Human-Centered Design Practice

Web Production Steps & Process

Marketing / A361

Live

Web Production Steps & Process

Marketing Content

Web Production Steps & Processes (LIVE Document)

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Contributors

Human-Centered Design Practice

Agenda

Web Production
Steps & Process
Aug 02, 2023

What to expect

This presentation defines the process of making an enhancement to the Customer Experience Platform (CEP). It includes everything that falls within Public Sites Shopping Product Group (and the Web Production PODs), from initiation through to launch.

Web Production POD Feature design process

The Web Production POD Feature design process consists of five core stages: **Define & Design, Legal Review, Development, QE, and Launch**. It's important to note that these stages are a guide. While this is a linear process, multiple tracks of work can happen concurrently during the Define & Design stage, or legal changes could move the project back to the Define & Design stage.

Today

Define & Design

Stage 1
Consists of UX, visual design, copy and Research

Legal Review

Stage 2
Ensure compliance with applicable laws and regulations

Development (Authoring)

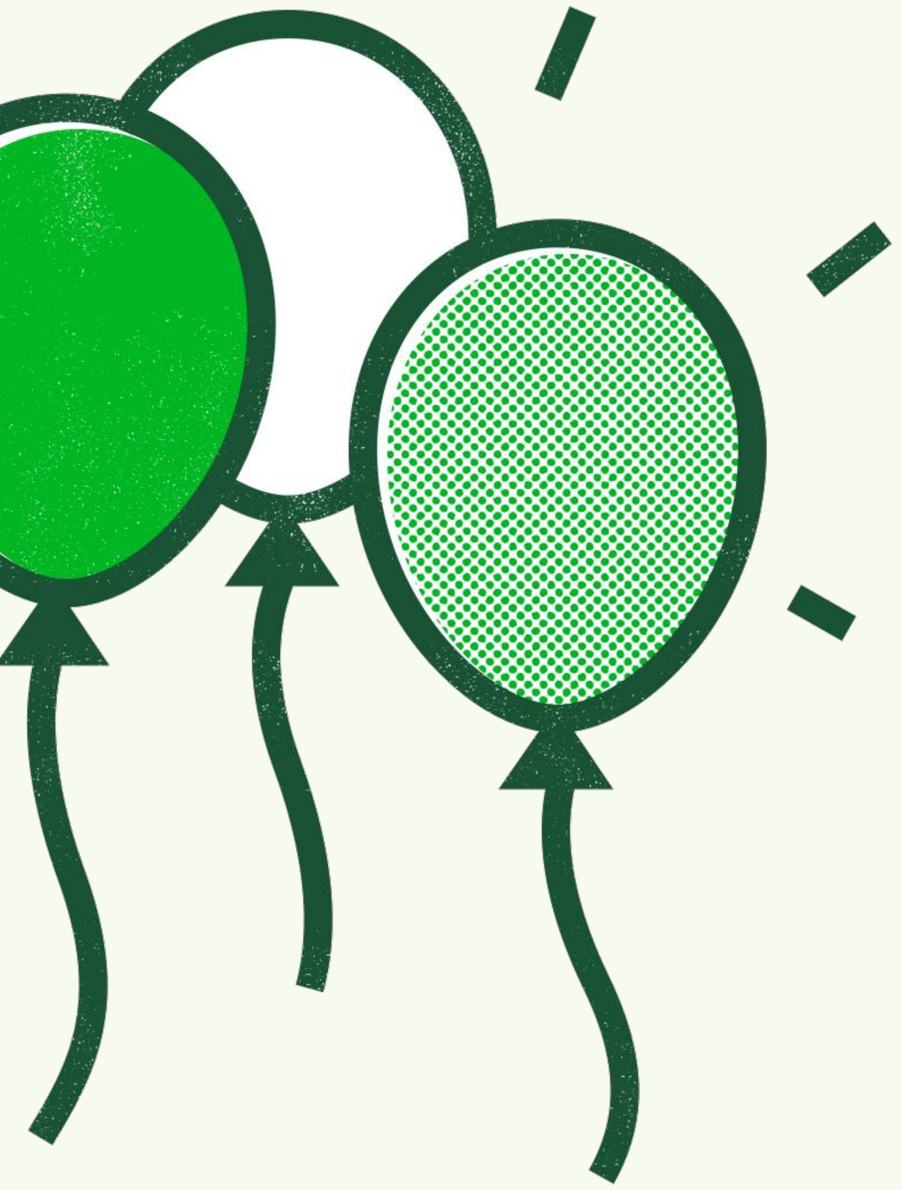
Stage 3
Pages are constructed using available AEM components

