

Portals and Collaboration

Design & Strategy Process

The Design & Strategy process is a 3 to 9-week duration consisting of ideation workshops designed to create a solution that serves the audience and purpose intended. Most sessions last from 2 to 4 hours. The *Discovery* and *Strategy* steps run concurrently as do *Design* and *Mockup*. The *Prototype* is the final delivery.

1. **Discovery**

The kick-off will help establish the who, what, why and how. This session generally lasts from 3 to 12 days.

2. **Strategy**

Strategy sets direction for the project and establishes the overall structure and purpose. Also 3 to 15 days.

3. **Design**

Once the flow and end-user requirements are established, we can determine the best approach for design, a 5-12 day process.

4. **Mockup**

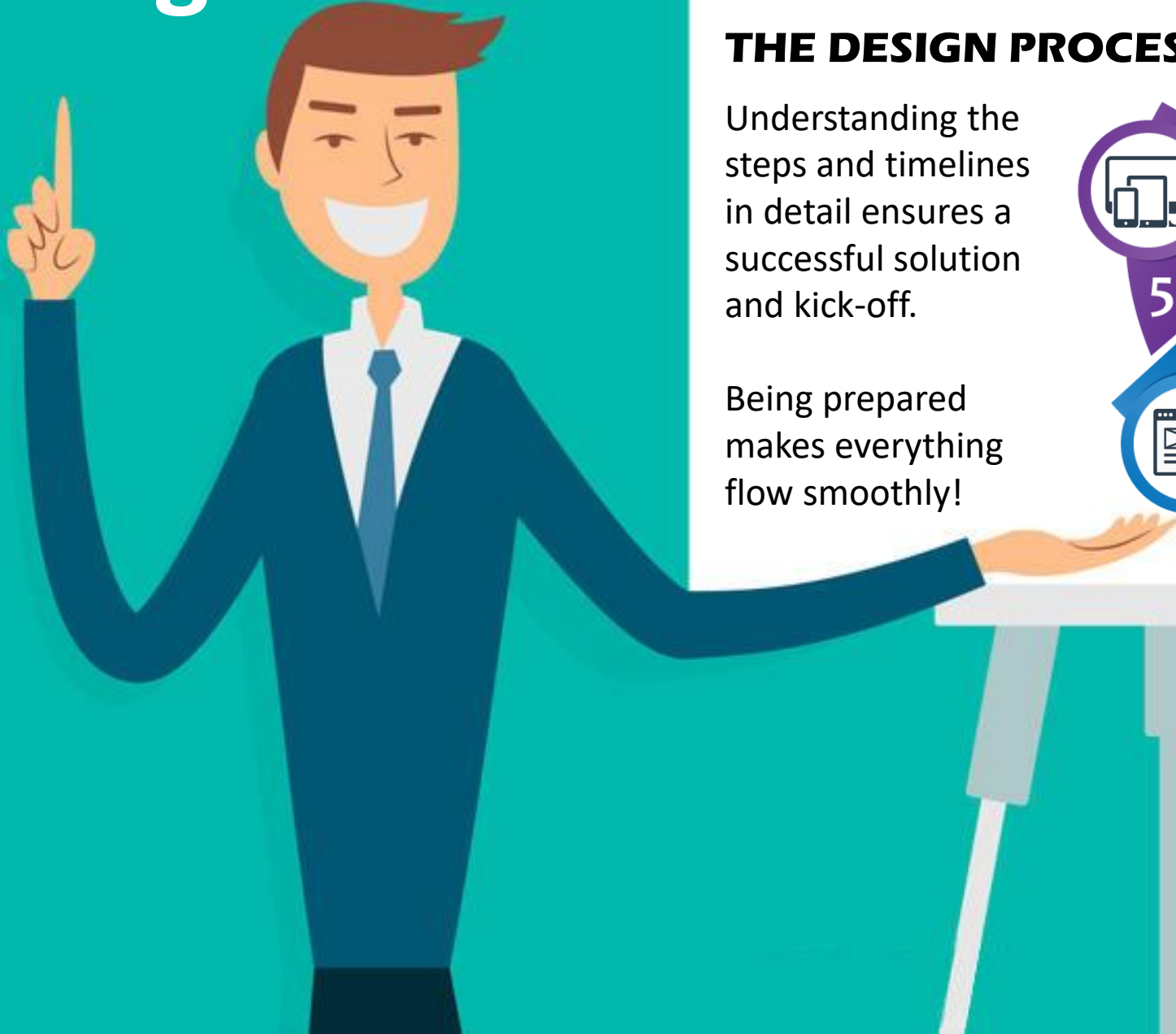
A mockup is used as a visual to share with the client. Once approved, the final delivery, a *prototype*, can be built. This is a 5-12 day process.

5. **Prototype**

A prototype is a clickable web-based mockup leveraging the latest in web technologies for front-end design. This is a 9-15 day process



Getting Started



THE DESIGN PROCESS

Understanding the steps and timelines in detail ensures a successful solution and kick-off.

Being prepared makes everything flow smoothly!



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The Discovery Process (3-12 days)



The key to a successful ideation workshop? Be prepared!

- Show up with a clear idea of what you need to accomplish
- Have a goal in mind and be able to communicate your requirements
- Provide samples or examples of similar solutions
- Provide a single point of contact with a backup contact
- Create an approval team and process to ensure timely deliverables
- Ensure an approving member of the team can join each workshop

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The Strategy Process (4-15 days)



Strategy sets direction and ensures success

- A successful launch depends on a clear strategy
- Set direction for the application/portal *and* the development process
- Define end-user roles and end-user expectations
- Create predictable results that can be optimized & analyzed
- Define architecture and information flow, minimizing costly edits

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The Design Process (5-12 days)



Designing for success

- Successful workshops lead to compelling interfaces
- A compelling interface is based on effective user experiences
- Designs are a collaborative effort between designer and business unit
- Creating an effective, user-centric design relies on detailed user stories
- Designs are iterative and require a lot of “touches” to ensure success
- A solid design leads to quicker mockups and more *usable* prototypes

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The Mockup Process (5-12 days)



Mockups bring design concepts to life

- A mockup is a *model* of an application used to demonstrate the design
- Used to evaluate the effectiveness and usability of the design
- Mockups are a visual representation without functionality
- This stage allows for fine-tuning of design strategies before development begins
- Provides the business unit with a clear understanding of the end product

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The Prototype Process (9-15 days)



A prototype is a functional demonstration

- A simulation or sample version of the final application
- Can be used to test user acceptance before development process begins
- Additional opportunity to confirm design strategies
- A *clickable* version of the application without actual data integration
- Can be used in production to speed up development deliverables
- Prototypes show how the application will work in multiple devices

Overview



Process Timeline



Highlights

