

APEX Content Processes & Tools Improvement

Final Readout

- 25 February 2022
- version 5.0

overview | purpose, objectives, agenda & deliverables

Why we're here

Purpose:

- To outline the findings of the APEX tools and processes evaluation
- To present directional recommendations improvements

Objectives:

- To align on the findings and recommendations
- To prioritize recommendations presented based on business impact and complexity

Deliverables:

- Recommended direction
- RACI
- Process flows
- Tools recommendations
- Prioritization matrix
- KPIs and targets
- Resources & team

overview | agenda

What we're covering

1. Purpose, objectives, agenda & deliverables
2. The ask & opportunity
3. The business challenge
4. Key areas of opportunity
5. Recommend direction
 - Tools
 - Roles & responsibilities
 - Processes & workflows
 - Sprint cadence
6. Component prioritization
7. Assessing effectiveness
8. Resources & team
9. Questions & next steps

overview

THE ASK AND OPPORTUNITY

overview | the ask

Overview

- Evaluate existing work stream processes, content development tools, and deliverables within the overall APEX development processes and tools
- Provide documented recommendations to improve the current UX content development processes within the overall UI development process
- Provide documented recommendations to current UX content development toolset based on industry best practices and projekt202 experience
- Provide documented recommendations to a future UX content development process based on recommended improved tools and deliverables within the overall UI development toolset

overview | the ask

Overview

- Assess Designer to UX Writer ratio
- Provide documented assessment of how to optimize workflows to drive improved Designer to UX writer ratio
- Provide documented guidance for tools required to best manage content within the entire UI toolset and processes
- Provide framework for assessing effectiveness of UX content and UX writers within UI development work streams (i.e., KPIs and targets)
- Provide best practices for assessing effectiveness of UX writers
- Provide guidance on how to effectively connect UX content with other APEX content developed for customers

THE OPPORTUNITY

To provide APEX with recommendations for work-stream processes, optimized roles, standard tool usage, and deliverables to reduce noise, streamline reviews required, and accelerate the time to publish updates.

context

BUSINESS CHALLENGES

context | themes

Areas to explore

Across the stakeholder interviews, tool walkthroughs, and team working sections, several themes began to emerge.



If anyone tells me we have processes, they are really customs

APEX has been chaos

The UX team need to figure out what it is we deliver

We don't get a JIRA notification for any request

The tools are sufficient to a certain extent

Coming on as new, I got a different style guide every time I ask. Need a single source of truth

Processes are all over the board. Look to JIRA in the future

We need to simplify. We're treating UX as a body shop

We're trying to be agile. We need someone as a point of contact that has skin in the game

Lack of process has been a problem. It's the wild west

Need to understand all roles and what they are

Don't know who owns which style and who it's for

context | business challenges

The current situation

- Need clarification around each stakeholders' responsibility and accountability in a process has yet to be fully defined.
- The APEX UX team is relatively new to the process and has been growing, while trying to fit into existing processes such that they are
- No specific processes have to date been specified for UX in general and UX Writers specifically in the current process
- How tools are used is inconsistent, with different resources and stakeholders using these tools differently
- No set style guide has been agreed upon for UX content or writing within the console

context | business challenges

Key focus areas

The following areas were identified during the discovery phase of work based on the findings of the stakeholder interviews, tool walkthroughs, and general observations.

ROLES

- Clear definitions of roles is needed
- Responsibility and accountability for each task in the process required

PROCESSES

- Systematized processes can address inefficiencies
- End-to-end and editorial processes need documenting

TOOLS

- Tools need to be used in consistent ways
- JIRA needs to fit how work is being performed

STYLE

- No single style guide has been identified to guide editorial direction
- Content strategy enforces this *ad hoc* to the detriment of strategic direction

context | business challenges

Key actors

We need to be leaders in how we work UX and Writers. Focus on what we are good at.

- There is confusion between IDD and UX writers. If we add these attributes to the tool, what is the difference? We need to clearly enumerate them
- The biggest challenge is the lack of understanding how UX Writing fits into the team and why their work is important. No one knows when to bring them in
- Main stakeholders in agile process are Engineering Lead, UX Writer, UX Designer, Product Manager, and UX Research
- Core teams also represent legal, procurement, marketing, and sales. All want to have particular functionality. Business requirements include description, benefits, etc. JIRA should note whether UX writers or technical writers (IDD) are required
- Once approved, Product Manager takes it Engineering
- The legal team has a big impact content and design
- No one has final editorial control of the content.

context | business challenges

Processes

Processes are inconsistently applied throughout definition, research, design, and writing.

