



Hypothesis-Driven Design For Editorial Projects

A guide to taking a user-centered and evidence-based approach to the planning and design of editorial projects.

INTRODUCTION

What is Hypothesis-Driven Design?

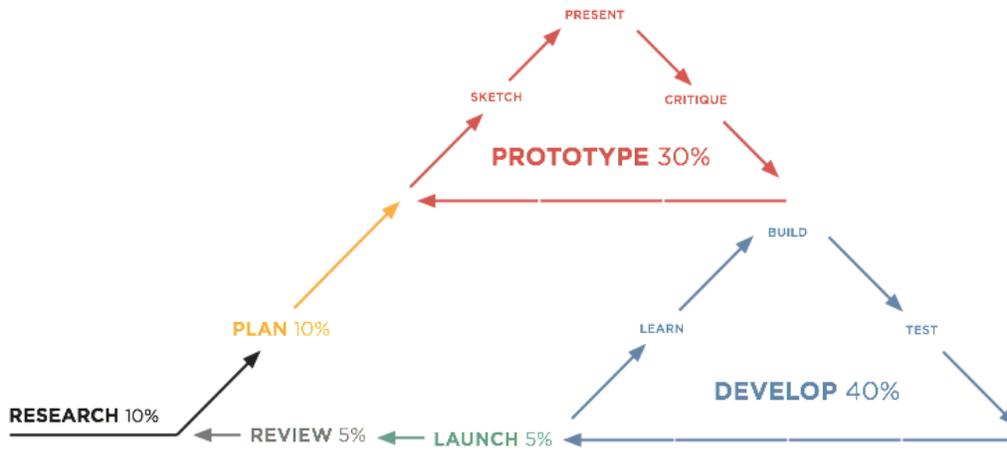
Hypothesis-Driven Design (or HDD for short) is a problem solving method that helps editorial teams take a user-centered and evidence-based approach to the discovery, design, and development of new storytelling projects.

The word “hypothesis” might conjure up images of science fair projects. If you think back to science experiments in school, you’ll remember that the purpose of a hypothesis is to offer an explanation for a phenomenon. Then you conduct an experiment to see if your explanation was right. Through testing, you prove or disprove your hypothesis.

You follow a similar process with HDD. Starting with an existing approach, you and your team form an educated guess about how you might improve the approach. Using experiments, you measure and learn from what works and what doesn’t.

Like [Lean UX](#) and GV’s [design sprint methodology](#) (both of which HDD draws inspiration from) HDD’s focus on experimentation is something that distinguishes it from design approaches that may only focus on layout and presentation. While experimentation is helpful when exploring new approaches, it is also risky. You can waste a lot of time with bad guesses and conflicting viewpoints. To increase the likelihood of success, HDD provides teams with a structure for developing an informed and shared opinion to test and learn from in quick and lightweight ways.

Any project that utilizes a design methodology will typically contain a *discovery*, *design*, and *development* stage. In the discovery stage, the team conducts research to learn about the problem they are trying to solve; in the design stage, the team explores possible solutions to the problem; and in the development stage they build the best available solution. While the size of each stage will vary based on the size and complexity of a project, the fundamental structure remains consistent.



An overview of the stages in a Hypothesis-Driven Design project. While timelines will depend on the unique needs of the project, this is a common distribution of time: Research 10%, Planning 10%, Prototyping 30%, Development 40%, Launch 5%, and Review 5%. Note that the review arrow points back to the research stage to indicate that the goal of the review stage is to distill what was learned in the project to inform subsequent versions of the project.

How to use this guide

The guide is organized into sections that correspond to the six stages of an HDD project (shown above). When using HDD for the first time it is advisable to complete all the steps in each stage to get a feel for the value they provide. Over time, you may find that some steps can be combined and other steps skipped for certain situations. HDD is not a rigid process, so do what works best for you and your team.

To help jumpstart your work with HDD, the guide includes templates for each step in the process. The templates include the following icons to indicate the type of activity involved:



Research



Planning



Meeting



Iteration



User Testing

A printable checklist of HDD steps

Research Identify the project's goals

- Develop The Project Pitch
- Research The User, Opportunity, And Problem
- Identify KPIs (Key Performance Indicators)
- Write The Problem Statement
- Start A Content Inventory
- Write The Project Brief

Plan Build shared understanding of the project's goals

- Hold A Kickoff Meeting
- Conduct Independent Research
- Hold An Assumptions Meeting
- Create An Affinity Map

Prototype Sketch out an approach to use as a starting point for development

- Hold Sketching Sessions
- Work On Story Reporting and Prototyping
- Finish The Content Inventory
- Write Hypothesis Statements
- Have Users Test Your Prototypes

Develop Build, test and improve your approach

- Hold A Hypothesis Review Meeting
- Hold A Development Kickoff Meeting
- Write User Stories
- Begin One-Week Iterations Of Work
- Hold An Iteration Planning Meeting
- Hold A Daily Scrum
- Hold An Iteration Review
- Hold An Iteration Retrospective
- Conduct Development Stage User Testing
- Conduct Development Stage Functional Testing
- Create An Analytics Plan
- Designate The Project As Ready To Publish

Launch Create a publishing plan

- Hold A Launch Planning Meeting
- Write A Launch Plan
- Create A Media Kit
- Conduct Launch Stage Functional Testing

Review Document what the team has learned

- Write An Analytics Report
- Hold A Team Retrospective
- Write A Retrospective Report
- Clean Up The Project's Code and Documentation

Roles and responsibilities

All projects benefit from a diversity of perspectives. In HDD, a cross-disciplinary team is critical to help manage the risks of faulty assumptions and unknowns. As the project progresses, the team will naturally develop a refined understanding of the best approach, so the work of the team is structured around the idea of building, measuring, and learning in a collaborative and iterative way.



From left, Team members Wes Lindamood, Kainaz Amaria, Claire O'Neill, and Alyson Hurt discuss the structure of the project Planet Money Makes A T-Shirt. HDD projects are collaborative and cross-disciplinary. Group edits, sketching sessions, and daily face-to-face meetings are common practice for the process. *Credit: Brian Boyer*

Each member of your team has a unique background and set of assumptions about how to approach the project. To avoid misunderstanding, HDD sets ground rules for team participation. By setting clear expectations about who is responsible for completing a step in the process, and who is accountable for ensuring the work is complete, the HDD team can focus on the work and not the process by which the work should be completed.

