

Design Process and Management



Rob Sandusky

271 Shipley Street, #2
San Francisco, CA 94107
415-957-9366
rob@race.com
<http://www.d-zine.org/>

Design Process

Definition

- The Problem: "What are we designing?"
- The Solution: "What is the intended result?"
- The Target: "Who is the audience?"
- The Parameters: "What features are required?"
- The Schedule: "What are the priorities?"
- The Metrics: "How will success be measured?"

Discovery

- Understand the business model.
- Identify target audience characteristics.
- Identify business scope and parameters.
- Identify design scope and parameters (technical and aesthetic).
- Summarize and document.
- Kick-off meeting – present project to implementation team.

Design

- Brainstorming and ideation.
- Sketches, thumbnails, wireframes, mockups.
- Refinement.
- Initial presentation.

Production

- Build and analyze prototype.
- Develop and optimize code and assets.
- Document assets.
- Identify any data points to be collected.
- Flesh-out architecture (flow diagrams).
- Document technical implementation and maintenance requirements.
- Apply look and feel.
- Test, tweak and retest.
- Release.

Review

- Conduct a "postmortem" to identify successes and shortfalls.
- Collect feedback.
- Review, Refine, Repeat.

Design Process: Web Site Development

Define the project

- Meet with Client and review project and parameters.
- Transfer information to production team in a kick-off meeting.

Discovery

- Understand business model:
 - Identify and analyze competition and related channels.
 - Identify existing best practices.
 - Determine problem areas and related issues.
- Identify target audience parameters:
 - Analyze existing feedback (customer feedback, flow, statistics).
 - Conduct focus groups.
 - Determine user tasks and goals.
 - Establish user profiles.
- Identify business parameters:
 - Performance objectives (traffic, throughput yield, user task yield).
 - Constraints (budget, technical, resources, time).
 - Metrics for measuring success.
 - Feedback requirements.
- Identify design parameters:
 - Solidify target message, collect adjective list.
 - Establish technical parameters (functionality, required technology, back-end interface).
 - Define implementation parameters (platform, UI parameters, data).
 - Maintenance issues.
 - Identify usability issues.
- Summarize:
 - Review findings and solidify with client.
 - Document parameters profiles, objectives, metrics, scope.
 - Present project to implementation team.

Design

- Ideation:
 - Review discovery data.
 - Identify maintenance points
 - Identify technical requirements (CGI, JavaScript, Flash, etc.).
 - Conduct any secondary competitive analysis.
 - Conduct and document Brainstorming sessions.
 - Determine target voice and tone for design approaches.
 - Develop ideas, sketches and IA block diagrams.

- Refinement:

- Flesh-out page flow schematics (wireframes).
 - Narrow down to top ideas.
 - Conduct focus groups.
 - Concept tests on target browsers (initial testing).
 - Develop solid workable solutions (3 presentation ideas).
- ### - Presentation:
- Present and review top solutions with client and team.
 - Collect feedback and narrow down to final concept.
 - Identify component deliverables, milestones, critical paths.
 - Archive unused ideas.

Production

- Develop and optimize code and assets (media, scripts).
 - Document assets. (Photoshop/Illustrator info layer).
 - Develop basic data collection elements for programming.
 - Flesh-out information architecture (flow diagrams).
 - Finalize primary templates used for page development.
 - Document implementation and maintenance requirements.
 - Apply look and feel.
- Test
 - Page flow and text proofing.
 - Multiple platforms.
 - Try to break the app with non-standard input.
 - Run final focus group against target users.
 - Client test and signoff.
- Release
 - Implement links into site.
 - Monitor traffic and feedback.
 - Compare stats against target metrics.

