Lean Requirements, Without Skimping on the Meat

Cornell Drupal Camp 2016 • #DrupalCampCU • @anthonydpaul

Let's start with an exercise

much excitement

:D

CAESAR

- romaine
- parmesan
- black olives
- (optional) chicken
- caesar dressing
- croutons

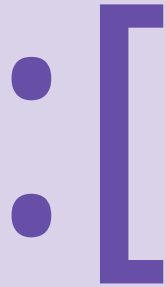* extra credit for sardines

meh.

:\

GREEK

- iceberg
- feta
- kalamata olives
- tomato
- cucumber
- peppers
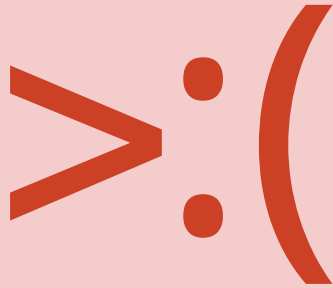- red onion
- (any oil & vinegar will do)

somewhat defeated

:[

COBB

- iceberg
- boiled egg
- avocado (if we're lucky)
- cheddar
- tomato
- bacon bits
- ranch dressing

negative brand attribution

>:(

Ruh-roh

Where'd we go wrong?

What to build rather than what to accomplish

Intake Form

How many pages?   _____

Stock photography?   Yes / No

Flash?   Yes / No

Internet Explorer?   Yes / No

Will you need a:

- ❏ Sign-up form
- ❏ Discussion board
- ❏ Shopping cart
- ❏ "Members only" area

Intake Form

How many bins? _____

Do you like meat? Yes / No

Do you like bacon? Yes / No

Want a meaty bacon? Yes / No

Will you need a:

- ❏ Bacon
- ❏ Meat
- ❏ Meat-Bacon
- ❏ Bacon-Meat

bacon	bacon	bacon	bacon	bacon
bacon	"MEAT"	bacon	bacon	bacon
bacon	bacon	bacon	"I really like cheese"	bacon
bacon	beets	bacon	bacon	*bacon-flavored dressing*

Sounds great, but doesn't solve user problems

CAES

- romaine
- parmesan

GRE

- iceberg
- feta
- kalama
- tomato
- cucum
- peppe

COBB

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- boiled egg
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So how do we get to those requirements?

"But, I'm not a designer."

To start...
If you make functional recommendations, you're a UX designer

"Sometimes we can't sell good UX, we have to sneak it in."

@brownorama #ias15

They're not wrong

One piece of a shared understanding puzzle

website
(salad bar)

reality hammer

problem

problem

What is the solution?

problem

Which parts of the problem are biggest?

Should we know more about this part?

pr ob le m

problem

Does it become a different problem from another viewpoint?

problem

philosophy

What and how much should we know?

perspective(s)

What role does this site play in its ecosystem?

tools

How do we get to the answers we need?

"lean"

"There is always
too much [website]
to build."

@jeffpatton #sxsw2015

Lean

Squeeze the most value out of limited resources.

Use any means to arrive at good enough as quickly as possible—then show it to somebody and try again.

- Define success, solve that
- Only produce needed documentation
- Seek pains and joys

"If you think of a product you love, you don't love it because it was finished on time."

@jeffpatton #sxsw2015

situational analysis

Ask research questions to…

Support   "Minimum viable product"

Improve   Not yet addressed / Opportunities

Innovate   Beyond improvement, change industry?