The Team and the Stakeholders

Broadly speaking there are two groups of people involved in an HDD project: The Team and the Stakeholders. The Team consists of the individuals actively involved in the development of the project. Stakeholders are colleagues that have a vested interest in the outcome of the project, including managers that will need to sign off on the project so it can be published. While Stakeholders do not attend every meeting, they need to be available to provide feedback during important milestones in the project. For example, at the project's kickoff meeting, Stakeholders will meet with the Team and confirm there is a shared understanding of the project's goals, resources, and milestones. At the hypothesis review meeting, the project team will meet to confirm there's a shared understanding of how the Team will evaluate the approach. And in iteration reviews during the development stage, the Team will meet with Stakeholders to gather feedback on the status of the project.

Team roles for a digitally focused HDD project

Listed below are the common roles you will find on a digitally focused HDD project. Because HDD is highly collaborative, it helps if the Team can sit together for the duration of the project and be available for all steps in the planning, prototype, and development stages. Ideally, each role on an HDD team is filled by a single individual. Having said that, it's possible for an individual to take on more than one role provided the roles and responsibilities are clearly delineated by the Project Producer.

Project Owner: In the NPR newsroom, this role is often filled by a lead digital editor. Like a product owner on a scrum team, the Project Owner holds the vision for the project. They are accountable for communicating the goals of the project to the project team and stakeholders. They may be an expert in the subject the team is covering, or responsible for working closely with subject matter experts to apply their knowledge to the project. The Project Owner should be actively involved and available to guide the team through key decisions each step of the way. The Project Owner has the authority to decide when a project is complete and, in the event of conflict, makes the final call.

Project Producer: In the NPR newsroom, this role is often filled by a Visuals Team designer or editor. The Project Producer works closely with the Project Owner to define the scope of the project, and is accountable for managing the work of the team. The Project Producer is the first person assigned to a project. They are responsible for preparing the project plan and identifying roles and responsibilities. As a coach, the producer supports the team and removes any impediments that stand in the way of completing their work. In product design, this role is often filled by a dedicated scrum master or project manager.

Content Leads: Content Leads are reporters, photographers, videographers, animators, illustrators, etc. They are responsible for creating the content and assets the team will use in the project. The Content Leads work closely with the Design, Development, and User Research Leads to understand the context in which their work will be presented. The Content Leads are a critical part of the team, and are expected to be active participants in the design and development of the project.

Note that if the Team includes more than nine participants, communication can get unwieldy and impact the efficiency of the work. In situations when a team includes more than nine participants, the team should designate a lead for each content area that can represent the interests of their group. For example, if a project includes 15 participants, including three photographers, not all of the photographers need to be active members of the team. In this situation, the team should identify one photo lead that can serve as an active member of the team, and pull the other photographers into the project on an as needed basis. The goal here is to make sure that the team has a core of expertise representing all the dimensions of the project, without growing too large.

User Research Lead: In the NPR newsroom, this role is often filled by a Visuals Team designer who splits time between this role and the Design Lead role. The User Research Lead is accountable for understanding and documenting user needs for the project. They work closely with the Project Owner to conduct research, identify measurable goals, conduct user testing, and facilitate activities that help the team understand the strategy, scope, and structure of the project.

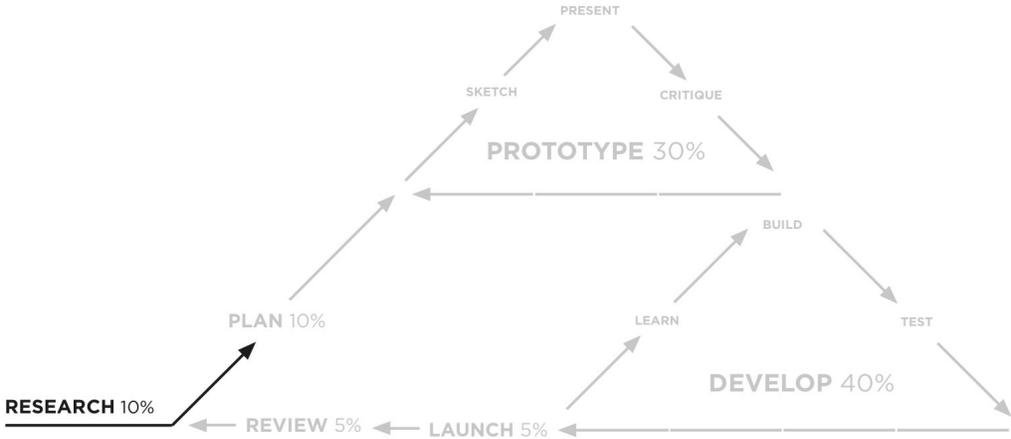
Development Lead: In the NPR newsroom, this role is often filled by a News Apps Developer on the Visuals Team. The Development Lead is accountable for the technical architecture of the project. Working closely with the Design Lead and User Research Lead, they will assess the feasibility of various approaches, and design and develop solutions that support the project's goals. They are responsible for leading functional testing activities to ensure the project works on all required platforms and devices, and serve as the primary point of contact for technical issues. The Development Lead also works closely with the Project Owner to implement the project's analytics, and develop a post-launch analytics reports.

Design Lead: In the NPR newsroom, this role is often filled by a Visuals Team designer that splits time between this role and the User Research Lead role. The Design Lead is responsible for the behavior and presentation layers of the project. Working closely with the Development Lead and User Research Lead, they will build testable prototypes, and presentation layer code for published project. In addition, the Design Lead works closely with the Content Leads as an art director, offering feedback on the voice and tone of the content.

Subject Matter Experts (SMEs): Subject Matter Experts serve as project advisors for business, technical and content matters. At NPR, SMEs may come from: Editorial, Social, Analytics, Digital Media, Member Partnership, Business Development, Sponsorship, or Marketing. They contribute to the project as needed to offer advice and answer questions for the team. Depending on goals and status of the project, a SME may join the team as an active member for a prescribed period of time. For example, a social strategist may work on the team over the course of design, development, and launch stage of a project to advise the team on an engagement strategy.

RESEARCH STAGE

Identify the project's goals



Research Stage Steps

At this point in the project you will have a subset of the full team involved. The activities in this stage are designed to help the Project Owner and User Research Lead explore the editorial goals and user needs of the project. By the end of the research stage, the Project Owner should be able to clearly explain the editorial value of the project, and how it will serve the audience.

- Develop The Project Pitch
- Research The User, Opportunity, And Problem
- Identify KPIs (Key Performance Indicators)
- Write the Problem Statement
- Start A Content Inventory
- Write The Project Brief

Develop The Project Pitch

What is this? A pitch with enough detail that the Project Producer can define the scope of the project, and recommend the necessary resources required to carry out the work.

