



YOU GONNA BUILD A PROCESS FOR THAT PROCESS?

Client Engagement, User Experience,
& Research Projects

About Us



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THE BEGINNING

CLIENT ENGAGEMENT

Pain Points

Our Origin Story



- Inconsistent Client Experience
- Budget Overruns
- Regularly over- and under-staffed
- Single Point of Failure

Building a Foundation

A Process is Born

IET Web Development / Professional Services Client Engagement / Meetings and Talking Points

0. Sales

1. Discovery

2. Design

3. User Stories

4. User Stories

5. Budget and Scope Review

Created by Shawn DeArmond
Last updated just a moment ago

Meeting Highlights

Talking points that go with the presentation.

- Introduce Quico - Maybe just do intro all around again
- Review the parts of the Statement of Work
 - Estimate Details
 - Service Description
 - Costs (Discuss this at the end)
 - Out of Scope
 - This is an Estimate, just that
 - Our approach
 - Agile/Scrum
 - Project Management
 - Training and Documentation
 - User Stories
 - SLA
- Review the SOW section by section
- Discuss the cost
 - Get verbal agreement on cost before finalizing the SOW and sending it for approval
- Discuss timeline and availability
 - Review Forecast
 - Enter project into Forecast if possible
- Go finalize SOW and send for approval

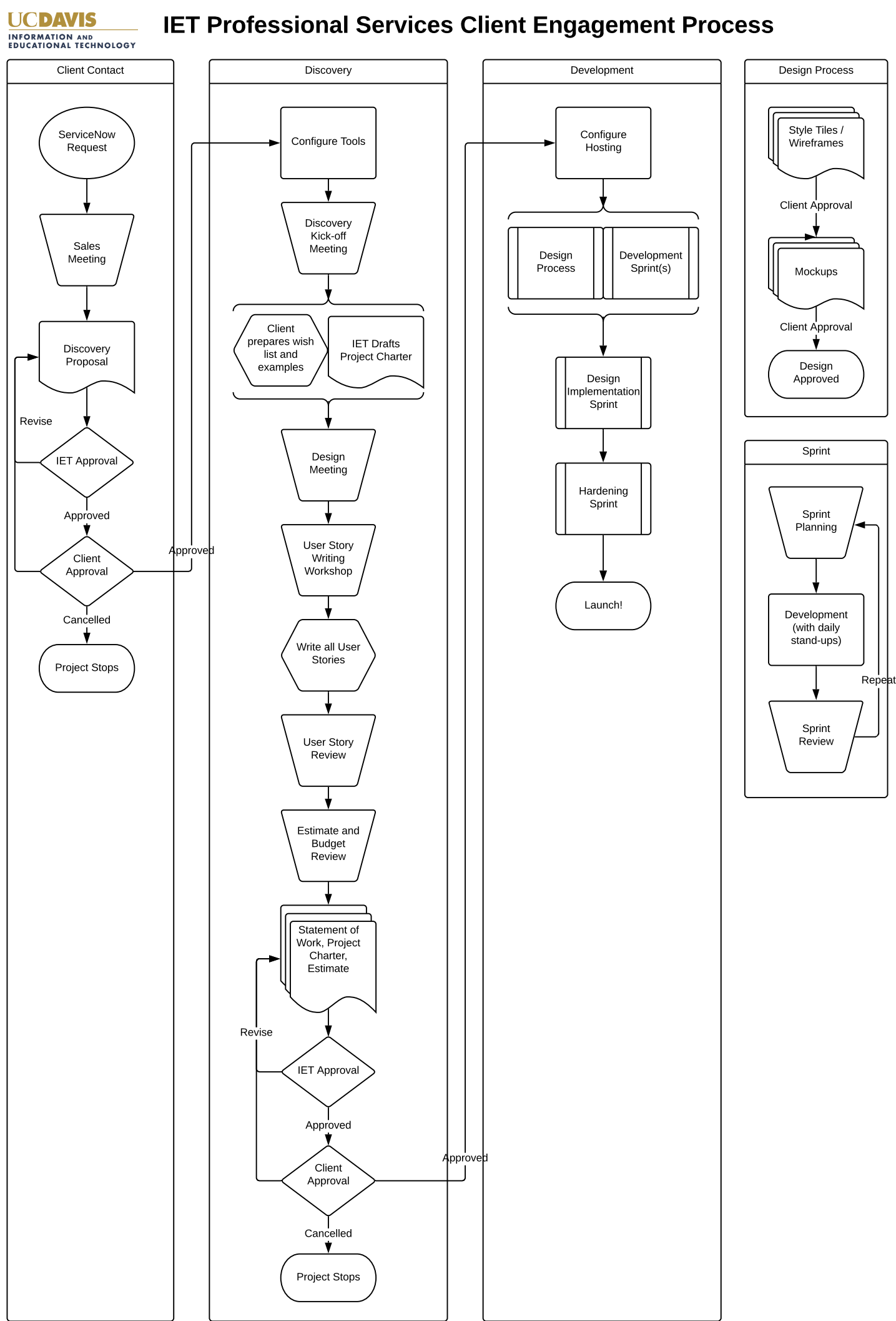
Meeting Minutes

Send out a meeting minutes email after this meeting with the following info. Feel free to edit or add.

Attendees:

- John Doe
- Jane Doe
- Ian E. Titan

Assets:



UC DAVIS

**INFORMATION AND
EDUCATIONAL TECHNOLOGY**

Our Process Re-Imagined

Evolution



- Slide Decks
- Speaker Notes
- Precomposed Meeting Minutes
- Lucid Chart Templates
- Hosted Resources and Files

Slide Deck Evolution

One For Every Meeting



Slide Deck Evolution

More Listening & Less Talking



What are Your Project Goals?

