

A top-down view of a wooden table with a white mug of coffee, a golden-brown croissant, and a notebook. The notebook has a red horizontal bar and a quote: "We must be the change we wish to see in the world." A hand with a ring is writing on the notebook.

Task Analysis & User Flows

MY GOALS

WEEK 2

we can't control the future... you decide

We must be the change we wish to see in the world.

— MARTIN LUTHER KING JR.

TODAY'S TARGETS

(write to move closer to your goals)

1.

2.

3.

WINS:

(the brag zone!)

- 1 Think about your relevant customer personas and their goals. They may be the same or they may be slightly different.

Customer Persona 1

Goals

Needs

Customer Persona 2

Goals

Needs

Customer Persona 3

Goals

Needs

- 2 What are the exact tasks/steps that they take in real life or when using other solutions or your solution to accomplish these Needs? Be explicit!

Tasks

Tasks

Tasks

Task Analysis 1

Now it's your turn to analyze the needs and the corresponding tasks. For each character, how great is this need? And then, for each task, how important is being able to do that task to them?

Persona 1

Persona 2

Persona 3

Needs

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State the priority of this "need" for each character: High, Medium, Low or N/A

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Tasks

State the importance of each task for each character: High, Medium, Low or N/A

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Task Analysis 2

Now it's your turn to analyze the needs and the corresponding tasks. For each character, how great is this need? And then, for each task, how important is being able to do that task to them?

Character

Character

Character

Needs

State the priority of this "need" for each character: High, Medium, Low or N/A

Tasks

State the importance of each task for each character: High, Medium, Low or N/A

Task Analysis 3

Now it's your turn to analyze the needs and the corresponding tasks. For each character, how great is this need? And then, for each task, how important is being able to do that task to them?

	Character	Character	Character
Needs			
	State the priority of this "need" for each character: High, Medium, Low or N/A		
Tasks			
	State the importance of each task for each character: High, Medium, Low or N/A		

How to say...that's not important!

Now that you've completed the Task Analysis in a structured way, you have an objective framework for identifying what's important and what's not important. When someone comes to you with a feature idea, this is your thought process:

- Is this person my target user, a key character or another important actor in my business model? If no, put the suggestion aside; it's not important.
- If **yes**, assign some value or weight to what this person is saying. If they're your target user or the one paying the bills, that's more important than a stakeholder.
- Conjure up other feedback you have received and research you have done.
- Then use the 1-2-3 rule to decide if it's valid.
- **If it's a 3**, then you use the Task Analysis framework:
 - Is this a feature that gets my target user closer to their goals?
 - If **yes**, continue.
 - If **no**, it's not important.
 - How important is this feature to my three key characters?
 - If **not important**, it's not important.
 - If **medium or very important**, continue.
 - Is it important to my key character?
 - If **yes**, explore the idea further.
 - If **no**, is it important to my supporting cast?
 - If **yes**, does implementing this feature hurt the main character's experience with your product/service?
 - If **yes**, it's not important.
 - If **no**, explore the idea further.
 - If **no**, it's not important.

Will make this a decision diagram!



ROOT OUT PERSONAL CONJECTURE

In order to get your customers to design your product for you AND eliminate the guesswork from what you should build, you need to root out personal conjecture; replace it with everything you know about your characters and actors in your business eco-system.

TO DO: CLICK HERE & WATCH THIS VIDEO

<https://www.youtube.com/watch?v=Fwle0ljQXTc>

Deciding on What to Build

Using the Task Analysis on the previous pages, focus on the tasks that are High Priority for your Main Character and also Medium or High Priority for your Supporting Characters. We want to pick the tasks that will demonstrate our core value and get our users towards their goals.

WHICH TASKS WILL YOUR CHARACTERS DO EACH TIME THEY USE YOUR PRODUCT?

WHICH TASKS ARE NECESSARY BUT MAY BE INFREQUENT?