Responsible: Project Owner

Accountable: Project Producer

The first step in an HDD project is to write a pitch. Using the project pitch template as a guide, the Project Owner should gather as much existing information about the project as possible. When the project pitch is ready to review, the Project Owner should schedule a meeting with the Project Producer to review the pitch, and discuss the story and approach.

The Project Owner and Project Producer need to agree on roles and responsibilities (editorial, social, design, dev), and their commitment to a shared project methodology (like HDD), before any work begins.



[Project Pitch Template](#)

This template includes a list of questions that will help start a conversation about the goals of the project.

[View](#) | [Download PDF](#)

Conduct Background Research

What is this? Background research that helps define the project's goals.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner

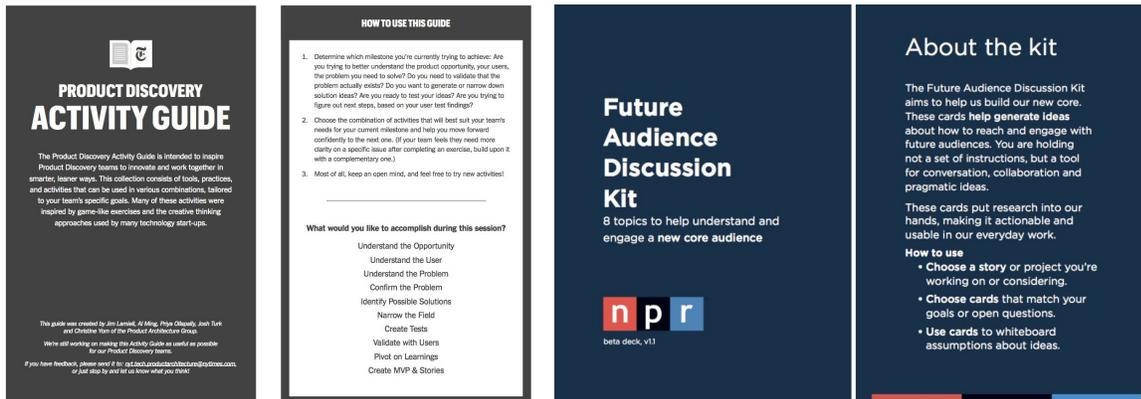
These activities are designed to aid the Product Owner and User Research Lead in the discovery process. Common activities include gathering competitive analysis that can help the team build a shared design vocabulary, and user research to better understand how to approach the story from the user's point of view.



[Research Template](#)

This template includes descriptions of common activities that are helpful in the research and planning stages. They help the Team develop ideas and build an informed opinion about the potential of various approaches.

[View](#) | [Download PDF](#)



The [Product Discovery Activity Guide](#) (Left) was created by the Product Architecture Group for the New York Times to help product development teams generate testable ideas for their projects. Similarly, the Future Audience Discussion Kit, which was created by NPR's Digital Media team, functions as a tool to help teams at NPR generate ideas about how to reach and engage with future audiences.

Identify KPIs (key performance indicators)

What is this? 3-5 statements that describe the approach that will be used to measure the goals of the project at a departmental level.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner

Based on editorial goals, business goals, and user needs, the Project Owner and User Research Lead should identify high level target goals for the project (user satisfaction, sponsorship, engagement, etc.) that align with the strategic goals of the department. The KPIs serve as a foundation and should be used to guide decisions about what to build later in the project. For example, if a department goal is to increase user engagement through newsletter subscriptions, a team working on digital series may decide to set a project goal of increasing newsletter subscriptions to a related newsletter by 10%. This will influence decisions about both the series design and content strategy for the project.



[KPI Template](#)

This template includes example KPIs and common KPI categories to consider in an editorial context.

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Write The Problem Statement

What is this? A concise summary of background research and project goals.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner

The goal of the problem statement is to succinctly connect the KPIs for the project to approaches the team will explore. As a framing device, it is helpful to have a reference point to compare your work to. If you've already published a project with a similar approach, describe how you plan to improve on it. If you haven't worked on a project like this before, look for similar work that you can use as a basis of comparison.



[Problem Statement Template](#)

This template includes a fill-in-the-blank outline that you can use to write problem statements that connect KPIs to new approaches you'd like to explore.

[View](#) | [Download PDF](#)

Start A Content Inventory

What is this? A spreadsheet that catalogs the existing and proposed content and assets that will be used in the project.

Responsible: User Research Lead, Content Leads

Accountable: Project Owner

Working with the Project Owner and Content Leads, the User Research lead should catalog existing and proposed project assets. Having a bird's eye view of this will help the team decide on the scale and shape of the project in the prototype and development stages.



[Content Inventory Template](#)

This template includes a spreadsheet that you can use to track project assets, including common information you'll want to track alongside the assets.

[View](#) | [Download PDF](#)

Write The Project Brief

What is this? *The Project Brief serves as a home for the project's goals, documentation, resources, and milestones.*

Responsible: *Project Producer*

Accountable: *Project Owner*

The Project Brief is a detailed document that serves as a home for the project's goals, documentation, resources, and milestones. The Project Producer is responsible for maintaining the Project Brief over the course of the project, and keeping the Team and Stakeholders apprised of the project's status.



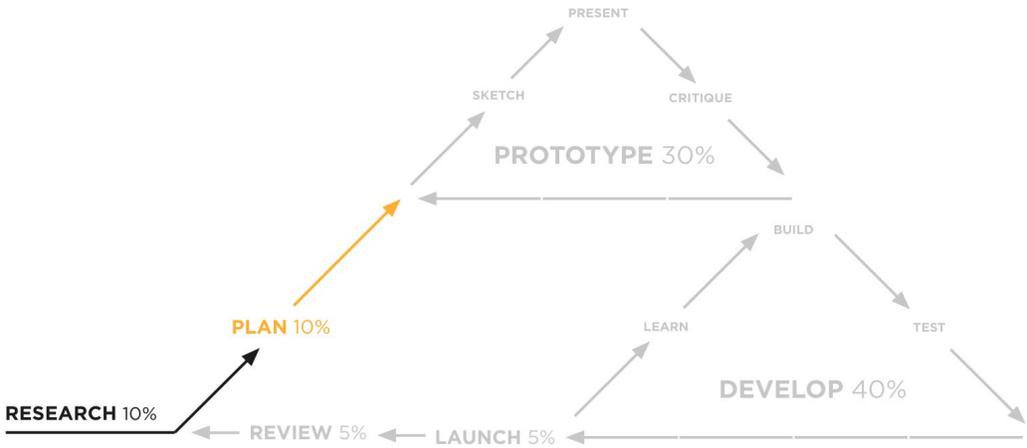
[Project Brief Template](#)

This template includes an outline of common categories of information that you'll want to track in a project brief, including: project description, team, systems, software, project assets, schedule, and background research.

