

User-Centered Analysis and Conceptual Design



HOW TO DO USER INTERVIEWS AND SURVEYS,
GETTING FROM TASK ANALYSIS TO CONCEPTUAL DESIGN

3 day course

www.humanfactors.com



Human Factors
International

User-Centered Analysis and Conceptual Design

Why take this course?

User-centered analysis provides the basis for designing software that makes sense to your users. Use proven, objective datagathering techniques to develop a clear understanding of who your users are and how they will approach your Web site or application.

Create effective, usable interfaces—the first time. This seminar walks you through HFI's process for collecting and analyzing relevant user and task data, and for developing a conceptual architecture for design. Alternating between explanation, discussion, and hands-on exercises, the course offers participants the tools and confidence necessary to plan and conduct effective user-centered analysis.

What you'll learn

- › user profiling
- › data gathering
- › task analysis
- › transitioning to design

General Course Information

What You Get

- › A comprehensive student manual
- › A student exercise book
- › The benefit of a wealth of knowledge and experience in software usability engineering

Who Should Attend

Web and application designers, system analysts, software engineers, information architects, experience designers, and documentation specialists. Anyone involved in the development of interfaces or interface requirements.

Prerequisites

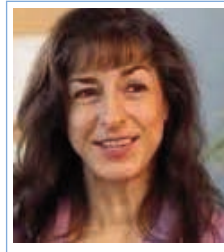
There are no prerequisites to attend this course

Course Objectives

Participants will learn to:

- › Develop a design strategy
- › Create user profiles, personas and scenarios
- › Develop meaningful interview questions
- › Carry out effective interviews
- › Understand the challenges of survey design
- › Analyze task flow
- › Understand and identify primary nouns
- › Develop user-driven information architecture
- › Engage in user-centered task/tool redesign

“Understanding the users, their expectations, and workflows, is at the heart of intuitive interface design. It’s what user-centered design is all about. In this course you’ll learn efficient and effective methods to quickly get the user data you need for design.”



Mary M. Michaels
BFA, MBA, CUA, CXA
Global Director of Training
Evolution, Certification, &
Strategic Advisor

Course Outline

Strategy

1 Introduction to UCA

- › Mental models
- › Knowing how the user works
- › Which UCA steps to perform
- › Obstacles of user-centered analysis
- › ROI—justifying the right process

Exercise: Evaluate task flow

Exercise: Calculate ROI

2 Creating a Design Strategy

- › Components of a design strategy
- › Site strategy drives design strategy
- › Where to get strategy information
- › Mining existing documentation
- › Working with brand objectives

Exercise: Develop a design strategy

Uncovering the user's conceptual model

3 Profiles and Personas

- › The value of profiles and personas
- › User profiles
- › Task profiles
- › Environment profiles
- › Personas

Exercise: Develop user profiles

Exercise: Develop high-level task / content list

Exercise: Create task prioritization diagram

Exercise: Create environmental profile

Exercise: Develop personas

4 Field Studies

- › Data gathering methods
- › Choosing the right method
- › Elements of the field interview
- › Developing good interview questions
- › Good and bad interview technique
- › Conducting a user observation

Exercise: Write interview questions

Exercise: Conduct interviews

5 Complementary Data Gathering Methods

- › Value of complementary methods
- › Focus groups
- › User group meetings and usability roundtables
- › Facilitated workshops and JAD sessions
- › Using surveys and other indirect methods
- › Online surveys
- › Using multiple methods

Exercise: Create online survey

Exercise: Choose the best data gathering method to use

Deriving the user experience model

6 Scenario and Task Analysis

- › The power of a scenario
- › Scenarios vs. use cases
- › Determining the level of detail
- › Scenarios drive priorities
- › Identifying functions and tasks
- › Common errors and challenges in task analysis
- › Characterizing the new task design

Exercise: Develop scenarios

Exercise: Fix task flow

7 Primary Noun Architecture

- › Value of primary nouns
- › Identifying primary nouns
- › Describing primary nouns
- › Primary noun views
- › Defining primary noun details
- › From primary nouns to navigation

