YOU GONNA BUILD A PROCESS FOR THAT PROCESS?

Client Engagement, User Experience,
& Research Projects

UCDAVIS
INFORMATION AND
EDUCATIONAL TECHNOLOGY

BADCAMP 2019

About Us

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THE BEGINNING

CLIENT
ENGAGEMENT

Pain Points

Our Origin Story

- Inconsistant Client Experience

- Budget Overruns

- Regularly over- and under-staffed

- Single Point of Failure

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Building a Foundation

A Process is Born

Better Tools & Resources

The Process Matures

Forecast

Harvest

PandaDoc

Worksheets

Our Process Re-Imagined

Evolution

- Slide Decks

- Speaker Notes

- Precomposed Meeting Minutes

- Lucid Chart Templates

- Hosted Resources and Files

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Slide Deck Evolution

More Listening & Less Talking
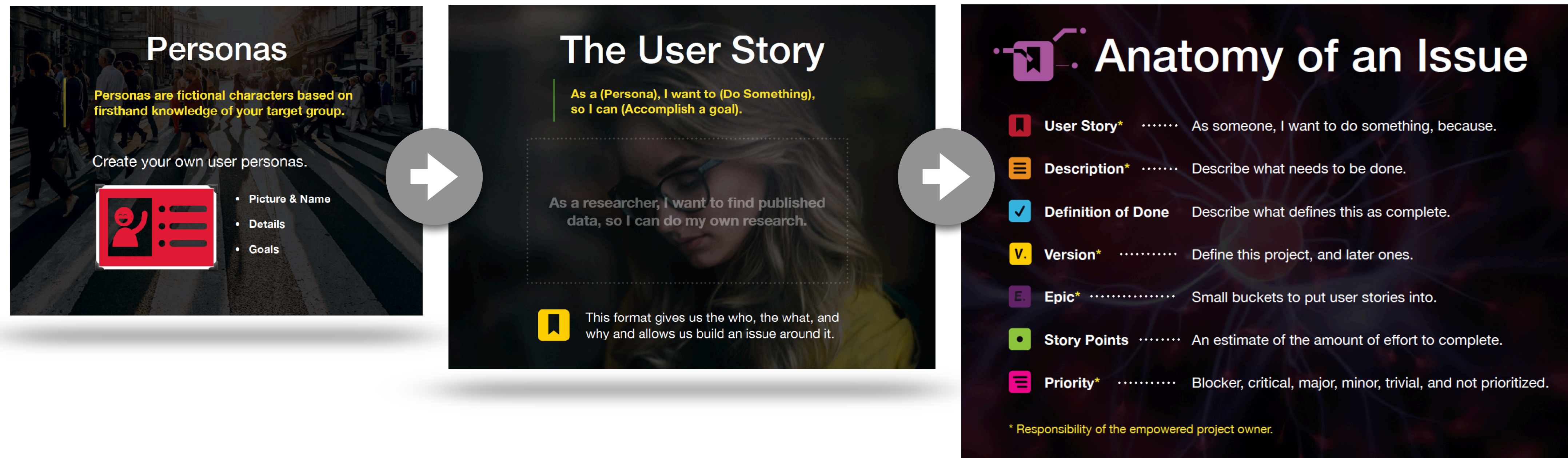

What are Your Project Goals?

We want to learn more about you.

- Tell us about your department
- What are the objectives of this project
  - Identify your target user(s)
  - Identify problems you want to solve
  - Identify some indicators of success
- What's your budget & timeline