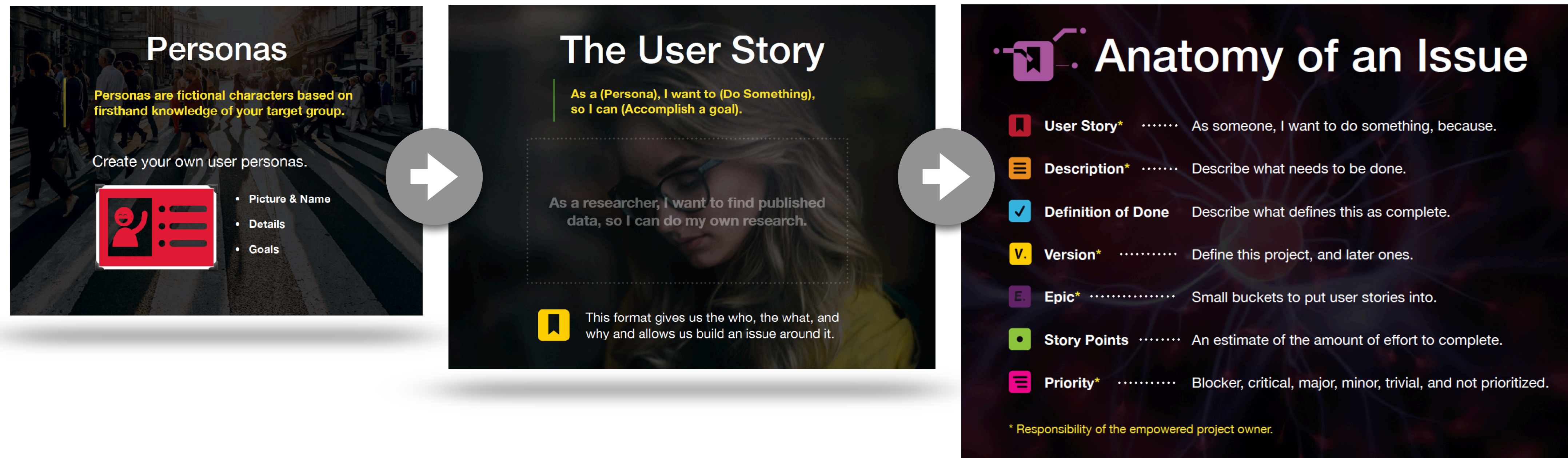
We want to learn more about you.

- 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

The slide features a background image of a meeting table with laptops, papers, and coffee cups. A large orange target icon with an arrow in the bullseye is positioned on the left side of the slide.

