

STAT Design System Roadmap

eProject name	STAT-isfied
Project Owner	@Jordan Yanke
Approver (may be the same as Owner)	@Jordan Yanke
Stakeholders (all who will be reviewing)	@Barry Yim @Darian Grant @Brian Ho
Date required to be complete	November 24th, 2023, to have the design system fully designed. Dev will have started development on it long before this date, but the final date of completion is dependent on the dev team.
What is driving this deadline?	Lift & Shift and STAT V2 Dev team
Time needed for Stakeholder and Approver review	
Is this a new project or an update of a previous deliverable?	New
If previous, please include link to previous JIRA ticket	
Design kick-off required	YES

Project Description i

Proposal: Design System Development for Stat

Opportunity to propose the development of a comprehensive design system for Stat. As an expert Product Design System Specialist, we understand the importance of consistency, efficiency, and user-centred design in building exceptional digital experiences. This proposal outlines the steps required to create a design system tailored specifically to Stat's needs.

Objective


The primary objectives of developing a design system for Stat are as follows:

Status

Where to find us

Slack channel	Purpose

Related Pages

- [Core Values & Principles to Guide the Design System](#)
-  [Stakeholder Alignment](#)
- [Meeting notes - Reviews of low fidelity mockup for IA rework](#)
- [Meeting notes - STAT Design System Choice](#)
- [Moz + STAT pattern library](#)
- [Feedback on Designs from Brighton SEO San Diego - November 2023](#)
- [User Research Game Plan - All STAT Screens](#)
- [High level plan for each STAT page](#)

Related Links

- Older versions of STAT concepts:
 - [Version 1](#)
 - [Version 2 - Variant 1](#)
 - [Version 2 - Variant 2](#)
 - [Version 3](#)

Deliverables




Deliverable description	Format	Size/specs
STAT Design System	Figma File	
Storybook Components	Storybook Library	

1. Consistency: Establish a unified visual language and design patterns that can be applied consistently across all digital products and platforms.
2. Efficiency: Streamline the design and development process by providing reusable components, guidelines, and best practices.
3. Scalability: Ensure the design system is scalable and adaptable to accommodate future growth and changes in the product landscape.
4. Collaboration: Foster collaboration and cross-functional alignment between design, development, and other relevant stakeholders.

Schedule

Part 1 - Defining requirements for the Lift and Shift

This first chunk of work is dedicated to understanding what is required, aligning the stakeholders, and defining the requirements for the Lift and Shift so that UX can build a design system around specifically what is required.

Milestone	Details	Links	Due date: September 8th, 2023
Phase 1: Discovery and Research	<input checked="" type="checkbox"/> Identify primary user personas and their specific needs.		1 weeks (Aug 7th - 11th)
	<input checked="" type="checkbox"/> Conduct a thorough analysis of Stat's existing design assets, UI patterns, and brand guidelines.		
	<input checked="" type="checkbox"/> Identify pain points, inconsistencies, and areas for improvement at the functional level of the user hierarchy of needs.	 STAT - User Hierarchy of Needs L&S	
	<input checked="" type="checkbox"/> Go through Pendo to understand usage of areas/features in STAT <input checked="" type="checkbox"/> Call out low usage areas separately so we can discuss them with Product/stakeholders (Nothing found here required a deeper dive with user interviews)		
	<input checked="" type="checkbox"/> Perform a moderated interview with: Patrick (This was originally going to be a series of interviews, however, that plan changed as we determined we can get what we need from Pendo data)		
	<input checked="" type="checkbox"/> Perform competitor analysis and industry research to identify best practices and trends.	 Competitor Landscape Quick View  STAT Competitor Analysis	

		<div><div>Feature Comparison</div><div>Team Feedback and Losses Data for STAT Competitors 2023</div><div>STAT training — Use cases</div><div>Solutions and Use Cases</div><div>STAT Go To Market – Legacy for Reference Only</div></div>	
<div>Phase 2: Stakeholder Alignment and establish values and principles</div> <div>@Jordan Yanke will facilitate workshops and interviews with key stakeholders mentioned above to gather requirements, understand their goals, and align expectations for the design system.</div>	<div><div>✔</div>Facilitate workshops and interviews with @Brian Ho & @Mark Rigley to gather requirements, understand their goals, and align expectations.</div>		1 week (Aug 14th - 18th)
	<div><div>✔</div>Sync with @Brian Ho & @Mark Rigley regarding L&S user flows and how to get them into PRD's</div>		
	<div><div>✔</div>Establish the core values and design principles that will guide the design system.</div>	<div><div>💡</div>Core Values & Principles to Guide the Design System</div>	
	<div><div>✔</div>Agree upon what design system to use<div><div>✔</div>Sync with @Brian Ho and dev team regarding transition from Material to M3 for Design System Implementation and frontend considerations.</div></div>	<div><div>📄</div>Meeting notes - STAT Design System Choice</div>	
	<div><div>✔</div>Align with @Brian Ho on L&S implementation to scope out information architecture</div>		
<div>Phase 3: Information Architecture and Component Inventory</div>	<div><div>✔</div>Define the information architecture of the design system, organizing layout, structure into logical hierarchies and curated a site map for PRD</div>	<div><div>🗺</div>IA - Site Map</div>	2 weeks (Aug 21st - Sept 1st)
	<div><div>✔</div>Create a comprehensive inventory of existing design structure, UI elements, and components.</div>		

