The Blue Book

Heuristics and Tenets of User Experience

Tenets of User Experience

Positioning

Error Handling

Ease of First Use

Sensorial Aesthetics

Wayfinding

Depth of Personalisation

Base Familiarity

Task Lifecycle

Steepness of Learning Curve

Security & Privacy

Value of Prolonged Use

Unintended Consequences

Consistency

Secret Sauce

False Promises

Rules

| Text | is predominantly assumed to be a negative scenario | Value assigned = 0 |

| Text | is predominantly assumed to be a moderately negative scenario | Value assigned = 0.5 |

| Text | is predominantly assumed to be a positive scenario | Value assigned = 1 |

| Text | no clear generalisation, value to be assigned by the designer through context and experience |

1

Positioning
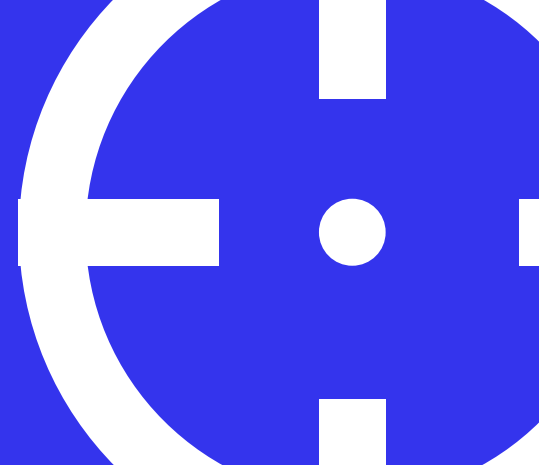
UX - Led Product positioning. Examining how the customers interact with the product and finds insights for improving how the brand differentiates itself from its competitors in the market.

Key Strategies.
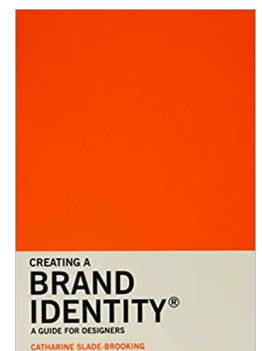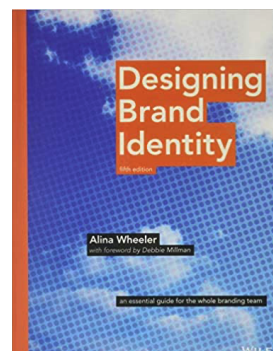
BRANDING PERSUASIVE DESIGN

USER PERSONA UX WRITING

References and Resources.

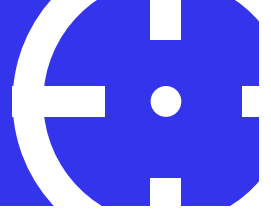[Why UX is important to Branding](#)

[Branding is Dead, CX Design is King](#)

[Branding & UX](#)

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Measurability.

Will be measured by comparing intended vs perceived positioning.
Will be defined as **Relatability for the Target Audience**

Target Audience

How clearly target audience persona is defined?

Clear — **Vague** — **Undefined**

Messaging Tonality

Is the message tonality persuasive to the target audience

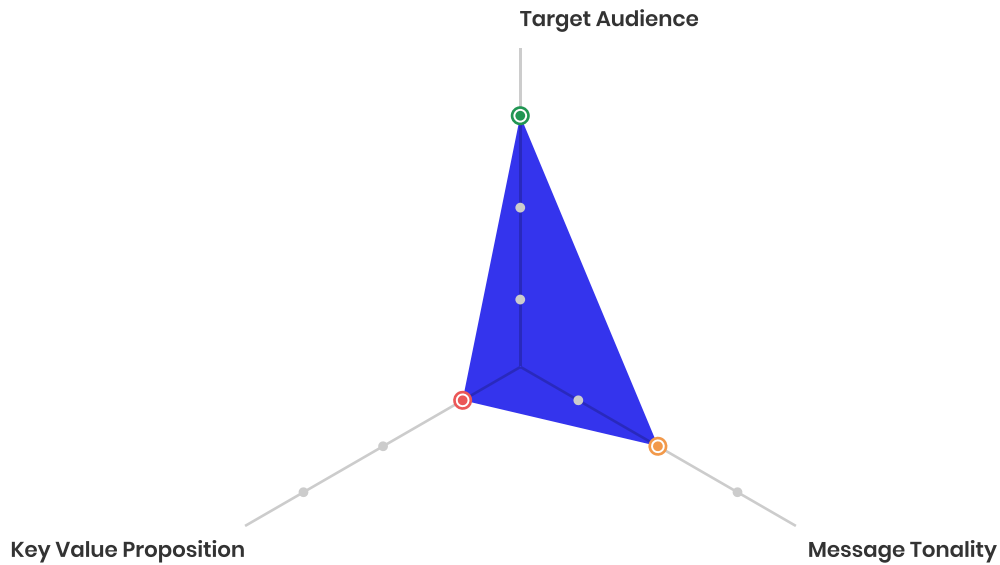**Aligned** — **Vague** — **Misleading**

Key Value Proposition

How clearly is the USP and value conveyed?

