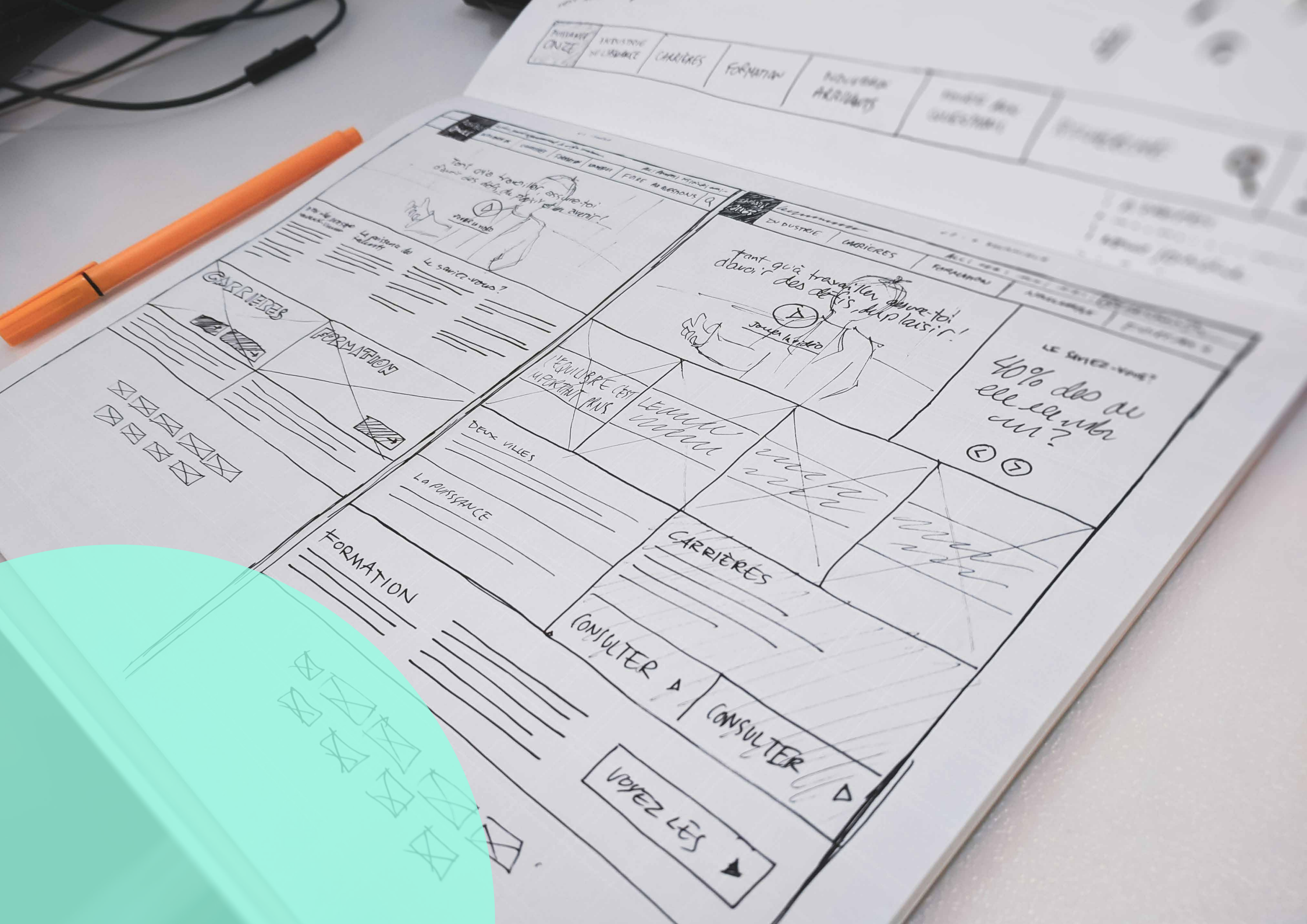




# Sitemap

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This is a less complex step, I see this as a “simple” version of the user flows. It gets all the information of the pages from the user flow and puts them into a diagram of where they slot into the system. Whether they are on the main navigation or whether they are a few clicks away.



ONZE  
 INDUSTRIE  
 CARRIÈRES  
 FORMATION  
 INDUSTRIE  
 ACTIVITÉS  
 TRAVAIL DES  
 QUESTIONS  
 PROBLEMATIQUES

Tant que travailler assure-toi  
 d'avoir des défis, du plaisir  
 et du sens

Tant que travailler assure-toi  
 d'avoir des défis, du plaisir  
 et du sens

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GARIÈRES

FORMATION

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LE TRAVAIL

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# Wireframes

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Based on the insights gathered from user flows and stories, I will sketch or generate low-fidelity wireframes using Miro or Figma (depending on the budget) for the essential screens needed in this iteration.

This process provides a clear understanding of the templates required and the types of components that will constitute the design system. Utilising wireframes is a swift approach because they allow for easy modifications. By mapping out a rough structure of the entire website or app, grouping similar components/pages, I can make changes as needed. The reason wireframes are introduced in the process is to facilitate flexibility, as making adjustments during this stage is far more convenient than at the design stage.

My workflow:

1. Draft rough sketches of all necessary pages on paper based on the sitemap.
2. Transform these sketches into a digital format, either in Miro (a cost-effective option) or Figma.
3. Review the wireframes to identify commonalities among pages and components.
4. Develop a document containing all templates derived from these wireframes.
5. Establish a preliminary guide outlining all the components needed for the project.