[View](#) | [Download PDF](#)

PLANNING STAGE

Build a shared understanding of the project's goals



Planning Stage Steps

HDD projects are cross-disciplinary and collaborative so you need techniques for building a shared understanding of the project's goals. By the end of the planning stage, all members of the Team need to be on the same page about the goals and scope of the project.

- Hold A Kickoff Meeting
- Conduct Independent Research
- Hold An Assumptions Meeting
- Create An Affinity Map

Hold A Kickoff Meeting

What is this? *The goal of the Kickoff Meeting is to review the Project Brief and confirm that the Team and Stakeholders have a shared understanding of the project's goals, resources, and milestones.*

Responsible: *Team and Stakeholders*

Accountable: *Project Producer*

The planning stage begins with a kickoff meeting that includes the Team and Stakeholders. Before the kickoff, the Project Producer should share the information from the research stage with all the meeting participants. In the meeting, the Team should review the project brief, KPIs, problem statement, and any research that has been gathered to date.



[Kickoff Meeting Template](#)

This template includes a meeting outline including kickoff goals and next steps.

[View](#) | [Download PDF](#)

Conduct Independent Research

What is this? *Background research that informs the assumptions meeting.*

Responsible: *Team*

Accountable: *Project Producer*

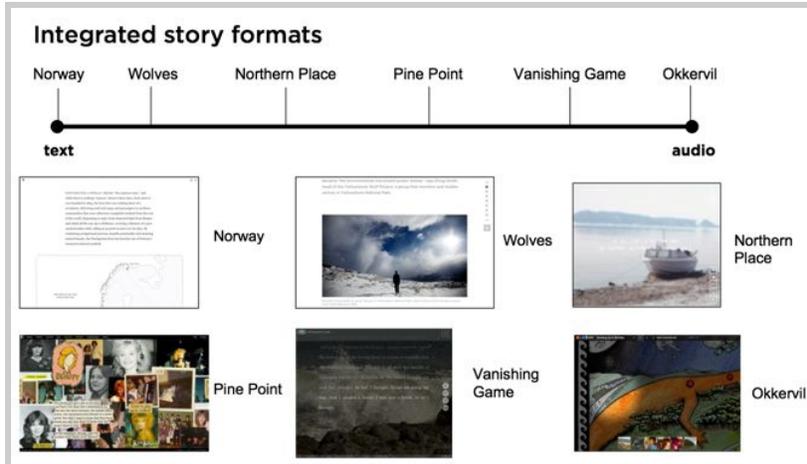
After the kickoff meeting, the Team should think about the problem statement and how it relates to editorial, technical, and design choices for the project. Independent research will vary based on project role but it typically involves background research for reporting, technical research into current metrics and approaches, and design research geared toward better understanding user needs.



[Research Template](#)

This template includes descriptions of common activities that are helpful in the research and planning stages. They help the Team develop ideas and build an informed opinion about the potential of various approaches.

[View](#) | [Download PDF](#)



As part of the design research for the story Life After Death, the team looked a spectrum of text-driven and audio-driven interactive stories to help inform the approach. *Credit: Wes Lindamood*

Hold An Assumptions Meeting

What is this? A meeting in which the team writes down all the ways they believe the project might be made useful, usable, and desirable to users.

Responsible: Team

Accountable: User Research Lead

Assumptions meetings help the Team uncover implied options about how to approach the project and tell the story. Drawing upon information collected in the research stage, the Team uses the meeting time to write down as many ideas as they can about the audience for the story. For example, what do users know about the subject of the story? What users need to know to better understand the subject of the story? What we can build to support the telling of the story? During the meeting, it is helpful to highlight assumptions about the project that contain the greatest amount of risk and uncertainty. To manage risk in a project, it helps to explore the riskiest features first, so risk assessment in the assumptions meeting will help with prioritization of experiments later in the project. By the end of the meeting, the goal is to have an exhaustive list of approaches the team might take to make the project useful, usable, and desirable to the user.



[Assumptions Meeting Template](#)

This template includes a meeting outline and facilitator instructions, including questions you should ask to help uncover Team assumptions about the project.

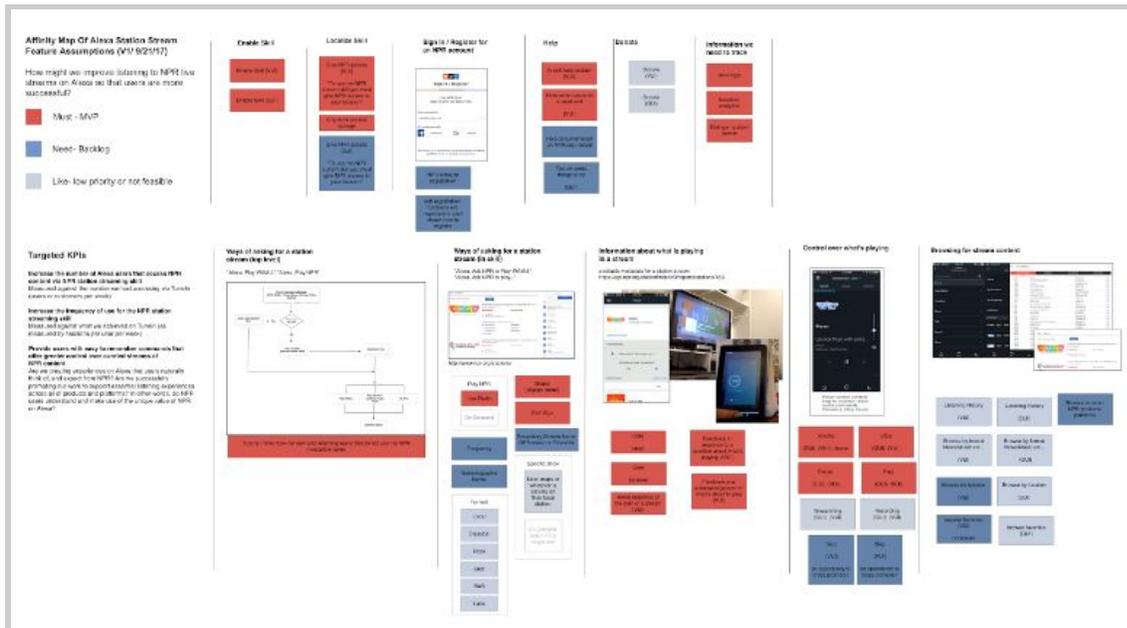
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Create An Affinity Map

What is this? A prioritized list of assumption statements.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner



A bird's-eye view of an affinity map. See the [affinity map template](#) for a description of the layout.

