Product Design JIRA Workflow

Conceptual vs Functional UX Design

Before getting into the specifics of the workflows, it's important to understand the difference between what we're calling "Conceptual" and "Functional" design.

Conceptual Design:

When designing a new product or feature, Product Managers and Stakeholders might have a general idea of what they want to build, but aren't sure about a lot of the details. There may be open questions about branding, business objectives, user experience goals, and feature set. Conceptual design work is where designers can help sketch out a general direction for the product, without getting into the specifics of execution. Deliverables for a conceptual design could be a set of rough mockups or a feature-rich prototype. The goal is to help the Stakeholders, Product Managers and Designers align on exactly what the product is and how it should work.

See an example Conceptual Design Epic here:

https://perkspot.atlassian.net/browse/PD-16

Functional Design

Once the Stakeholders, Product Managers and Designers have a clear understanding of what they need to build (achieved through the Conceptual Design process), the next step is execution. Here, the design process needs to shift to a focus on scope, user interface, accessibility and brand implementation. Product Managers and Designers should work together in these steps to distill the larger conceptual design down into a clear set of features which Developers can start building. Deliverables for the Functional Design process should be high fidelity prototypes which showcase every feature Developers will need to build in detail, taking into account PerkSpot Design Standards, project scope, accessibility and more. While the main deliverables for the Functional Design workflow should be delivered by the "Refinement" step, the workflow is ongoing until the product is released to production.

See an example Conceptual Design Epic here:

https://perkspot.atlassian.net/browse/PD-22

Conceptual Design Process

Functional Design tickets should be marked as "Tasks" in JIRA.

Conceptual Design Workflow (Tasks)

To Do → Ready → In Progress → PM Review → Refinement → In Development → Done
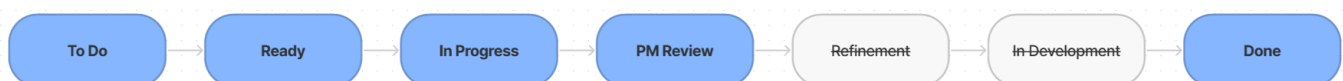
To Design

Responsibility: Product Manager

Here, the Product Manager can create a ticket with a very simple product/feature description. "To do" tickets will sit in the backlog until a Product Manager is able put more time into it.

> ✅ **"To Do" Ticket Deliverable Example**
>
> *Build a "Favorites" System for PerkSpot Mobile*

Ready

Responsibility: Product Manager

For a Product Manager to move a Conceptual Design ticket to "Ready", they should first:

- Communicate the business goals of the Product.
- Have a general understanding of what kinds of features this product should include.
- Have a general understanding of how this product will fit in with existing PerkSpot products or features.
- Be able to communicate the objectives of this project to a UX Designer.
- Compile any necessary dependencies (rough draft of copy, stakeholder guidance on any required creative, etc).

> ✅ **"Ready" Ticket Deliverable Example:**
>
> *Build a "Favorites" System for PerkSpot Mobile*
>
> - *Business objectives: Increase user delight and conversion by allowing users to save and revisit their favorite offers and brands.*
> - *User should be able to add offers to their "Favorites"*
> - *User should be able to follow brands*
> - *User should be able to mark offers or brands as "Not Interested"*
> - *User should have a place on where they can manage their favorites.*

In Progress

Responsibility: UX Designer

Once a UX Designer is ready to start working on a Conceptual Design ticket, they should move the ticket to "In Progress".

> ✅ **"In Progress" Ticket Deliverable Example:**
>
> *A Figma prototype or mockup showcasing updates to PerkSpot Mobile which would allow users to add offers to their favorites, follow brands, mark offers and brands as "Not Interested", and manage all of the above. The prototype should focus on the "big picture" of the product, nailing down the overall branding and organization of the product - where the UI for these features exists, how the features are branded, etc.*

PM Review

Responsibility: UX Designer

Once the initial conceptual prototype is complete, the ticket is moved to "PM Review". Here, the Product Manger should look over the prototype (either independently or in a meeting with the designer), and determine if it accomplishes the business goals and includes all of the desired features. The Product Manager might also choose to demo the prototype to Stakeholders to ensure they are on board with the design direction.