# User testing

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User testing a designer will always believe to be an essential part of the process, otherwise it is all designed from assumptions.

- How we run user testing will be:
- Planning the scenarios to test
- Recruiting users to test
- Booking hour slots for them
- Organise a teams call with the user
- Group together feedback and plan changes to be made

## What happens during a user test?

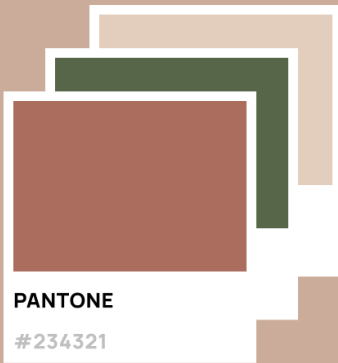
The designer or project manager will have a list of questions to ask the user for each scenario. In the test there is normally 2 people from Adido – one person to ask the user questions and one to observe behaviour and make notes.

The important thing to ask open ended questions to challenge the user to speak openly their observations, rather than a closed yes or no.

We tend to do user testing with wireframes (if it's a complex website), this means that the findings from the tests can be amended more easily than when you get to polished designs.

Then again when the design is finished.

# Moodboard



# Soul . Creativity

# Moodboards

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Opting for mood boards proves more efficient than creating numerous mock-up variations, saving time and potential costs for clients. By utilising mood boards, designers gain greater control over suggested ideas and the design process direction.

In my research for mood board content, I explore web design galleries, taking inspiration from unique websites suitable for the project audience. Kickoff calls provide insights into clients' preferences by discussing their three favourite website projects and crucially, what they dislike, helping to focus on key elements.

I create the moodboard in either Figma or Miro, utilising its project option for easy incorporation of colour swatches, text, and images in a grid or mosaic structure. The software enables feedback, enhancing communication and reducing the risk of misinterpretation.

Focusing on design rather than content when creating mood boards is essential. Although content should complement the design, fixating on it prematurely can hinder progress. I keep mood boards design-focused, reserving content considerations for later stages in the project.





## Colours

Colours for all elements of the designs.

### Primary

The colour used for approximately 60% of elements.



### Secondary

The colour used for approximately 30% of elements.



### Tertiary

The colour used for approximately 10% of elements.

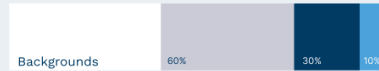


### Gradients



### Colour proportion

The 60 - 30 - 10 rule. To use white shade for backgrounds and larger areas, primary blue for 30% of items and bright blue for impact.



### Forms

The different tints of Blue can be used to provide contrast throughout the designs



### Corporate greys

The different tints of grey can be used to provide contrast throughout the designs



### Black, white and grey

For black - Where #000000 is used - please change to #333333



### Background colours

Lorem ipsum



## Typography

### Display 1

**Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt**

Work sans / 48px / 62px / 0px / Bold

### Display 2

**Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et do**

Work sans / 40px / 48px / 0px / Bold

### Display 3

**Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et do**

Work sans / 32px / 40px / 0px / Bold

### Display 4

**Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et do**

Work sans / 24px / 32px / 0px / Bold

### Display 5

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et do

Work sans / 20px / 28px / 0px / Bold

[Link style](#)

Work sans / 16px / 24px / 0px / Bold

# Style guide

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Before commencing any web project, it is essential to develop a style guide, typically derived from the brand guidelines.

During this phase, the designer meticulously reviews colours, fonts, logos, and icons, crafting a web-applicable style guide.

Font licensing is checked, and we assess the feasibility of using your brand font on the website. If not possible, we explore alternative font families. Additionally, various font sizes are determined in this stage.

Colour choices are also finalised, with emphasis on establishing primary, secondary, and tertiary colours. This becomes particularly crucial for primary button actions on pages. The selection of all other colours necessary to construct the page is also part of this process.

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Excellent ★★★★★ 4.9/5 feefo

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# About us

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Average Customer Rating: ★

Independent Service Rating based on 1

## Event Insurance Services Limited operating within the private and public sectors

Our policies provide affordable, reliable insurance, tailored to fit the occasion – from school fetes and small ceremonies to high profile events

Established in 1996, we have evolved a professional and original approach to meeting the needs of the competitive event insurance market. We do this through clear and simple communication, quality products. We have an expert team on hand five-and-a-half days a week to answer your enquiries, quotations and cover, as well as claims handling.

### Event Insurance

Event insurance is the safety net for anyone organising an event, from county fairs to weddings and parties. Event insurance can cover the policy holder against public liability, employer's liability, damage, loss or theft of event equipment, cancellation of the event, including adverse weather conditions and much more circumstances of the event. Event organisers take out event insurance to ensure they are covered in unexpected instances during their event which would otherwise leave them with a significant financial loss.

### Expertise

Our event insurance policies have been developed with the benefit of long term experience in the event insurance market.

# Graphic user interface design

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This is where we combine the wireframes, mood board and style guide and create a visual representation of how it will look when it is built.

The process comprises:

- Creating elements and components – we adopt the atomic design system principles with this to ensure consistency and less duplication of similar components.
- Applying the colours created in the style guide to the components
- Sourcing images