



# UX REQUIREMENTS WORKBOOK

**Methods & Templates for Successful Projects**

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## INTRODUCTION: THE POWER OF WHY

### Stop me if you've heard this one before...

Tell me if this sounds familiar to you: requirements are “gathered” by a Product Owner and/or other management stakeholders and handed to the development team as written law. If you ask **how they got those requirements**, you'll likely hear some variation of “*We gathered them from the existing system, what customers said they wanted, and meetings with our Marketing, Executive and IT teams.*”

In this scenario, you're in trouble already — because those requirements are based on 4 false clues:

1. Executives' **personal opinion**
2. IT **technology preferences**
3. What customers have **said** they want
4. What someone **thinks** customers want

When these are your sources for features and functionality, I will guarantee you that there isn't a single requirement on the list that *truly addresses the root cause* of a current problem. There's nothing here that truly addresses or answers the issue that's motivating the redesign or the new feature set. It also often means that the problem itself **isn't really the right problem to solve** in the first place. No one really *knows* the reason we're doing all this in the first place, and they're unwilling to speak up and say so because they're afraid to look dumb or uninformed.

So these requested requirements are usually little more than **opinions** and **guesses**.

In addition, most requirements state **features**.

Features are **solutions**.

Which means that we have a list of solutions **before we've done any work to figure out what the problems are** in the first place. Does this make any sense to you?

Of course not. But that's exactly why you experience various degrees of endless debate, argument and political compromise throughout the development cycle.

At best, this means **everything takes a lot longer than it should**. At worst, that means a **product that fails** and causes great pain to every person involved in the project, in particular the people who designed it or built it.

You will be held responsible for every decision you *didn't* make, and that will suck. Greatly.

## INTRODUCTION

The course you've enrolled in, along with the tools and exercises in this workbook, changes this scenario dramatically. Particularly when you combine them with another secret weapon of mine: a one-word question. That's right, **one word**.

The word, in the form of a question, is **WHY?**

When you use that word — and ask it at least three times — you will find yourself having a **very different conversation** with the folks in the room. Here's an example; your stakeholder here could be anyone from a Product Owner to a Team Lead to an Executive.

**Stakeholder:** *"We have to port all desktop data views to responsive format."* (Note: this is a solution, not a need)

**You:** *"Why?"*

**Stakeholder:** *"So people can work on their smartphones."*

**You:** *"Why would they want to do that?"*

**Stakeholder:** *"So they can get work done when away from their desks."*

**You:** *"Why would they want to look at these massive data tables on a three- or five-inch screen, when they won't be able to view all columns and rows at once? That would make it impossible to compare data points."*

**Stakeholder:** *[ blank stare, because nobody knows if, how or why someone would want to access a data-heavy enterprise reporting system on a tiny screen ]*

Everyone in the room now realizes that **the need is grossly undefined**. And as such, it has **no business being a requirement**.

A simple exchange like that is all it takes to make people receptive to the idea that there's a whole lot we **don't know** and **didn't think about** here. That's your opening to suggest the UX and User Research that helps figure it out, that helps generate meaningful requirements that deliver value — both to users and back to the business.

This "WHY" method, when combined with the methods contained here, work better than any other way I have tried — over the last *three decades* — to get stakeholders to budge from their position that UX work is unnecessary or a nice-to-have. **It works all the time, every time.**

I hope this workbook helps light the way to UX improvement — GIVE GOOD UX!



1 IMPROVING USER STORIES

TYPICAL VS. IMPROVED USER STORY FORMAT

**TYPICAL USER STORY** As a **user** I want **function** , so that **action taken** .

**IMPROVED USER STORY**

The **user** wants **function** to achieve the goal of **user goal** .

The current inability to do this is causing **adverse effect** for the organization.

Enabling users to do this would deliver **specific measurable value** to the organization.

