



Design Process Cheatsheet for PMs

This document maps out the full UX process. Discussions should be had with your UX and other team members to determine if any steps should be adjusted. Every project is different and this process should be personalized to meet project needs.*

**Note that UX can adjust for a short project timeline but critical steps may need to be skipped which can later lead to a potential increase in design/tech debt due to missed user needs, poor market fit, less user friendly UI etc.*

About the process

1. **Collaborative:** Involve UX (designer, writer), the Center, and Tech from Day 1.
2. **Data-Centered:** Make decisions grounded in research.
3. **Transparent:** Document and communicate at every step.

Process breakdown

1. Discovery Phase (Pre-Project Work)

Timeline: 2 weeks to 12 months*

**Please check with UX to get a more specific timeline.*

Objective: Understand users, market, and problem space.

Key Actions

- Create initial hypothesis or set of hypotheses to validate
- Develop research plan
- Execute research

Roles to include

UX Strategist and/or UX designer

- Champion user/business needs.
- Identify research needs
- Guide early strategy

UX Researcher

- Gather and analyze insights
- Define discovery work needs
- Validate assumptions and map research gaps

UX Content Designer

- Audit and analyze existing content gaps
- Content strategy alignment with stakeholders
- Gain context on the history of the product

The Center (Research Experts)

- Identify research questions
- Identify data sources, and then collect and analyze data
- Support understanding of user contexts via current literature/research

Tech Lead

- Provide technical context early
- Highlight technical feasibility or constraints

2. Define Phase (Early Project Work)

Timeline: 1 week to 1 month*

**Please check with UX to get a more specific timeline.*

Objective: Clarify problems, goals, and measurable outcomes.

Key Actions:

- Formulate a validated problem statement.

- Define project objectives and scope.
- Identify and confirm technical constraints.
- Problem prioritization
- Content Design POV

Roles to include

UX Strategist

- Ensure business and user needs are incorporated into the planning.
- Coordinate demos and strategy alignment.

UX Designer

- Prioritize features based on user impact, business needs, and technical constraints.
- Collaborate cross-functionally to define design direction.

UX Content Designer

- Recommendations about what content work should be done
- Document content strategies and guidelines for consistency
- Collaborate on user flows/journeys.

The Center

- Bring research expertise to define success criteria and metrics.
- Support measurable project outcomes.

Tech Lead

- Assess technical feasibility and complexity.
- Recommend technically viable solutions.

3. Design Development Phase (Explore & Collaborate)

Timeline: 1 week to 1 month*

**Please check with UX to get a more specific timeline.*

Objective: Build, test, and iterate on design solutions.

Key Actions:

- Translate insights into UI/UX solutions.
- Conduct user testing and iterate designs.

- Finalize specifications for development handoff.

Roles to include

UX Designer

- Develop user interfaces and interactions.
- Conduct user tests and apply feedback iteratively.
- Document design decisions and maintain UI consistency.
- Review final UI before QA phase.

UX Content Designer

- Write and validate UX microcopy.
- Organize "namestorms" for terminology brainstorming.
- Support UX designers during user testing and iterations.

UX Strategist

- Provide consulting support to ensure design aligns with strategic goals.

Tech Team

- Work closely with design to ensure the solution is technically feasible.

4. Deliver & Evaluate

Timeline: 2 weeks to 3 months*

**Please check with UX to get a more specific timeline.*

Objective: Ensure quality handoff, gather post-launch data, and identify future opportunities.

Key Actions:

- Finalize and deliver assets to development.
- Conduct UI reviews during build phase, before QA.
- Track user adoption, satisfaction, and business impact.
- Conduct retrospectives to gather lessons learned.
- Identify enhancement opportunities or future research needs through analytics, A/B testing, user interviews, feedback etc

Roles to include

UX Designer

- Provide design clarification.
- Review implementation to ensure design fidelity.
- Analyze usability outcomes post-launch.

UX Content Designer

- Review final content in staging and production.
- Ensure consistency in tone and terminology.
- Identify content improvements from user feedback.

UX Strategist

- Lead post-launch evaluations and data reviews.
- Align lessons learned to future projects or enhancements.
- Coordinate metrics reporting and stakeholder communication.

The Center

- Follow-up with the project KPI metrics and other relevant metrics
- Analyze user behavior and satisfaction post-launch, as needed.
- Work with the rest of the team to design on-going plans for product evaluation.
- Recommend further research if gaps remain.

Tech Team

- Execute final implementation and QA.
- Monitor technical performance.
- Flag issues for future design consideration.

Resources

- [Detailed design process](#)
- [About the design process documentation](#)
- [Design journey documentation template](#)
- [Success metrics documentation template](#)