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Slide Deck Evolution

Process Builds Logically

Slide Deck Evolution
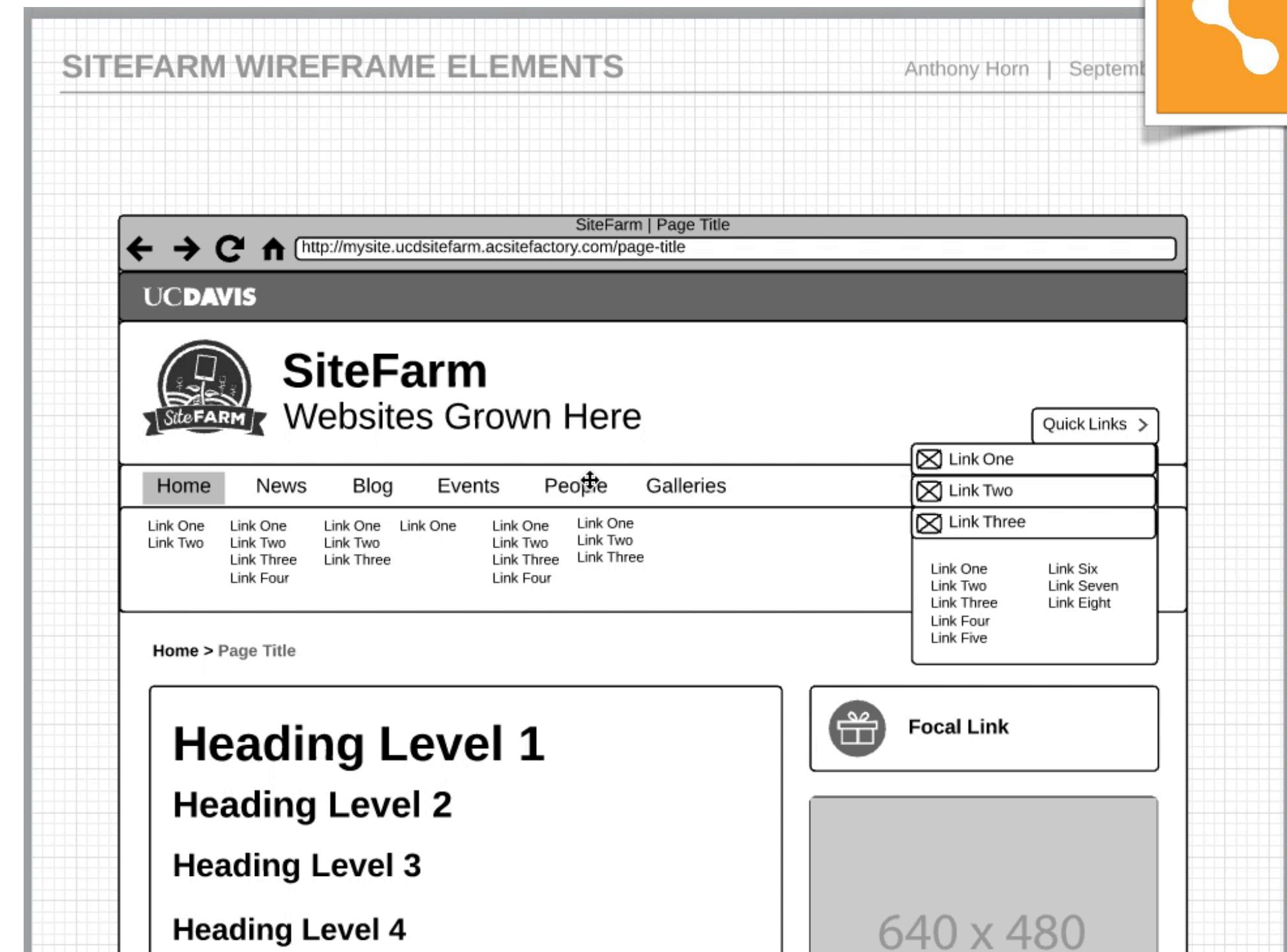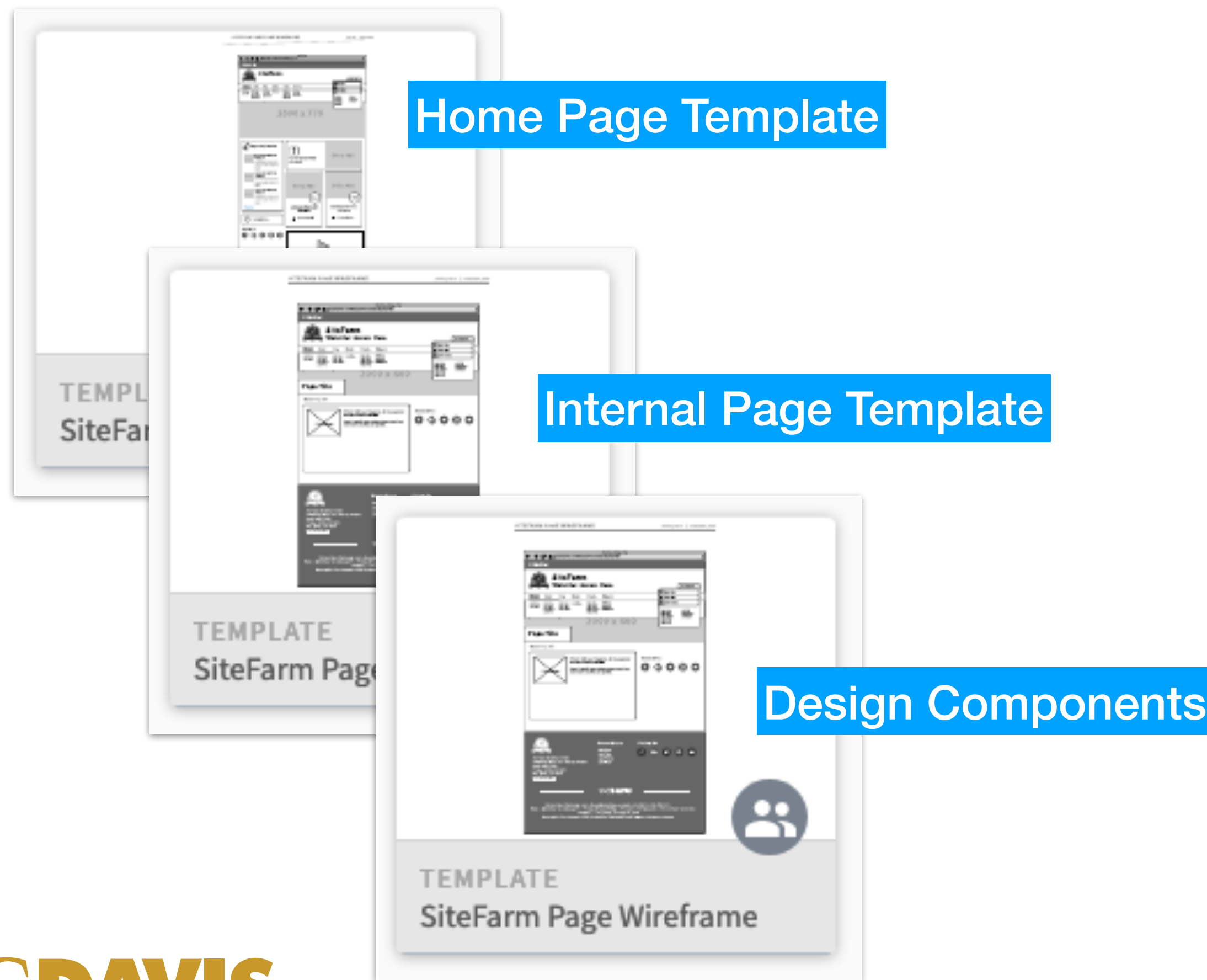
Better Formatting & Sharing