Clear — **Vague** — **Unclear**

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Sample - Qualitative

Target Audience

Is clearly defined, details available at user persona definition level.

Message Tonality

Is misleading for the target audience.

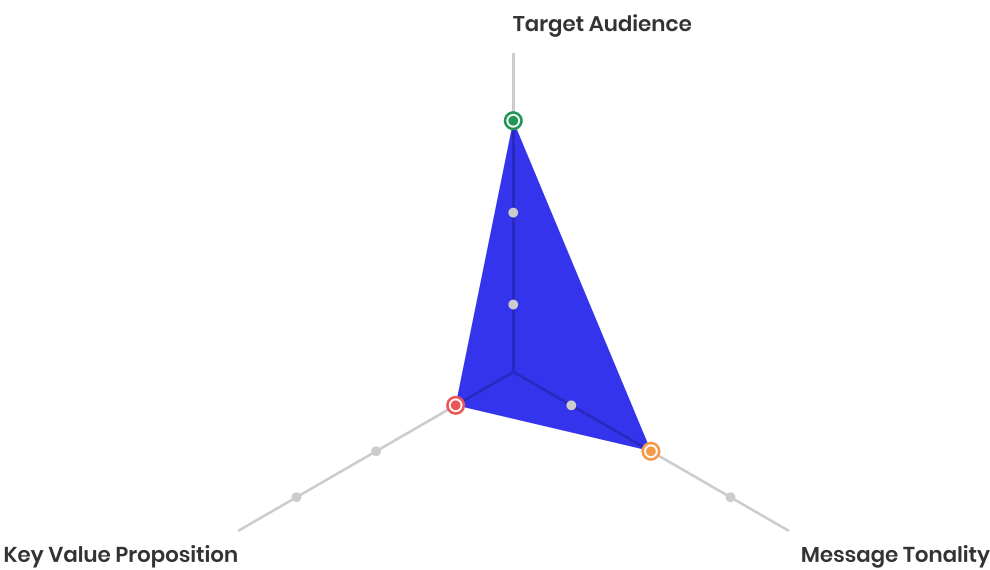> 💡 Use of language and keywords which are more relatable to the target segment.

Key Value Proposition

The USP and value is vagulely conveyed creating confusion in the user's mind.

> 💡 Clear communication of value / services delivered to the user on the Home Page

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Sample - Quantitative

1.5
OF 3

Target Audience
Is clearly defined, details available at user persona definition level.

1
OF 1

Message Tonality
Is misleading for the target audience.

0
OF 1

💡 Use of language and keywords which are more relatable to the target segment.

Key Value Proposition
The USP and value is vagulely conveyed creating confusion in the user's mind.

0.5
OF 1

💡 Clear communication of value / services delivered to the user on the Home Page

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2
Ease of First Use

Identify how easy or hard it is for the users to onboard onto the application and get started with using it.
Often called "First Time User Experience (FTUE)", "Out of Box Experience (OOBE)" or "Unboxing".

Key Strategies.

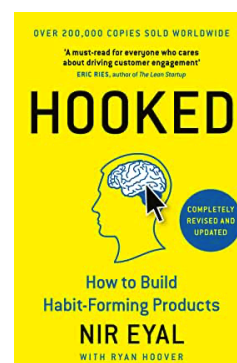ONBOARDING STRATEGY   COACH MARKS

EMPTY STATES   IKEA EFFECT

References and Resources.

First Time User Experience

The In depth Onboarding UX Resource

Guide to onboarding UX Patterns

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Measurability.

Understanding the User journey **from the point of entry till the completion of first critical task**

Ease of Sign up

How smoothly can a user Signup for the product / service

| Clear — Confusing | Fast — Slow | Flexible — Rigid |

Trail in the Woods

Can a user figure out a suitable starting point and journey to get started

| Guided — Unguided | Multiple Trail — Single Trail — No Trail |

First Task Gratification

Is the user able to test the waters by completing one task successfully? Here the system primes the user for their first success on the platform.