Slide Deck Evolution

Process Builds Logically



Slide Deck Evolution

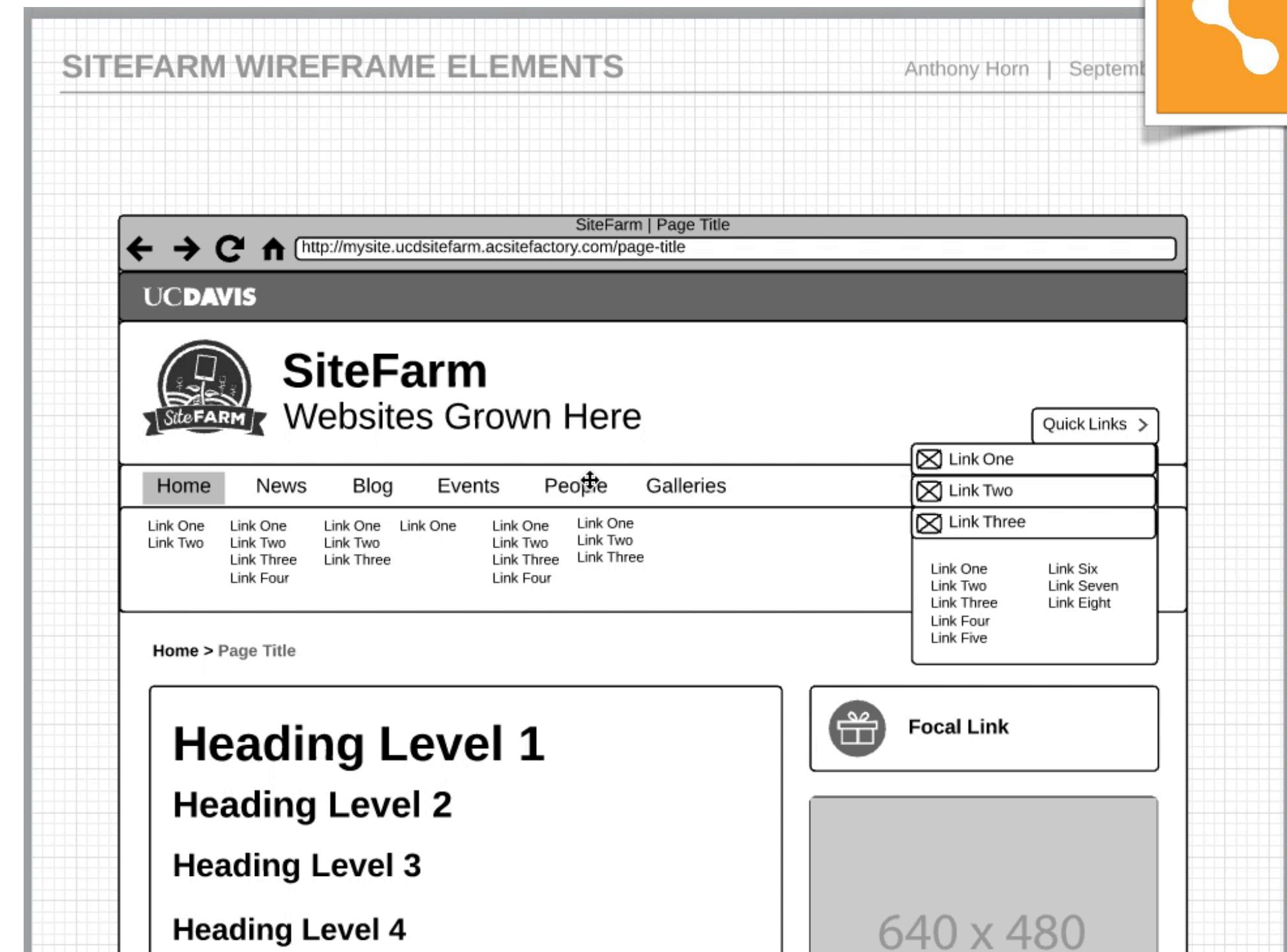
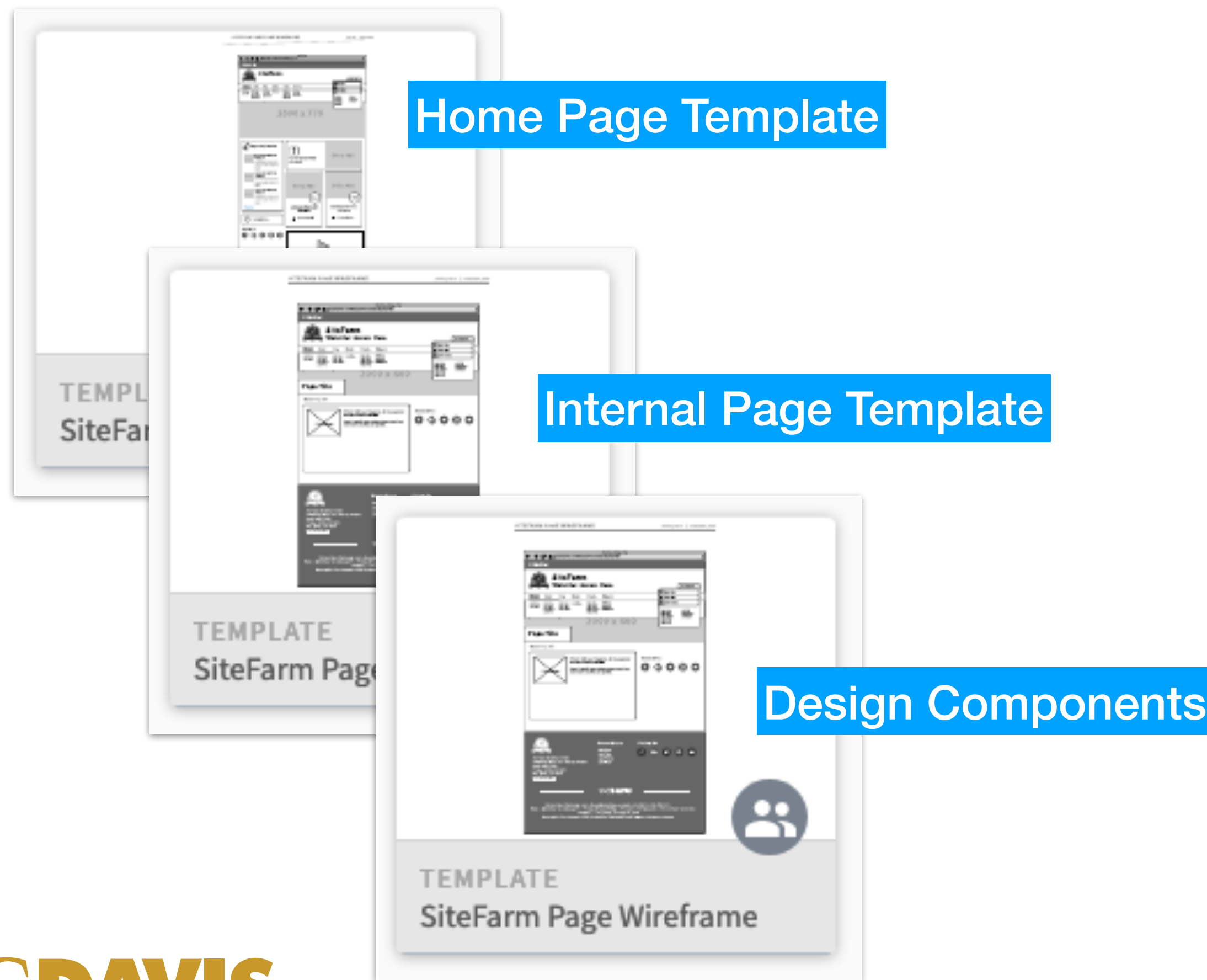
Better Formatting & Sharing



- No Transitions or Animation
- PDF, PPT, KEY with no issues
- Hosted in Box(file sharing) public folders