Credit: Wes Lindamood

At the end of the assumptions meeting, the team will have a large set of project approaches. Some of the approaches will complement each other and others will conflict. The Project Owner and User Research Lead should work together to identify common patterns and share a prioritized list of assumptions about how to approach the project. The prioritized set of assumptions serves as the foundation for the prototype stage of the project.



Affinity Map Template

This template includes a starter layout that you can use to show feature ideas grouped by category and priority.

[View](#) | [Download PDF](#)

Hold Sketching Sessions

What is this? A series of meetings in which the team creates paper prototypes that illustrate potential project features.

Responsible: Team

Accountable: User Research Lead

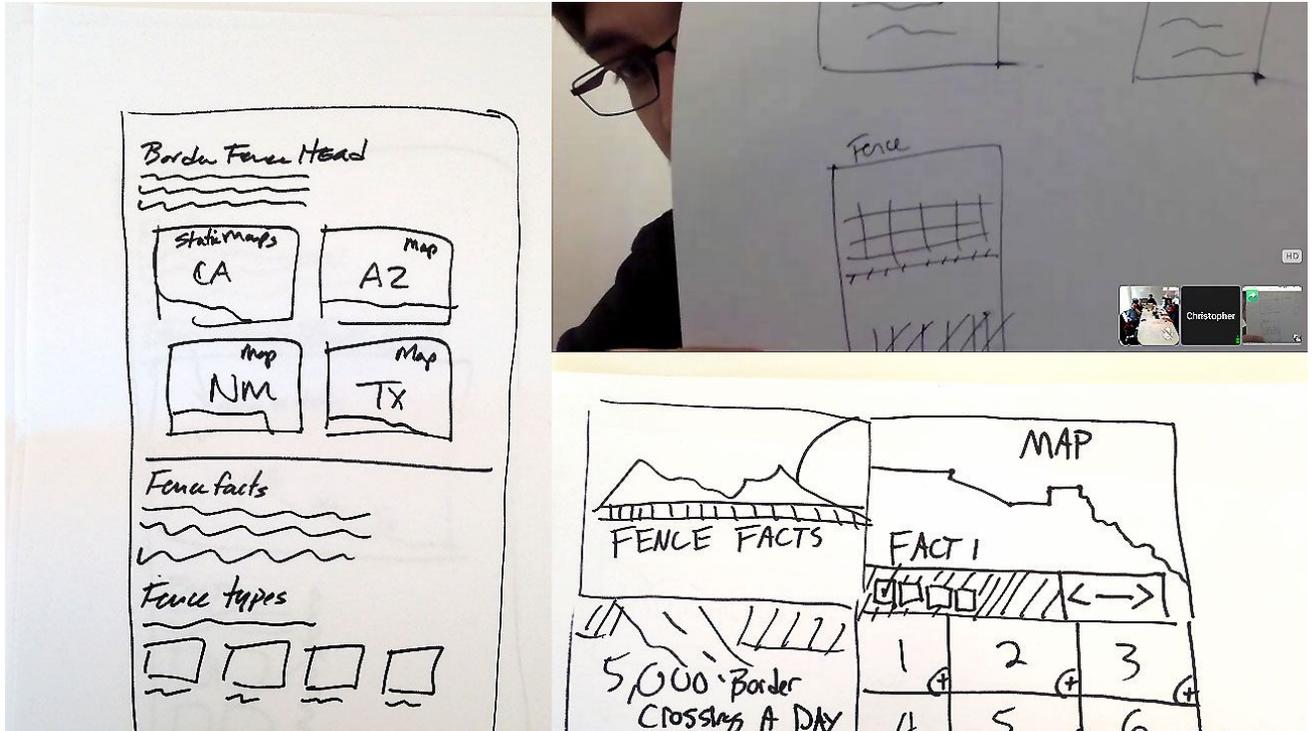
The prototype stage begins with a series of team sketching sessions. Using the prioritized assumptions identified during the planning stage, the User Research Lead should identify 2-3 approaches to explore that can offer the team guidance on the direction of the project. Like an assumptions meeting, this sketching session is inclusive. The only materials needed are pen and paper. The benefit of this approach is that it allows design ideas to mix — and it's fast. Speed is the name of the game. You're creating an artifact to aid in understanding. If you spend too much time here making a polished mock-up, you're wasting your time. It is not uncommon for the resulting sketches to look nothing like the eventual design. The point is not to design the thing, but rather to equip the team to solve the problem in the development stage.



[Sketching Session Template](#)

This template includes a meeting outline, facilitator instructions, and a printable sketch sheet that can be used by meeting participants to draw and document ideas.

[View](#) | [Download PDF](#)



Team sketches from a sketching session exploring the [Fence Facts section](#) of NPR story Borderland. To make the sketching session accessible to remote participants, the team used screen sharing via Google Hangouts to share drawings Credit: Wes Lindamood.

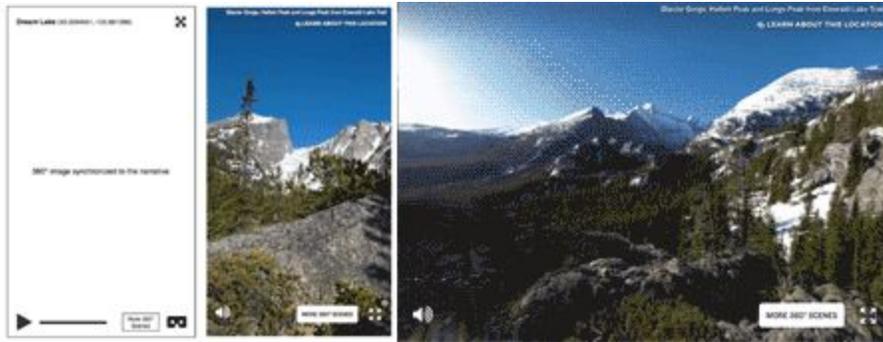
Work On Story Reporting and Prototyping

What is this? Distributed work in which the team explores the practical implications of approaches under consideration. For Content Leads, reporting happens at this point.

