

The Full UX Design Process

Summary

This document outlines the recommended UX approach that all associated teams should follow to implement a structured, design-forward plan covering the definition, ideation, design, and testing phases needed to successfully deliver a fully implemented experience.

IMPORTANT NOTES

- This process is ideally applied to new initiatives and products, but the team is encouraged to adapt it pragmatically when working on existing products. Designers should tailor the steps based on project needs.
- Cross-functional collaboration between PMs, UX designers, and engineers is essential for aligning user needs, business goals, and technical feasibility throughout product development. This partnership prevents costly misalignments and ensures teams deliver feasible, user-centered solutions on time.
- For internal, *non-customer-facing tools*, using design system components is optional, but is encouraged for quicker development. Teams may use alternatives like AI-generated UI or wireframes, as long as the UX foundation (IA, flows, personas, etc.) is clearly defined before UI execution. *This is strictly for internal products/projects as an alternative when speed is a priority over UI experience.*

●● PHASE 1

Design Documentation and Planning

During this phase, the lead UX designer creates design documentation based on scope documents and requirements provided. Using the UX Design Process template, this design documentation outlines the entire project journey, including process workflows, deliverables, and project timeline based on established UX methodologies.

Review Project Scope and PRD

Lead UX designer will evaluate the scope of the project and review the relevant Product Requirements Doc (and other pertinent documentation) provided by the PM and team.

Complete UX Design Process Document Template

Lead UX designer will fill out the UX Design Process Document template with the proposed phases of implementation for the initiative and have the completed documentation peer reviewed by designated team member(s). Once complete, the UX designer will share the completed document with PM and TPM for review and approval.

Key Contributors, and Collaborators

List the following team members:

- Lead UX Designer
- Support UX Designer(s)
- UX Researcher
- Other contributors and collaborators (e.g. PM, EM, etc)
- Process approvals needed/required

● PHASE 2

Research/Discovery

This initial discovery phase focuses on clearly identifying the project/initiative and understanding user needs. It could include parts or all of the following:

Define Problem Statement and User Needs

During this phase, the lead UX designer establishes problem definitions for various user segments and documents specific user needs based on experience level and workflow context.

Conduct Research

The UX Designer or UX Researcher will conduct various forms of research to identify and understand user needs, best practices, and inspiration; analyze current interfaces and usage data across platforms and products; and consider how to identify specific pain points and establish metrics for measuring improvement.

Types of Research That Could Be Used

The following are forms of research we could conduct to understand user needs, behaviors, and pain points

- **In-depth User Interviews** – One-on-one conversations with current users to understand their habits, frustrations, and goals
- **Contextual Inquiry** – Observing users in their natural environment as they use features to see authentic behaviors
- **Usability Testing of Current Solution (Baseline)** – Watching users attempt specific tasks with the existing interface to identify pain points
- **Survey Research** – Collecting quantitative data from a larger sample about preferences and satisfaction
- **Analytics Review** – Analyzing logs and user behavior data to identify common queries, abandonment rates, and patterns
- **Competitive Analysis** – Evaluating experiences in similar products to identify best practices and opportunities
- **Card Sorting** – Having users organize content categories to understand their mental models
- **Heuristic Evaluation** – Assessing the current interface against established usability principles

Note: Documentation staff will contribute and weigh in throughout the full UX Design process.

● PHASE 3

Ideation/Concept Design

In ideation and concept design, we explore multiple potential solutions to the problems identified during research. The goal is to generate approaches that address user needs before committing to specific design directions.

Synthesize Discovery Findings

The UX Designer will organize research data and user insights into actionable design opportunities, highlighting key pain points and user needs.

Establish Design Direction

The UX Designer will document actionable design opportunities into a systematic, planned cadence of initial design implementation, and select ideation techniques for the design process (see *Types of Ideation/Concept Design* list below).

Identify Documentation Scope

The Documentation staff to evaluate and determine the scope of client-facing documentation and the degree of visibility based on existing release phases.

Types of Ideation/Concept Design

The following are forms of design iteration we could use to generate a clear design approach.