If there is still work that needs to be completed on the prototype, or if the prototype doesn't meet expectations, the Product Manager will move the ticket back to "In Progress" for further design work. Otherwise, the Product Manager can move the ticket to "Done".

> ✅ **"PR Review" Ticket Deliverable Example**
>
> *The Product Manager and Designer sit down and go over the prototype in a 30 minute Zoom meeting. The Product Manager approves of the work the Designer has completed, so they move the ticket to "Done".*

~~**Refinement (N/A for Conceptual Design)**~~

This step is skipped for Conceptual Design, since nothing is being built yet.

~~**In Development (N/A for Conceptual Design)**~~

This step is skipped for Conceptual Design, since nothing is being built yet.

Done

Responsibility: UX Designer/Product Manager

Tickets are moved to "Done" once the Product Manager, Stakeholders and UX Designer all agree that the prototyped deliverables properly showcase the requested features, and will provide a solid foundation for the Functional Designs.

> ✅ **"Done" Ticket Deliverable Example**
>
> *The conceptual prototype for the "Favorites" project is complete and linked in the ticket. The Designer and Product Manager have worked out any initial questions, and the project is now ready to be scoped out for development work.*

Functional Design Process

Functional Design tickets should be marked as "Stories" in JIRA. For larger projects, Functional Design Stories can be batched into Epics.

Functional Design Workflow (Stories)

To Do → Ready → In Progress → PM Review → Refinement → In Development → Done
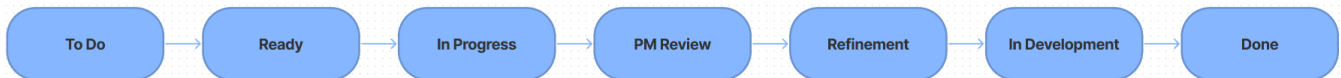
To Design

Responsibility: Product Manager

Functional Design "To Do" tickets can be created at any point and added to the Product Design board backlog. These tickets shouldn't be moved to "Ready" until the Conceptual Design process is completed.

> ✅ **"To Do" Ticket Deliverable Example**
>
> *Build Favorites v1 in PerkSpot Mobile*

Ready

Responsibility: Product Manager

Functional Design tickets should be moved to "Ready" once the conceptual design process is completed, and the Product Managers have decided on a scope and general plan for execution. Any outstanding questions or materials which will be required for development should answered or provided at this step, such as final copy or creative from Marketing, and new brand guidelines, etc.

> ✅ **"Ready" Ticket Deliverable Example**
>
> *Build Favorites v1 in PerkSpot Mobile*
>
> *Link to My Favorites conceptual design prototype here.*
>
> - *Allow users to "Favorite" Offers*
>   - *Offers can be favorited on the Home Page, Weekly Perks, and Search Results*
>   - *A "toast" should appear when an offer is favorited, indicating to the user that the offer has been added to their Favorites. "Offer Added to My Favorite Offers".*
> - *Allow users to manage offers they've Favorited*
>   - *Users can visit a page, linked in the Fixed Nav, that will allow them to see all of the offers they've added to their Favorites.*
>   - *On this page, users will be able to remove favorited offers from their Favorites.*
>   - *Upon removal, users will get a "toast" indicating that the offer has been removed from their favorites. "Offer Removed from My Favorite Offers"*
> - *"Following Brands" feature is not included in scope for V1.*
> - *"Not Interested" feature is not included in scope for V1.*

In Progress

Responsibility: UX Designer

Once the Designer is ready to start working on the Functional Design ticket, they will move the ticket to "In Progress" and begin building a new, functional prototype. This should be separate from the conceptual prototype, as that prototype may still be used for future work on the product.