SAMPLE IMPROVED USER STORY

**IMPROVED USER STORY**

The **user** wants to **register using a social media login** to achieve the goal of **quickly trying the demo with little effort.**

The current inability to do this is causing **potential customers to abandon the registration page.**

Enabling users to do this would **increase the number of prospective customer registrations and potentially increase sales.**



## 2 EMPATHY MAPPING

### USER PERCEPTIONS, INFLUENCES + GOALS

Assume you're designing a **call scripting application** for **emergency response operators**. The app provides scripted responses for multiple types of emergency situations, allowing the operator to respond quickly to a variety of situations. Your primary persona is:



#### Jane Holden

51, Emergency Operator

*“Emergency calls can be pretty intense, and I need all the help I can get to stay calm and focused in order to get information and act quickly.”*

Consider the following as you fill out the **Empathy Mapping Worksheet** on the next page:

- ▶ What does she likely **believe** about the work she does?
- ▶ **Where does she interact with the product**, and how might that **environment** influence decisions or constrain her ability to act?
- ▶ From a social perspective, **who influences how she thinks** or what she does: bosses, coworkers? Friends? Family?
- ▶ How does she want to be **thought of** and “seen,” at work or out in public?
- ▶ What **fears** and **frustrations** does she likely have, and what **obstacles to success** might be present?
- ▶ What does she want or need in order to be **successful**?
- ▶ What constitutes **success** for her?

**Remember that this is exploration, so you don't have to be right.** These are inferred guesses, and that's OK. You will get closer to reality and throw out the things that don't apply later on in the project. Right now, the only thing that needs to happen is for you to get your brain into the purposeful habit of trying to put yourself into that person's heart and mind.

**Just go – think, write and examine.** You may use multiple sheets for the same person, and you may find that coming back to your work a day or two after the fact helps you see it more clearly.



1

## THOUGHTS & EMOTIONS:

Beliefs, convictions, motivations, worries & goals.

2

## ENVIRONMENT:

How is s/he affected by workplace, social settings, similar products/services?

3

## SOCIAL INFLUENCE:

Who does s/he listen to most? Friends? Bosses?  
Co-workers? Outside influencers?

4

## BEHAVIOR:

How s/he acts, and how s/he *wants* to be seen and thought of; In the workplace and public spaces.

5

## PAIN:

Fears, frustrations and perceived obstacles.

6

## GAIN:

Wants, needs and what s/he believes constitutes success.

### 3 SITUATIONAL MAPPING

#### USER PERCEPTIONS, INFLUENCES + GOALS

Now you're going to explore the context of a situation Jane might find herself in. Here's Jane's story, which you'll use to extract **functional needs** and **functional elements** on the following pages:



Jane has just taken a call from a woman who is crying hysterically and possibly hyperventilating.

Jane cannot understand a word she's saying and **the caller is not listening to or answering the questions Jane is asking** about her situation and location.


The first thing Jane is required to do is ascertain the caller's **situation** and **location**. She cannot dispatch any **help** to the woman until she gets this information.

Note the **urgency** of the situation, and the obstacle Jane, our user, faces: she cannot move to the next step in the process until she does something else first.

So, for example, if Jane is looking at a UI that's meant to coach her through these situations **what** does she need to access, **how quickly** does she need to see that it **exists**, and how **easy** does it need to be for her to access a method *relevant* to the specific scenario she's dealing with right now?

Consider the following:

- ▶ What does she need to **do** in this situation — first, next?
- ▶ What does she need to **see** onscreen in order to do those things?
- ▶ What is she likely **thinking**, both at the outset of the situation and at critical points throughout?
- ▶ What is she likely **feeling**, both at the outset of the situation and at critical points throughout?