Responsible: User Research Lead, Design Lead, Development Lead, Content Leads

Accountable: Project Producer

Following the sketching sessions, a shared vision for the project approach begins to emerge. Now the team should consider the practical implications of various approaches. From an editorial perspective, this involves reporting, gathering assets, and developing the story. From a development perspective, this means exploring the feasibility of approaches through technical prototyping. From a design perspective, this involves taking what the team learned in the sketching sessions and transforming that information into prototypes that can be used for usability testing, and documentation of the recommended approach. While much of the work at this point is distributed, the team should remain in close contact, and have an agreed-upon tool for distributed planning and communication. Content gathered through the reporting process should inform the direction of the prototypes, and the prototypes should offer guidance to the Content Leads to inform the assets they gather during reporting.



Wireframes and a mockup in the prototype stage followed by an animated sequence from the final project show the evolution of the story design for the project [Stand At The Edge Of Geologic Time](#). Credit: Wes Lindamood

Finish The Content Inventory

What is this? An updated content inventory that includes all assets gathered in in the reporting process.

Responsible: Content Leads, User Research Lead, Design Lead, Development Lead

Accountable: User Research Lead

Upon the completion of reporting and newsgathering activities, the User Research Lead should finalize the content inventory that was started in the research stage.



[Content Inventory Template](#)

This template includes a spreadsheet that you can use to track project assets, including common information you'll want to track alongside the assets.

[View](#) | [Download PDF](#)

Write Hypothesis Statements

What is this? 3-5 statements that describe the approach the team will use to evaluate if the project features are supporting the project goals.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner

Using the goals defined in the research and planning stage and the knowledge gained from reporting and prototyping, the User Research Lead should translate the recommended approach into a set of hypothesis statements that distill how the Team will test and learn from the approach they take. Each hypothesis statement should describe a category of features,

and what the team hopes to learn by building the feature set. In addition to informing the implementation of analytics for the project, the hypothesis statements will serve as the foundation for user stories that describe the goals of design and development tasks during the development stage of the project.



[Hypothesis Statement Template](#)

This template includes a fill-in-the-blank outline that you can use to write hypothesis statements that will help you test and learn from the features you build, and connect the features to the KPIs you defined for the project.

[View](#) | [Download PDF](#)

Have Users Test Your Prototypes

What is this? A usability test recruitment plan, and usability test report that provides a summary of feedback regarding the proposed approach.

Responsible: User Research Lead, Design Lead, Development Lead

Accountable: User Research Lead

Take some time during the prototype stage to collect feedback from a diverse group of users. Informal usability testing of medium-fidelity prototypes with colleagues is great. The goal is to collect early feedback from folks who do not have a connection to the project to help inform the recommended approach. Feedback gathered during informal testing should also inform a test script for the development stage. During testing, begin to put a recruitment plan in place to regularly seek feedback from users during the development stage.



Test participants recruited from across NPR participate in a usability test for the rough draft of a project. *Credit: Wes Lindamood*



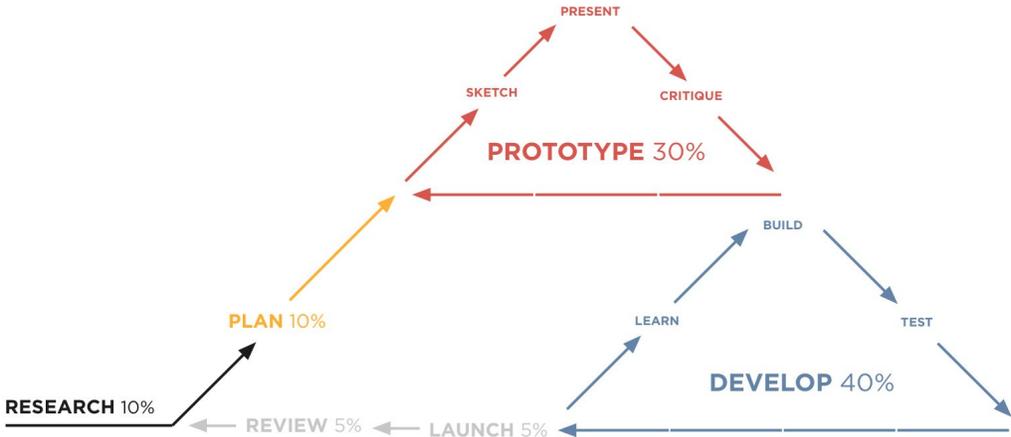
Usability Test Template

This template includes instructions for recruiting, screening, testing, and documenting the findings for a usability test.

[View](#) | [Download PDF](#)

DEVELOPMENT STAGE

Build, test and improve your approach



Development Stage Steps

Over the course of the development stage, the team will build a production ready project. The steps in the development stage are repeated until the Project Owner says the project is ready to publish.

- Hold A Hypothesis Review Meeting
- Hold A Development Kickoff Meeting
- Write User Stories
- Begin One-Week Iterations Of Work
- Hold An Iteration Planning Meeting
- Hold A Daily Scrum
- Hold An Iteration Review
- Hold An Iteration Retrospective
- Conduct Development Stage User Testing
- Conduct Development Stage Functional Testing
- Create An Analytics Plan
- Designate The Project As Ready To Publish

Hold a Hypothesis Review Meeting

What is this? A meeting in which the Team and Stakeholder confirm that there is a shared understanding of the project's goals and hypothesis statements.

Responsible: Team and Stakeholders

Accountable: Project Producer

The development stage begins with a Team and Stakeholder meeting to review the Team's hypothesis statements and recommended design approach. Using story drafts and rough assets (untuned photos, video clips, unedited audio), the Team should be ready to share a functional prototype or medium-fidelity design that will give the Team, and Stakeholders a tangible sense of the recommended approach. It needs to be clear to the Team and Stakeholders that the work shared in this meeting is not the final design, but the start of an iterative process that kicks off the development stage. Having said that, there needs to be agreement between the Team and Stakeholders on the goals and hypothesis statements for the project before development begins.



[Hypothesis Review Meeting Template](#)

This template includes a meeting outline including goals and next steps.

[View](#) | [Download PDF](#)

Hold A Development Kickoff Meeting

What is this? A backlog of development and editing tasks, and a prioritized list of work for the first week of development.