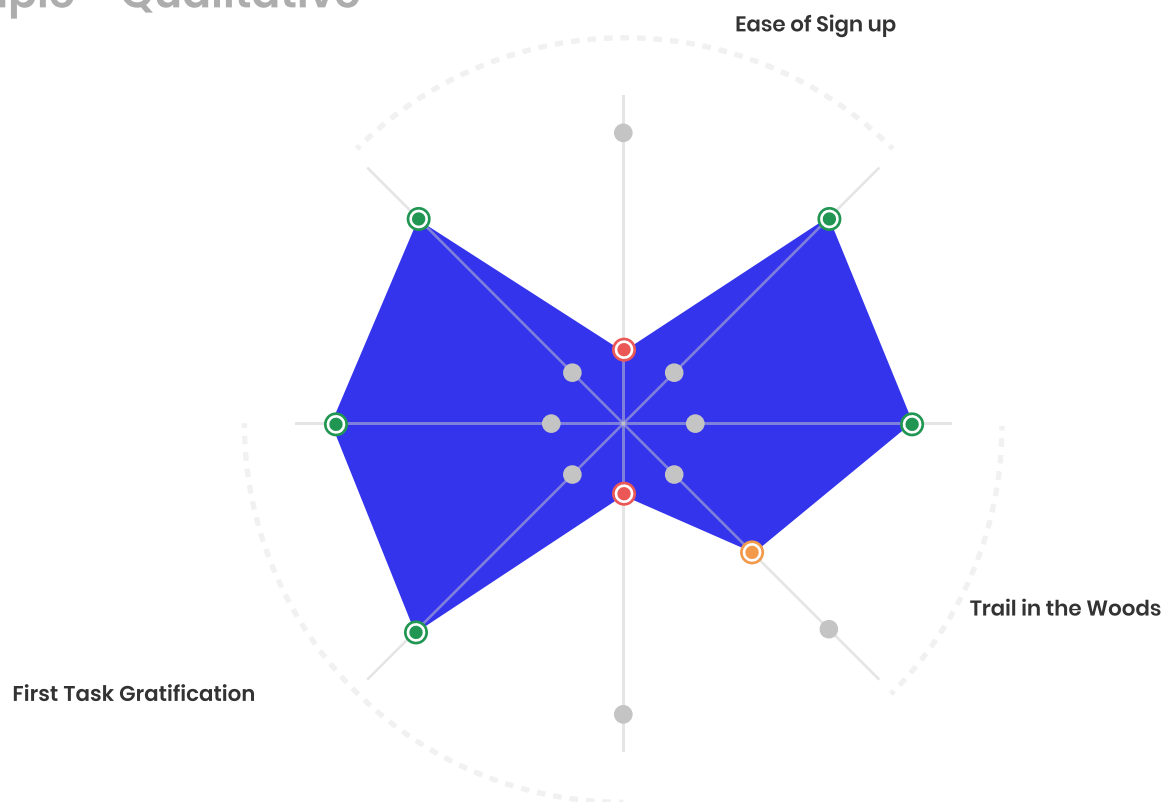Can the user complete the task without external support

Can the task be completed in Reasonable time

Is the task delightful

| No — Yes | No — Yes | No — Yes |

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Sample - Qualitative

Ease of Sign up

Trail in the Woods

First Task Gratification

Ease of Sign up
Is clear and gives user flexibilty to choose between various services.

> 💡 The sign up process can be made faster by removing capture of unnecessary information.

Trail in the Woods
Is clear and gives user flexibilty to choose between various services. The onboarding experience is guided and provides a good walkthrough.
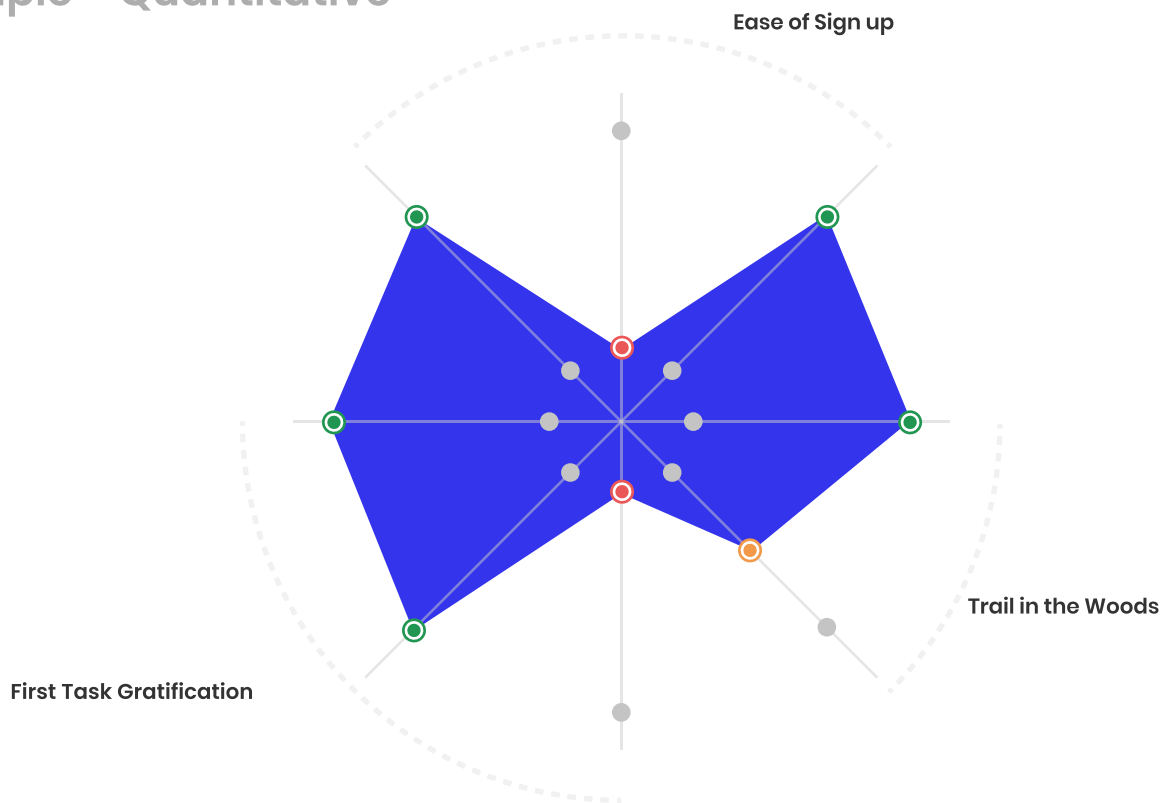
First Task Gratification
The onboarding task, though easy to complete is trivial and does not give alot of room to the user to experience true value of the platform