Daily Tasks

Fast to learn w/
shortcuts after more
use

Necessary Tasks

Nothing fancy
needed

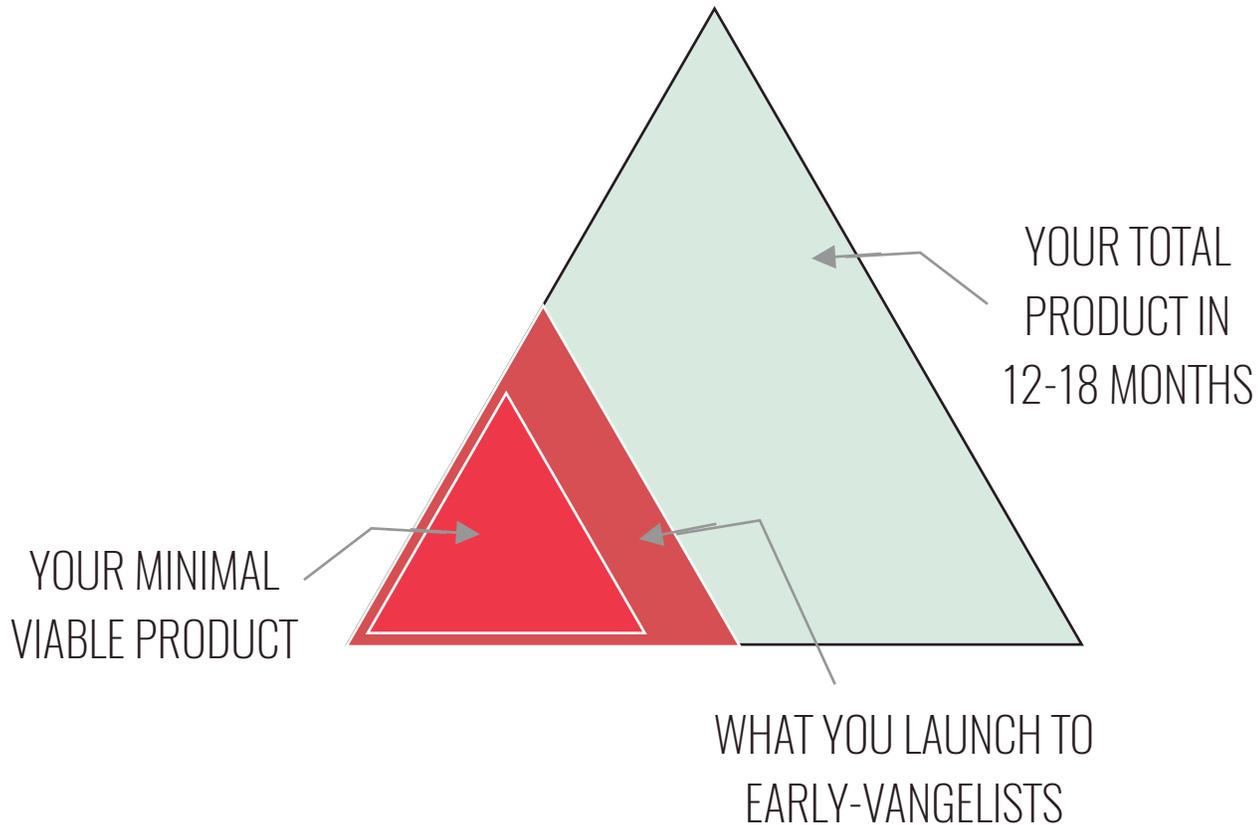
Edge Cases

Ignore or save for
version 2

EDGE CASES - BUT WHAT ABOUT...?

On the previous page, I gave you a framework for deciding which features to pursue. The answer is, essentially, that we build features that make the most people happy and help them towards their goals. The flipside of these types of scenario are the **edge cases**. The easy rule with edge cases is that you should ignore them or save them for a future version. Don't mix up a "fluke event" with a "necessary, but infrequent" activity.

Product Planning



WHICH TASKS HAVE TO BE IN YOUR MINIMAL VIABLE PRODUCT?

Yes, all of these tasks are supported in what I currently have built.

WHICH TASKS HAVE TO BE IN WHAT YOU LAUNCH TO YOUR EARLY-VANGELISTS?