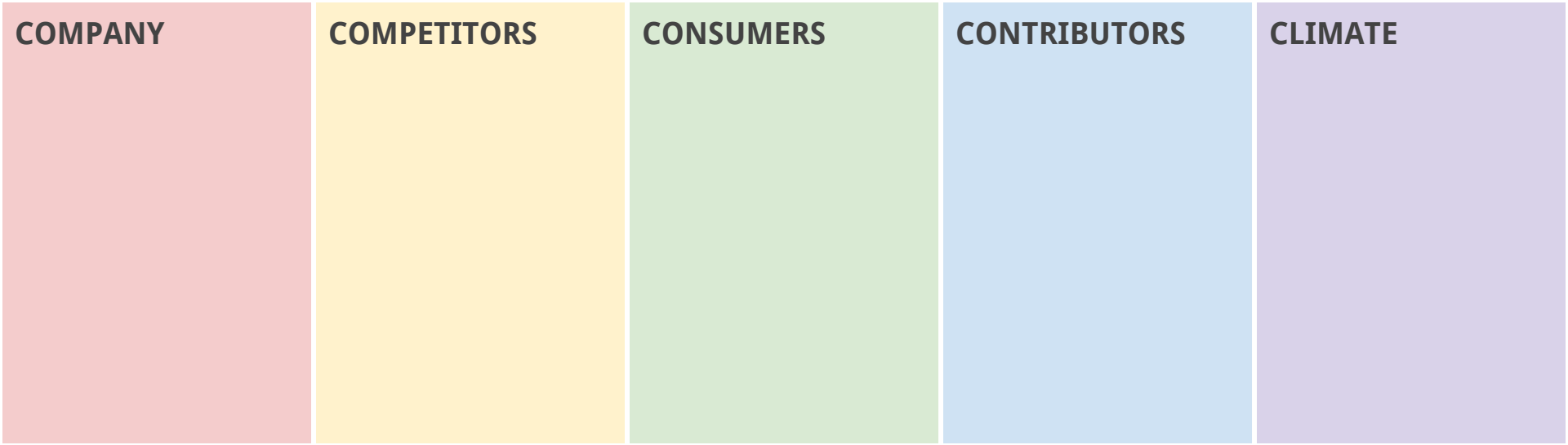Our job is to change the world…or 'dent the universe'.

Steve Jobs

only hearing
decision-makers

COMPANY

if they're lucky
enough to be in
the room

CONTRIBUTORS

COMPANY	COMPETITORS	CONSUMERS	CONTRIBUTORS	CLIMATE

Five C's of a *Situational Analysis*

Support   What does my website need to do to
               maintain our existing success?

Improve   How can my website further our
               business, brand, and mission?

Innovate   Are there opportunities to support
               our business in ways not yet imagined?

decision-makers • brand • finance

Support   What is the baseline for survival in our market?

Improve   How can my website differentiate us from our peers?

Innovate   Are there opportunities to rethink how our market operates?

direct • aspirational • indirect (recruitment)

CONSUMERS

Support What do our existing consumer groups need?

Improve What consumer groups are we ignoring? (ex. media, bloggers)

Innovate What can we give our consumers that doesn't directly benefit our company? (ex. knowledge sharing)

people • search engines • devices • APIs

Support   Who feeds the website (admins and consumers) and what are their tasks?

Improve   Which tasks are most repetitive or cumbersome and can be optimized?

Innovate   How can we change the focus of a contributor's work from assembly worker to expert strategist?

internal • consumers • APIs

Support   To be successful, what is critical for reception?

Improve   If we fail, what will cause it and how can we prevent it?

Innovate   What could we do to change this industry entirely?

today's market • trend forecast

tools

surveys

interviews

internet research

task analysis

user journey maps

IA docs (sitemaps, wires)

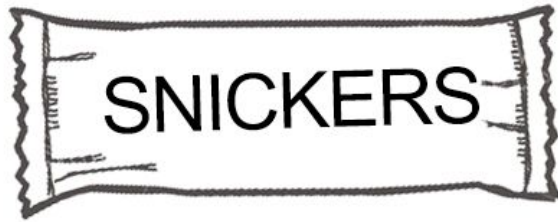prototypes (paper, code)

usability tests

…more

tools

task analysis

Tasks vs stories

Why did Peter Buy The Snickers?