- **Collaborative Sketch Workshop** – Conduct a sketch session with cross-functional team members to generate ideas and solutions that address the identified problems.
- **Information Architecture** – Create the structure of the content in the final product.
- **Wireframes** – Create low-fidelity wireframes that map key user flows and interaction patterns by designing very simplified versions of the interface that focus on the layout and the basic elements.
- **Refine Wireframes** – Iterate the initial sketches or wireframes into mid-fidelity wireframes that further define specific interface components needed to support the user's needs.
- **AI:** leveraging AI in the ideation phase to quickly generate and explore design concepts, empower the design team to lead with stronger ideas, and use AI-driven testing to validate directions early and efficiently.

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●● PHASE 4

Design Refinement/Prototyping

The design phase turns wireframes into visual designs that show how the interface will look and function.

Create High-Fidelity Designs

The UX Designer will transform the approved wireframes into polished, detailed visual designs that incorporate the design system, interactive elements, and finalized copy.

Develop Interactive Prototypes

The UX Designer will build functional prototypes that simulate the actual user experience, allowing stakeholders and test users to interact with the interface, evaluate result displays, and test capabilities across different scenarios.

QA Initial Review

Once high-fidelity designs have been prepared and the UX team has completed their internal design review, engage QA as part of that same review stage.

In practice, this means the associated ticket moves to a Testing column — where it currently might move directly to Done — giving QA the opportunity to quickly review the designs. QA can then either move the ticket to Done or leave feedback if anything needs clarification.

Engaging QA in an early review of high-fidelity designs and prototypes to surface blind spots — including missing UI states, edge cases, and testability concerns — while design is still fluid enough to rethink or adjust without a significant impact on timelines.

Produce & Validate Technical Documentation Draft

Documentation staff will use the design prototype and internal developer notes to create the initial draft of client-facing technical documentation.

● PHASE 5

Validation/Testing

The validation phase tests designs with real users to ensure the design interface works as intended and meets their needs before building the final product.

Conduct Usability Testing

The UX Designer will facilitate structured testing sessions (moderated or unmoderated) with representative users to observe their interactions with the prototype, collect feedback on pain points, and measure success against predefined metrics for effectiveness.

Iterate Based on User Feedback

The UX Designer will refine the design based on usability findings, addressing any discovered issues while maintaining alignment with user needs and business requirements before finalizing for development.

Produce & Validate Technical Documentation Draft

Documentation team will use the design prototype and internal developer notes to create the initial draft of client-facing technical documentation.

QA Validation

Share finalized, user-tested designs with QA for a structured review. At this stage, designs reflect a clear, stable direction — giving QA a complete picture to evaluate rather than a moving target.

QA will:

1. Review designs for testability, flagging any missing UI states, interaction gaps, or unclear error handling.
2. Identify any missing or inconsistent Testing IDs required for automation.
3. Provide a consolidated list of findings for UX and PM review; any critical items are resolved before the freeze.

4. Formally signs off, confirming designs are ready to proceed to Design Freeze.
5. Begin drafting test plans and automation strategies based on the reviewed designs, so the team is ready to hit the ground running the moment development starts.

Note: Documentation staff will contribute and weigh in throughout the full UX Design process.

Design Freeze – Marketing Assets Developed

All design specifications and requirements are locked in, preventing further changes to allow the development team to focus on implementation and production. This ensures stability and prevents scope creep that could delay timelines, and allows the Technical Writing team to prepare and finalize the documentation (see below).

● PHASE 6

Client-Facing Technical Documentation

The technical documentation phase ensures changes and additions to client-facing features are captured in an appropriate and timely manner in our client-facing technical documentation.

Scoping and Drafting completed in steps 3 & 4

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Finalize & Review

The Technical Writing team will have finalized copy reviewed and signed off on by SMEs.

Publish & Monitor

The Technical Writing team will launch new documentation and use analytics tools to monitor for negative or positive reception.

Post-Launch Improvement and Iteration

Monitor post-launch analytics and gather user feedback to measure design success and inform data-driven optimizations for ongoing development and iteration.