Wireframing Improved

Templates and Libraries in Lucid Charts



Wireframe Components from our Pattern Library

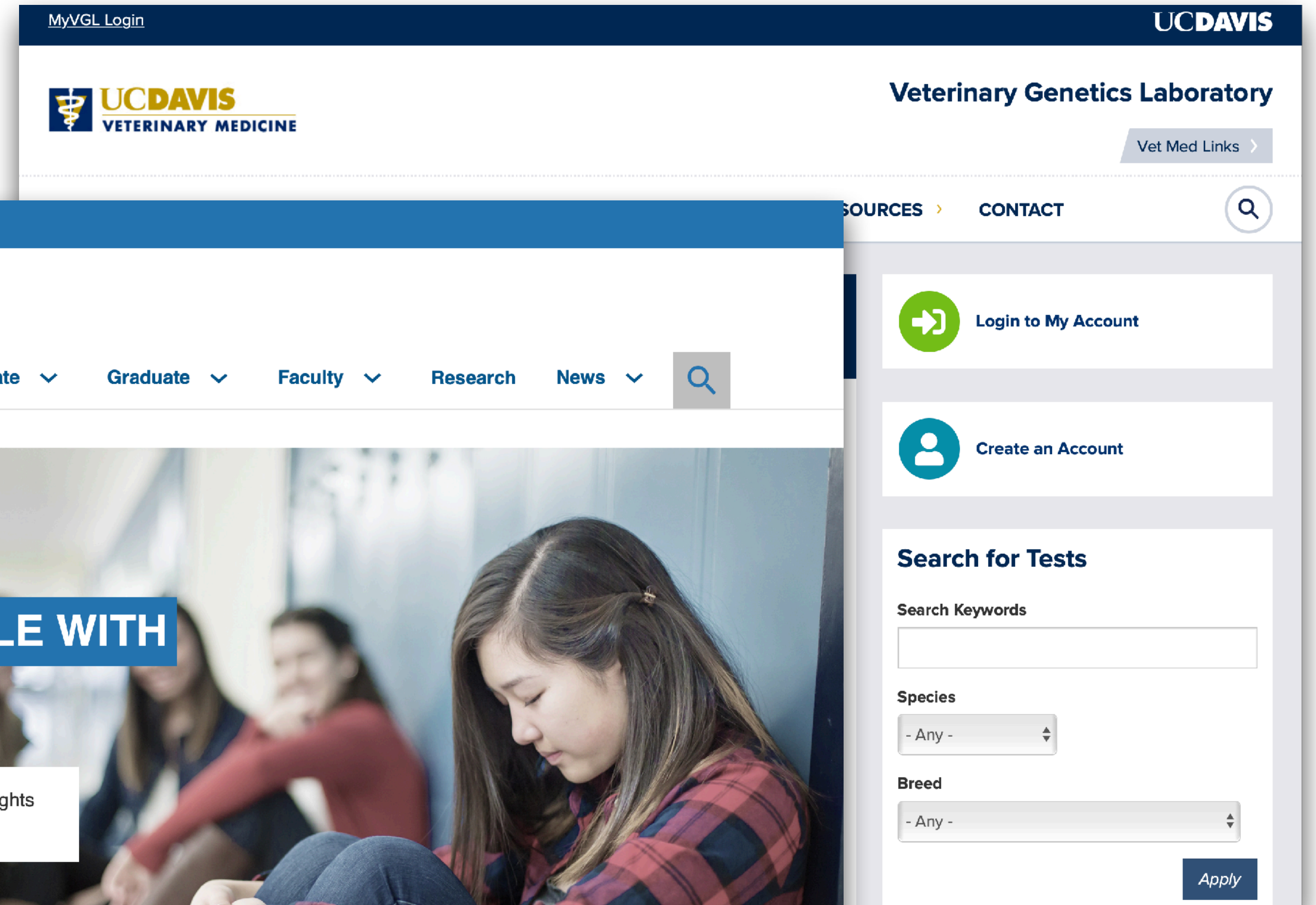
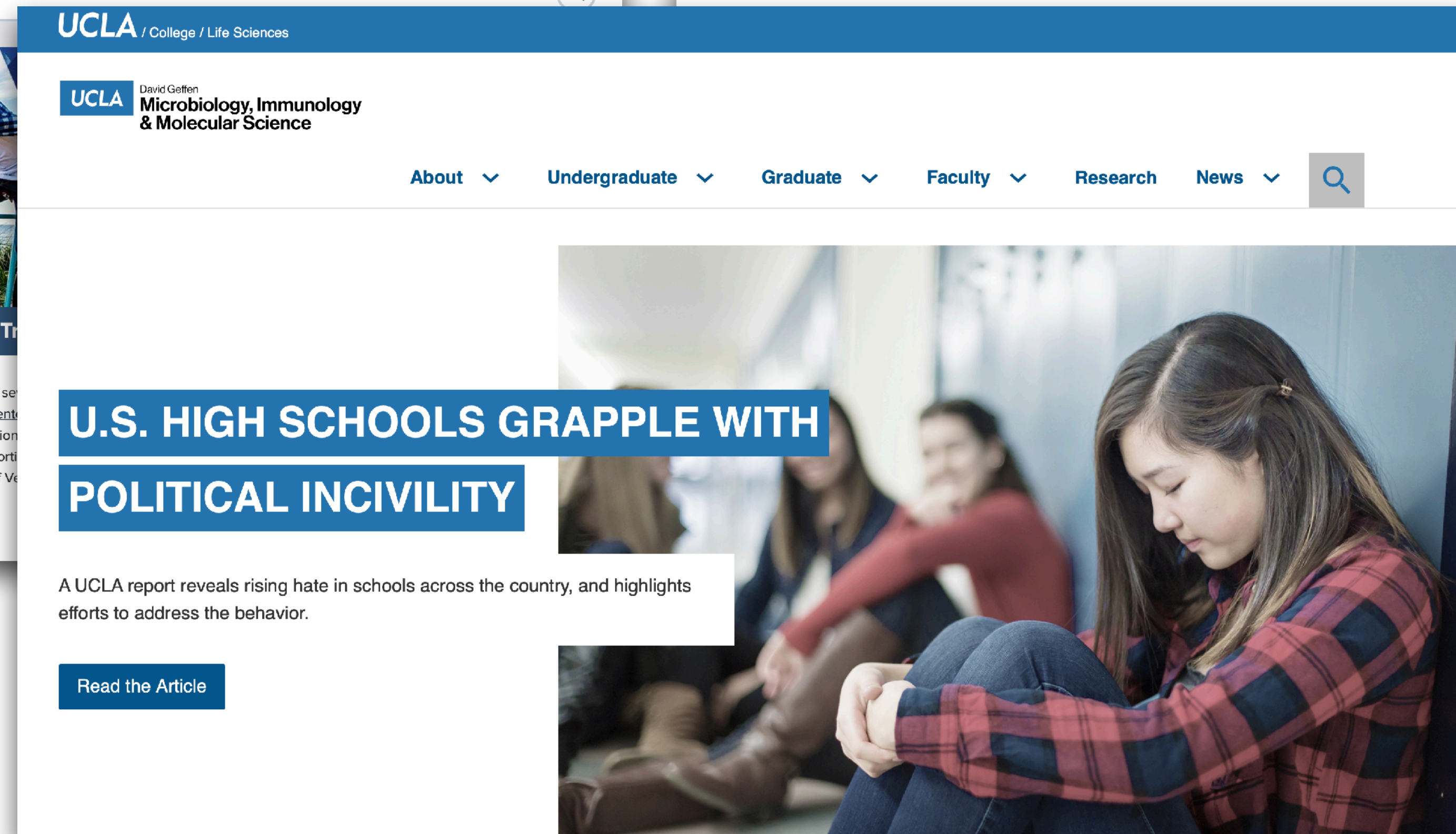
<https://sitefarm.ucdavis.edu/blog/sitefarm-wire-framing-lucidchart>