- No Transitions or Animation

- PDF, PPT, KEY with no issues

- Hosted in Box(file sharing) public folders

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Wireframe Components from our Pattern Library

https://sitefarm.ucdavis.edu/blog/sitefarm-wire-framing-lucidchart
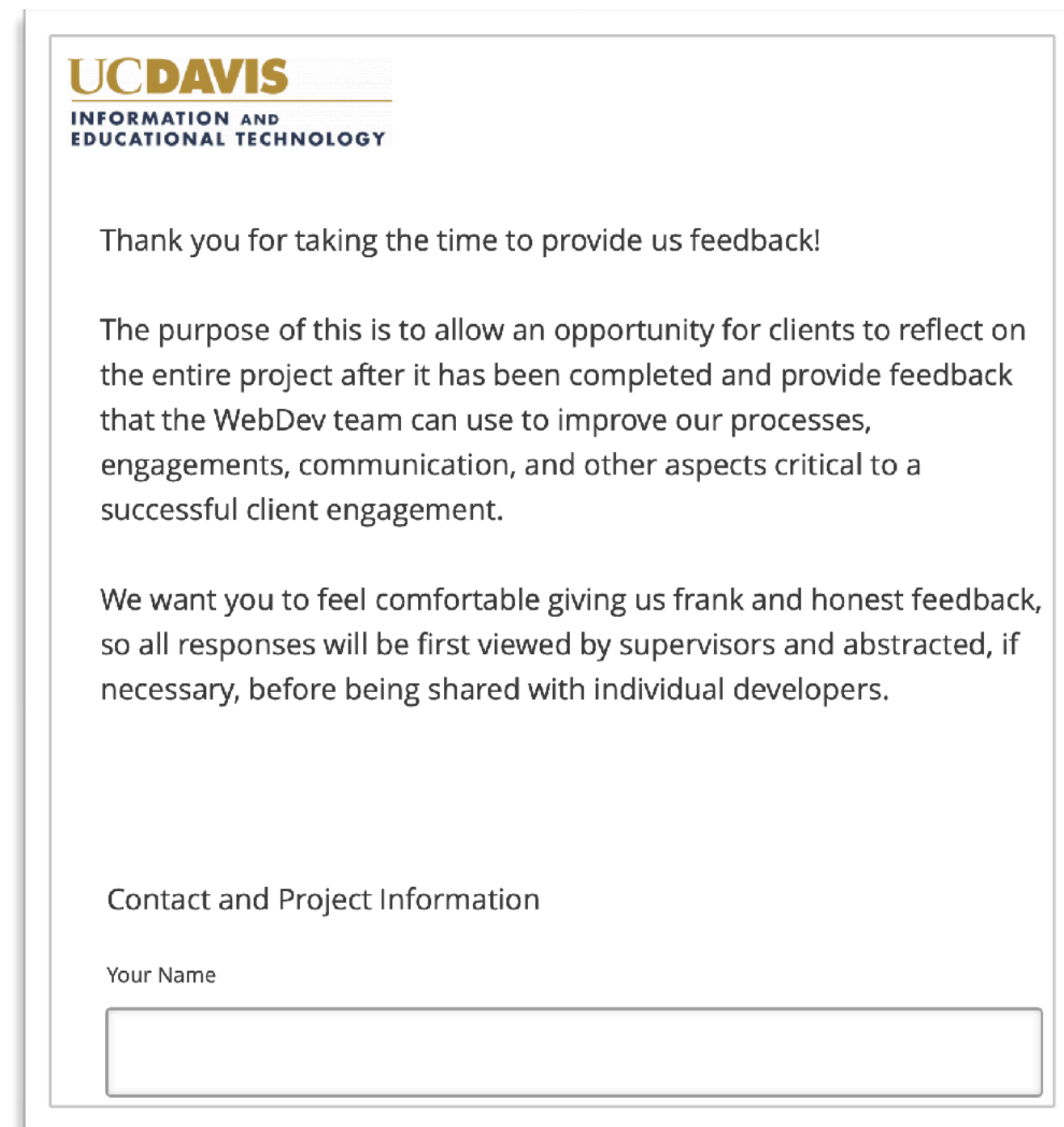
Results