> 💡 Find a task better suited to showcase platform's value and instill a sense of buy in from the user

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Sample - Quantitative

5.5
OF 8

Ease of Sign up

Trail in the Woods

First Task Gratification

Ease of Sign up

Is clear and gives user flexibilty to choose between various services.

2
OF 3

💡 The sign up process can be made faster by removing capture of unnecessary information.

Trail in the Woods

Is clear and gives user flexibilty to choose between various services. The onboarding experience is guided and provides a good walkthrough.

1.5
OF 2

First Task Gratification

The onboarding task, though easy to complete is trivial and does not give alot of room to the user to experience true value of the platform
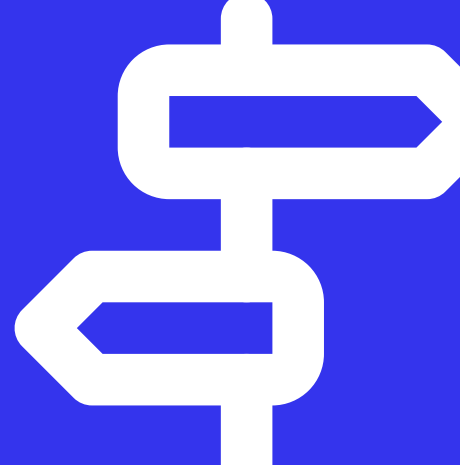
2
OF 3

💡 Find a task better suited to showcase platform's value and instill a sense of buy in from the user

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3
Way finding

Analysing the user journeys to find if the product gives enough clues to the users to guide them to the next steps to complete the tasks. The application should be contextually designed so the user can find his way to relevant information and tasks.

Key Strategies.

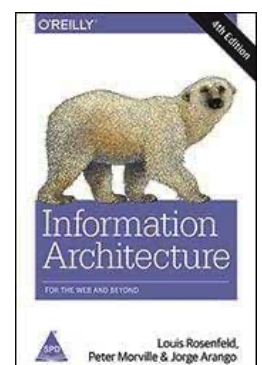INFORMATION ARCHITECTURE   CARD SORTING

USER JOURNEY   PRIMARY / SECONDARY NAVIGATION
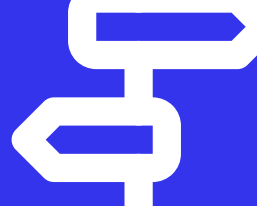
References and Resources.

The cost of not finding Information

Excellent Beginner's guide to IA

Low findability & Discoverability

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Measurability.

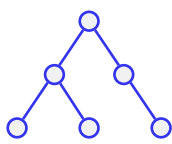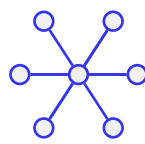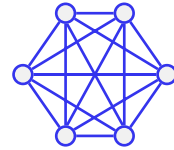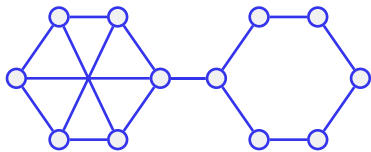Analyzing Information Architecture

Structure

Linear

Tree

Hub & Spoke

Mesh

Hybrid

Information Grouping

Object Based

Task Based

Hybrid

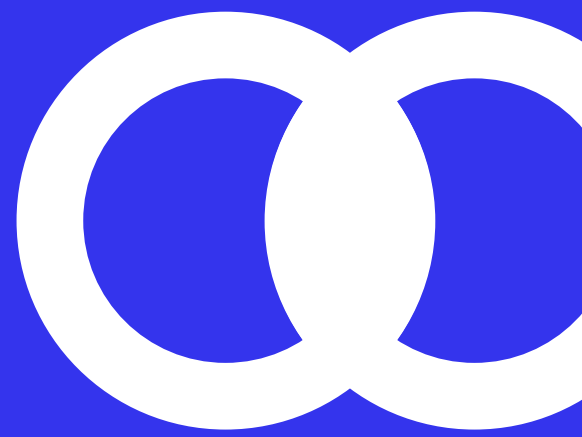## Visibility of System Status

Do the users know where they are?

Do the users know where to go next?