Quality Engineer

Stage 4
Pages are tested to catch and correct defects before going live

Launch (Go LIVE)

Stage 5
Pages are pushed to the live site



Journey, Platform or something else

Understanding where your **Feature** belongs in the bigger picture.

So, where does my **Feature** belong?

Features can vary significantly in terms of their size, complexity, and objectives. Understanding where your Feature fits within this spectrum can sometimes be confusing. When work comes directly to the Platform, we need to understand the objective and complexity of the ask. Some factors we use to measure this are:

- Whether content will be net new or existing
- Whether this is for new or existing functionality
- Whether research has been conducted prior to briefing the Design Practice
- Whether we will need user research to validate the approach
- Whether we will need user research to validate the solution

Based on the answers to these questions, which will determine the scope and complexity of the ask, work will go into one of three streams.

Work pathways

1 **Web Production POD -** Additions or changes to the public site, otherwise known as the Customer Experience Platform (CEP).

2 **Design Practice Journey Strategy -** Highly conceptual work that focuses on Horizon 2 and 3. This role sits within the Product Family at the Business/Journey level.

3 **Content Publishing (aka BAU) -** This includes copy changes, templates and other work that does not require Design Practice involvement. If your project requires Content Publishing, then your work will be redirected as these asks are not handled by the Shopping Product Group.

What happens when we need to **evaluate** the approach or solution to a Feature?

A couple things can happen depending on the objective, complexity, and size of the ask. A large Feature with a potential revenue impact will be sent to the Design Practice Journey Strategist if no prior research has been conducted. Smaller Features may not, as not all Features will require us to evaluate the approach or solution.

In most cases, an embedded researcher is available who can perform rapid testing techniques through unmoderated studies. This will have an impact on the duration of the project.

CEP WOF Intake

In order to initiate a Feature, the **first step** is to submit a CEP Work Order Form (WOF) request.

As part of the CEP WOF request process, Business/Journey will be asked to complete an additional form called the Public Site Intake Form, which is intended to clarify feature requirements and identify known interdependencies.

Submitting the CEP WOF request and providing the additional form prior to the Feature Intake Meeting is essential to facilitate a smooth feature initiation process. This way, when the Feature enters the PI Planning phase, the features specified in the form can be considered ready for inclusion in the planning discussions.

Public Site Intake Form

The **second step** in the Feature initiation process is completing the Public Site Intake Form.