Seeing is Believing

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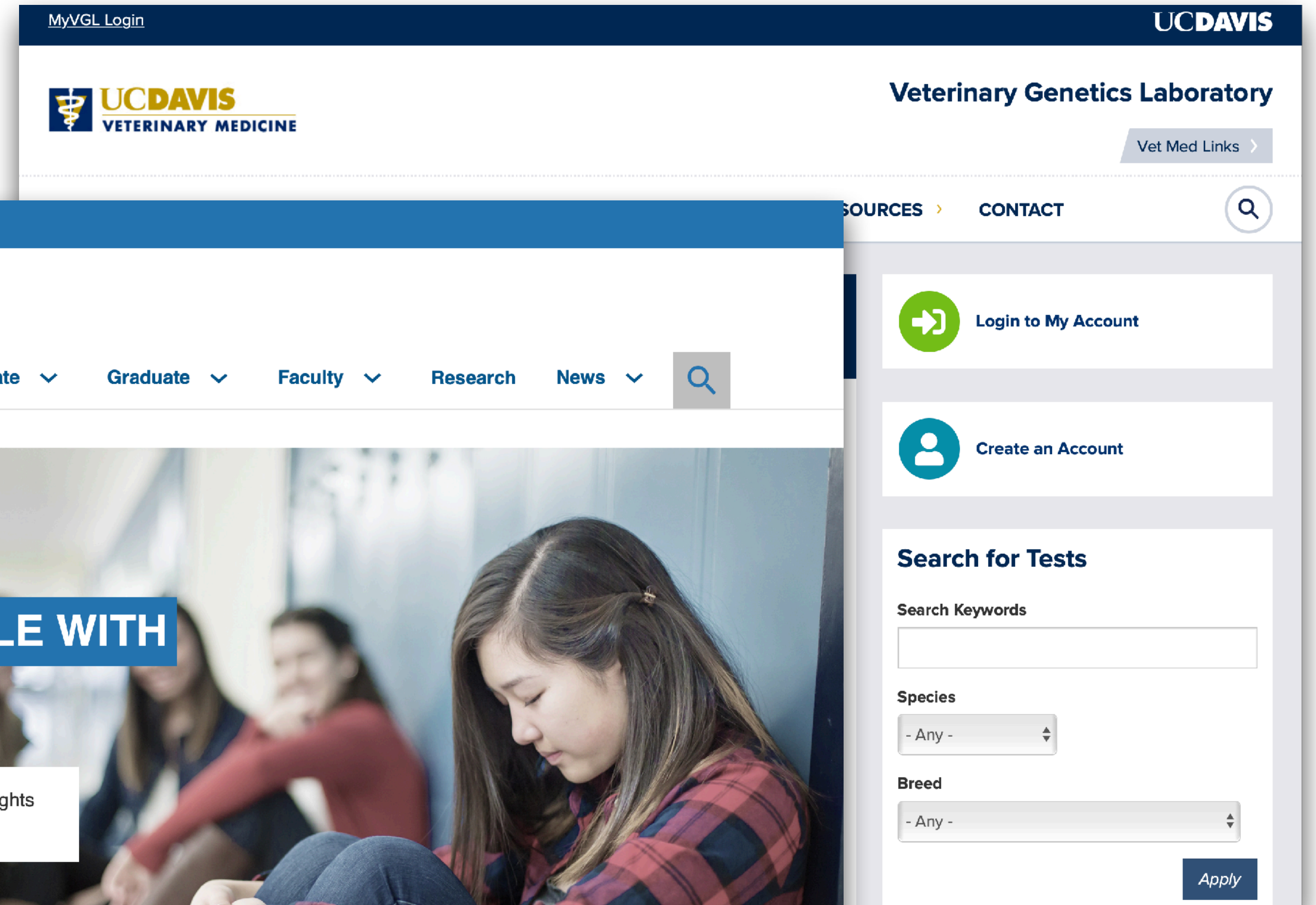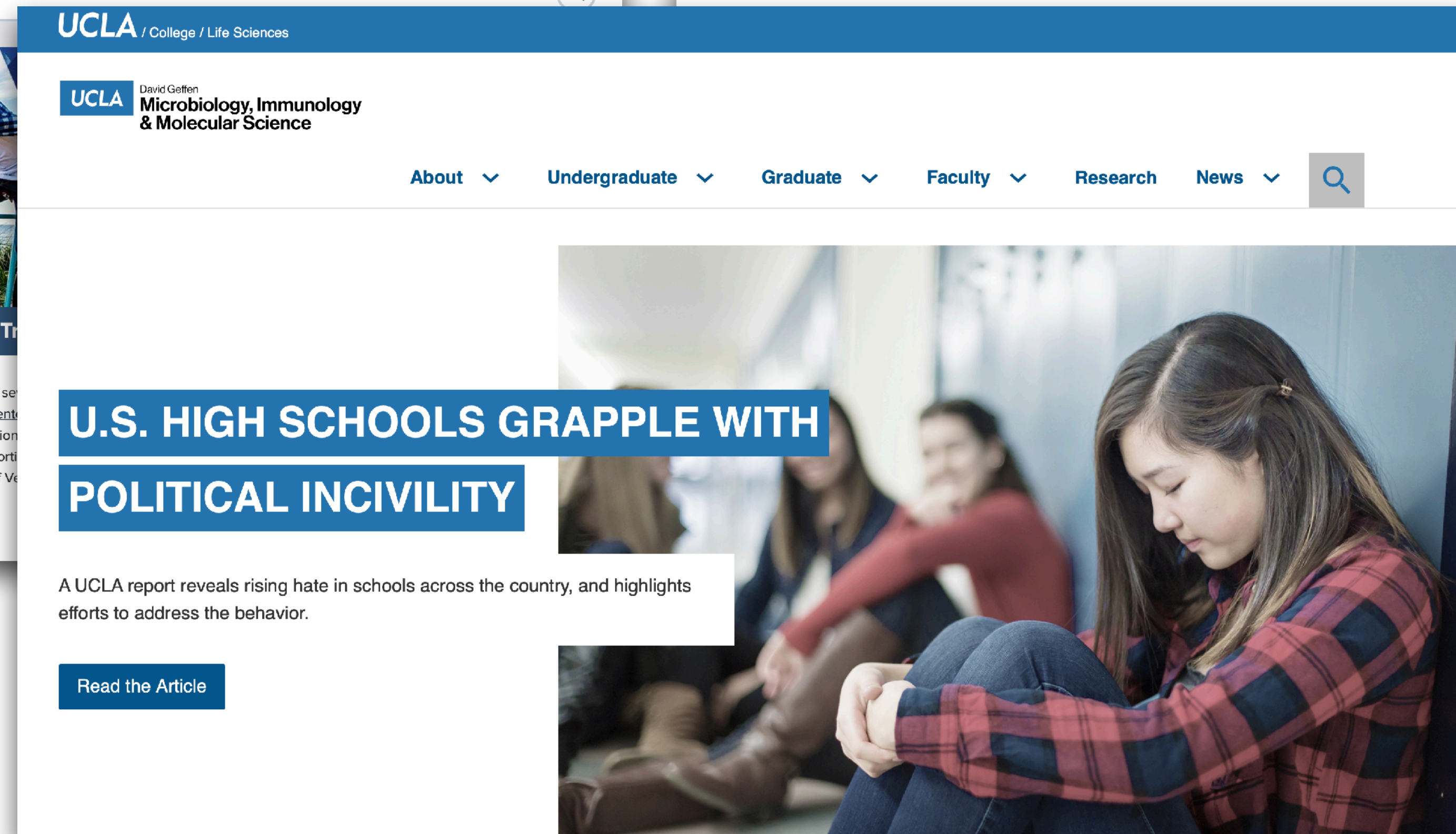
Analyzing Our Success
Problems Addressed

