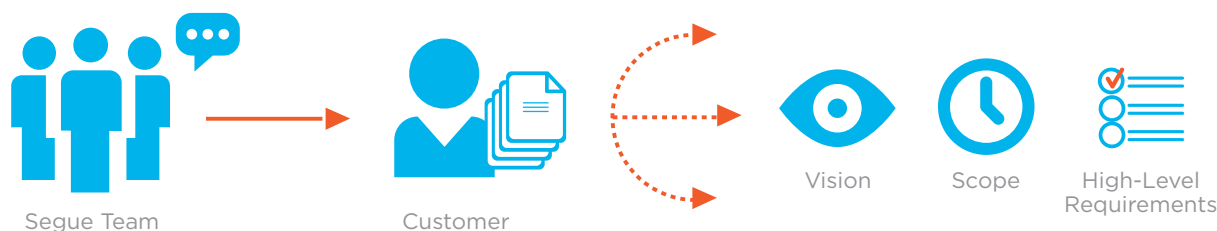# SEGUE DISCOVERY

An initial engagement with Segue begins with a Discovery Phase where our experienced team works directly with our customer to define the vision, scope, and high-level requirements for the project. Conducting Discovery is the most effective way to achieve a comprehensive understanding of both functional and technical requirements for the project as well as ensure that Segue and our customers are in complete agreement on scope at project onset.

Segue Team   Customer   Vision   Scope   High-Level Requirements

PARTICIPATION IN DISCOVERY

The Segue Discovery team typically includes a **Project Manager**, a **Business Analyst**, and a **Technical Lead**. We also ask that our customers provide a primary point of contact, however, we encourage as many customer stakeholders as necessary, to ensure a successful discovery effort. To make discovery as efficient as possible, while meeting client needs, we use communication tools such as Skype, Google Hangout meetings, and email to support remote participants, in addition to in-person meetings.

DISCOVERY DELIVERABLES

The specific deliverables for the Discovery Phase vary by project, but will be agreed upon by Segue and the customer before the project kick-off. Typical deliverables include: a **High-Level Functional Requirements Document**, **Project Plan**, **Wireframes** and/or **Design Concepts**, and a **Cost Proposal**.
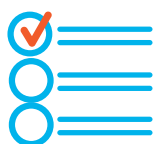
High-Level Requirements   Project Plan   Wireframes   Cost Proposal

Discovery   Design   Development   Maintenance

DISCOVERY PROCESS

Segue has refined a methodology for conducting discovery that allows our team to gain a full understanding of our customer's requirements. This process is structured on three phases: "Identification, Analysis, and Recommendation" – (IAR). The three aspects of the IAR process work together to define the vision and scope of the work at hand. In addition, we use the IAR to provide recommendations to achieve our customer's future goals and objectives. The three aspects of the IAR process are as follows:

Identification

Identification

During the identification component of the IAR, we conduct customer interviews; inventory existing assets that pertain to the proposed effort and create customer surveys where appropriate. Our Discovery team will also look to identify potential project risks and relevant existing technologies or systems. The information captured in this step is documented and shared with project stakeholders in preparation for the Analysis task.

Analysis

Analysis

Once our findings are documented, we will review key aspects of the proposed project as identified and provide critical functional and technical analysis. At this time we perform a "deep dive" to understand the interrelationships between proposed elements. We also apply our technical experience to create an objective and constructive view of the feasibility of the project components to support our recommendations. One reason why this analysis step is critical, is that new recommendations can manifest that weren't previously considered during the project onset, yet have tremendous benefits to the project.

Recommendation

Recommendation

The recommendation step extends from the analysis in that we will follow up our critical review of the proposed project with actionable recommendations for development. Multiple options may be suggested based on cost, time to implement and other factors. R ecommendations can define the criticality of project components, set priority, and identify areas for future enhancements. The ultimate goal for the IAR is to provide the customer with specific recommendations to successfully complete the project with respect to business processes, technology, and implementation strategy.

Discovery   **Design**   Development   Maintenance

DESIGN

The Design phase starts with the information gathered during the "Discovery Phase" or a formal requirements analysis is completed to determine more specific details before moving forward. All requirements will be reviewed by key stakeholders and the development team for a thorough understanding of the clients needs. Once approved, the project cycle kicks off with product design. Our Approach is structured around User Research methods with the goal of producing an engaging solution that fosters a positive user experience.