<b>SITUATION:</b>	<b>ACTION STEP:</b>
<p data-bbox="827 917 936 946"><b>THINKS</b></p> <p data-bbox="1150 917 1224 946"><b>SEES</b></p> <p data-bbox="844 1003 936 1032"><b>FEELS</b></p> <p data-bbox="1150 1003 1224 1032"><b>DOES</b></p> 	

**4 EMPATHY + SITUATION: QUESTIONS TO ASK**

EVALUATING YOUR WORK

QUESTION	YOUR ANSWERS
What attributes or situational factors surprised you the most?	
What aspects of your persona do you need to learn more about?	
What situational factors most affect your product's potential to deliver real value?	
What situational factor has the most impact on your feature set?	
What aspects of your persona or her situation will (or should) impact or influence your requirements most?	

## 5 CONTEXTUAL USE SCENARIOS

### USING STORYTELLING TO GENERATE REQUIREMENTS

Assume you're designing an **appointment scheduling system** for dentists. It's used by the receptionist to schedule appointments and procedures. Your primary persona is:



#### Kia Bhandari

Receptionist, Dentist Office

*"Managing and scheduling patients – while keeping them happy at the same time – can be a tall order. And when I can't help them quickly, calls back up fast."*

Here's Kia's story, which you'll use to extract **functional needs** and **functional elements** on the following pages of the workbook:

*Kia takes a call from Mr. Wilson, who needs to make an appointment for his son to have a tooth capped.*

*Kia looks him up and sees that he has two sons, Jim and Jason. Jason is flagged for follow-up, so she confirms with Mr. Wilson that the procedure is for Jason. She selects that name and chooses the procedure type.*

*The system shows the next several non-urgent appointments for Dr. Davis, Jason's usual dentist, along with when the room and equipment required for the procedure are available.*

*She suggests the first few dates to Mr. Wilson, who says he was hoping to take care of it sooner.*

*She can see that another dentist, Dr. Adams, has an opening sooner, but Mr. Wilson prefers Dr. Davis.*

*She can also see that Dr. Davis has two slots that are close to the required parameters but don't quite fit them.*

*She looks at the calendar to see what appointments are on either side of those slots. One is just Dr. Davis's administrative time, so she moves that to later in the day and offers it to Mr. Wilson, who accepts.*

*Kia tells him he'll get a confirmation in the mail. The postcard immediately gets sent to the printer on her desk.*

*Kia hangs up the phone and greets a client at the desk who's ready to check out.*

EXTRACTING FUNCTIONAL NEEDS + ELEMENTS

<i>"Kia looks him up and sees that he has two sons, Jim and Jason."</i>	
WHAT KIA NEEDS TO DO (FUNCTIONAL NEEDS)	WHAT THE SYSTEM NEEDS TO SHOW (FUNCTIONAL ELEMENTS)
<i>"Jason is flagged for follow-up, so she confirms with Mr. Wilson that the procedure is for Jason. She selects his name and chooses the procedure type."</i>	
WHAT KIA NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW
<i>"The system shows the next several non-urgent appointments for Dr. Davis, Jason's usual dentist, along with when the room and equipment required for the procedure are available."</i>	
WHAT KIA NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW

EXTRACTING FUNCTIONAL NEEDS + ELEMENTS (CONTINUED)

*“She suggests the first couple of dates to Mr. Wilson, who says he was hoping to take care of it sooner. Another dentist, Dr. Adams, has an opening sooner, but Mr. Wilson prefers Dr. Davis.*

*She can see that Dr. Davis has two slots that are close to the required parameters but don't quite fit them. She looks at the calendar to see what' appointments are on either side of those slots.*

*One is just Dr. Davis's administrative time, so she moves that to later in the day and offers it to Mr. Wilson, who accepts.”*

WHAT KIA NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW

*“Kia tells him he'll get a confirmation in the mail. The postcard immediately gets sent to the printer on her desk. She hangs up the phone and greets a client at the desk who's ready to check out.”*

WHAT KIA NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW

## 6 PUTTING IT ALL TOGETHER

### EMPATHY, SITUATION + CONTEXTUAL USE SCENARIO

Now it's your turn to create artifacts for a brand new persona! Assume you're designing an **account investment portal** for retirees. It's used to access retirement accounts and change investments. Your primary persona is:



#### **Bob Davison**

*68, Retired Mechanical Engineer*

*"I'd like to make some changes to my portfolio, but it's impossible to get a person on the phone. They want me to use the website, but I hate all this newfangled stuff. It's confusing."*

Use the blank templates on the following pages to:

- ▶ Create an **empathy map** for Bob.
- ▶ Create a **situational map** for Bob.
- ▶ Write a **contextual use scenario** where Bob is using the website for the first time to try and change an investment fund.
- ▶ Generate a set of **functional needs** and **functional elements** based on your contextual use scenario.

**Remember, you don't have to be right!** The point here is to go through the processes and spend the time throwing out possible answers. The *more* you do this, the better you get at it, the faster and more accurate the results become. **Repetition is your friend, OK?**



1

## THOUGHTS & EMOTIONS:

Beliefs, convictions, motivations, worries & goals.

He is afraid of the new technologies  
He believes that it will take a lot of time  
He doesn't want to make a mistake it will cause a problem

2

## ENVIRONMENT:

How is s/he affected by workplace, social settings, similar products/services?

Bob is oldhead, the new web sites looks unfamiliar to him  
He will visit this website without any help from his side so he need some help from the web  
Probably he has old computer so the data will process longer

3

## SOCIAL INFLUENCE:

Who does s/he listen to most? Friends? Bosses?  
Co-workers? Outside influencers?

4

## BEHAVIOR:

How s/he acts, and how s/he *wants* to be seen and thought of; In the workplace and public spaces.

5

## PAIN:

Fears, frustrations and perceived obstacles.

