

Goal Directed Design Methodology

Phase 1 - Market Hypothesis

One (maybe two) page document giving a high-level overview of:

- 1) What is the market need we seek to address, described from the end-user's perspective without regard to any particular software solution.
- 2) How will our software meet that market need and fit into the user's workflow?
- 3) How will we derive revenue (e.g., advertising, subscription, or direct purchase with recurring upgrade revenue, or whatever).

Phase 2 - Describe the User Population

Collate knowledge about the user population we hope to serve. Define a succinct vocabulary of key behavioral variables that describes the variations within the user population that are relevant to the market problem (one example would be, where they fall on an amateur-to-professional dimension).

Phase 3 - Develop Personas

Looking at the distribution of the user population across the behavioral variables, identify clusters and coalesce them into a handful of archetypical users. Form them into Personas, by giving each archetype an identity, real-world goals, a realistic context, and some brief narrative backstory.

Phase 4 - Develop Scenarios

For each Persona, develop a series of scenarios: a description in narrative form how they will interact with our software to achieve some particular real-world goal (without going into specifics regarding screen layout, etc).

Phase 5 - Develop Style Guide

Work up some treatments on fonts, colors, widget styling, information density, etc (independent of any particular task) — the look-and-feel of the interface, which should convey the attitude and emotional temperature of the software (e.g., professional-looking or artistic or ...)

Phase 6 - Develop Overall Structure of the Software

Given the above scenarios, sketch the overall navigation and information architecture that will mediate the workflows as the user proceeds through accomplishing each goal. The overall structure needs to synthesize all the scenarios into a coherent whole, so that the user can naturally find what they're looking for.

Phase 7 - Iterate Through User Stories (on-going)

Here is where you might say the “real work” begins — actually laying out and implementing the screens all the way down to the fine details. The work is generally structured around User Stories, which are elaborations on the previously-identified scenarios, just more detailed and specific.

----- A note From Paul:

Here's a Persona Creation exercise I worked up at my day job a while back. It goes into more detail on the Phase 2 and Phase 3 stuff I talked about before. The examples given are for the beginning band/orchestra students and teachers that were relevant at my other job, but the approach would be the same for photographers.

Persona Creation

Prerequisites:

- o Broadly understand the problem domain
- o Broadly understand the sort of solution we could possibly bring to market
- o Understand the user population (existing and prospective)

Goal:

We want to capture a succinct, robust picture of our user base as they exist in the real world. We want to sketch their broader, real-world goals and motivations around the problem domain, without regard to any particular means (e.g., they're looking to increase their music skills by whatever means, not necessarily via some particular software package).

— Steps —

1. Identify the relevant user populations

(Student, Teacher, Parent, School Admin, Tech, etc?)

2. For each user population, define a set of key behavioral variables that succinctly characterizes the variation in the user population, relevant to the problem domain.

Criteria:

- o Have we captured all relevant characteristics?
- o Can we exclude irrelevant characteristics, or characteristics that are uniformly true across the population?
- o Can any variable be made more powerful and expressive?
- o Can we be more succinct with fewer variables, without losing depth or clarity?

3. Looking broadly at how the user population distributes across the variables, identify clusters and form them into a handful of archetypical users. Start building a persona for each cluster by assigning values to the variables.

Criteria:

- o Does the set of personas, taken as a whole, give us robust coverage across all variables? (Robust — representative but not necessarily complete)

- o Can we be more succinct with fewer personas, without losing coverage?

4. For each persona, identify their goals.

Criteria:

- o Is each goal a real-world desire from the user's perspective?
- o Is each goal relevant to the problem domain and our proposed solution?
- o Are we tipping the scales to make our jobs easier?

5. For each persona, flesh out a narrative backstory that illuminates the place where our proposed solution could possibly fit into their goals.

Criteria:

- o Are the individual data points relevant?
- o Is it a realistic sketch of the sort of person who would use our software?
- o Does this persona exist within a realistic context?
- o Does it present an interesting design challenge?

— Expedited/abbreviated persona-building example —

1. User populations:

Students

Teachers

2. Key behavioral variables:

Students:
Skill level
Raw talent
Engagement/commitment to learning instrument
Home life challenges
Social media savvy
Ensemble type (band, orchestra, choir, music theory)
[... etc ...]

Teachers:
Passion for music education
Institutional support (e.g., funding, administrative backing, training, systematic learning objectives)
[... etc ...]

3. Form archetype personas around the key behavioral variables:

(scale of 1 to 5)

David A.:
Passion for music education: 5
Institutional support: 1

Linda B.:
Passion for music education: 3
Institutional support: 1

Robert D.:
Passion for music education: 3
Institutional support: 5

4. Identify goals

(For example ...)

David A:
Wants to build a desire for life-long love of music in students
Wants to prove to district administration the value of music education

[... etc ...]

Linda B:

Interested in learning Best Practices for music education

[... etc ...]

Robert D.:

District pressing for proof-of-learning-achievement via systematic application of state standards

[... etc ...]

5. Narrative backstory

(For example ...)

David A:

New teacher. Fluent with many instruments. Passionate about music education. Stays up late nights creating notation files for students. Faces yearly pressure for budget cuts. [... etc ...]