	<ul style="list-style-type: none"> ✓ Meet with @Darko Cejkov and @Pedro Naponoceno regarding front/backend efforts for search capabilities regarding LAS. 		
	<ul style="list-style-type: none"> ✓ Curate a low fidelity mockup for IA rework 		
	<ul style="list-style-type: none"> ✓ Review low fidelity mockup and identify redundancies and opportunities for consolidation with @Brian Ho , then adjust. 	Meeting notes - Reviews of low fidelity mockup for IA rework	
	<ul style="list-style-type: none"> ✓ Complete the Product Requirements Document for the Lift and Shift 	STAT LAS IA Requirements	
Phase 3b: Provide dev with interim assets Dev is going to start work on the lift and shift at this point and will need some assets to start working with. This phase is to get them the assets, even though they won't have the styling/branding updates. We will add that in after phase 4 is completed.	<ul style="list-style-type: none"> ✓ Create a foundational design system to house the interim assets (figma file) ✓ Complete the design system assets for everything included in the PRD <p>The outcome here is a mockup of the IA that contains the MUI components</p>	Link to PRD https://www.figma.com/file/K8aGHQOiJmb6z02wtvMR6I/STAT-Design-System---DO-NOT-TOUCH?type=design&node-id=106%3A12430&mode=design&t=3zlkrtIDy5RoFHST-1 Connect your Figma account	1 week (Sept 5th to 8th)
Total Estimated Time:			5 weeks Please note that this timeline is subject to change based on project scope, resource availability, and any specific requirements identified during the discovery phase.






Part 2 - Creating the design system, language, and visual style

This next chunk of work is dedicated to the actual creation of the design system, which will also include the styling, followed by the documentation and vetting of the design system and decisions.

Milestone	Details	Link to the outcome	Due date: November 24th, 2023
<p>Phase 4: Create Design Language and Visual Style</p> <p>Develop a design language that aligns with Stat's brand identity and values.</p> <p>Due to the phased approach with the lift and shift, the design language and visual style will be created within the boundaries of a 1:1 implementation of STAT (plus the IA foundation changes). This means not all components that may be needed for v2 will be considered while we set the design language and visual style at this point.</p>	<p>✔ Review work to date with @Kellie Gibson and understand historical design language choices</p>	<p>I presented and shared the updated information architecture mockup and sitemap with @Kellie Gibson, focusing on the textual modifications. Kellie was quite receptive to the enhancements and revisions in the new navigation language/landscape. Additionally, Jordan engaged in a discussion with Kellie about the implementation of the Design System and visual style, expressing concerns for consistency between the website assets and the stat product. Jordan has committed to keeping Kellie informed as the Design System evolves in the upcoming weeks for further alignment.</p> <p>Reviewed the existing styles and its origins from previous contractors, and I expressed some concerns regarding consistency, between the website assets and the product. Kellie had some concerns with the font choices with the website and the old-product, Jordan will ensure that the font is more accessible for future iterations. Jordan will focus on adhering to best practices for a fresh approach for typography, and the design choices moving forward.</p>	<p>3 weeks (Sept 11th-October 6th)</p> <p>(Jordan is OOO the 25th to the 29th of September, pushing this to 4 weeks total)</p>
	<p>✔ Take stock of existing design assets, UI components, and branding/marketing guides for consideration</p>	<ul style="list-style-type: none"> Marketing's new branding guide: STAT_brand_guidelines_3b (1).pdf.zip Older versions of STAT concepts: <ul style="list-style-type: none"> Version 1 Version 2 - Variant 1 Version 2 - Variant 2 	

