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**[Step By Step: Methodologies for Planning Your Online]  
Project**

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## Step by Step: Methodologies for Planning Your Online Project

In producing a new online tool, ambition presents a mixed blessing. While often a catalyst for truly innovative projects, ambition also leads to mission creep, as team enthusiasm balloons the project beyond manageability. To protect against this, projects should commit to a process of systematic management. By following a strict methodology of design, even the smallest projects stand to benefit from a more coherent and polished realization. Through the lens of the textual mash-up project, *JiTR*, this essay will consider project planning through the use of a scenario model, its progression into wireframing, and the concurrent procedures of usability and visual design.

This paper is an initial argument for the methods used in the *JiTR* project, and may evolve as the project does. It will not go in depth into the project but rather use the project as empirical support of the methodologies outlined.

### ***What is JiTR?***

*JiTR*, which stands for *Just-in-Time Research*, is a project that considers how principles of online mash-ups can benefit text-based research. Its natural development, from these objectives, is primarily in areas of data collection and processing. It is a project in two identifiable parts. The more general mechanics of collecting and organizing are being looked at by the *BROAD* component of the project, while the more in-depth editorial and workflow functionality is being considered by the *DEEP* component. Most examples in this paper will look at *BROAD*.

The concepts of mash-ups are embodied in two chief ways. First is concept of *JiTR* as a common area for online content from a variety of sources. Rather than keeping textual content at its primary source and simply saving a URL, *JiTR* works as a sort of research scrapbook, calling the actual content into the service. In line with the principles of online mash-ups, *JiTR* offers functionality to take advantage of the collected corpus, such as flexible tagging, creating a product that is greater than the sum of its parts. Not simply mashing

content with other *content*, *JiTR* also includes a facet of extensibility, allowing content to be connected to computer *processes*. This allows external tools to be accessed from within *JiTR*, for analysis of the collections.

### ***Personas and Scenarios***

If the end purpose is functionality for users, why not begin the process by thinking about users? This is the approach trumpeted by **personas and scenarios**. Personas are imagined possible users that “act as stand-ins for real users” (Calabria). They are created to stimulate thinking, during planning, about people, rather than exclusively concepts. Once realistic user personas are created, scenarios are conceptualized, which consider ways users could possibly employ the final product. Scenarios move into specifics, detailing the steps that the user would follow in order to reach their means. Generally, considerations of achievability come in later in the process, and scenarios are open-concept and idealistic ideas. Usually, an individual persona is determined as the primary user, with others selected as secondary users.

An example of a persona that emerged in conceptualizing *BROAD* is Mandy Molyneux, an assistant marketing analyst for a software company. In an entry level position, Mandy’s work involves managing large amounts of tedious data. Her familiarity with computers is primarily in using business software, but she is able to learn well documented programs quickly. On recommendation of a friend, Mandy decides to try *JiTR* to collecting and sort through online mentions of her company.

Mandy’s first scenario outlines her first visit to the *JiTR*. Upon arriving at the site, she is greeted with information regarding the possibilities of the tool, framed in such a way as to emphasize practical examples over raw features. There is also a short, casual video explaining exactly what it is. Clicking through to sign-up, the system asks Mandy of her primary purpose, offering a list of answers. Soon, the reason for this question is revealed, as

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the first login has tips and information tailored for Mandy's purposes of press mention tracking. Included is a tutorial collection, consisting of texts that explain JiTR in-depth.

Since being made famous in 1998 by Alan Cooper (Blomquist 197; Cooper),



*User: Godfrey Laroche  
Independent Researcher*

Godfrey is using [JiTR](#) to track news. He's not well-versed in computers, but competent in figuring them out.

able about Godfrey's is the ability to organize large data sets easily, and call them back up even easier. He loves labels and repository sharing.

personas have been subject to controversy and skepticism. However, they hold many benefits that have earned them scholarly praise and business use. At the root of the benefits is proper identification of users. Cooper argues that "user" is too general, because the product team may have differing ideas of what that may entail (Blomquist 197). In the persona model, a name such as 'Mandy', evokes a consistent character in team members. In this respect, a persona is very much a communicative tool. Rather than thinking about a vague "user", the JiTR team considers Mandy Molyneaux's occupation, education, computer ability, motivation, support in surrounding environment, resource

accessibility, and timeframe of usage (RDI Meeting Notes). Furthermore, the process of determining personas and scenarios can lead to otherwise unconsidered users or uses.

Prior to Mandy, the *JiTR* team did not consider the first time visitor or the help-documentation dependant user, despite the importance of both to user experience.