> ✅ **"In Progress" Ticket Deliverable Example**
>
> *Designer provides a prototype link including:*
>
> - *Interactive flows demonstrating all of the scoped features, such as adding an offer to "My Favorites" from Home, Weekly Perks and Search Results. These flows should be detailed and polished.*
> - *The prototype should be high fidelity, following PerkSpot Design Standards. The PerkSpot digital brand should be applied correctly with white labeling taken into consideration.*
> - *The prototype should make use of the PerkSpot Design System and UI Kit.*
> - *The prototype should take into account the variety of device types this feature might be viewed on, and should take WCAG 2.0 Accessibility Standards into account.*
> - *The prototype should not include any out-of-scope features.*
>
> *Any new creative assets (icons, graphics) should be prepared for web use and attached to the ticket*

PM Review

Responsibility: Product Manager

At this step, ideally the Designer and Product Manager should sit down together an go through the features showcased in the function prototype. The Product Manager should develop a clear understanding how to navigate through the prototype, and how to communicate the details of the prototype to developers. If there are any issues with the prototype such as missing features, the ticket should be moved back to "In Progress". Otherwise, the Product Manager can approve the Design and move the ticket to "Refinement".

At this point, the Product Manager should start creating Stories for the Developers to work from on the PerkSpot Development Jira board. These stories can be broken up into many tickets, but should all reference the functional prototype and include links to it. The tickets may also include links to the Conceptual prototype, if the larger project context will help Developers better understand what they are building.

> ✅ **"PM Review" Ticket Deliverable Example**
>
> *The Product Manager and Designer have connected and approved the final Functional Design prototype. The Product Manager then uses the prototype to create development stories on the PerkSpot Development Board in preparation for a Refinement Meeting. Tickets may look like:*
>
> - *[PS-10000] Add "Favorite" button to offer cards on Home, Weekly Perks, Search*
> - *[PS-10001] Create "Toast" functionality for indicating when an offer has been added to Favorites.*
> - *[PS-10002] Create "My Saved Discounts" page for managing favorites.*
> - *etc*

> ⚠️ Note: From this point on in the workflow, the Designer will move into "oversight" mode. They won't be prototyping anymore, and most of the work will be done by developers on the PerkSpot Development Board, but the UX Designer will still be responsible for keeping tabs on the project as it progresses. This way, they can help to ensure that the product that is build matches the prototype, and that it adheres to PerkSpot Design Standards.

Refinement

Responsibility: UX Designer and Product Manager

Now that the PerkSpot Development Board stories have been created, the Product Manager will set up a refinement meeting with the development team building the product. The UX Designer should be present in this meeting, and should be available to answer any questions or make any clarifications. If issues arise in the refinement process which call for changes to the Functional Prototype, the ticket should be moved back to In Progress while those changes are made.

> ✅ **"Refinement" Ticket Deliverable Example**
>
> *The Product Manger and Designer attend a Refinement meeting with Developers. They answer any questions the developers have, and get them started on their work.*

In Development

Responsibility: UX Designer

After Refinement is completed, the Development team will be hard at work building out the product. While this is happening, the UX Designer should be aware of the progress they're making, and checking in with them regularly either by touching base individually, or attending morning standups.

The UX Designer should be tagged in Code Reviews (with screenshots attached) so they can help weed out any clear issues before the code goes to QA. Once the code is in QA, the UX Designer should talk QA Team and get access so they can test out the product for themselves. If there are any issues, they should talk to the Product Manager and Developers to get tickets created for fixes.

> ✅ **"In Development" Ticket Deliverable Example:**
>
> *The UX Designer touches base with the developers regularly. They send him screenshots of their progress, and the UX Designer makes suggestions for fixes. The UX Designer is generally available and engaged, doing what they can to ensure that the product that is build adheres to PerkSpot Design Standards.*
>
> *Developers are expected to adhere to the User Facing Feature Checklist when creating new features. Designers should help enforce these rules.*

Done

Responsibility: UX Designer

Functional Design tickets reach "Done" once the product is released to production, and the designer has had the opportunity to review it in action. Ideally, the UX Designer should take this time to evaluate what has been built, and identify and gaps or issues. They should take note of any of these issues, and work with Product Manager to get revisions/fixes/additions prioritized for the next iteration.

> ✅ **"Done" Ticket Deliverable Example**
>
> *The "My Saved Discounts v1" product has shipped! The designer has confirmed that it works as intended in Production, following PerkSpot Design Standards. The UX Designer discusses the final product with the Product Manger and Stakeholders, and they agree that the next iteration of this product should focus on building out the "Not Interested" feature from the original Conceptual Design (which was cut for scope). The Product Manager should then get to work on creating a new Functional Design ticket for this feature, and the UX Designer can close out this ticket. All parties involved can have a beer and celebrate a job well done!*