## CONTENT INVENTORY AND REVIEW

Taking inventory of content is a critical first step in assessing where to make changes to an existing application. A **content inventory** is as simple as creating a list of all the content on the application. Inventory will typically include text, images, documents, and other files.

Alternatively, a **heuristic review** can be performed. During a heuristic review, a usability expert will evaluate the applications user interface and content messaging against usability best practices. The product would then be scored and specific tasks would be derived from the review ranging from non-critical to serious changes that need to be made to the site to improve overall usability.

DEFINE INFORMATION ARCHITECTURE
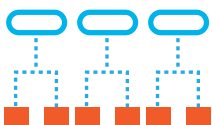
Once the content has been reviewed, Segue takes a deeper look at the actual users of the system to determine the most appropriate Information Architecture. Several research methods can uncover a user's mental model. The methods below are used at various stages of the project and largely depend on budget, timeline, and other requirements.

Card Sorting

Important!

Task Analysis

Contextual Interviews

Scenario/Persona development

Click tests

Surveys

WIREFRAMING

Wireframes help visualize project specifications and give the client a chance to provide early, useful feedback. They create a foundation for designers to bring usability to the forefront, before the product goes to development.

Some projects are simple and straightforward enough that they can go directly to development once low fidelity wireframes are approved. Other projects may involve more complex functionality that requires fully functional prototypes for testing. The prototypes tested would be based off the high fidelity wireframe. Different types of wireframes that Segue provides are described below.
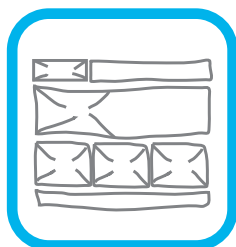
Low fidelity wireframes are simple black and white sketches that highlight page elements, features, and navigation for a website or application. In the early stages of design, wireframes are void of color, logos, and special treatments you would find in the finished product.

Medium fidelity wireframes, commonly referred to as "mockups" are a step forward in detail and can serve as valid requirements documentaton for an interface. In some cases, basic functionality can be applied and validated to be able to begin development, based on medium fidelity wireframes.

High fidelity wireframes present the full look and feel of the finished product. They fill in all the missing details from font styles to colors and interactions to functionality. At this stage, the (future) prototypes are ready to be handed off to the development team and should provide a clear visualization of an application or site, allowing the engineering team to begin their work.

DEVELOPMENT

Development will begin when key application wireframes have been locked down. This allows the design team to continue with an iterative approach for development by working on smaller areas of the wireframes that still need attention, while the development team moves forward with the larger areas. This process allows both teams to work in parallel and shortens overall development time.
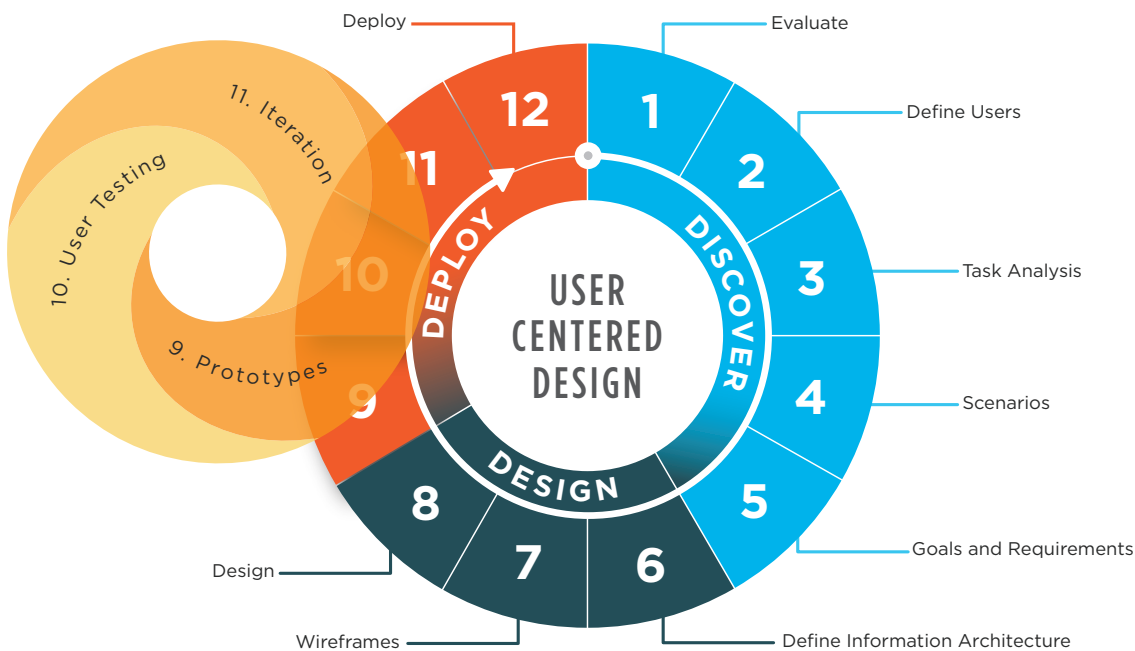
USER-CENTERED APPROACH