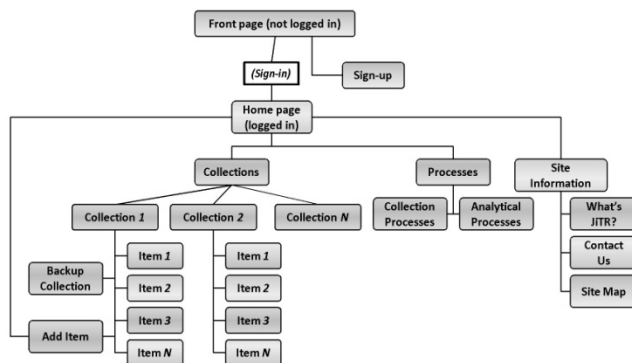
When personas lead to specific functionality or usability choices, a direct connection is made between these choices and their motivations. Such a connection makes prioritizing concepts easier and more effective. As each idea is an independent concept with a specific persona motivating it, concepts can easily be numbered and organized by priority (Sood, Gilligan, Chandler and Slack 877). To better understand the link between persona and feature, consider two ideas from the conceptualization of *BROAD*: the first being the

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inclusion of a first log-in “tutorial collection” and second being the ability to backup and restore collections offline. How do you decide what is more important to the project? In this case, the former idea is important to Mandy, while the latter is important to another persona, named Godfrey. The team’s decision is then made easier, because they can base it on which user is considered a more important demographic to the project.

Even later in the design process, scenarios become a sort of audit for the project. Tina Calabria writes that “disagreements over design decisions can be sorted out by referring back to the personas” noting further that such evaluation reduces the frequency of large and expensive usability tests.” As a product begins to emerge from the project, the team can ask questions such as “does this satisfy Mandy’s needs” or “what choice makes Godfrey’s experience quicker”.

The persona model may be jarring or “silly” for some, but following will result in a



Example 2: Sitemap

final product more relevant to its users. By no means is this model intended to be the sole method of project planning, but it is one of the most affordable. Perhaps most notable, then, is the insistence on considering unique users prior to

the creation of any materials, an action that will save time and money on later usability testing.

### ***Wireframes, Mockups and Final Design***

After the project and its features have been planned out, it progresses into visual growth. This process begins with **wireframing**, moves into **mockups** and finally manifests itself in its **final form**, as a website in the case of *JiTR*.

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The wireframing process can be seen as having two parts. The first is sitemapping: the creation of roadmaps that delineate the flow and logical connection of pages or sections in the product. A sitemap gives a bird's-eye view of the project and shows its breadth. The second aspect of wireframing is creating skeletons of individual pages. A proper wireframe should include "where content will appear, entry and exit points, and all primary and



secondary navigation" (Rosso 64). In essence, a wireframe is the theoretical framework of the interface, without concern for stylistic elements. This avoids distraction, in much the same way that Lorem Ipsum text is often used in lieu of the distraction of real text.



Clutter and mission creep are identified in the wireframing step, and tend not to move beyond it. Lastly, by putting theoretical design at its rightful place at the foundation of the interface, the navigation becomes more intelligent. Rather than trying to fit into the design, the design tries to fit into it. After

### Example 3: 2 Wireframe Pages for Mandy

wireframing, mockups are created of what the final

interface will look like, usually using an illustration method, and only in the end is the interface design hammered, through code, into the image of the mockup. Mockups should represent the culmination of visual design for the project. Before moving into the next step, colour schemes should be chosen, icons and illustrations created, and logos should be created.

It has been argued (Rosso 65) that wireframes should be created in the medium of the final interface, such as HTML or Flash. However, this adds an unnecessary layer of complexity that muddles the process. Each step should be addressed individually, with the

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mockups and final designs respectively tackling style and coding. Thus, the wireframe, should be created in the medium of least resistance. This can be anything from dedicated wireframing programs to Microsoft Powerpoint to pencil sketches. Once again, the purpose of these methodologies is conciseness through separation of steps.

Simpler wireframes allow multiple ideas to be effectively merged. Sometimes, as in the *BROAD* wireframes, persona-specific wireframes are created and later merged into a master wireframe. Because *JiTR* has two parts, *BROAD* and *DEEP*, this is the step where the two planning processes can merge coherently.

### ***Usability and Concerns***

Ultimately, a separated and methodical process serves to stimulate the human-computer interface design and the process of making a usable product. It serves to prevent distraction and call the attention of the project team to the exact purposes of the task at hand. While other models require a bit of trial and error, blazing through the creation of the product but getting sent back to the drawing board by usability testing, the use of personas, scenarios, wireframes and mockups results in a more complete product, albeit slower.

Despite the advantages, there are three notable downfalls to keep in mind about this method. The first is that the overarching picture of the project is at threat of being lost, and by concentrating too closely on the small steps, the project may unintentionally deviate from its original purposes. One way to protect against this is to return to the original product pitch or to write a mission statement for the project. Another concern is enthusiasm: by moving through the process one step at a time, individual enthusiasm may begin to subside. Lastly, larger teams will have trouble overlapping tasks. While there is some scenario/wireframe overlap and a number of stylistic features can be worked on well before mockup time, a larger team may find themselves with an antsy programmer or bored

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graphic designer. Team leaders using this methodology need to be aware of the long planning process and schedule appropriately.

Ultimately, the process of personas and wireframes presents more benefits than pitfalls. It offers a user-centric planning process, better accounting for the product's eventual audience. Above all, it forces a level of self-awareness onto the project, making planners consider the purposes behind both conception and visual choices.

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