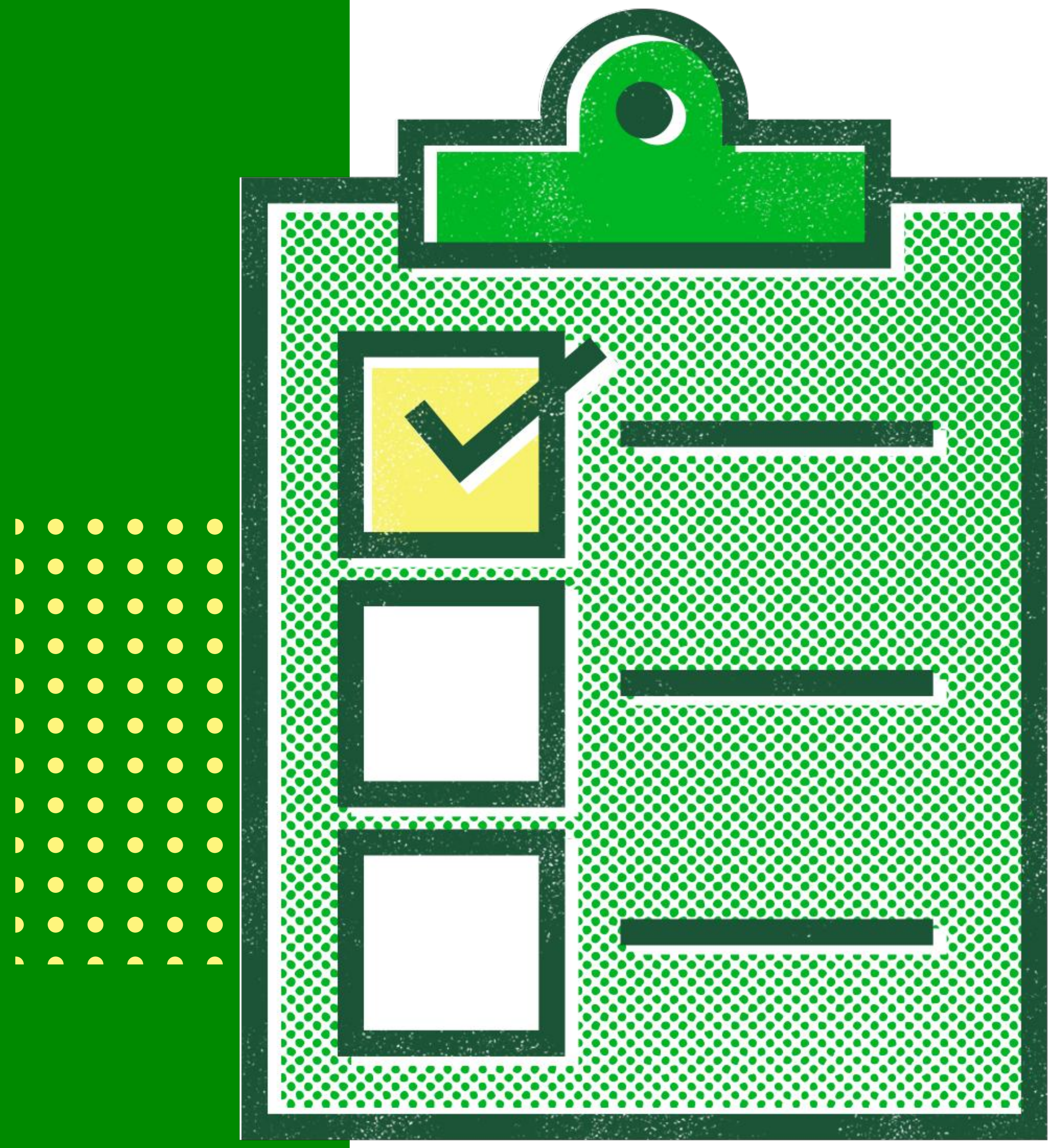
The completion of this form is required before the Feature Intake Meeting (Step 3) can occur.

Completing the Public Site Intake Form helps clarify and summarize the type of work, problem statement, target audience and desired outcome, as well as highlight possible dependencies or technical requirements.

The Feature Intake Meeting is the **third** and final step.

During this step, Partners walk the Feature team through the **Public Site Intake Form.** The larger team will evaluate the information gathered and assess the requirements for design and development of the Feature.

By conducting a Feature Intake Meeting before the Feature Kick-Off Meeting, Business/Journey can set a solid foundation for the Feature, align partners, gather requirements, and identify potential challenges. This helps increase the chances of success and reduces the likelihood of misunderstandings or misalignment after the work has been started.



What happens next to my **Feature?**

Your TD Invent Product Owner will reach out and you will be requested to complete a Feature Brief and, if applicable, Content Outline.

Features will be ready to be considered for QBR and upcoming PI Planning ceremonies.

Roles and responsibilities

Intake

Roles	Involvement	Responsibilities
Feature POD	Responsible	• Review and triage the CEP WOF request • Set up the Feature Intake meeting
Business/Journey (Partners)	Responsible	• Submit CEP WOF request • Completes the Public Site Intake Form • Attends Feature Intake Meeting and walks the Feature team through the Public Site Intake Form • Completes the Feature Brief and Content Outline (if applicable)
Product Owner	Responsible	• Attends Feature Intake Meeting • Shares the Feature Brief and Content Outline with the Business/Journey (Partner) • Clarify the work back schedule • Books upcoming Feature Kick-off Meeting
Human-Centered Design Practice	Consulted	• Assist in CEP WOF triage meeting • Attends Feature Intake Meeting

The **Feature Kick-off Meeting** sets the tone for the Feature, establishes a shared vision and creates a common understanding.