Exercise: Determine primary nouns and views

Exercise: Develop primary noun table

Exercise: Create high-level navigation diagram

8 Information Architecture

- › Costs of poor organization
- › Basic organization schemes
- › Hybrid schemes
- › Shallow vs. deep structures
- › Labeling systems
- › Affinity diagrams and card sorting techniques
- › Card sorting tools

Exercise: Conduct and analyze a card sort

Exercise: Create high-level information architecture

9 Getting Ready for Design

- › Getting sign-off on the contract for design
- › Using concept sketches to drive out requirements
- › Setting usability criteria

Exercise: Develop usability criteria

“User analysis is not my primary focus but this information will definitely help me become a better business analyst. Great course, I learned a lot.”

Joseph Scruggs –

Business Analyst, JPMorgan Chase

“Learned a lot of information in a short period of time. Excellent blend of lecture, discussion, and exercises.

Vince Conti –

Manager, Interactive Development, American Express

Our Guarantee of Your Satisfaction

Human Factors International, Inc. intends that all participants will benefit from the seminar. We offer the best possible training in this field. If at any time during the first day of the course a participant notifies the instructor of his or her desire to withdraw, he or she may leave and receive a full refund. There is absolutely no risk to the participants or their companies.

Register now!

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Certification

Advantages of HFI Certification

- › Get certified by the world's leading user-centered design firm and become a recognized UX authority
- › Help your company increase user satisfaction in products and services
- › Join CUA Central - exclusive online community for CUAs and CXAs
- › Achieve growth and progress in your career path

HFI offers two kinds of certification, each requiring an examination to demonstrate mastery. Moreover, HFI offers optional courses to help you prepare for each exam.

CUA Certification

Become a Certified Usability Analyst™ (CUA) with HFI's certification program. CUAs must pass an examination demonstrating their mastery in all key areas of interface usability. This certification is supported by the following courses:

- Course 1. User Experience (UX) Foundations
- Course 2. User-Centered Analysis and Conceptual Design
- Course 3. The Science and Art of Effective Web and Application Design
- Course 4. Practical Usability Testing

CXA Certification

The Certified User Experience Analyst™ (CXA) certification indicates advanced skills in persuasion, innovation, strategy, and institutionalization of UX. CUA certification is required to take the CXA exam. This certification is supported by the following courses:

- Course 1. How to Design for Persuasion, Emotion, and Trust (PET design™)
- Course 2. The PET Architect
- Course 3. Omni-Channel UX Strategy and Innovation: An Ecosystem & Future Modeling Approach
- Course 4. How to Support Institutionalization of a Mature UX Practice

“The certification served as a reinforcement for what I’m doing, so I am more confident in presenting a concept or design.”



Jim O'Brien –
Senior Interaction Designer
AutoTrader.com

“The training was great, very effective. Now, having been tested and certified by HFI, I have more confidence in addressing usability challenges.”



Chow Sok Mui Murie –
Senior Creative Consultant
NCS, Singapore

For more information:
www.humanfactors.com/certification

Featured Instructors



Mary M. Michaels
Global Director of Training
Evolution, Certification, &
Strategic Advisor
BFA, MBA, CUA, CXA



David Bell
User Experience Strategist
BSc, MSc, CUA



Ashok Shetty
Project Director
MBA, CUA, CXA



Catherine Gaddy
User Experience Strategist
PhD, CUA, CXA

A partial list of companies where we have taught Human Factors courses

- Agilent Technologies
- Airborne Express
- Ameritech
- AT&T Information Systems
- The BBC World Service
- Blue Cross/Blue Shield
- ChevronTexaco
- Cognizant Technology Solutions
- Deloitte Consulting
- dotMobi
- Ericsson Information Systems
- Ernst & Young
- FedEx
- Fidelity Investments
- General Motors
- Hewlett-Packard
- IBM
- Library of Congress
- McKesson HBOC
- MCI
- Metropolitan Life Insurance
- Motorola
- National Semiconductor
- Nextel
- Northern Telecom
- Pay Pal
- Prudential Life
- RBC Royal Bank
- SAP / SAP Norway

Onsite Training

If you have a group of people who would like to attend this course, please contact us to discuss having a private course at your company or hosting a public course.

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