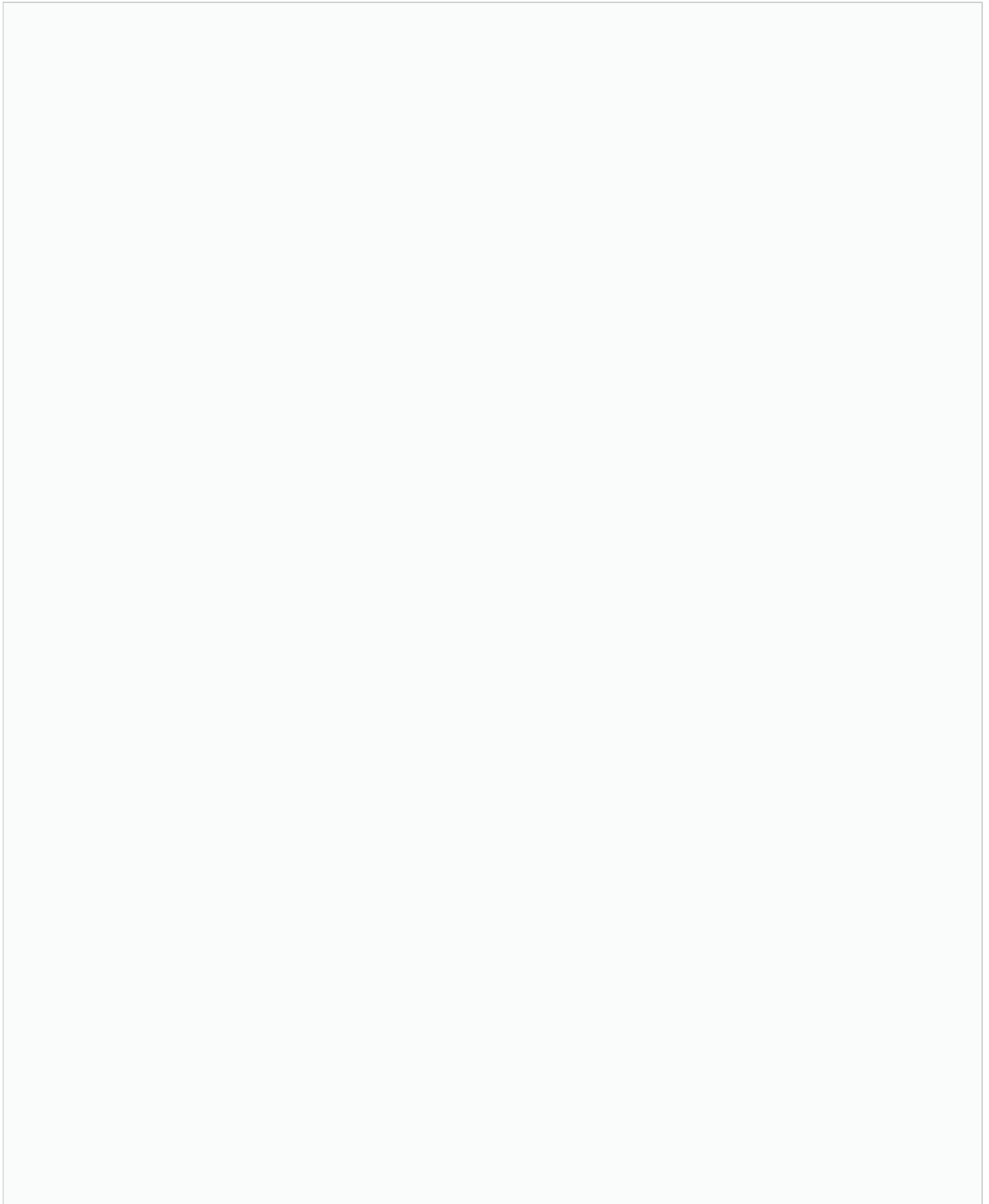
6

## GAIN:

Wants, needs and what s/he believes constitutes success.

He wants to understand web from the first touch  
He needs an online scale of fonts inbuilt in site because he don't want to miss something  
Easy to use and user friendly interface

**BOB'S CONTEXTUAL USE SCENARIO**



## EXTRACTING FUNCTIONAL NEEDS + ELEMENTS

WHAT BOB NEEDS TO DO (FUNCTIONAL NEEDS)	WHAT THE SYSTEM NEEDS TO SHOW (FUNCTIONAL ELEMENTS)
WHAT BOB NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW
WHAT BOB NEEDS TO DO	WHAT THE SYSTEM NEEDS TO SHOW