This is a session run by Business/Journey (Partners), which walks the attendees through the **Feature Brief** and **Content Outline.**

1 The **Feature Brief** and **Content Outline** are required a few days before the Feature Kick-Off Meeting and are delivered to the TD Invent Product Owner.

2 **Business deliverable 1: Feature Brief.** The Feature Brief serves as a reference document that ensures all stakeholders have a clear understanding of the Feature's purpose, requirements and expectations. It helps align efforts, manage expectations and guide decision-making throughout the project lifecycle.

3 **Business deliverable 2: Content Outline.** The purpose of a Content Outline is to provide a logical structure, guide the writer's thought process, and ensure all relevant points and information are covered.

Roles and Responsibilities

Kick-Off Meeting

Roles	Involvement	Responsibilities
Business/Journey (Partners)	Responsible	• Shares the Feature Brief and Content Outline with the Product Owner • Walks through the Feature Brief and Content Outline at the Feature Kick-Off Meeting
Product Owner	Accountable	• Shares the Feature Brief and Content Outline prior to the Feature Kick-Off Meeting with the POD • Sets up the Feature Kick-Off Meeting (based on the complexity of the project, two meetings may be required to go through each document)
UX Designer	Accountable	• Reviews the Feature Brief and Content Outline prior to the Feature Kick-Off Meeting • Raises questions or concerns during the Feature Kick-Off Meeting
Visual Designer	Accountable	• Reviews the Feature Brief and Content Outline prior to the Feature Kick-Off Meeting • Raises questions or concerns during the Feature Kick-Off Meeting
Publishing	Informed	• Reviews Feature requirements and expectations
QE	Informed	• Reviews Feature requirements and expectations

Wireframes steps & milestones

Step 1: Wireframes creation begins
Initial creation of the Feature wireframes.

Step 2: Wireframes review
Wireframes are reviewed by Partners.

Step 3: Wireframes approval
Partners approve wireframes.

Note: High Fidelity Visual Designs
Visual Designer begins to create the High Fidelity Visual Designs.

The **Design Practice** creates the Feature **Wireframes**.

Wireframe creation is the process of designing the skeletal framework of a digital interface or webpage. It involves creating a simplified, black-and-white layout that outlines the structure, placement, and functionality of key elements within the interface, such as navigation menus, content sections, buttons, forms, and other interactive components.

Wireframes are reviewed by Partners.

The primary purpose of reviewing wireframes is to gather feedback, iterate on the design, and ensure that the final product meets the needs of its intended audience.

Wireframes Approved by Partners.

The Wireframe approval is a crucial milestone in the design process as it signifies the agreement and alignment of partners regarding the proposed design direction. It ensures the wireframes meet the requirements, objectives, and expectations of the Feature, and sets the stage for subsequent design and development activities.

High Fidelity Visual Design Starts

After Partner approval of the wireframes, the Visual Designer can begin to create the High Fidelity Visual Designs (HFVD), or wait until the MCD is approved. The HFVD will be used by development to create the web page.

Roles and responsibilities

Wireframe Creation and Approval

Roles	Involvement	Responsibilities
Business/Journey (Partners)	Accountable	• Reviews wireframe(s) and provides feedback • Approval when all concerns are addressed
Product Owner	Accountable	• Book wireframe walkthrough with all required partners • Clarifies image sourcing responsibility
UX Designer	Responsible	• Creates the wireframe(s) • Validates the experience with members of the Design Practice • Validates any technical aspects of the design solution • Revises and shared the wireframe based on partners suggestions and requirements
Visual Designer	Responsible	• Reviews the wireframe • Clarifies the use cases of images/illustrations that should be added to the wireframe • Creates the High Fidelity Visual Designs

Master Copy Deck (MCD) steps & milestones

Step 1: Master Copy Deck (MCD) is made available
MCD created by Agency 361 is provided by Partners.