Yes, all of these tasks are supported in what I currently have built.

Step-by-Step

In Chapter 1, you did the Sit-and-Watch activity. You marked down what worked and didn't work, and identified any random events. Now you have the opportunity to fix all of those problems for your users by deciding the exact steps and order in which they solve their problems or reach their goals. Here's your chance to define an efficient and simple process from start to finish.

PROVE THAT YOU CAN DO IT

With your Needs listed and Task Analysis on the previous pages, you should have a solid idea of the singular user flow you need to demonstrate to provide value. Now you need to prove that your product can do it with even more specificity. This is how you tell people exactly how your product works.

Paypal Example (Let Me Pay You)

1 - User has items to purchase at an e-commerce checkout	Prerequisite: Has to want to buy something online
2 - They select the Pay with Paypal Button	Prerequisite: Has to select Paypal
3 - A new page loads that asks them to sign in to Paypal	They must identify themselves to access payment options (required)
4 - They select their payment option or confirm preselected payment option	Paypal needs to know which payment method to use
5 - They select "Pay Now"	Paypal is told to process the payment
6 - The user has paid the e-commerce store	

The order of these steps is critical. The user cannot successfully pay the e-commerce store without all the preceding steps. If you look at this list through a different lens, these are exact instructions on how to checkout using Paypal.

What's the best way?

A.K.A. The Main Success Scenario

Your approach: Something called the Backwards/Forwards Method is perfect for figuring out how any feature should work. You can either start from the very beginning: the moment a new user discovers your product. Or, you can start from the end; use the need or end result, and work backwards from there.

While you're detailing the steps think about: What order do these steps (tasks) need to be in? What has to happen first before something else can happen? Would it be faster a different way?

Need - The end result

Order	Steps	Reason
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>

Why is this important?

You're a visionary and you have a dream for your company. You have so many ideas for the future and you can recite facts, statistics, trends and insights easily. But, you may think your partners, employees and contractors know as much as you do. They don't, and they need you to spell it out for them. Giving them the reasons supplies a deeper understanding so they can add even more value to your project as well as reduce confusion.

What's the best way? (cont'd)

Need - The end result

Order

Steps

Reason

1

2

3

4

5

Need - The end result

Order

Steps

Reason

1

2

3

4

5

Draw The Story

What is the customer doing when they experience the problem?

What's their reaction when they experience the problem?

What is it that made them think of you?
What's the trigger?

How are they interacting with your product?