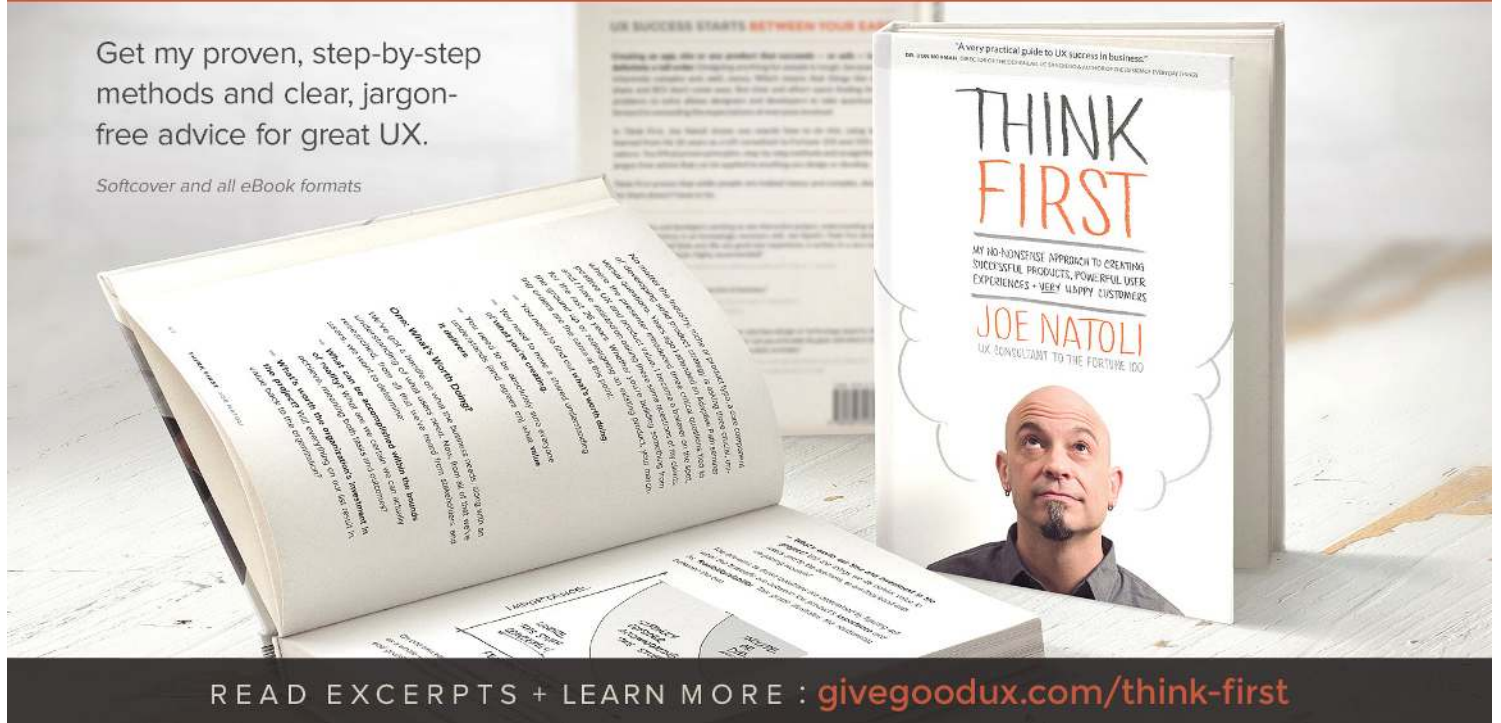
**EXTRACTING FUNCTIONAL NEEDS + ELEMENTS**

<b>WHAT BOB NEEDS TO DO</b>	<b>WHAT THE SYSTEM NEEDS TO SHOW</b>
<b>WHAT BOB NEEDS TO DO</b>	<b>WHAT THE SYSTEM NEEDS TO SHOW</b>
<b>WHAT BOB NEEDS TO DO</b>	<b>WHAT THE SYSTEM NEEDS TO SHOW</b>

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**Knowing why you're doing something** is the first step toward making an app, site or system valuable. And when you don't take the requisite time to ask the **right questions** and qualify the answers, UX suffers — you build something that people either don't need or can't use.

Design and Development teams operate under a great deal of pressure, and because of that **the urgent often trumps the important**. *Think First* gives you an arsenal of tools and tactics to change that.

In nearly three decades of working with Fortune 500 and 100 companies, I've learned that when a product fails, the underlying cause is rarely poor UI design or technology limitations. It's not even bad UX. **These are symptoms of a failed UX strategy**. *Think First* is my step-by-step guide to turning things around and delivering value — both to users and to the business.

- ▶ **Practical & realistic scenarios.** I give you real-world examples of how to create UX strategies for digital products that ensure success (along with what not to do).
- ▶ **Foundational UX ideas.** I explain core concepts and timeless principles of UX in a conversational and easy-to-read style.
- ▶ **Patterns, approaches and tools.** I share the tools and methods I've used with some of the largest organizations in the world for nearly three decades.



*"A very practical guide to success in business."*

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*"Think First is a practical guide to UX that makes sense of strategy and structure. Highly recommended!"*

**PETER MORVILLE** BESTSELLING AUTHOR OF *INTERTWINGLED*



*"For designers and developers, understanding strategy and UX is an increasingly necessary skill. Joe Natoli's Think First demystifies these foundational ideas in a very conversational, easy to read style."*

**ILISE BENUN** FOUNDER OF *MARKETING-MENTOR.COM*  
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