No — **Yes**

No — **Yes**

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4
Base familiarity

To ease in the user to any product or service, the behavior of key components should be according to normalized expectations. The medium, domain, current trends, and patterns will play an important role in this.

Key Strategies.

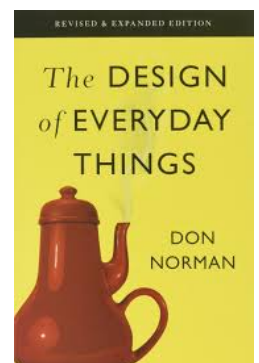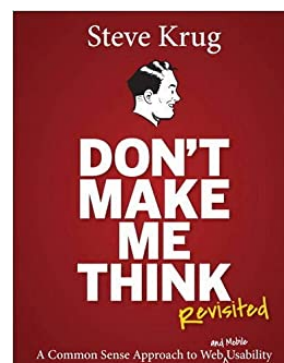DOMAIN UNDERSTANDING   MEDIUM UNDERSTANDING
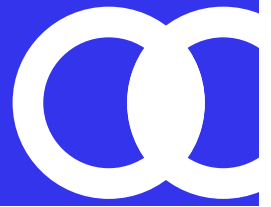
UX PATTERNS   RECOGNITION OVER RECALL

References and Resources.

Apps Dissection : UX Patterns

Little Big Things: UX Patterns

Recognition over Recall: Leveraging Memory in Interface Design

Measurability.

The medium, domain, current trends, and patterns
will play an important role in this.

Test of Time
Classification for design patterns as per prevalent trends

| New | Timeless | Outdated |

Patterns and Components Familiarity
Based on medium and Domain

| Mostly Conventional | Mostly Unconventional |

| Leads to Expected Outcomes | Leads to Unexpected Outcomes |

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5
Steepness of Learning Curve

The effort needed to put in from user's end to learn and use the app effectively. The starting point depends on the base Familiarity the app has with other regular apps.

Key Strategies.

| HELP | SUPPORT | DOCUMENTATION |

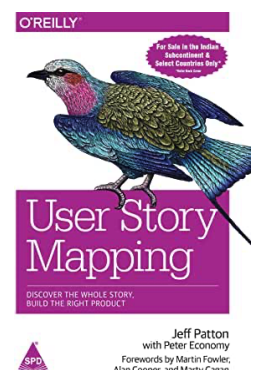| USER JOURNEY | INSTRUCTIONAL DESIGN | GAMIFICATION |

References and Resources.

Learning Curve Theory

The Learning Curve Design problem

Help & Support Content

Two types of help your user needs

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Measurability.

is measured by how easy / hard a system makes the process of learning how to work with a product / service - this tracks the details of a user's journey from Beginner to Advanced and the strategy deployed

Learning Models

Blended Learning
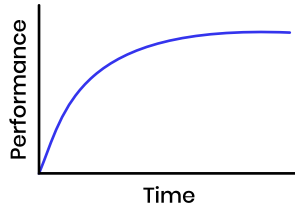
Cognitive Learning

Continous Learning

Collaborative Learning

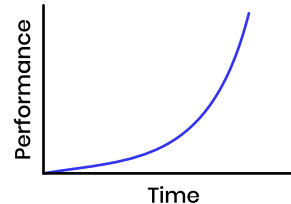**Personalised Learning**

None
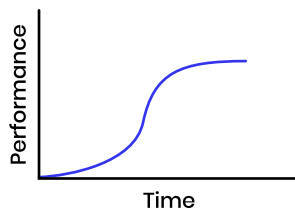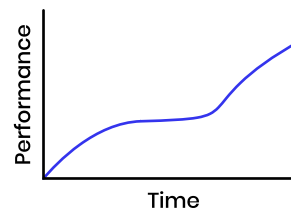
Learning Curve

Diminishing Returns

Increasing Returns

Increasing Decreasing Returns

Complex Curve

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6 Value of Prolonged Use

In order to keep the user engaged and connected to the application. The time invested in the system by the user should lead to better understanding and increase in value.

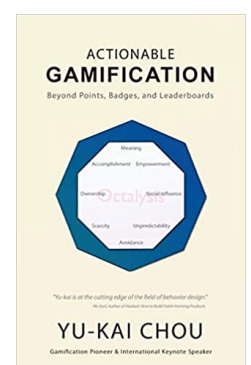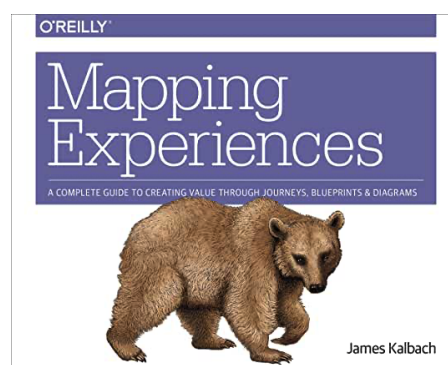## Key Strategies.

DYNAMIC PERSONAS   FOMO

PERSONALISATION   GAMIFICATION

References and Resources.