Step 2: MCD review meeting
MCD is reviewed by the Design Practice and Partners.

Step 3: MCD approval
MCD is approved by Partners.

Step 4: MCD legal review and approval
Legal reviews to ensure the project is compliant.

Step 5: MCD translation
MCD is sent out for language translation.

The **Master Copy Deck (MCD)** created by Agency 361 is shared with the Design Practice.

Partners take the approved Wireframes to create the first draft of the MCD and SEO keywords.

Component copy requirements
Character count limits must be followed for each component.

Master Copy Deck is reviewed by the Design Practice and Partners.

The Business/Journey (Partners) reviews the MCD and consolidates feedback from all required stakeholders. An **MCD review meeting** is then held to discuss recommendations and concerns, and clarify any points of feedback.

A total of two MCD reviews will take place. The MCD review meeting is the first of those sessions. The following review is completed over email (a meeting can take place if required/requested).

The final **Master Copy Deck (MCD)** is approved by Partners.

Once all the content has been written, reviewed, and refined by the Design Practice and Partners during the two review sessions, Partners provide final approval.

It is important to note that the copy approval process can vary depending on the project's complexity and the number of Partners involved.

Legal reviews the final **Master Copy Deck (MCD)** provided by Partners.

Partners share the final Master Copy Deck (MCD) with legal to secure their approval. The legal approved copy deck is shared with the Design Practice and is reviewed for any changes that impact the MCD or wireframes. This can trigger an additional round of Wireframes and copy review.

It is important to note that images need to be sourced prior to legal review as image alt tags may need to be created and translated.

Once the final Master Copy Deck (MCD) is approved by legal, **translation** can begin.

Partners share the translated MCD with the Design Practice and the MCD is reviewed for a final time. The MCD is then made available for Publishing.

Roles and Responsibilities

MCD creation, review, approval, and translation

Roles	Involvement	Responsibilities
Business/Journey (Partners)	Responsible	• Takes the approved wireframe to Agency 361 to create the master copy deck (MCD) including SEO keywords • Shares the MCD with the Design Practice • Approves MCD • Shares the final MCD, after all concerns are addressed during MCD reviews with legal • Shares the lifestyle images with Design Practice • Shares the Legal approved MCD with the Design Practice • Sends the the legal approved MCD for translation after Design Practice review • Shares the translated MCD with the Design Practice
Product Owner	Informed	• Books the MCD Review Workshop meetings • Raises the possible risk to Partners in case of any legal changes which impact the design
UX Designer	Responsible	• Reviews the MCD and shares concerns during the MCD review meetings/workshops • Updates Wireframes when reviewing the MCD, if necessary • Recommends copy changes if it improves the user experience • Reviews the legal-approved MCD • Reviews the translated MCD • Makes MCD available for Publishers in SharePoint

Roles and Responsibilities cont.

MCD creation, review, approval, and translation

Roles	Involvement	Responsibilities
Visual Designer	Responsible	• Reviews the MCD and shares concerns during the MCD review meetings/workshops • Reviews the wireframe in case wireframe is updated during the MCD review • Reviews the legal-approved MCD • Sends the request to create required icons/illustrations after legal approval • Reviews the translated MCD • Reviews images sourced by Agency 361

Visual Design steps & milestones

Step 1: Visual Designs created
High Fidelity Visual Designs (HFVD) are created and reviewed internally.

Step 2: Sourced images are provided
Images are provided by Partners.

Step 3: Source/Create visual assets
Icons, illustrations are sourced.

Step 4: Visual assets approval
Partner icon, illustration, image approval.

The Wireframes are converted into **High Fidelity Visual Designs**.

The Visual Designer builds the High Fidelity Visual Designs (HFVD) and adds in all the visual assets such as icons, illustrations, and images. Final copy will not be added to the HFVD.

Partners provide any sourced **images**.

Marketing and Agency 361 source and size the images to be used, and to have them made available for the Design Practice to add to the Feature.

Image timing
It is important to note that images need to be sourced prior to legal review as image alt tags will need to be created and translated if images are not considered lifestyle.

Icons, and illustrations are sourced.