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Thank you for taking the time to provide us feedback!

The purpose of this is to allow an opportunity for clients to reflect on the entire project after it has been completed and provide feedback that the WebDev team can use to improve our processes, engagements, communication, and other aspects critical to a successful client engagement.

We want you to feel comfortable giving us frank and honest feedback, so all responses will be first viewed by supervisors and abstracted, if necessary, before being shared with individual developers.
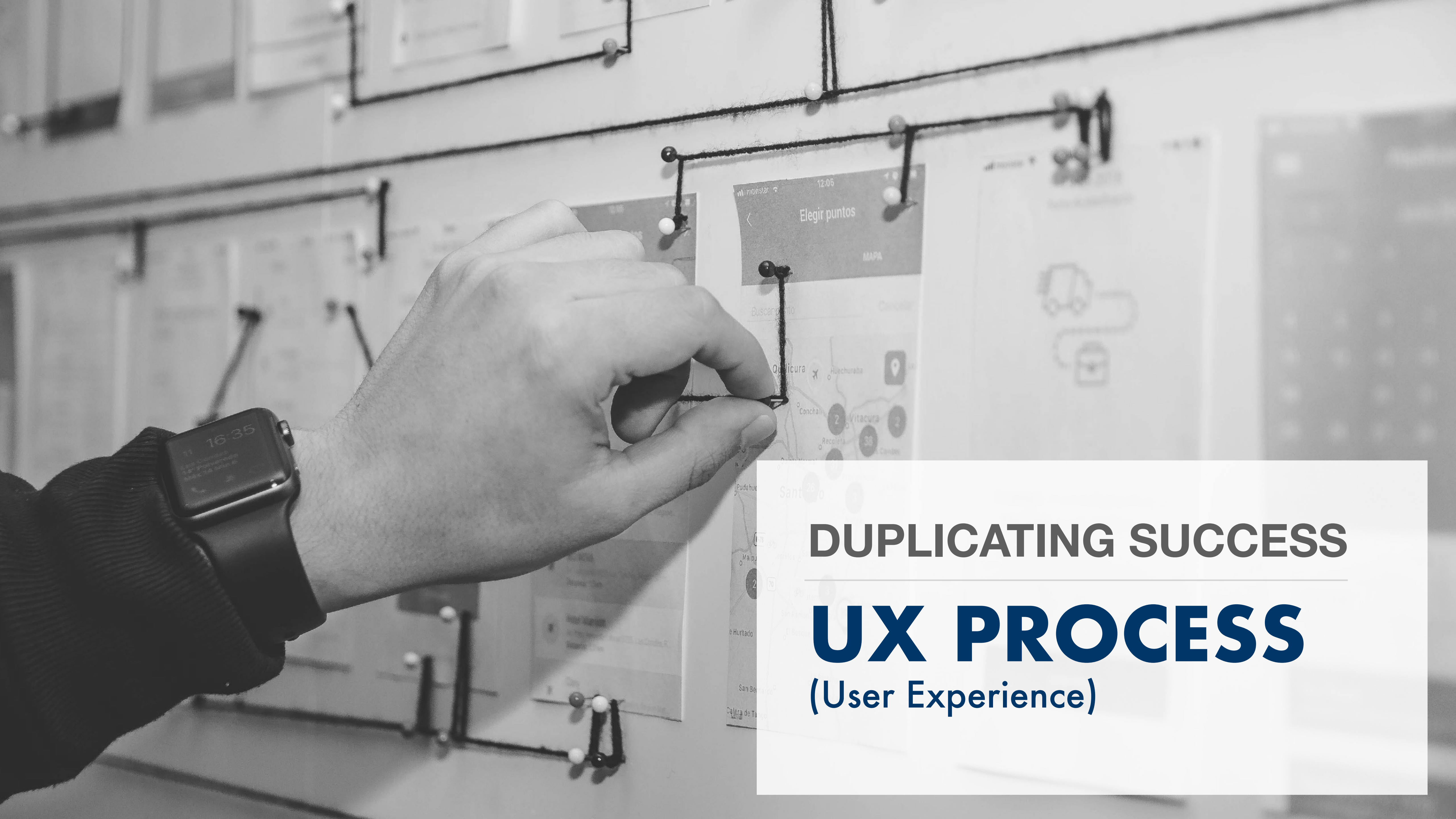
Contact and Project Information