- Workflows or processes are all over the board. Multiple instances of JIRA exist. Different instances for design and engineering is not optimal and leads to unnecessary churn and confusion
- UX (writers, researchers, and designers) are not currently involved early enough in grooming epics and stories
- Need a debrief of the assignment with all stakeholders regarding requirements summary, estimation, timeline, deadlines, etc., during grooming sessions before design begins
- There's not really a set process used by all stakeholders. No up-front collaboration between writers and designers
- Once the design is done, UX rarely hears from anyone down the path for demos or quality assurance and proofing

context | business challenges

Processes (continued)

A standardized, agreed upon, process would clarify what happens when.

- The biggest pain point is communication. Make sure that communication is the right communication and in the right amount. It comes from a well thought out process.
- Content gets changed somewhere in Engineering without my knowledge, opinion, etc. It needs to be communicated that this has been approved.
- There's some confusion as to who does what. It's a huge issue. Often needs to refer people to technical and not UX writing. The workflows are different for each
- Often, SME reviews incur multiple rounds of iteration (i.e., greater than 4 or 5)
- UX doesn't have visibility into features that get delivered as part of the core console.

context | business challenges

Key tools

The tools provide the required functionality, but how they are used varies widely.

- JIRA is the source of truth for workflows or processes. The wires are the source of truth for the end product
- Workstream sessions allow us to identify gaps in JIRA structure. Not having the right fields, however, introduces noise
- Edits should happen in the tool. We get a lot of content from other sources that don't have access to Figma, so we need to consider that as well
- We need to think about versioning, as Figma doesn't have much of a historical record of changes or versioning, which may have been addressed with last year's release
- We are using JIRA as single source of truth. We put things in Figma and add it to JIRA ticket. UX resources don't get a JIRA notifications for any requests
- We need to stop tracking progress on task manually or offline, and use the tools we have

context | business challenges

Key tools (continued)

We need to align on using the same tools in the same way every time.

- UX Writers use Figma differently depending on the writer or the use case
- Legal, product, and marketing reviewers use Figma comments to provide feedback on designs
- UX Writers rarely login into JIRA
- UX doesn't have tasks or stories assigned to them in JIRA. They don't exist in system today
- Other tools are used only rarely. Locally, Excel and Trello see some usage, while technical writers use XMetaL and then Tridion. It's a confusing pattern. In an ideal world UX writers would be doing it all for the console
- Designs are rarely reused, which leads to extra effort for engineering

context | business challenges

Style resources

No, single style guide exists for APEX UX Writers to refer to.

- An agreed upon APEX Style Guide is needed, including guidance on voice and tone. Messaging and emails are a challenge.
- Every department seems to have made a style guide, but new team members get a different answer every time they ask. Need a single source of truth for style as well
- We have the IDD style guide, but doesn't really apply to UX. This should be used as a supplement
- There are few different style guides at play. Start with the Glossary, then IDD style guide, then will open question up to writing team. Need a step for UX Writing style up front

context | business challenges

Team

We need to simplify.
We're treating UX as a
body shop. Need
dedicated people that
do work.

- It's a relatively new team that's adapted amazingly well
- We need a regular schedule regular times to share work with other designers and writers to see what we everyone is working on, how we are approaching it, and how we solve challenges
- We need to clarify what content is UX writing versus technical writing, which is subject to a different process, has different goals, and is for a different audience
- We don't really take advantage of reusable designs. Different designs are created for the same functionality. This increases engineering work and increases the potential for user confusion

direction

KEY AREAS OF OPPORTUNITY

direction | key areas of opportunity

Opportunities observed

The following areas were initially observed, among others summarized above, that could lead to great gains in communication and standardization of process and presentation:

Process

- Systematized processes can address inefficiencies across the design process
- Common kickoff/debrief with all stakeholders, including legal and marketing as required
- Collaboration time between UX Designers and Writer increase the opportunity to evolve the designs
- Continue workstream meetings with Product Managers for collaboration once content and design have reached the draft stage
- Common reviews obviate official signoff from Product Managers
- Final editorial reviews before final legal review will ensure adherence to style and drive consistence
- Connect UX Writing with overall APEX Content Strategy, including linkage to non-console content

direction | key areas of opportunity

Opportunities observed

The following areas were initially observed, among others summarized above, that could lead to great gains in communication and standardization of process and presentation:

Tools

- Standardize use of Figma to write and and edit inline (reserving comments for reviews)
- Tag UX Designers and Writers to tasks in JIRA for tracking and notifications
- Update JIRA with status and other important information
- Align on common editorial style to minimize inconsistencies
- Use previous, published work where possible to encourage reuse in Engineering
- Use Miro, as required, for initial brainstorming and collaboration
- Institute Style Guide as a single point of reference on matters of style, voice, and tone

direction | key areas of opportunity

Initiatives underway

The following initiatives may have a positive bearing up streamlining the UX Design and Writing process and the tools used within it:

- Continuing JIRA rollout to include writers, designers, and experience owner. (Two workstreams with most writers already involved)
- Scrum at scale being introduced to the design process, including grooming sessions, stand ups, and retrospectives
- Two UX writers have been brought on board to right-size the designer to writer ratio
- Style guide development for UX writing for APEX, focusing on voice and tone and writing for users

direction RECOMMENDATIONS

recommendations

TOOLS

direction | future tools usage

Figma alignment & next steps

Alignment:

- Use inline writing and editing capability in Figma to author and revise UX copy
- UX Writers to work closely with UX Designers to alert to design changes from text (no copying from MS Word)
- Continuous coordination with legal to ensure alignment through workstream meetings and Figma comments to be used for SMEs (legal, marketing, product, etc.) to request revisions on design and copy
- EDG to pursue Figma versioning to facilitate IDD and EDG collaboration

Next steps:

- Investigate tools for overlays and help (WalkMe)
- Investigate how CloudIQ handles help content
- Investigate Acrolinx plug-in

direction | future tools usage

JIRA alignment & next steps

Alignment

- During grooming, Product Manager sets up story with requirements and then separate tasks to be added during grooming for design and writing if required
- Experience owner (either UX designer, researcher, or UX) is added to tasks
- Working with Product Manager and Scrum Leader, UX Writing Manager and UX Design Manager estimates UX tasks for addition
- UX Writers and Designers follow features and parent stories to their task to receive updates. Any update at the Epic level and down will notify them automatically
- “Use NeedsUX,” “NeedsIDD,” and “NeedsUXW” labels for resources needed and reporting rather than process management

direction | future tools usage

Other tools alignment & next steps

Exploration:

UX resources can continue to use the following tools outside the scrum at scale process:

- Miro/FigJam: UX resources use this for brainstorming as applicable in UX collaboration sessions
- MS Word: UX Writers can draft content initially in Word if required, but to paste copy into Figma, it must be pasted as plain text to remove unnecessary formatting and styles that will conflict with those in Figma (**do not paste directly from Word!**)
- Teams: UX team will continue to use for asynchronous communication

recommendations

ROLES & RESPONSIBILITIES

direction | actors & roles

Role descriptions

- 1. Customer Experience Strategist:** oversees the entire digital experience for an APEX offering or feature
- 2. Product Manager:** owns the requirement specification for each feature or offering that needs to be designed for. Owns handoff to engineering
- 3. Engineering:** owns the actual implementation of the design including the UX writing
- 4. Experience Owner:** one of the UX

Designer, Researcher, or Writer. Acts a knowledge owner at the feature level, and owns interface with Engineering during their process, including scrums and identifying appropriate resources (UX Designer, UX Writer, UX Researcher) required to make any changes during development process

direction | actors & roles

Role descriptions

5. **UX Designer:** works with UX Writer to own design of experience to meet requirements, including text spacing and character counts. Incorporates findings from Research in design
6. **UX Writer:** works with UX design to owns writing content for the experience, as well as specifying content requirements for flow. Creates content and applies taxonomy. Incorporates findings from Research in UX Writing
7. **UX Researcher:** own customer insights to inform design and communicating findings to larger team
8. **Content SMEs:** understands what is supposed to be communicated, provides background and expertise, and reviews content for accuracy. Owns providing feedback from non-core design functions, such as marketing and legal, and approving designs, including content

direction | actors & roles

Role descriptions

9. Content Strategist: owns content brief or priority guide that outlines the content mapping and connects the page-level content direction to the overall APEX content strategy and prioritized content by importance. Owns taxonomy and controlled vocabulary. Connects console content strategy with larger APEX content strategy