At the same time the wireframes are being converted into High Fidelity Visual Designs, icons, and illustrations are sourced from the available libraries.

New icon/illustration requirements

For new icons and illustrations that need to be created, a separate intake will be sent to the Design System Brand Experience Team. This is the team responsible for creating the assets.

Visual assets are approved by partners.

The Visual Designer completes a final check with Partners for approval of visual assets before moving to the development of the page(s). Final assets will be available in Figma for Publishing.

Roles and responsibilities

Visual Design Creation

Roles	Involvement	Responsibilities
Business/Journey (Partners)	Responsible	• Marketing sources life-style images and provides to the Design Practice • Review icons / illustrations • Approve icons / illustrations / images
Product Owner	Accountable	• Ensures all Marketing images are received in a timely manner • Sets up review and approval meetings (POD determined)
UX Designer	Accountable	• Reviews the high fidelity visual designs • Reviews icons / illustrations / images
Visual Designer	Responsible	• Creates the high fidelity visual designs • Source icons / illustrations • Ensures that the final high fidelity visual designs align with TD's Design Guidelines and Standards • Makes visual assets available for Publishers in SharePoint
Design System Brand Experience Team	Responsible	This team is involved **only** when new icons or illustrations need to be created. In such situations, the Visual Designer sends a separate intake to this team requesting new icons/illustrations.

Page development steps & milestones

Step 1: Design/Developer refinement session
Walkthrough of the design files.

Step 2: Page development
Software engineers develop the page(s).

Step 3: Page (authoring) review
Detailed page review to capture defects.

Step 4: Page launch
Project files are uploaded to the LIVE site.

Step 5: Live page review
Quick post launch page review to ensure nothing is broken.

Once the designs are finalized and approved, a **design / developer refinement session** will occur before page development begins.

During the backlog refinement ceremony, the designers explain the overall design vision, layout, functionality, and user interactions. They may showcase wireframes or mockups to provide a visual representation of the design. This walkthrough allows the development team to gain a clear understanding of the design requirements, ask questions, provide feedback, and ensure alignment between design and development before the implementation phase.

Having a clear understanding of the Feature, **page development** can begin.

As development takes place, frequent collaboration between developers, designers and product owners will occur as continuous refinement to the page is made.

Once complete, authoring links will be made available for QE, Design Practice and Business/Journey (Partners) to review.

Once in Authoring, a detailed **review** of the page(s) are performed to capture and correct any defects.