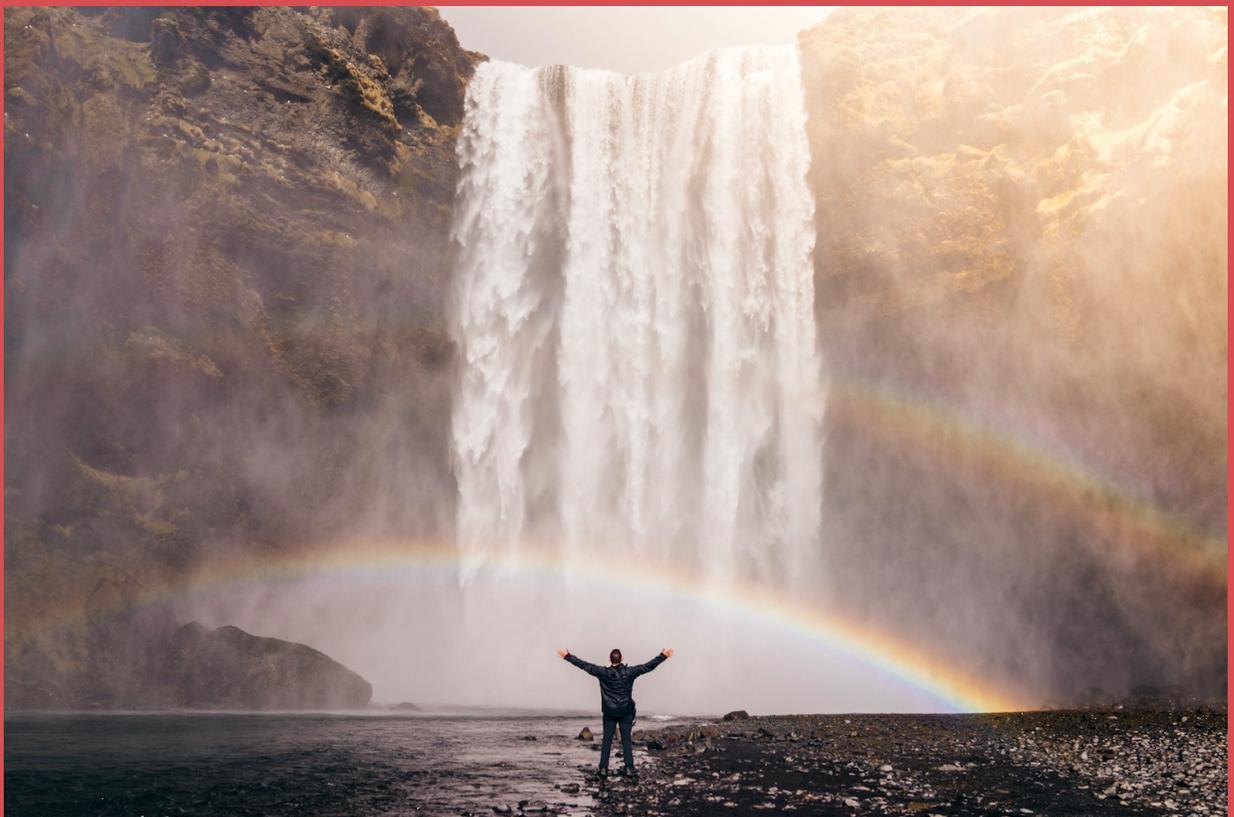
How do they continue to interact with your product?

How do they feel now that they've solved their problem with your product?

Whoah. You just "designed" something

People say "User Experience" is all about communication. With the previous exercise, you are communicating your ideas to your teammates. You're also communicating to your users how they can easily solve their problems and reach their goals using your product.

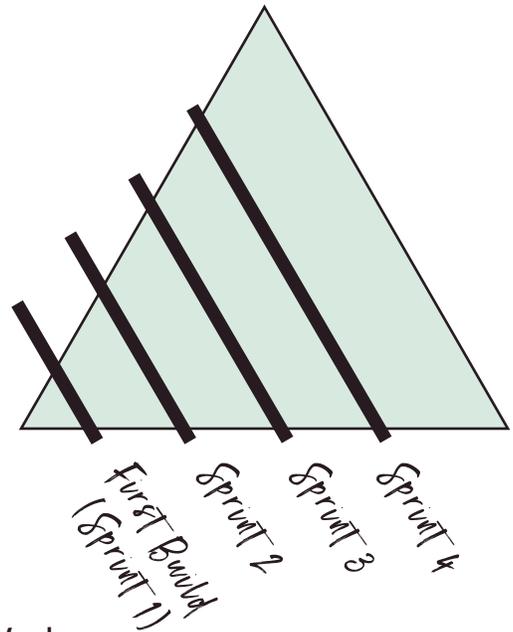
If you just pushed yourself to think through the proper order of the tasks, you just "designed" something. You're awesome.



Product Roadmap

A **Product Roadmap** is very similar to a project plan. It's a list of the features you're going to build, in the order you're going to build them, where each is assigned an estimated due date.

Given the exercises on the previous pages, now you can craft your first roadmap to figure out how all of these features will be implemented.



	Already Built	Needs Work
Sprint 1		
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
Sprint 2		
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
Sprint 3		
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
Sprint 4		
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

Write any notes, thoughts or outstanding questions here. It's good to run this by other people!

**MAGIC IS
SOMETHING
YOU MAKE**

20/240

5/20/20

It is time
Truth.
community,
other. And
outside you
leader. The
flowing now
so great and
are those wh
They will tr
the shore.
they are be
and will
Know the r
destination.
of the shore
the middle o
our eyes ope
above water
in there
c e l e b

Appendix