Designing for Advanced users

UX Curve

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Measurability.

By looking at how user and system are affected over time

User

| User has increased gains on Key values | User knows the system better | User has anticipation for system updates |

No — **Yes**   **No** — **Yes**   **No** — **Yes**

System

| System becomes smarter over time | System knows user better | System is updated regularly |

No — **Yes**   **No** — **Yes**   **No** — **Yes**

7
Consistency

Examining the product for overall consistency. Visual design, Service Delivery, Customer Support. Overall consistency helps in providing the user a consistent experience and can establish it self as a reliable product / service

Key Strategies.

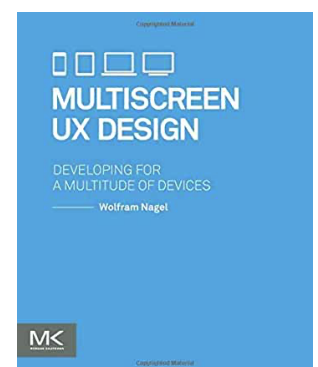DESIGN SYSTEM   BRANDING

ECOSYSTEM MAP   USER JOURNEY

References and Resources.

Guide to Design System

Inconsistency killed the cat

The best UX is consistent

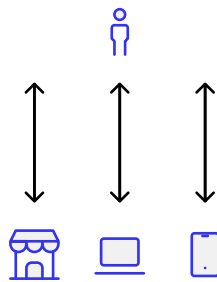**f1 studioz**

Measurability.

Comparing the overall consistency in all the task flows.
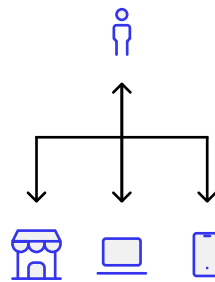
Channel

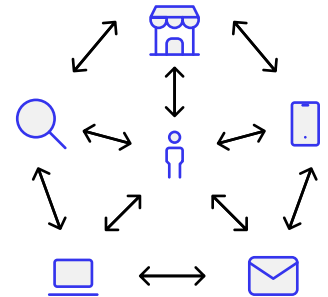Single channel   Multi Channel   Cross Channel   Omni Channel

Design System

How is the design system of the Product/Service defined

Well Defined — Loosely Defined — Undefined

Brand

Is the voice/personality of brand consistent throughout the product/service?

Well Defined — Loosely Defined — Undefined

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8

False Promises

Making false promises to end user for conversion or other reasons and not delivering the same will affect user's perception of brand and hit Credibility and Trust the user has in the Product/Service

Key Strategies.

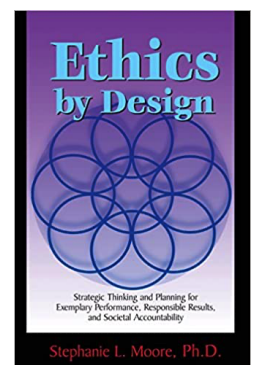BUYER'S REMORSE   BRANDING / POSITIONING

HIDDEN MOATS - EG. FREEMIUM   DARK UX PATTERNS

References and Resources.

Dark Patterns in UX

Sinister UX

Why I'm loosing faith in UX

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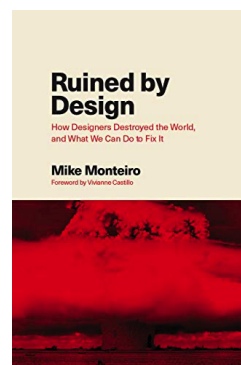
Measurability.

Will be measured by taking account of events where a system misleads/misdirects/hides key information on purpose.

False Promises

Are there any false promises made by the Product/Service?

No — **Yes**

Types of False Promises

Hidden Information   **Misdirection**

Impact

What is the impact of the false promise on user

Low Impact — **Medium Impact** — **High Impact**

9
Error Handling

How system deals with, Error propensity & prevention. Also, how does system handle the experience once an error occurs.

Key Strategies.

ERROR PREVENTION   SYSTEM FEEDBACK
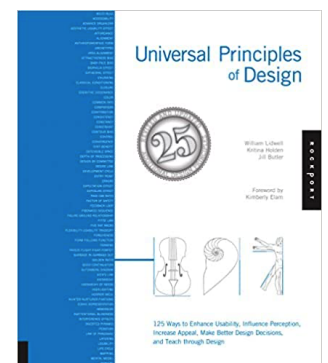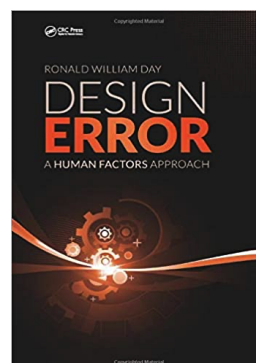
BASE FAMILAIRITY   AFFORDANCE

References and Resources.

UX Guidelines for Error Handling

Error Messages are an Anti Pattern

Failing Gracefully

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Measurability.