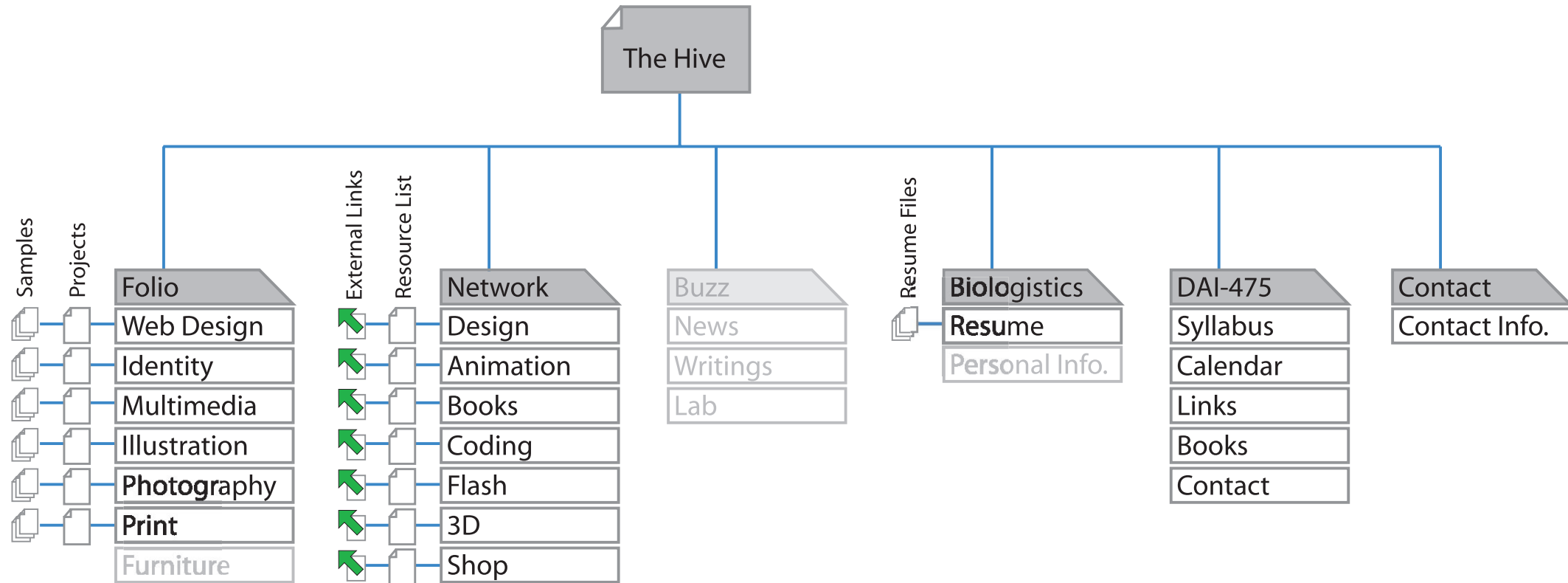
Review

- Review results, check traffic patterns, identify any problem areas.
- Conduct team postmortem review, identify successes and shortfalls.
- Follow maintenance procedures.
- Collect feedback.
- Review, Refine, Repeat

Page Flow Diagram for "The Hive"

Architecture

The architecture for The Hive was intended to be fairly flat and easy to maintain and navigate.



Technologies Used

- Transparent GIF backgrounds to create transparency effects.
- Site-wide use of Cascading Style Sheets.
- Frames to enable multiple screen resolution support.
- Simple javascript routines stored in a single source library.

Design Process: "The Hive"

Definition

The d-zine.org site Serves multiple functions:

- Online portfolio for potential employers or clients.
- Portal for interesting or useful sites.
- A place for experimentation.

Design parameters included:

- Visually rich, aesthetically pleasing.
- Low bandwidth requirements, download friendly.
- Demonstrate use of Cascading Style Sheets.
- Variety of navigation methods, high usability.

Discovery

Since this is a site that I wanted to use every day, I was interested in creating a warm, approachable and organic feel to contrast with the digital medium in which it was being presented. The concept of "The Hive" came from the notion that bees are complex yet organic. The honeycomb represents a highly geometric shape developed in a completely natural and organic setting. The hexagon motif appears throughout the site.

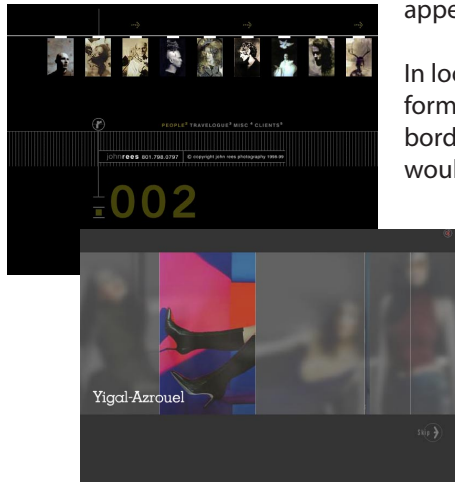
In looking at other portfolio sites, I found the 16:9 "letterbox" format appealing for several reasons. The black top and bottom borders provided a neutral setting against which the site imagery would stand out. The format conveys a sense of entertainment.

Additionally, it allows accommodation of a variety of browser and screen resolutions, scaling well for larger screens. The center of the screen floats at a constant height allowing for strict formatting to be applied, the downside being the occasional appearance of scrollbars on lower monitor resolutions or browser sizes.

Sources such as the John Rees (www.johnrees.com) and Yigal-Azrouel (www.yigal-azrouel.com) were typical of sites I found appealing when conducting competitive analysis. The John Rees web site demonstrates effective presentation of photographic material. The visual richness of the Yigal-Azrouel site appealed to me for tone, layout and minimal presentation.

Design

Targeting for the audience was fairly easy. I thought about what I looked for in potential hires when I was managing at InsWeb Corporation. The first thing to do was to create a solid online portfolio demonstrating the variety of design skill. The site itself was meant to contrast the relatively conservative e-commerce look of InsWeb. A variety of resume formats would also be helpful for those looking to hire.



John Rees and Yigal-Azrouel web sites.

The Network section had to be easy to maintain, knowing that if it wasn't, I would stop using it as a portal, which was the primary purpose. It should be simple and flexible enough to support ongoing additions, deletions and reorganizations.