UC DAVIS

INFORMATION AND
EDUCATIONAL TECHNOLOGY

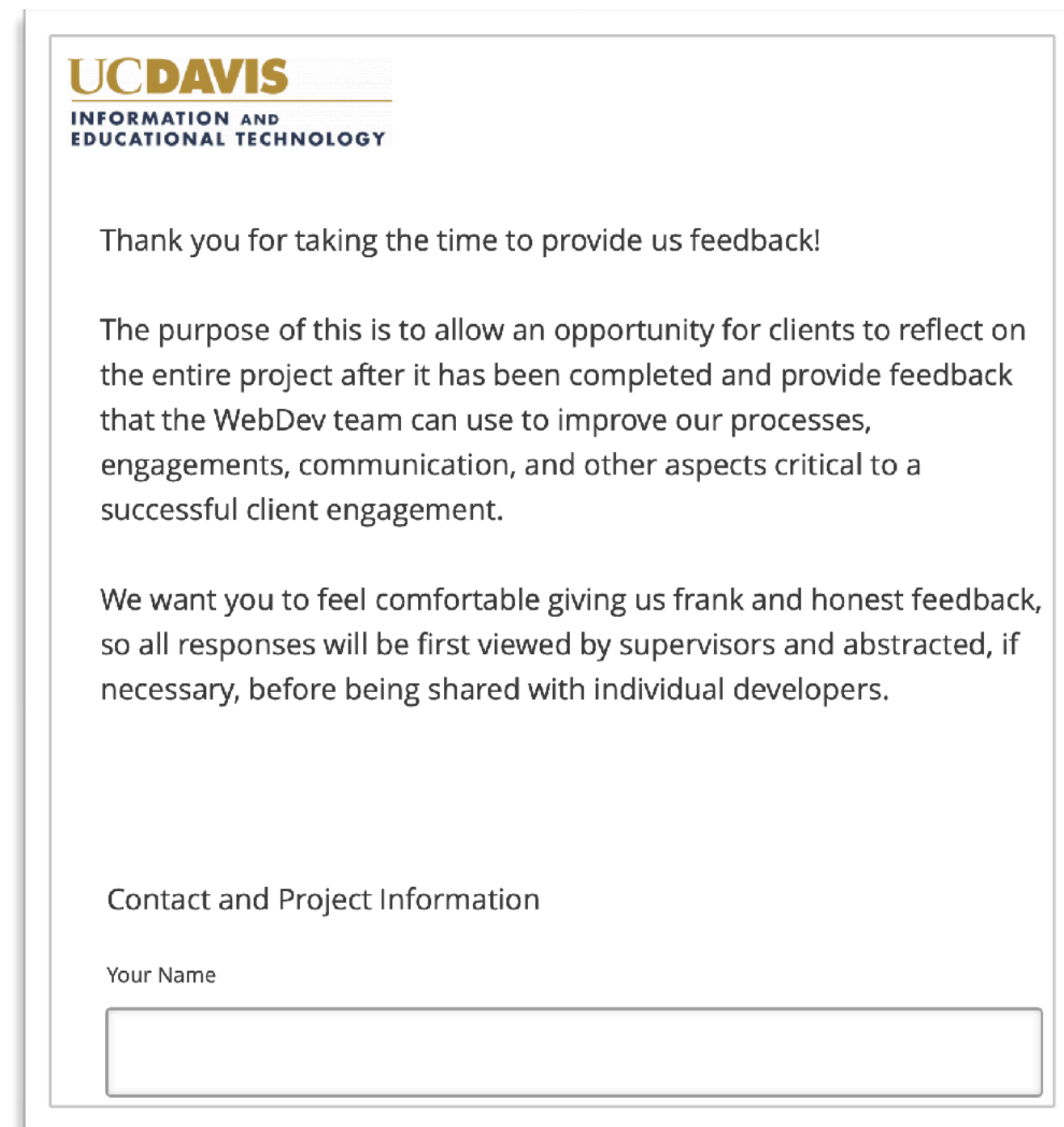
Results

Seeing is Believing



Analyzing Our Success

Problems Addressed

A screenshot of a web-based feedback form from UC Davis Information and Educational Technology. The form has a white background with a thin grey border. At the top left is the UC Davis logo. The text inside the form is as follows:

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.