Your Name

Client Feedback

- Inconsistant Client Experience

- Budget Overruns

- Regularly over- and under-staffed

- Single Point of Failure

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DUPLICATING SUCCESS

UX PROCESS

(User Experience)

New Service, New Process

The Reasons for a User Experience Process

- Popularly requested service

- Have provided bits and pieces in the past

- Team expertise

- Looking to repeat our success

- Improve client products

Google Analytics

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New Service, New Process

New Hurdles to Creating a UX Process

- Missing expertise (UX Strategy, UX Research)

- No clear model for UX Process in higher education (Most UX profit driven)

- Who's going first?

- How much/little is required to see results?

- Is this a one time service or a subscription?

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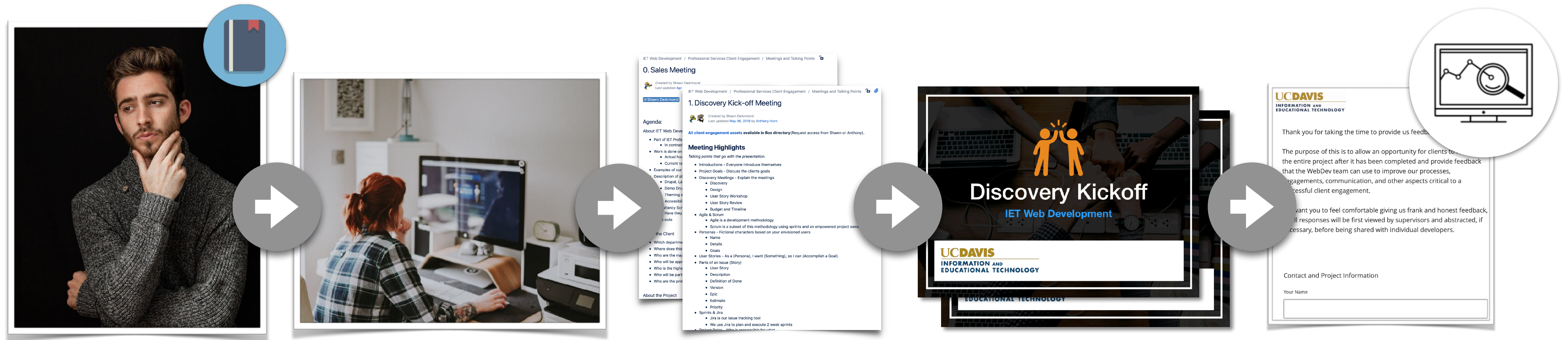
ANOTHER PROCESS

RESEARCH PROJECTS

Faculty Are... Different

Different Client Engagement Needs

- Different technology needs
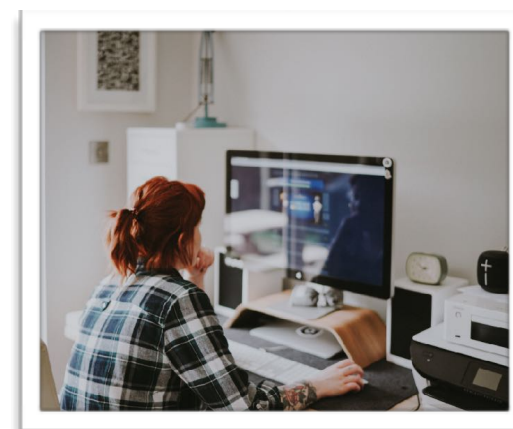
- Different type of client