Measured by ability of system to reduce number of errors, clearly communicate and reduce the impact of errors on user's journey

Type of Error

What is the type of the error?

| Preventable Error | Non Preventable Error |

Error Feedback/Communication

How is the feedback of error communicated, Is its visibility clear?

| Clear State visibility | Unclear State Visibility |

Error Rectification

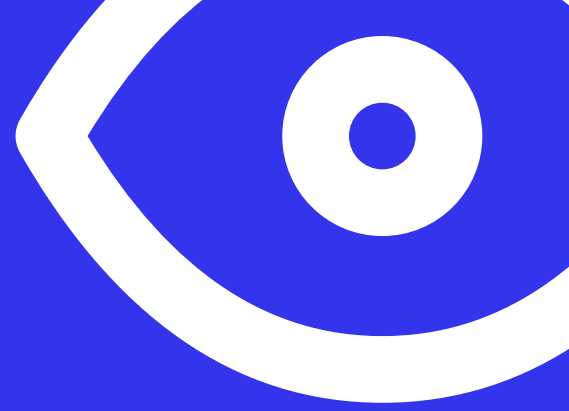Are the next steps after the error has occured clearly stated?

| Yes | No |

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Sensorial Aesthetic

Aesthetic and clean design can increase the overall value of app UX and help in improving brand perception and usabilty for the users.
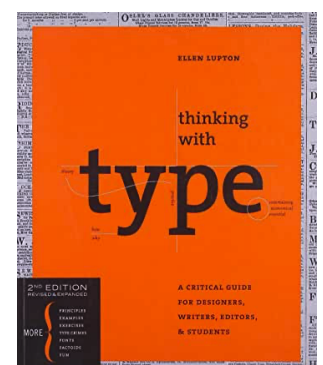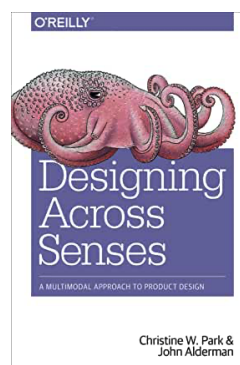
Key Strategies.

GESTALT PRINCIPLE   VISUAL HIERARCHY   DESIGN FOR VOICE

COLOR THEORY / PSYCHOLOGY   TYPOGRAPHY

References and Resources.
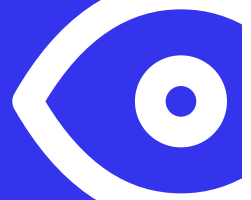
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Measurability.

Measured by how aesthetics enhance the beauty and the experience in conjunction with the product / service.

Layout

Does it need multiple Layout

| No — Yes |

↓

Is the Layout flexible?

| No — Yes |

Spacing & Alignment

| Imbalanced — Balanced |

Typography

Does the Style matches the brand and domain?

| No — Yes |

Is the typography readable at most sizes?

| No — Yes |

Is the typography scalable?

| No — Yes |

Color Palette

Does it enhances or conflicts with the Brand?

| Conflicts — Enhances |

Is the color palette scalable?

| No — Yes |

Does the color palette conflict with the system statuses?

| No — Yes |

Are the colors in the palette harmonious?

| No — Yes |
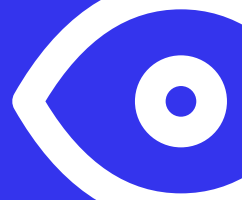
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Sensorial Aesthetic

Measurability.

Measured by how aesthetics enhance the beauty and the experience in conjunction with the product / service.

Graphic Elements

Static

How are the graphic elemets used in the product/service?

Well used ——— Ill Used

Dynamic

How are the transitions and animations used in the product/service?

Well used ——— Ill Used

Other things to consider.

Auditory

Tactile / Haptic

11 Depth of Personalisation

Personalisation helps in making a digital product that is unique and meaningful for each user. It makes user feels in control and eventually stay loyal to the brand

Key Strategies.

RECOMMENDATIONS   PERSONALISATION

USER PERSONA / JOURNEY   DYNAMIC PERSONAS
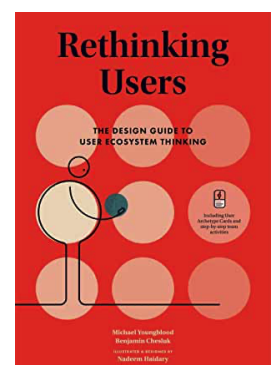
References and Resources.

Progressive Personalisation

Personalisation (Medium)

Navigating the Personalisation Gap

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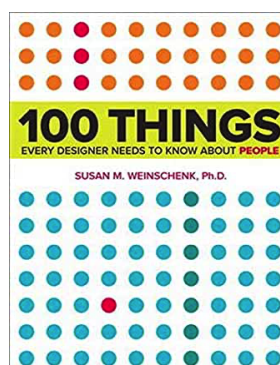
Measurability.

Measured by identifiying various degrees of personalisation

Degrees of Personalisation

Individual

Role Based

Thematic

No Personalisation

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Task Lifecycle

Everything on a platform comes together in form of tasks, which constitute of various stages and components. Task Lifecycle takes stock of journey of a user from triggering a task to successful completion.