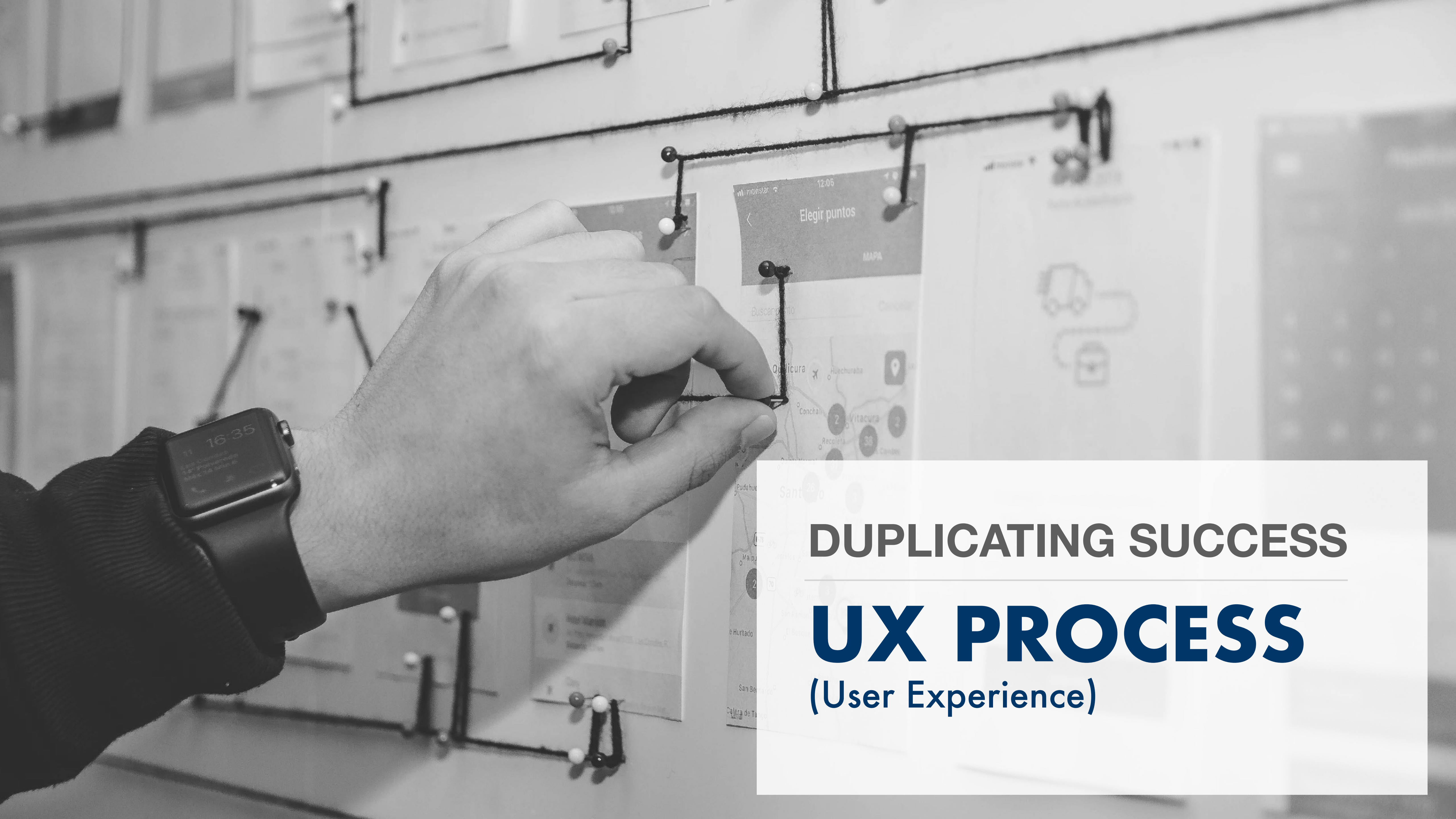
Contact and Project Information

Your Name

[Empty text input box]

Client Feedback

- Inconsistent Client Experience
- Budget Overruns
- Regularly over- and under-staffed
- Single Point of Failure



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

New Service, New Process

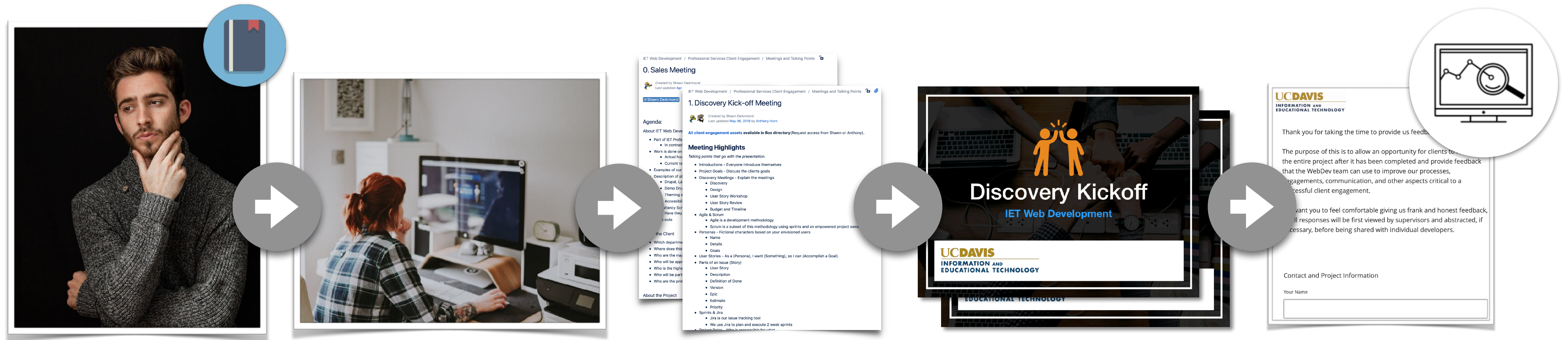
New Hurdles to Creating a UX Process

- 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?