Responsible: Team

Accountable: Project Producer

Once the Team and Stakeholders agree about the project goals and hypothesis statements, the Team should meet to create a backlog of development and editing tasks. Each task should be ranked by size and complexity, and prioritized based on risk. The team should start with the risky tasks that will help the team answer questions that will avoid unnecessary work.



[Development Kickoff Meeting Template](#)

This template includes instructions for creating a backlog of development and editing tasks, an outline for the development kickoff meeting, and a template that can be used to track tasks.

[View](#) | [Download PDF](#)

Write User Stories

What is this? Brief feature statements that describe the user benefits and measurable outcomes of features under development.

Responsible: User Research Lead, Project Owner

Accountable: Project Owner

The goal of a user story is to describe how a feature you are building will benefit your audience. Like hypothesis statements, user stories are designed to help the team remain focused on user needs and measurable outcomes.



[User Story Template](#)

This template includes instructions and a fill-in-the-blank outline for writing development tasks that can be evaluated and traced back to the goals of the project.

[View](#) | [Download PDF](#)

Begin One-Week Iterations Of Work

What is this? A structure for organizing, completing, and reviewing work completed over the course of a one-week period.

Responsible: Team

Accountable: Project Producer

Once the Team has identified the backlog of tasks, they should begin their first iteration of work. The order of steps in an iteration is as follows: *Iteration Planning* > *Daily Scrum* > *Iteration Review* > *Iteration Retrospective*. These steps should be repeated until the Project Owner has identified the project as feature complete. Each step in the iteration is described in more detail below.



[Iteration Template](#)

This template provides instructions and an outline for structuring the work of the team over the course of a one-week period.

[View](#) | [Download PDF](#)

Hold An Iteration Planning Meeting

What is this? A meeting in which the Team documents a list of work they will commit to for the upcoming iteration.

Responsible: Team

Accountable: Project Producer

At the beginning of each iteration, the Team should meet and plan out tasks for a week of work. Using the same rules from the development kickoff meeting, the Team should prioritize tasks in the project backlog, assigning a single owner to each task who can sign-off on the completed work. Feedback from prior iteration reviews, and user testing should be included in the discussion and used to inform the prioritization. As the team gains a more nuanced understanding of the project approach, consider reintroducing activities from the prototype stage (like assumption meetings, sketching sessions, and prototyping) to explore new features that are added to the backlog of work.



[Iteration Planning Meeting Template](#)

This template includes a meeting outline including meeting goals, and a template that can be used to track tasks.

[View](#) | [Download PDF](#)

Hold A Daily Scrum

What is this? A 15-minute daily check-in to help the Team stay in sync regarding work in progress.

Responsible: Team

Accountable: Project Producer

While working on the tasks that were identified in iteration planning, the Team should stay in close contact. To help this, they should plan to meet daily for a 15-minute meeting to talk about work they have completed the previous day, what they plan to focus on next, and any issues that are blocking them from completing their work. Outside the daily scrum, the Team

should be in close communication via a distributed communication channel such as Slack. Under ideal circumstances, the team sits together until the project is published.



[Daily Scrum Template](#)

This template includes instructions for facilitating a daily scrum meeting

[View](#) | [Download PDF](#)

Hold An Iteration Review

What is this? A weekly review meeting that provides the Team and Stakeholders with the opportunity to ask questions, and provide feedback on the status of the project.

Responsible: Team

Accountable: Project Producer

At the end of each week of work, the Team should document the progress they have made, and address any questions or changes in approach with Stakeholders and Subject Matter Experts. This is done via a regular iteration review meetings. Make sure to schedule the meetings a couple of weeks in advance to accommodate busy Stakeholder schedules. Feedback from the meeting should be incorporated into the planning work for the next iteration.



[Iteration Review Meeting Template](#)

This template includes a meeting outline, including goals and next steps.

[View](#) | [Download PDF](#)

Hold An Iteration Retrospective

What is this? A meeting in which the Team documents what's working well about the project, and recommend suggested improvements.

Responsible: Team

Accountable: Project Producer

Before planning for the next iteration begins, it is important that the team talk about what is and isn't working about the process, and suggest changes that will help the team work well together. A retrospective is typically a separate meeting, but can be added to iteration planning depending on the team's schedule and availability.



[Iteration Retrospective Meeting Template](#)

This template includes instructions for facilitating a retrospective, and a meeting outline structured around helpful feedback that you'll want to gather about the project.

[View](#) | [Download PDF](#)

Conduct Development Stage User Testing

What is this? *A process for conducting tests that research and report on user feedback about features under development.*

Responsible: *User Research Lead, Design Lead, Development Lead*

Accountable: *User Research Lead*

Coinciding with each iteration, the User Research Lead should consider opportunities to test features under development with users recruited during the prototype stage of the project. In addition to testing the usability of features, the testing should be used to validate hypothesis statements, and inform any quantitative testing that will be conducted when the project is published.



[Usability Test Template](#)

This template includes instructions for recruiting, screening, testing, and documenting the findings for a usability test.

[View](#) | [Download PDF](#)

Conduct Development Stage Functional Testing

What is this? *Functional tests of key features, and documentation of any bugs that are encountered during development.*

Responsible: *User Research Lead, Design Lead, Development Lead*

Accountable: *Development Lead*

While the project is under active development, the Development Lead should begin work on a test plan that documents features that need to be functionally tested, and a list of platforms and devices that the project should be tested on. Coinciding with each iteration, the

Development Lead should consider opportunities to spot check features under development on targeted platforms and devices.



[Functional Testing Template](#)

This template includes the outline for a test plan that will help you identify any technical issues with your project. It also includes a test results spreadsheet that you can use to track the status of issues.

[View](#) | [Download PDF](#)

Create An Analytics Plan

What is this? A document that describes the methods by which the features of the project will be quantitatively tested.

Responsible: User Research Lead, Development Lead

Accountable: Development Lead

Using the hypothesis statements as a guide, the Lead Developer and Project Producer should meet with a SME from the Analytics team to discuss the analytics plan. The analytics plan should document how the project KPIs will be measured, any custom events that need to be created to measure discrete features of the project, and any multivariate tests that will be conducted when the project is published.



[Analytics Plan Template](#)

This template includes a meeting outline focused on documenting how the hypothesis statements for the project will be quantitatively tested, including a set of baseline analytics that you'll want to track for all projects.