Key Strategies.

MICROINTERACTIONS · WIZARDS

TASK FLOW ANALYSIS · ERROR PROPENSITY

References and Resources.

Task flow Analysis

Scenarios and Task flows

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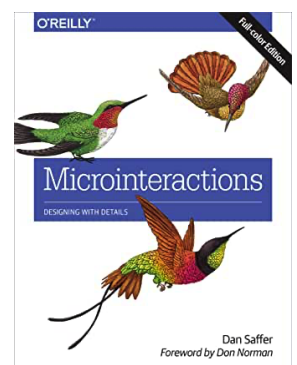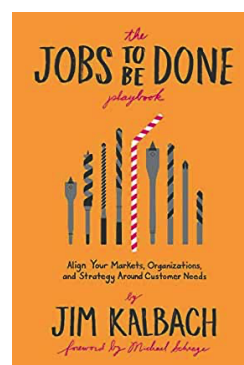
Measurability.

This will be measured by checking how clearly the Task anatomy is defined as an end to end interaction.

Trigger

| System Initiated | Manual |

Rules

| Well Defined | Loosely Defined | Undefined |

Feedback

| System provides Clear feedback | System provides no feedback |

Loops & Modes

| Well Defined | Undefined |

13
Security & Privacy

Security and privacy are important for the users to feel safe and secure while using the application. It also affects the credibility of the brand.

Key Strategies.

GDPR

DARK UX PATTERNS

PRIVACY & SECURITY AUDITS

DESIGN ETHICS

References and Resources.

GDPR and User Experience

f1 studioz

Measurability.

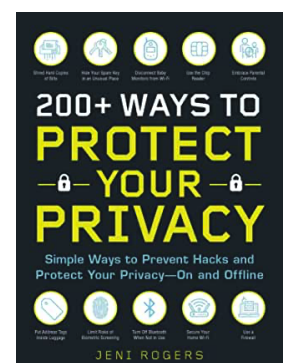Can be measured by taking an account of possible and potential breaches in security / privacy

Currrent Consent Practice

Do you provide enough context and details as to who and how user data is processed?

No — Yes

Does system have any pre-checked consent boxes

No — Yes

Users have the option to easily withdraw consent?

No — Yes

Transparency

Does system disclose the names of controllers who will be processing the data?

No — Yes

Does user have control over transparency of critical information ?

No — Yes

Right to manage and delete data

No — Yes

Security

Is Username / Password handling good?

No — Yes

Is Sign in secured

No — Yes

Does the product/Service ask for Authentication for critical / sensitive tasks

No — Yes

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14

Unintended Consequences

Our own central argument as designers is that humans are complex, and designing for them is not straight-forward. So how can we know what the full effect is from the things we make? All those complexities of humans will produce unintended design consequences.

Key Strategies.

INTENT-EFFECT MAPPING   USER EFFECT

COBRA EFFECT   POLARITY MAPPING

References and Resources.

Unintented Consequesnces in Design

The Joys of Polarity Mapping

User Feedback in UX

Bottlenecks
Aligning UX Design
with User Psychology
—
David C. Evans
Apress®

O'REILLY®
Tragic Design
THE IMPACT OF BAD DESIGN AND HOW TO FIX IT
SPD
Jonathan Shariat &
Cynthia Savard Saucier

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Measurability.

This will be measured by system's ability to track short / long term effects and detection of UICs through monitoring the system and user feedback

Design Decisions with conflicting Polarity

Short Term Conflicts

Long Term Conflicts

User feedback

| Effective Feedback Loop | Ineffective Feedback Loop | No Feedback |

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15
Secret Sauce

Every system has something unique defined for itself in approach which helps propagate greater value and delight over other systems. The presence of a well-defined secret sauce strengthens the system by acting as an attractor and an industry moat.
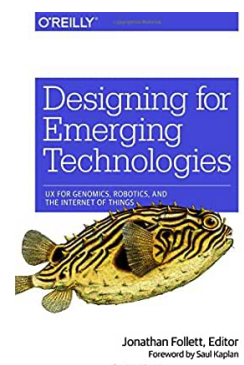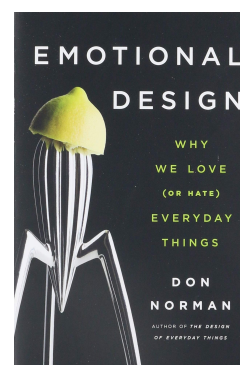
Key Strategies.

DOMAIN UNDERSTANDING NOVEL UX

AHA / DELIGHT MOMENTS EMOTIONAL DESIGN USER JOURNEY MAPPING

References and Resources.

Is there a formula for delight?

Measurability.

Identification, classification and impact analysis of the secret sauce

Secret Sauce

Does system have a secret sauce?

No — Yes

Type	Impact
Visceral	**Low**
Behavioural	**Moderate**
Reflective	**High**