

# UX Design Project Checklist

## Management Vision & Goals

- What is the purpose of the website or app? Define the primary use or need. Why does this website or app exist?
- What is the overall vision for the website or app? A clearly defined vision helps us understand how this project affects the future roadmap.
- What are the short-term goals for the business overall? What does the business want to accomplish and how does this project fit with those goals?
- What metric we can track? How will we know we've succeeded? We need a way to measure our success.
- What is the strategy for accomplishing the goal? This is *what* needs to be done to accomplish the goal; the tasks, tactics, or deliverables for the project.
- What are the business requirements for this project? Having documented requirements up-front is important, but we can also work together to create them.

## Users or Customers

- Who are the users? What do we know about them? This could be a starting point for writing personas and user stories.
- What is the primary problem we want to solve for them? What are the biggest pain points for users right now? This may not be the goal of the project right now.
- How do users interact with the site or app? Their context / location, device type and size, entry and exit points, or frequency of engagement.
- What is the plan or budget for usability testing and / or user interviews? We need to work with real users in order to design for them.

## Workflow and Communication

- What tools should we use to communicate? What is the best way to get answers? Everyone has different preferences about email, text, video, and phone.
- What should our meeting cycle look like? We'll want both short, frequent updates, as well as longer, in-depth progress reports. For example, 30 minutes daily, plus a weekly hour-long (or more) design review.
- What is the timeline for the project? How frequently can we release? Establish a pattern for when tasks should be completed. Take the deadline and work backwards on the calendar. This may inform resourcing or scope too.

- Who makes the final call on decisions? Identify one person overall and/or assign one individual per role, for Business, Product, Design, Engineering, or Content. No committees.

## Access to Information and People

- What technical resources will we need access to? Who can provide us with access? This includes login credentials, email accounts, VPN, or access to servers.
- What existing data is available? Access to analytics, usability studies, A / B tests, or any business reports or slide decks.
- Is there an existing website or app we can use for reference? Another product that can be used as a basis for this project?
- What is the org chart for the company? What people are important for our project? A list of relevant people, including: names, titles, relationships and areas of expertise along with contact information.
- Do we have permission to work with these people? Necessary introductions or permissions need to be given for us to contact other people in the organization.

## Design and Tech

- What design guidelines already exist? Branding guidelines, logo standards, design language documentation, style guides, or visual UI libraries.
- What is the tone or style of the design? This might be defined by the design guidelines above. If not, we can discuss.
- What are our ground rules or design goals for guiding the design? A short list of limitations, best practices, or focused priorities to guide design decisions.
- What are other websites or applications are similar or relevant? A list of competitors, similar or unrelated products that are of interest.
- What technical requirements will influence the design? Accessibility, browser / OS version, device or viewport size support, responsive / adaptive / mobile.