		<ul style="list-style-type: none"> ◦ Version 3 	
	<ul style="list-style-type: none"> ✓ Create design language and visual style <ul style="list-style-type: none"> ✓ Research and define typography ✓ Research and define color palettes, including dark mode ✓ Research and create icons ✓ Research and define grid systems, breakpoints. ✓ Research and define <i>base level</i> components (ex: buttons, form elements...) while applying the style to them. ✓ This will also include any additional components required to create one full screen so we can get feedback from users on it <p>Notes:</p> <ul style="list-style-type: none"> • Jordan will keep the core values of the product's goals and user needs in mind while going through this step, and ensure accessibility, scalability, and brand identity are evident in the new design system. • Curation of the design language and visual style may conflict with the Website asset. 	<p>Typography Research</p> <p>Color Scheme Research</p> <p>Iconography - We will utilize Google Symbols for our iconography</p>	
	<ul style="list-style-type: none"> ✓ Review the design language and visual style against the core values to ensure that they align with the product's goals and user needs. Adjust if necessary. 	<p>This might not have a linkable artifact unless there were some very drastic changes. Then you may want to link to the old version and this newly updated version to show the change.</p>	
Phase 5: Test design language and visual style. Adjust and Review.	<ul style="list-style-type: none"> ✓ Create a mockup of one full screen 		3 weeks (October 10th to October 27th)
	<ul style="list-style-type: none"> □ Run the mock up by users to validate the design's effectiveness and identify areas for improvement. Adjust. <p>To stay on track, this may require additional help from @Darian Grant @Brian Ho , or others on the UX team</p>		
	<ul style="list-style-type: none"> ✓ Review design language and visual style with @Kellie Gibson and team. Adjust if necessary. 	<p>Design Language & Visual Style Presentation:</p> <ul style="list-style-type: none"> • Jordan presented the design system, encompassing Design Language and visual style elements: <ul style="list-style-type: none"> ◦ Typography 	

	<ul style="list-style-type: none">◦ Color palettes◦ Iconography◦ Grid systems and breakpoints for responsive designs◦ Base-level components for dashboard rollup◦ Light mode and dark mode themes <p>Stats, Guiding Principles, and Core Values:</p> <ul style="list-style-type: none">• Jordan presented target audience, guiding principles, and core values for the project.• @Kellie Gibson had no direct feedback to provide on this aspect.• Jordan mentioned we need to do some persona work in the future perhaps for better research methodologies. <p>Menu System Concerns:</p> <ul style="list-style-type: none">• @Kellie Gibson expressed concerns regarding the menu system and its structure for organizing projects and data views.• Jordan is considering other alternatives for the menus <p>Overall UI Impression:</p> <ul style="list-style-type: none">• @Kellie Gibson expressed being impressed with the updated UI and IA rework, and did not provide any specific feedback.• Jordan Shared the mockups for Kellie to review for further considerations.
✓ Review design language with design team, present current findings thus far.	
✓ Present design language with dev team.	<div>📅 2023-10-13 First LAS Over</div> <div>view for Frontend Team</div>

	<p><input checked="" type="checkbox"/> Review with Product. Adjust if necessary.</p> <p>Reviewal with @Andrea Harrison</p> <p>@Kellie Gibson @Brian Ho @Darian Grant @Steph Port @Maddie Rayfield @Zac Heinrichs</p> <p><input checked="" type="checkbox"/> @Darian Grant @Jordan Yanke</p> <p>Conducted research for better understanding our users in pendo and fullstory.</p> <p>A IA quantitative study discovered that a left primary is faster to navigate than a top primary. This effect also applies to left secondary menu levels. It also found that navigation is faster when the primary level is separate from the secondary and tertiary levels. Overall, left-top-top and top-left-left were the fastest, and top-top-top and top-top-left were the slowest.</p> <p>Our data concluded:</p> <p>👉 DATA VIEWS Clicks: 101,643</p> <p>👉 DASHBOARDS COMBINED: Clicks: 39,523</p> <p>👉 HOME/TABS COMBINED: Clicks: 31,375</p> <p><input checked="" type="checkbox"/> Presented numerous mocks for the information architecture and the menu structuring.</p> <p><input checked="" type="checkbox"/> October 24th review with stakeholders:</p> <p>Purpose of meeting:</p> <ul style="list-style-type: none"> • Alignment on the IA work regarding the placement of Data views, Dashboard menu, and home/site tabs. • Review feedback • Presenting refined iterations for user consideration • Come to a conclusion for Jordan to start mocking up iterations for moderated interviews this/next week. 	<div>  Validating STAT's Information ... </div> <div>  Owned by Jordan... </div> <div> October 17, 2023 Meeting Purpose and Supporting Documentation: Purpose of... </div> <div>  Confluence Open preview </div>
<p>Phase 6: Fleshing out the design system framework, building the rest of it, and documenting it all</p>	<p><input type="checkbox"/> Conduct research on existing design systems within our industry and related fields (ex: SEMrush), looking for valuable insights into best practices and potential pitfalls.</p> <p><input type="checkbox"/> Possibly make adjustments to our foundational design system set up in phase 3b.</p>	<div> Restricted content </div> <div>  You'll need to request access or try a different account to... </div> <div>  Miro Try another account </div> <div> 4 weeks (October 30th - November 24th) </div>

Design System Documentation / Dev Handoff:

1. Create Component Library:

- Document and categorize all UI components (buttons, forms, cards, etc.).
- Provide clear guidelines on usage, behavior, and variations.