New Service, New Process

Old Methods. Repeating the Process



Start with Knowledge

Go Use It

Mature It

Evolve It

Feedback/Analysis



ANOTHER PROCESS

**RESEARCH
PROJECTS**

Faculty Are... Different

Different Client Engagement Needs



- Different technology needs
- Different type of client
- Different approach



BUILDING

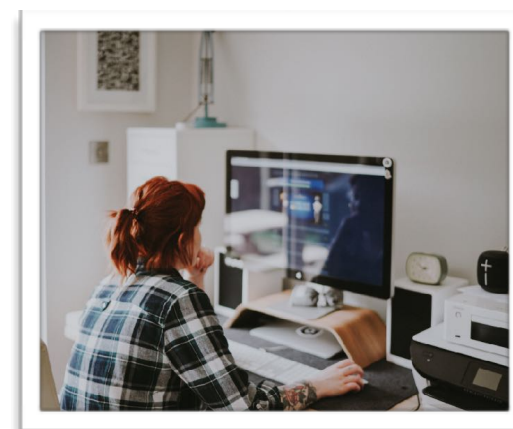
**A PROCESS
FOR PROCESS**

How We Continue to Build

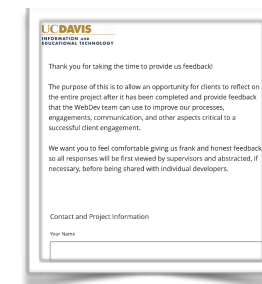