SNICKERS

SNICKERS

Satisfy your hunger

Peter

Is 35 years old
Has a degree in marketing.
Likes peanuts, chocolate, nougat and caramel
Loves Snickers & eats one every day
Has an active lifestyle
Has 2 dogs
Hangs out at Jack in the box, but eats at Taco Bell.
Stubbed his tow yesterday
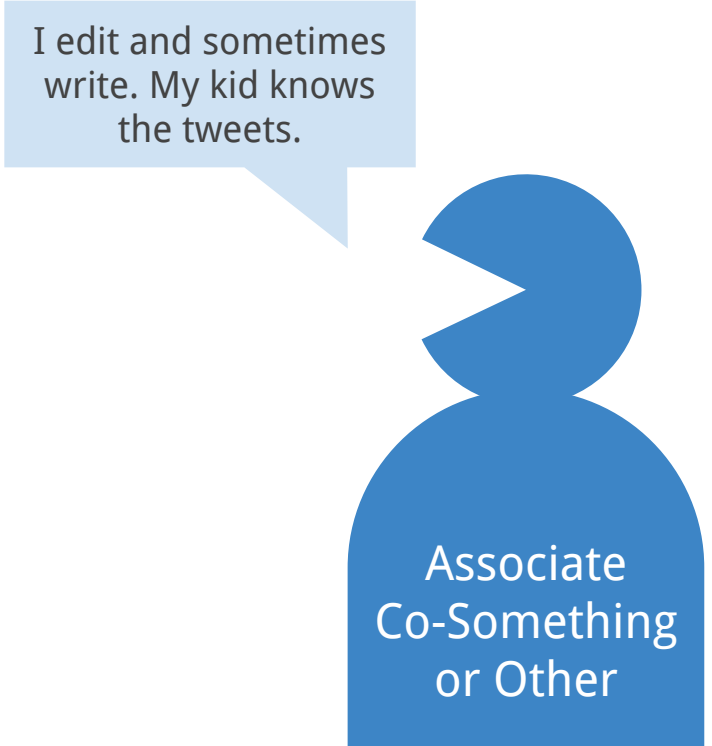
Focus on roles (to get to tasks)

Content writer

Content editor

Subscriber

Job-seeker

Tweeter

I edit and sometimes write. My kid knows the tweets.

Associate
Co-Something
or Other

ex. Content Writer

Tasks <u>they want</u> to perform

 Write popular posts

 Accumulate quality points

Tasks <u>we want</u> them to perform

 Promote advertiser products

 Promote recruitment via personal channels

ex. Content Writer

Motivations   Company has financial incentives for number of ad clicks per month

Anxieties   Product placement brands aren't cool

Influenced by   Content Editor, brand, incentives

Influences   Job-seekers, peers, subscribers

ex. Content Writer

What we learned:

CW influenced by CE.

We want CW to promote advertiser products.

Recommendation:

Create dashboard for CE to see number of placements by CW.

Include in-editor tool to recommend spots for product placement based on keyword context.

Full circle

philosophy	*perspective*	*tools*
Lean	**Five C's**	**(any)**
Focus on the most important problems to solve.	Reframe the problem to ask the right questions.	Employ any tool, but only when you need it.
Define success and work toward that.	Focus on solving real problems from real stakeholders.	Treat tools as disposable decision-makers.

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CAES

- romaine
- parmesan

romaine	iceberg	parmesan	feta	cheddar
black olives	kalamata olives	chicken	bacon	boiled egg
tomato	red onion	peppers	cucumber	avocado
croutons	La Choy	sesame seeds	dried cranberries	*dressings*

Worksheet

Up next

1. Lean requirements gathering

2. User journey mapping

3. Information architecture

4. Usability tests

Thank you

Communicating Design: Developing Web Site Documentation for Design and Planning

http://is.gd/Fz4PD1 (Amazon books), Dan Brown

Situational Analysis: 5C Analysis

http://is.gd/IXdYS4 Wikipedia

Designing Features Using Job Stories

http://is.gd/6RQRwO Smashing Magazine, Alan Klement

Lean UX: Getting Out of the Deliverables Business

http://is.gd/FN6b1v Smashing Magazine, Jeff Gothelf

(my talks and blog)

http://adp.rocks *or* http://⚡❄️.ws *or* http://🍕🐀.ws