Quality Engineer

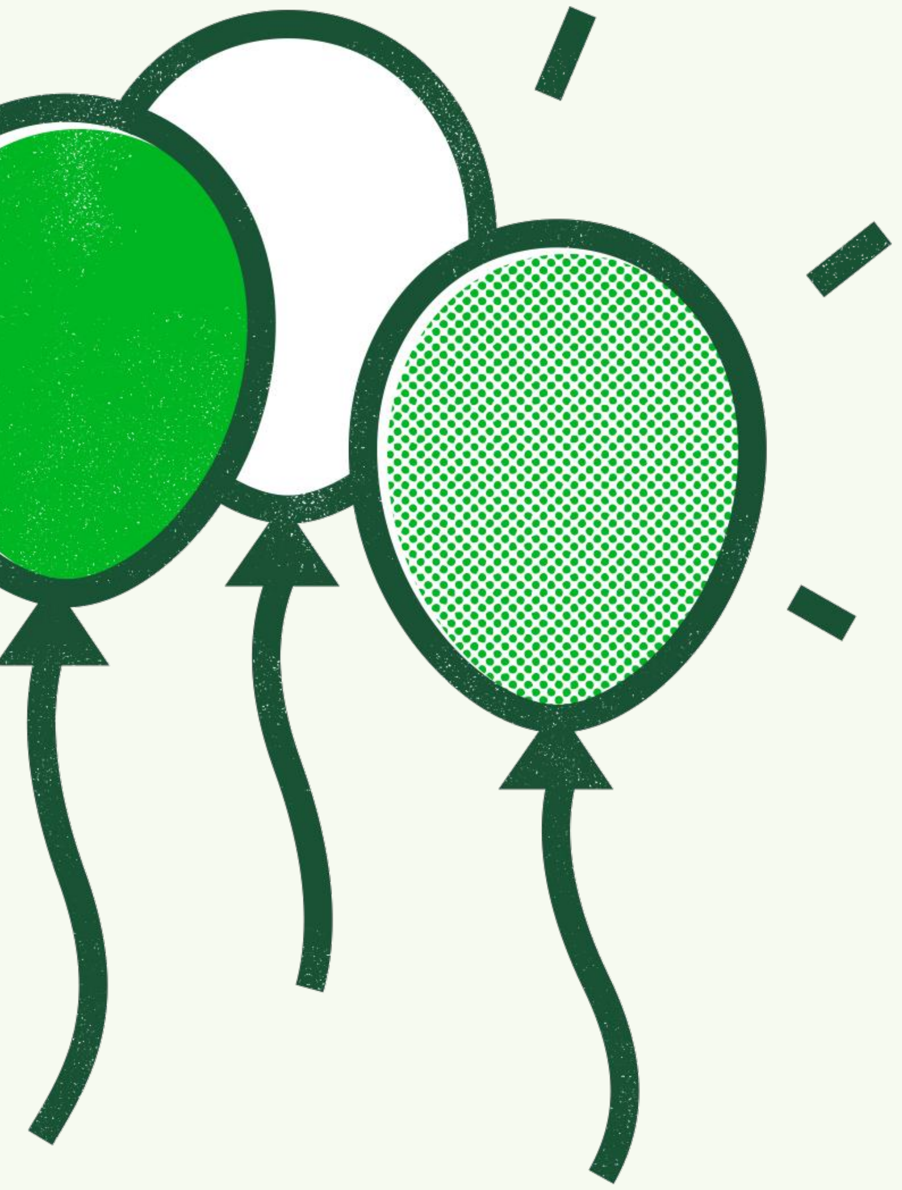
Ensures the page meets the desired quality standards.

Design Practice

Primarily focused on evaluating the visual aspects, user interface, and user experience of the page.

Partners (Business)

Ensures the page meets the defined business requirements, and objectives.



Feature launch

When all **Partner** and **Design Practice** concerns are addressed, the Publishing team launches the page.

All team members participate in a quick **page review** and raise any concerns.

Publishing addresses any post-launch concerns raised by the larger group.

Roles and Responsibilities

Page development, review, and launch

Roles	Involvement	Responsibilities
Business/Journey (Partners)	Responsible	• Review the authoring pages • Shares concerns after their review • Quick review of the live pages
Product Owner	Accountable	• Shares the authoring links with Business/Journey (Partners) • Share Business/Journey (Partners) feedback with the POD • Sends out a notification email to let the team know that the Feature is live
UX Designer	Responsible	• Walks Publishing and QE through the final HLVD during the Refinement Session • Review the authoring pages • Reviews business feedback • Shares concerns with Publishing and QE • Quick review of the live pages
Visual Designer	Responsible	• Review the authoring pages • Reviews business feedback • Shares concerns with Publishing and QE • Quick review of the live pages

Roles and Responsibilities cont.

Page development, review, and launch

Roles	Involvement	Responsibilities
Publishing	Responsible	• Reviews the final visual designs and bring any questions that need further clarification to the design team before starting the implementation phase • Creates the authoring links for testing • Fixes defects raised by the Design Practice and Business/Journey
QE	Responsible	• Review the authoring pages • Logs defects from QE, Design Practice and Business/Journey • Quick review of the live pages

Resources

Resources

- CEP Work Order Form (WOF)
- Public Site Intake Form
- Feature Brief
- Content Outline Template
- Master Copy Deck (MCD) Template

Design Process Enhancements

Design process enhancements to improve efficiency.