2. Typography Guidelines:

- Specify font choices, sizes, weights, and styles.
- Include guidelines for headings, paragraphs, and other text elements.

3. Color Palette:

- Define the color scheme, including primary, secondary, and accent colors.
- Specify use cases and accessibility considerations.
- Show the frontend team how you apply color with Variants

4. Iconography Guidelines:

- Document the library of icons with clear usage guidelines.
- Provide variations and sizes for different contexts.

5. Layout and Grid System:

- Define the layout structure and grid system.
- Specify responsive behavior for different screen sizes.

6. Interaction Patterns:

- Document common interaction patterns (hover, click, transitions).
- Provide guidelines for animations and micro-interactions.

7. Accessibility Guidelines:

- Ensure the design system adheres to accessibility standards.
- Document accessibility guidelines for each component.

8. Anatomy Documentation Structure:

- Define a clear and consistent structure for documentation.
- Organize information logically for easy navigation.

9. Page Templates:

	<ul style="list-style-type: none">• Create templates for documentation pages (component detail, guidelines, usage examples).• Include placeholders for text, images, and code snippets. <p>10. Documenting Components:</p> <ul style="list-style-type: none">• Detail each component's purpose, variations, states, and code snippets.• Include design rationale and considerations. <p>11. Versioning and Updates:</p> <ul style="list-style-type: none">• Implement a version control system for the design system allow design team to better understand branches.• Clearly document updates and changes between versions.	
	<div><input type="checkbox"/> Build out the rest of the components until 100% of the required LAS components are in the design system, with style applied<ul style="list-style-type: none"><input type="checkbox"/> Check ins with dev along the way for gut checks on technical feasibility of the proposed components</div>	
	<div><input type="checkbox"/> Document each component's purpose, usage guidelines, and variations.<ul style="list-style-type: none"><input type="checkbox"/> Sync with Noriko and UX to present a proposal and to see how Moz Pro does this. There should be consistency amongst the processes around these design systems.</div>	
	<div><input type="checkbox"/> Provide clear code snippets and implementation instructions for developers.<ul style="list-style-type: none"><input type="checkbox"/> Work with dev to figure out the best way to provide code snippets to dev</div>	
Total Estimated Time:		10 weeks <p>Please note that this timeline is subject to change based on project scope, resource availability, and any specific requirements identified during the discovery phase.</p>

Part 3 - Implementation and adoption of the design system to complete the Lift and Shift

This chunk of work is dedicated to integrating the design system into the product and our processes.

Milestone	Details	Links	Due date: Unsure
Phase 7: Implementation and Adoption Work alongside development until implementation is up to design spec. This will require 1hr meetings every other day with dev team (or a dev team frontend member). FYI: @Mark Rigley	<input type="checkbox"/> Present the completed design system to dev who will begin work to turn the design system into their workflows and codebase. Ex: Storybook		This timeline is mainly dependent on dev and how fast they can build the design system and get it live
	<input type="checkbox"/> Provide transparency and training workshops to make sure they know how to use the design system, and ensure a smooth transition and adoption of the design system.		
	<input type="checkbox"/> Review the built components at a regular cadence until all components for the Lift and Shift are built, reviewed, and approved		
	<input type="checkbox"/> Solidify and document the process for maintaining and evolving the design system over time (as it concerns the UX team) so others can ramp up quickly if need be.		
Total Estimated Time:			Unsure Please note that this timeline is subject to change based on project scope, resource availability, and any specific requirements identified during the discovery phase.

Part 4 - Updates and iterations

At this point the Lift and Shift will be complete, built, and live for our users. Now we can spend time observing them in action, looking for any points of frustration and areas for improvement. We aren't sure in what form we will conduct the research, but it could be a mix of quantitative data analysis, watching fullstory sessions, surveys, and interviews.

The work for STAT v2 will be well underway as well, so this will be a phase that happens in tandem.

Milestone	Details	Links	Due date: Unsure
Phase 8: Iterate and update if necessary	<input type="checkbox"/> Iterate and refine the design system based on user feedback <input type="checkbox"/> Observe user behaviour and look for areas of improvement <input type="checkbox"/> Possibly conduct research if necessary (methods TBD)		Ongoing

	<input type="checkbox"/> Update components/flows if necessary	
Total Estimated Time:		Ongoing Please note that this timeline is subject to change based on project scope, resource availability, and any specific requirements identified during the discovery phase.

? Risks / Open Questions

High priority things we need to understand:

Question	More details	Answer	Follow ups
Curation of the design system may conflict with the Website asset.	JORDAN PLEASE EXPLAIN		