UX CONSULTING PHASE

Days 1 - 7 | Days 8 - 21 | Day 21 | Days 21 - 28 | Day 29 +

Contract Execution Milestone

PM Selected/Assigned

Prior to Kickoff Call:
- Review Contract
- Create/Task out current site map
- Complete internal network resources for the project (BTNET project set, new project folder structure, FTP folder, etc.)

PM schedules Kickoff Call

Kickoff Call

- UX Specialist required to join Kickoff for Advanced UX Package
- For Basic UX, let the client know that UX Specialist will reach out to them, if not present during Kickoff

- If Consulting Workshop is to be conducted via WebEx, confirm client's meeting location is properly equipped to handle the online meeting – good internet connection and speaker phone design for meetings

Additional Details Related to UX Responsibilities
Within 1 to 2 business days of the kickoff call, UX Specialist will:
- Email/follow up with client and share instructions on how to install the heat map code and request access to their website analytics data
- Send Stake Holder Survey links to all clients (Graphic Design & Planning) and sets the deadline 3 weeks out at minimum
- Send Community Survey link for Advanced UX Package and sets the deadline 3 weeks out at minimum

See *Sample After Kickoff Email to Client from UX Specialist.pdf*

PM Creates BTNET Ticket with Project Details and Assigns to UX Specialist

Project Details for BTNET Ticket
- Project Name
- Network Folder Location
- URL of Current Site
- UX Offering (Basic or Advanced)
- Budget total
- Goal Dates for Discovery Phase
  1) Survey Return Due Dates
  (3 weeks after Kickoff minimum)
  2) Consulting/Design Workshop Date
  (1 week after Survey deadline)

UX Specialist Contacts and Works with Client to Produce Usability Report

- It is the PM's responsibility to follow up with the client to confirm that information and instructions provided by the UX Specialist in the Discovery Package is fully understood. If not, provide or arrange to provide assistance to ensure proper completion.
  Example cases:
  1) client does not know how to add the heat mapping tracking code to their current site.
  2) client does not use Google Analytics or uses other types of analytics or has no current analytics
  In these cases, confirm that UX Specialist is already working with the client to resolve the issue or make the UX Specialist aware of the situation and that follow up is necessary.

PM Schedules Consulting Workshop

Discovery Package Provided by UX Specialist includes:
- Online Planning Survey Link
- Online Graphic Design Survey Link
- Community Survey (Advanced UX Package Only)
- Examples of well crafted survey responses
- Heat Mapping Code (To be added to current site by client)
- Access to Google Analytics (If other than Google, additional work will be required)

PM Produces Current Sitemap

Client Completes Discovery Package Requirements

Expected Deliverables by Client
- Successful installation of heat mapping code to current site
- Full access to current website analytics or provide report
- Completed Surveys by the deadline
- Images, logos, branding assets, color palette necessary to schedule design immediately after the consulting meeting

PM Reviews Completed Survey Results

- PMs are expected to offer 3 possible dates and must be at least 1 week (5 business days) after the survey deadline
- PM is to schedule the consulting meeting no earlier than 4 weeks from the kickoff date. This will provide 3 weeks to generate heat map data and time for client to respond back to the surveys. 1 week is set aside for UX Specialist to review the heat map generated data, analytics, and to prepare the report after the deadline.

Additional Details Related to UX Responsibilities
- Update the BTNET Ticket to include the analytics related details:
  - Whether Google Analytics (*GA*) is in use
  - If NOT in use, indicate *GA* is not in use and subscribe Robert S. to the ticket -- he will create the account and update the ticket to include the ID
- Subscribe Natalia on the ticket to let her know a new project has started

UX Specialist completes Usability Report and Presentation

UX Specialist creates (3) homepage wireframes

- When the deadline for the surveys at the end of 3 weeks, PMs are to review the Graphics Survey results to ensure enough details and input is provided. If not enough detail, let Graphic Designer know

Consulting Meeting with Client Decision Makers
PM, UX, Graphic Designer Present

UX Consulting Meeting
Consists of Three Parts -- Typical Agenda items include:

1. PM: Project /CMS Overview
- Review of Timeline
- Demonstration of CMS and Discussion of project scope/specification
- Existing Third-Party Vendors and Applications & how they will or will not be integrated in the new site
- Hosting and Domain, SSL Certificate
- Content Migration Sitemap Creation
- Approval Cycle Worksheet

2. UX Presentation and Wireframe Approval
- Discuss Usability
- Present Study Findings from heat mapping, analytics and surveys
- Present/Review/Revise/Finalize Homepage Layout Wireframe

3. Graphic Design Consulting
- Present Graphic Design Survey results
- Discussion about design direction for the site

- Unless specified in the scope of work, UX Specialist and Graphic Designer will join the onsite consulting meeting via the WebEx
- For onsite consulting meetings, PMs are required to set up and confirm meeting location can accommodate WebEx for UX Specialist and Graphic Designer to join the meeting

Client Approves Homepage Wireframe

PM/UX Specialist Produce / Delivers Proposed Sitemap

- Approval at the end of consulting meeting is ideal
- UX Specialist responsible for completing the Wireframe Sign Off document

PM Creates BTNET Ticket for Design Brief / Inspiration Board

- PM is responsible for communicating with the client about having all design assets ready
- If the images, photos, logos, branding, and other assets are not ready by end of consulting meeting, graphic design cannot begin
- Designer will deliver the initial homepage design two weeks after all required design assets, including completion of the design brief / inspiration board are available.

Graphic Designer Creates Design Brief/ Inspiration Board

- With Main Navigation defined at this point, completing the proposed sitemap asap is crucial in initiating the "blank site" for content migration
- UX Specialist will provide assistance/guidance in creating the proposed site map – especially the adoption of CMS components to use

Graphic Design Phase

End of UX & Discovery Phase