Enhancement	What's changed?
Public Site Intake Form	**New document** - A Public Site Intake Form was added during CEP WOF submission aimed to clarify the type of work, problem statement, target audience, desired outcome and to highlight possible dependencies or technical requirements.
Project Kick-off Meeting	**Name change** - Formerly known as Envisioning on some PODs. This meeting sets the tone of the project and establishes a shared vision and a common understanding. Partners walk the attendances through the Project Brief and Content Outline during the meeting.
Project Brief	**Document revision** - The Envisioning and High Level Requirements documents were merged into one document called the Project Brief. The Project Brief serves as a reference document that ensures all partners have a clear understanding of the project's purpose, requirements, and expectations. It helps align efforts, manage expectations, and guide decision-making throughout the project lifecycle.
Wireframes	**Name change** - Formerly known as High Level Designs (HLD). A simplified, black-and-white layout that outlines the structure, placement, and functionality of key elements within the interface.
MCD Review Meeting	**New meeting** - The Design Practice shares their recommendations/concerns after reviewing the MCD. This applies to MCDs that have been modified by Partners and Agency 361.

Design Process Enhancements Cont’d

Design process enhancements to improve efficiency.

Enhancement	What’s changed?
High Fidelity Visual Designs Hand-off	**Meeting Revision** - During the scrum refinement session, the designers share the HFVD to showcase the overall design vision, layout, functionality, and user interactions.
Visual Assets added in Figma	**Step Revision**: Visual assets such as the icons, illustrations and images are added to the High Fidelity Visual Designs in Figma (design tool) and not added to the MCD anymore. This allows designers to create, edit and collaborate on designs with ease.

Design process enhancement timeline.

CEP Work Order Form (WOF) request

Starting your Feature

Wireframe Creation

MCD Creation

Scrum Refinement Session

Visual Assets

Public Site Intake Form

NEW DOCUMENT
Mini Feature Brief aimed to clarify the type of work during the Feature intake meeting.

Feature Brief

DOCUMENT REVISION
Envisioning and HLR documents merged for simplicity.

Feature Kick-off Meeting

NAME CHANGE
Formally known as the Envisioning Session

Wireframes

NAME CHANGE
Formally known as High Level Designs

MCD Review Meeting

NEW MEETING
Design Practice reviews with Business/Journey

High Fidelity Visual Design Hand-off

MEETING REVISION
Design Practice shares the HFVD instead of wireframes with Publishing

Visual Assets Removed

STEP REVISION
Visual assets are added to the High Fidelity Visual Design instead of the MCD

Glossary

Term	Definition
CEP	Customer Experience Platform.
Feature	Features are distinct functionalities and may vary in terms of their size and complexity. They are the building blocks of the system and are broken down into user stories and tasks for development.
Platform	Underlying technology or foundation affecting the additions and changes to the public site, also known as the Customer Experience Platform (CEP).
Design Practice Journey Strategy	Highly conceptual work that primarily focuses on Horizon 2 and 3 work.
HCDP	Human-Centered Design Practice.
BAU (Business as Usual)	Content Publishing. Handles only copy changes, templates and other work that does not require Design Practice involvement.
WOF	Work Order Form.
Public Site Intake Form	Form that helps clarify and summarize the type of work, problem statement, target audience, desired outcome and highlight possible dependencies or technical requirements.
Project Intake Meeting	Partners walk the project team through the Public Site Intake Form during this time. The larger team will evaluate the information gathered and assess the requirements for the design and development of the feature.

Glossary

Term	Definition
Project Kick-off Meeting	This meeting sets the tone for the project, establishes a shared vision, and creates a common understanding.
Project Brief	The project brief serves as a reference document that ensures all partners have a clear understanding of the project's purpose, requirements, and expectations. It helps align efforts, manage expectations, and guide decision-making throughout the project lifecycle.
Content Outline	The purpose of a content outline is to provide a logical structure, guide the writer's thought process, and ensure that the content covers all the relevant points and information.
Wireframes	A simplified, black-and-white skeletal framework of the web page outlining the structure, placement, and functionality of key elements within the interface such as navigation menus, content sections, buttons, forms, and other interactive components.
SME	Subject Matter Expert.
MCD	Master Copy Deck.
High Fidelity Visual Designs (HFVD)	Visual Designer builds the High-Fidelity Visual Designs based on the wireframes and adds in all the visual assets such as the icons, Illustrations and images.
Visual Assets	Icons, illustrations and Images.
Design / Developer refinement session	Designers showcase the visual designs to explain the layout, functionality, and user interactions to ensure alignment between design and development before the implementation phase.