



1. Establish an Understanding

Set up a baseline understanding of the assignment and who you can reach out to for additional information.

Project

*What is the project and/or application?
What technology is being used?*

Contacts

Who are the stakeholders and project related contacts?

Client-Identified Pain Points

What is your understanding of the application? What is the purpose of the application?

Targeted Users

If this is unknown, what activities are needed to know it?

Users Top Tasks

If this is unknown, what activities are needed to know it?

Value Proposition

How does this help the agency succeed in its mission?

Defining Success

What does success look like? What are the success metrics?

2. Create a Work Plan

Set up a baseline understanding of the assignment and who you can reach out to for additional information.

What is the type of UI/UX work required?

List/add all types of work: UI Modernization, Research Heavy, Content Strategy, Current State Enhancements, Full Redesign, 'Zero-state' design, etc.

What deliverables are needed?

Personas, Journey Maps, content audit, and other artifacts. Other elements like prototypes or coded support can be included here.

Understand development timeline and cycle.

What is your deadline? What steps are required to reach the final product? Account for any periods that may pose as blockers.

3. Calculate the Effort Needed

What is the scope of work for the project?

Using 'T-shirt' sizes can be a helpful way to frame the scope: Extra Small, Small, Medium, Large, Extra Large. This can be broken down into separate components based on the ask.

Understanding UX resources and their required capacity?

Once you describe the scope, calculate the resources you will need as well as the capacity that will be required of the resources available to you.

4. Determine Next Actions - Initial UX Activities

Create a non-exhaustive plan of next steps. This can include any number of activities but should have at least 3 areas to explore next. Examples: Stakeholder Interview, Current State Analysis, Task Flow Diagramming, Service Map, Journey Map, User Interviews, etc.

If needed, include what you hope to understand from each activity in your plan.

5. Initial Assessment and Additional Comments

Provide an initial assessment and any comments on your plan, assumptions, or where you see potential difficulties.