Initial thumbnails and rough sketches were done with pencil and paper. As ideas progressed, components were built and refined in Adobe Illustrator so that they could be easily incorporated into the final design through Adobe Photoshop.

The tone of the images and color scheme are intended to convey the warmth and approachability of something organic. Link colors were modified from standards to remain subtle, reinforcing the idea that this is a site on which to linger and explore. Supplemental navigation in subdued gray is available for those in a hurry, and remains consistent throughout the site through use of frames.

Production

An initial HTML page template was hand coded for each of the major sections of the site. Initial navigation was incorporated into the templates and refined in sub-sections of the site as needed. HTML documents were organized into sections and archived.

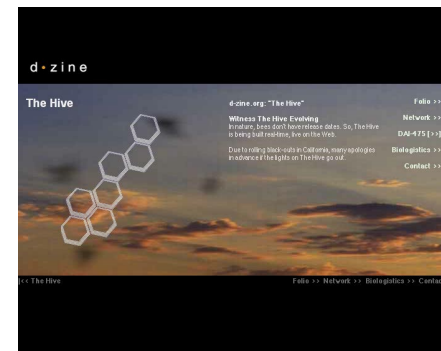


Sketches on paper and in Adobe Illustrator.

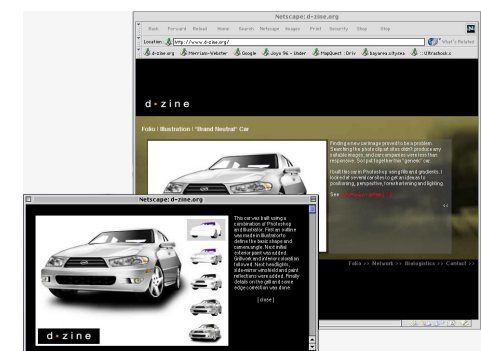
The site runs on a modified Apple Macintosh 7600 connected to a DSL line at my home. The server acts as web host, firewall and gateway/router for my small home network.

Review

After the first month online, the site has fulfilled its purpose. Feedback from those viewing it is positive, and it has been easy to maintain. Some fixes made after release included renaming of some pages, and removing/refining of some graphics to reduce page clutter.



Screen shots from <http://www.d-zine.org/>



Design Process: Managing People

I think of managing people as a Design problem in a human medium. Many of the same methods apply when working to solve problems facing people.

Creative Management: Design in the Human Medium.

Define the issue

- What's the nature of the issue? (Attitude, performance, reliability)
- What is the goal? What improvements would we like to see?
- What are the existing strengths and areas for improvement?
- What requirements must the individual fulfill?
- How will we measure the results? (satisfaction, performance, improvement).

Discovery

- How are the communication skills of the team/individual?
- How does the team/individual prefer to work?
(morning or evening, quiet environment or w/ music?)
- How does the team/individual fit in the environment?
- What are the individual's goals? Are they learning enough?
- Is the team/individual challenged enough? Too challenged?
- Define the expectations of management, business, clients, team members.
- Review the findings with the team/individual to clarify communications.

Design

- Define and agree on the performance issue parameters.
- Brainstorm on possible solutions with the person.
- Define the time frame and milestones for improvement.

Production

- Implement the plan.
- Have regular reviews and allow for drop-in discussions.
- Provide suggestion and direction.

Review

- Give feedback.
- Receive feedback.
- Review the plan.
- Refine and repeat as needed.

Managing People: Some Observations

Education and Mentoring:

- **Communication** - use of context and metaphor to convey ideas.
- **Responsibility** - delegating responsibilities demonstrates trust.
- **Public Speaking** - develop comfortable presentation skills.
- **Self Actualization** - individuals drive their education, training, fulfillment.

Fostering Creativity:

- **Sleep** - many solutions are spawned out of the subconscious.
- **Focus** - large blocks of time to focus on solution development.
- **Research** - time to investigate and be inspired by a variety of design.
- **Recognition** - acknowledging efforts and giving credit.
- **Continuing Education** - never stop learning new things.

Start with the notion that people inherently want to do a good job.

- Those rare individuals who don't won't last long.
- Often problems arise through:
 - Miscommunication of expectations: "What do you want?"
 - Unrealistic expectations: "Are you serious?!"
 - Misunderstanding of motivation: "Why should I?"
- Communicate context and background:
 - Give the whole story. Don't hide important parameters.
 - Reinforce by comparing to previous situations.
 - Ask the individual to "put themselves in their client's shoes"
 - Cross-educate the team to better understand team members.
- Management's primary goal is to enable people to do good work.

Taking Risks and Making Mistakes.

- Mistakes and Risks are methods of innovation.
- Mistakes are valuable tools if we learn from them.
- Find solutions not blame.
- When presenting a problem, take a moment to present a possible solution.

A practice that I've found useful is that at the time of performance evaluations, I have my direct reports evaluate me on my management skills. Their comments are kept anonymous so that they can be as candid as possible. I've learned much from this kind of feedback.