[View](#) | [Download PDF](#)

Designate The Project As Ready To Publish

What is this? *Sign-off by the Project Owner designating the project as ready to publish.*

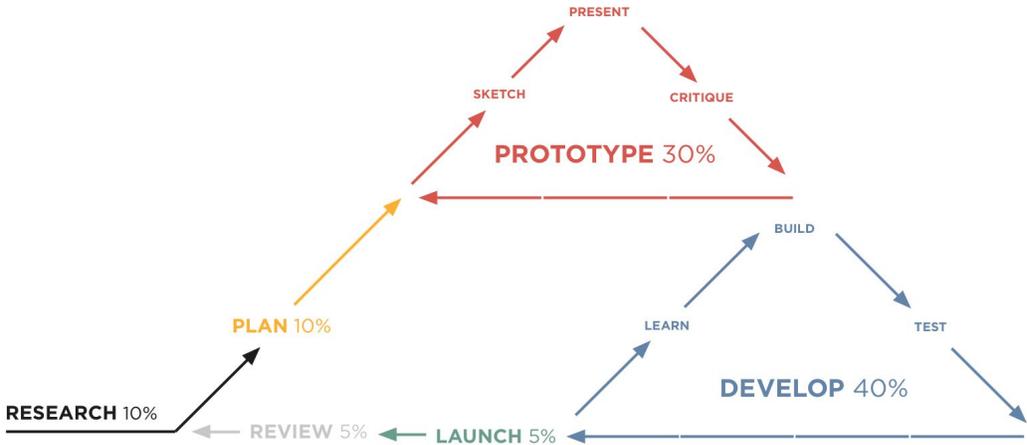
Responsible: *Team*

Accountable: *Project Owner*

The team should continue to work in one-week iterations until the project is considered feature complete and ready to be published. While this decision will be influenced by feedback from the Team and project stakeholders, it is the responsibility of the Project Owner to designate the project as feature complete and communicate this decision to the Team and Stakeholders.

LAUNCH STAGE

Create a publishing plan



Launch Stage Steps

Finishing the project and publishing it are not the same thing. By the end of the launch stage, the Team should have a shared understanding of when and how to publish and promote the project.

- Hold A Launch Planning Meeting
- Write A Launch Plan
- Create A Media Kit
- Conduct Launch Stage Functional Testing

Hold A Launch Planning Meeting

What is this? A meeting in which the Team and Stakeholder confirm that there is shared understanding of the launch plan and schedule.

Responsible: Team and Stakeholders

Accountable: Project Producer

The launch stage begins with a Team and Stakeholder meeting to discuss the internal and external launch communication plan and schedule. Stakeholders from your audience engagement, marketing, and public relations teams will assist with launch planning to help the project reach the right audience at the right time.



[Launch Planning Meeting Template](#)

This template includes a meeting outline focused on the discussion of strategy, schedule and contacts for the launch of the project.

[View](#) | [Download PDF](#)

Write A Launch Plan

What is this? A detailed document that serves as the main source of information about the launch schedule, launch contacts, and assets.

Responsible: Project Owner, Project Producer

Accountable: Project Producer



[Launch Plan Template](#)

This template includes an outline of common categories of information that you'll want to track at the time you publish the project including: project description, launch schedule, audience engagement, promotional assets, and an internal communication plan.

[View](#) | [Download PDF](#)

Following the launch planning meeting, the Project Owner and Project Producer should prepare a launch plan that documents the launch schedule, key project contacts, and location of project assets. The launch plan, which is managed by the Project Producer, should be shared with the Team and Stakeholders.

Create A Media Kit

What is this? An index of media that can be used to share and promote the project.

Responsible: Team

Accountable: Project Producer

The media kit accompanies the launch plan and serves as a home for documentation of promotional assets including: the project title and subtitle, project URLs, suggested social text, images, and other social assets for the homepage, Facebook, Twitter, and Instagram.



[Media Kit Template](#)

This template includes an outline of promotional asset types and information that you'll need to share and promote your project, including a guide to social media image sizes.

[View](#) | [Download PDF](#)

Conduct Launch Stage Functional Testing

What is this? A complete test of all the project's functionality, a documented list of bugs, and documentation of any outstanding bugs.

Responsible: Team

Accountable: Project Producer

Before the project is published, the Team should conduct a final functional test. The Lead Developer and Project Producer are responsible for developing a script the Team can follow to conduct the functional test. In addition, a final copy edit of the project should be conducted at this time.



[Functional Testing Template](#)

This template includes the outline for a test plan that will help you identify any technical issues with your project. The template also includes a test results spreadsheet that you can use to track the status of issues.

[View](#) | [Download PDF](#)

Write An Analytics Report

What is this? A report highlighting the analytics for the project one week after launch.

Responsible: User Research Lead, Development Lead

Accountable: Development Lead

One week after the project is published, the Lead Developer and User Research Lead should prepare a report that documents the baseline analytics for the project, and analysis of the project's KPIs and hypothesis statements. If the project will continue to be updated, the report should include recommended changes that can be used to inform subsequent versions of the project.



[Analytics Report Template](#)

This template includes a report outline with categories of information you'll want to track and share after the project is published.

[View](#) | [Download PDF](#)

Hold A Team Retrospective

What is this? A meeting in which the Team documents what they learned while working on the project, and suggested improvements to the project process for subsequent work.

Responsible: Team

Accountable: Project Producer

The Team retrospective is an opportunity to celebrate the work the team has accomplished and look back at the process of working together. Like the iteration review retrospective, it provides the team with the opportunity to discuss what worked well about the project process, what didn't work well about the project process, and suggested changes to the process for any subsequent versions of the project.



[Project Retrospective Template](#)

This template includes instructions for facilitating a retrospective, and a meeting outline structured around helpful feedback that you'll want to gather about the project.

[View](#) | [Download PDF](#)

Write A Retrospective Report

What is this? A report prepared for the stakeholders that shares highlights from the retrospective, the analytics report, and qualitative test findings.

Responsible: Team

Accountable: Project Producer

Following the team retrospective, the analytics report and key findings from the team retrospective should be summarized in a Retrospective Report. The report is designed to serve as foundational research geared toward the research stage of future projects.



[Retrospective Report Template](#)

This template includes an outline for a report designed to summarize what was learned over the course of working on the project.

[View](#) | [Download PDF](#)

Clean Up The Project's Code and Documentation

What is this? A period of time at the end of the project to clean up the code, assets, and documentation for the benefit of future reference and use of the project.

Responsible: Team

Accountable: Project Producer

To ensure the project's code and documentation can serve as a reference point for future work, the Team should take some time at end of the project to clean up the project's code and documentation. This includes versioning, deleting unused code and documentation, archiving assets, and annotating key documents.

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