Awesome Processes



Start with Knowledge



Go Use It

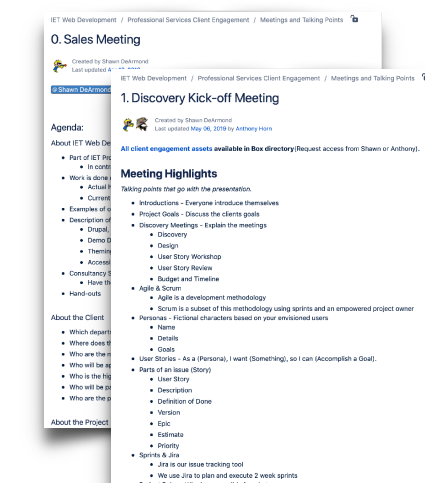


Feedback/Analysis

PROCESS



Evolve It



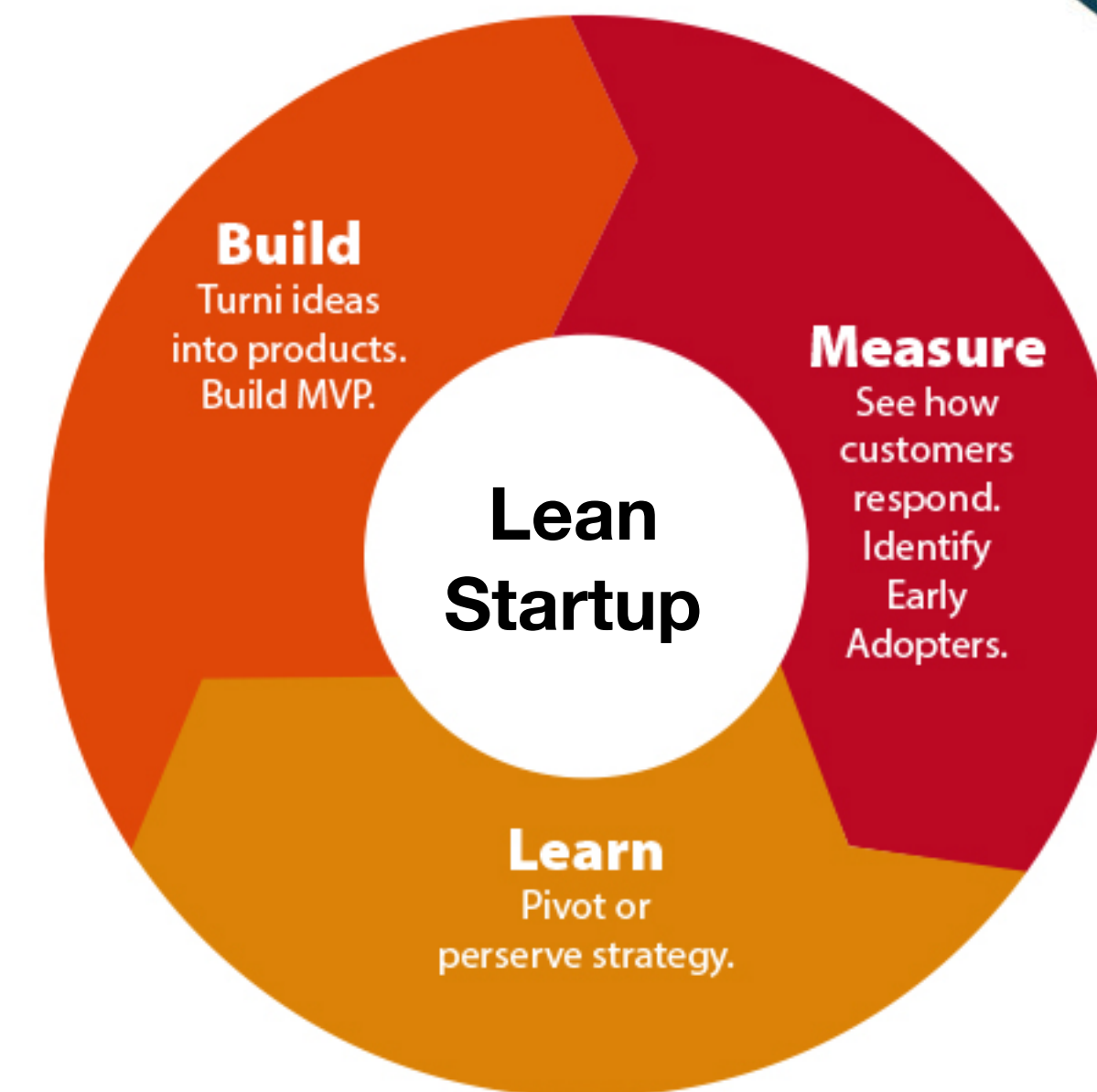
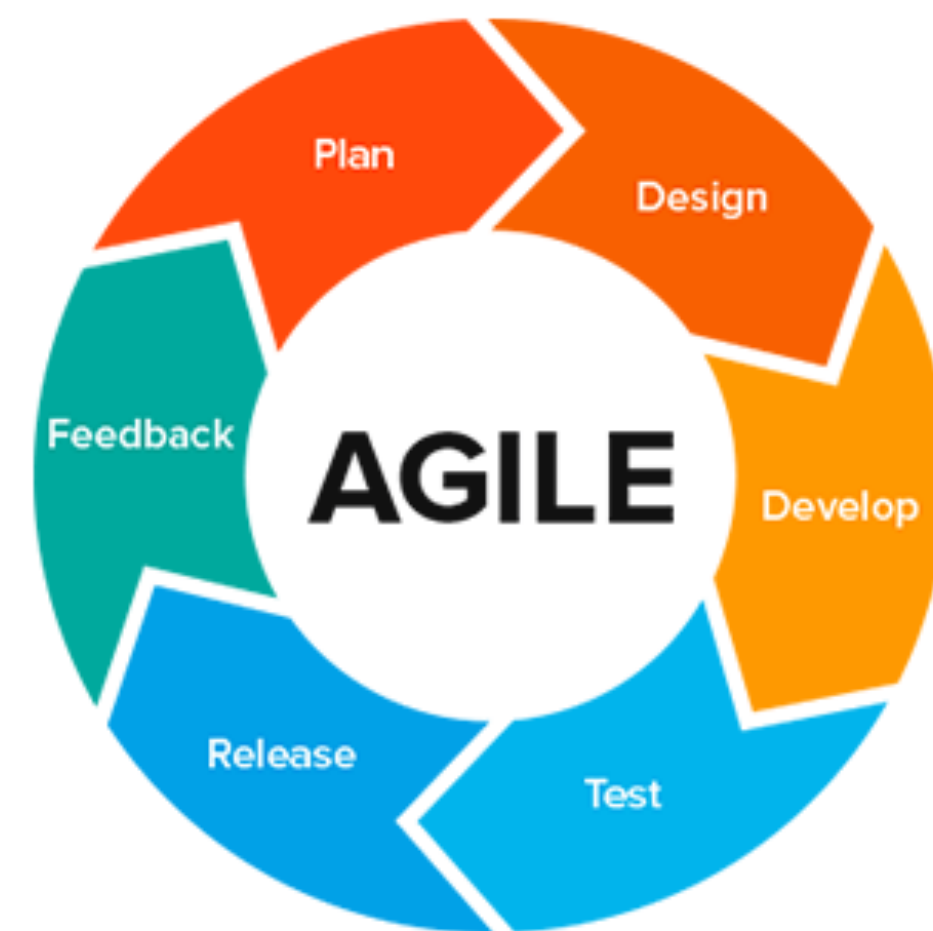
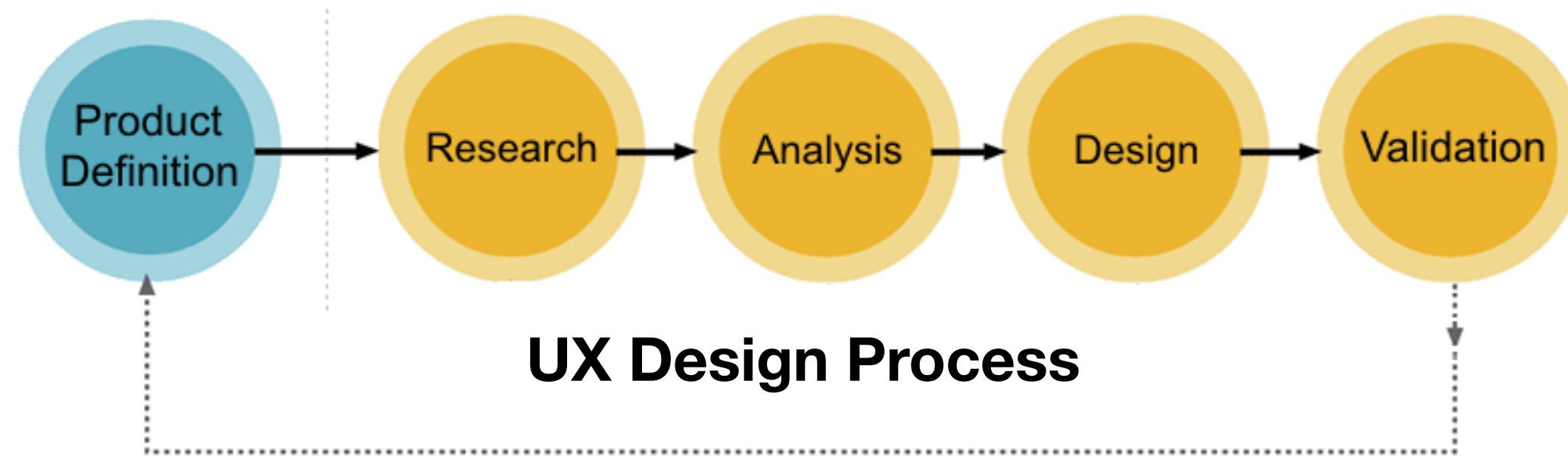
Mature It

UCDAVIS

INFORMATION AND
EDUCATIONAL TECHNOLOGY

If Any of This Looks Familiar

Maybe Because...





CHECKOUT OUR

**CLIENT ENGAGEMENT
PROCESS MATERIALS**

<https://bit.ly/2mxBuuZ>

thanks!



BADCAMP 2019