Segue Technologies practices a user-centered design (UCD) approach to deliver engaging solutions that foster a positive user experience. The process is broken down into three phases; discovery, design, and deployment, and can be tailored to meet client requirements and budgets.

The Discovery phase is a data collection and vetting process, which sets the path for the design approach. At this stage the goal is to learn about the users mental model and how they expect the website or application to function. In the Design phase Segue determines how the site content should be organized based on the data collected during user research. From this information we can derive the structure for the information architecture, developing a high-level site map of the website. The Deploy phase takes the application live, and is tested to ensure all objectives have been met. Surveys can be distributed to collect data on overall satisfaction of the site, field studies or interviews can also determine all criteria has been addressed. Once this has happened the UCD methodology can repeat for new phases of development on the same product.

ITERATIVE DEVELOPMENT AND TESTING

Segue develops the product in various stages to allow review of the work in progress. As key components come to life, dependent functions often shift in priority and purpose, necessitating changes in requirements and design. Each iteration provides new functionality and refines existing functionality to efficiently create and polish the application. Depending on the size and scope of the project, completed builds will be deployed to a testing environment and reviewed by our QA team. This team will ensure browser compatibility and functionality is in place and meets requirements. Feedback from testing is applied to subsequent development iterations to adjust the deliverable to meet customer expectations.

CUSTOMER REVIEW AND FEEDBACK

Prototypes provide value to both the development team and customer stakeholders during iterative development and testing, to visually understand and plan requirements changes. Prototypes can support usability testing for features that need requirements refinement prior to development. Updated prototypes can be deployed as frequently as needed, thereby reducing rework after time and money are put towards development.

Clients will work with a certified usability analyst and an expert UX design team during the review process. Segue always educates clients on usability best practices to steer them in the right direction and help make the most sensible changes for the betterment of the product.

DEPLOYMENT

When all defects have been addressed and the customer has approved release, the product will be deployed to production. Deployment does not mean the project has come to an end. In fact, Segue has multiple maintenance options for ongoing support and a continued partnership. Each project has different needs and to accommodate these we have developed multiple service package options.
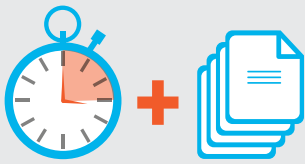
Discovery   Design   Development   **Maintenance**

MAINTENANCE OPTIONS

Segue offers a variety of service package options to meet our customers individual needs and budgets. Our options are designed to tailor your maintenace costs to efficiently maintain your system.

OPTION 1

TIME AND MATERIALS

Time and Materials (T&M) support is billed on an as needed basis. Level of Effort estimates are provided to the customer for approval prior to commencement.

"A T&M contract is ideal for stable systems that may require periodic support for emergency fixes or minor mainte-nance and enhance-ment. "

OPTION 2

TIME BLOCK OPTIONS

Segue offers support in blocks of time which can be used as needed at any time for up to 1 year. Different packages are available for each time block.

"Time block packages are most popular for special "one-time" projects, or for support on already complete projects."

OPTION 3

ANNUAL PLAN

Segue offers annual packages for monthly support. Each option comes with a fixed rate dependent on the number of hours selected.

"Any overage for annual plans will first be approved by the customer and then billed at the effective rates per each block."