- Different approach

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BUILDING

A PROCESS
FOR PROCESS
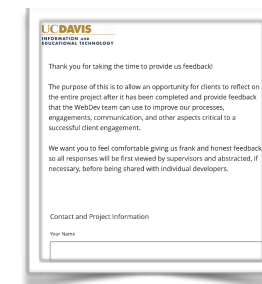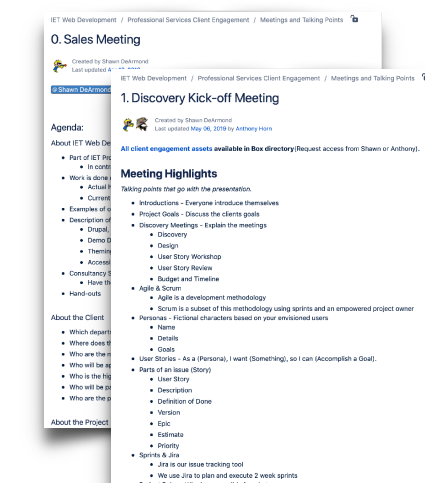
If Any of This Looks Familiar

Maybe Because…
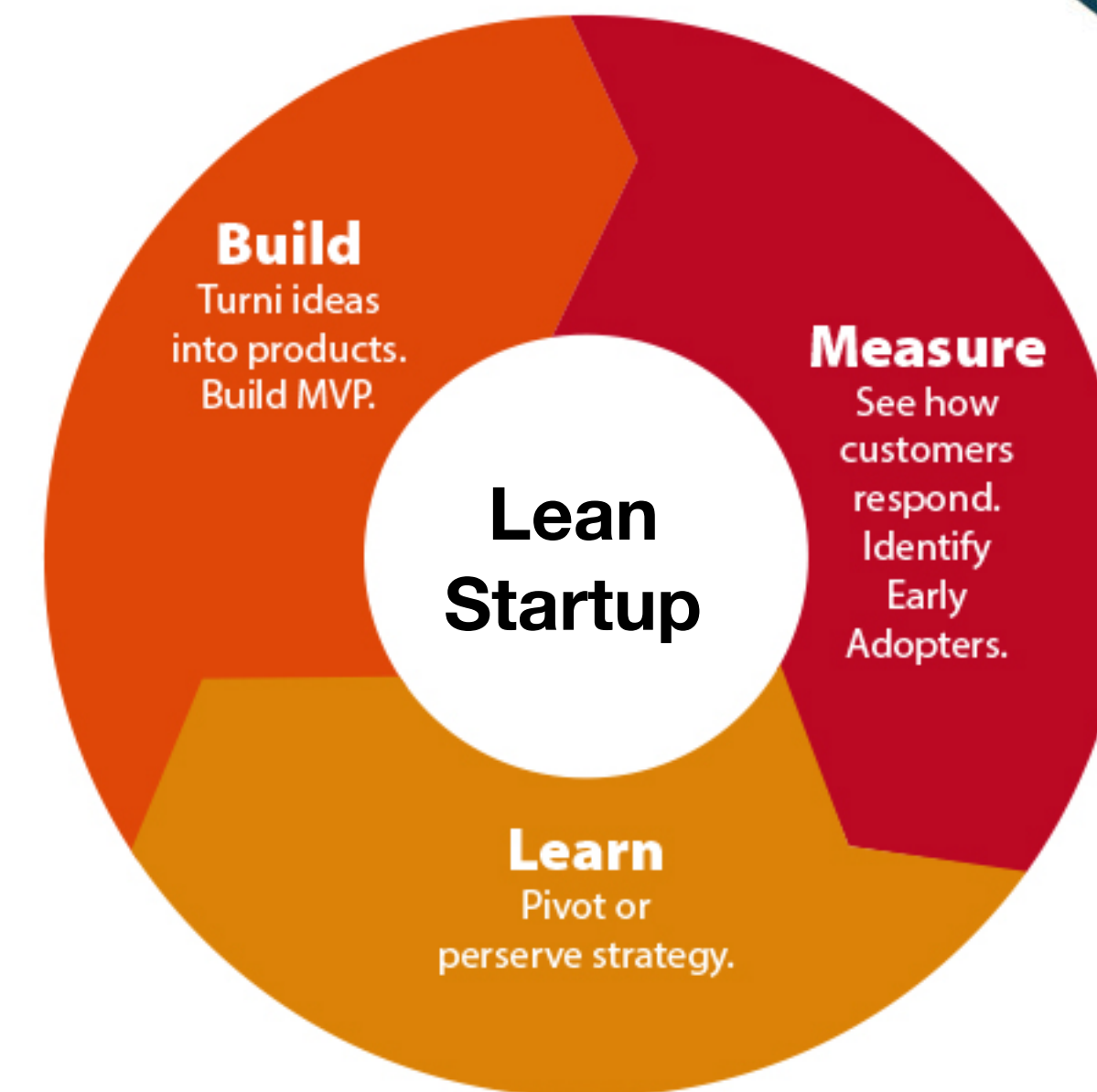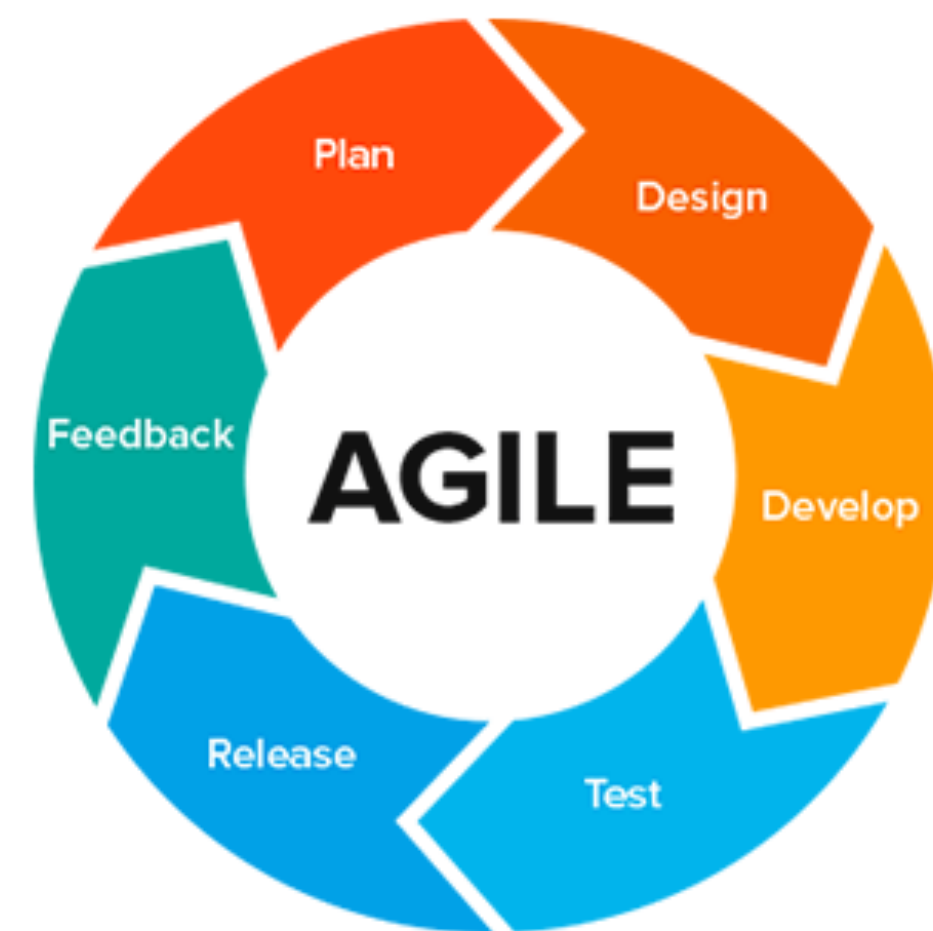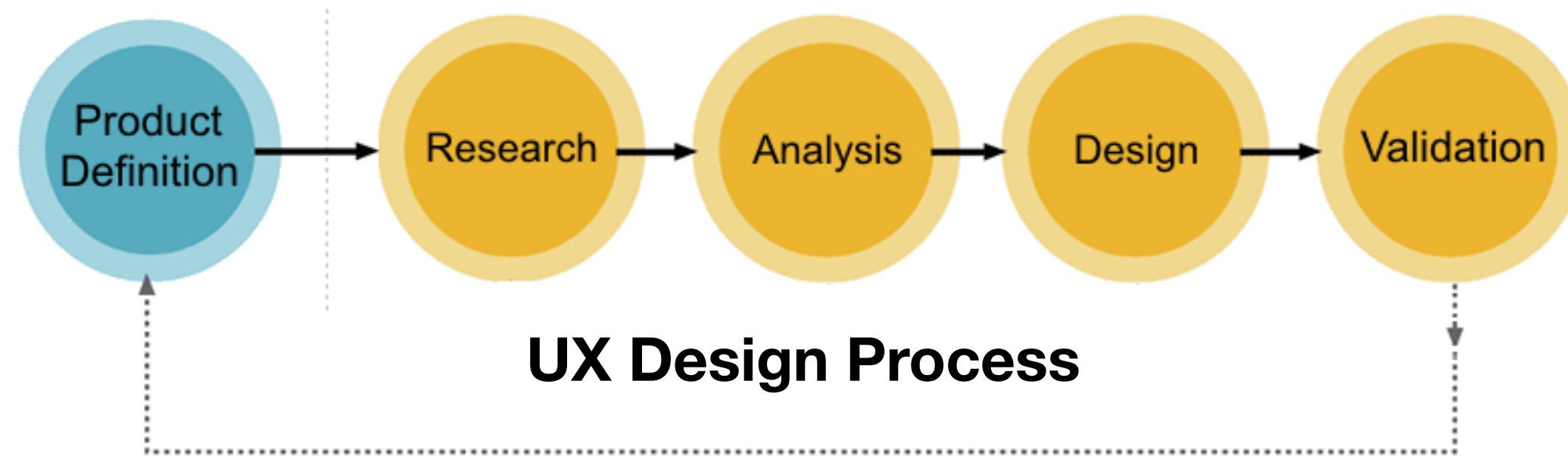
CHECKOUT OUR

CLIENT ENGAGEMENT PROCESS MATERIALS

https://bit.ly/2mxBuuZ

thanks!

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