10. Editor: Owns brand and language review of design before finalization upon ultimate legal review

11. UX Writing Manager: Oversees UX

Writing requests for creation of or adjustments to features, offerings, and designs. Estimates High-Level LOE for writing for each feature. Assigns resources based on stories

12. EDG Manager: Oversees UX Design requests for creation of or adjustments to features, offerings, and designs. Estimates High-Level LOE for design for each feature. Assigns resources based on stories

Note: roles ≠ people or titles necessarily. One person, for example, could perform multiple roles

direction | actors & roles

Role descriptions

- 13. **Scrum Lead:** Owns scrum at scale for agile process for features and stories. This includes scheduling meetings and holding retrospectives
- 14. **Quality:** owns quality of content and design for adherence to standards

direction | actors & roles

RACI

Task	CX	DPM	ENG.	EXP Own.	UXD	UXW	UXR	Core Team	CS	Edit.	UXW- Mgr	EDG- Mgr	Scrum Lead	QA
DPM Intake Process	C	R,A	I						I		I	I	I	
Initial requirements definition and documentation	C	R,A	C	C	C	C	C	C	C	I	I	I	I	I
Backlog setup	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Initial backlog (feature)	I	R	C	C	C	C	C	C	C	I	I	I	A	I
Initial backlog (epic, story)	I	R	C	C	R	R	R	C	C	I	I	I	A	I
Grooming: Design/content brief		R	I	C	C	C	I	I	R	I	I	I	A	
Grooming: Task for UX Design and UX Writing		R	I	R	R	R	R	I	I	I	I		A	
Grooming: UX Writing & Design Estimation		I	I	R	R	R					C		A	
Grooming: Backlog Maintenance with Actuals		R		R	R	R	R		R	R	C		A	

direction | actors & roles

RACI

Task	CX	DPM	ENG.	EXP Own.	UXD	UXW	UXR	Core Team	CS	Edit.	UXW- Mgr	EDG- Mgr	Scrum Lead	QA
Resource Management		C		I	C	C			I		A	A	I	
UX Design		C	C	C	R	C	C	C	C	C		A		
UX Writing		C	C	C	C	R	C	C	C	C	A			
UX Research		C	C	C	C	C	R	C	C	C	A			
UX Collaboration		I		R	R	R	R	C	C	C	A	A		
Interim Design review		R		R	R	R	C	C	C	C	I	I	A	I
Interim Design revision		A		R	R	R	C	C	C	I	I	I	A	I
Design review (MVP Demo)		R	C	R	R	R	C	C	R	R	I		A	I
Design revision (MVP Demo)		R		R	R	R	C	C	R	I	I		A	I
Sprint Feature Acceptance	I	R	C	C	C	C	I	I	C	C		C	A	
Hand off to Engineering: Work Breakdown Phase	I	R	R	C	I	I	I	I	I	I	I	I	A	

Note: roles ≠ people or titles necessarily. One person, for example, could perform multiple roles

direction | actors & roles

RACI

Task	CX	DPM	ENG.	EXP Own.	UXD	UXW	UXR	Core Team	CS	Edit.	UXW- Mgr	EDG- Mgr	Scrum Lead	QA
Implementation / Build	I	I	R,A	R	C	C	I	I	I	I	I		I	I
QA	I	I	C	R	R	R				C	I			A
Meetings (scheduling, collaboration, notes, etc.)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Productive		R			R	R	R	C	C	I	I	C	A	
Overhead (Administrative)		I			R	R			C	R	A	A		
Retrospective		R	R		R	R	R	I	C	C	C	C	A	C
Defects		C	R	R	C	C	C	R	I	C	I	I		
Style Guide maintenance				I	I	C	I	I	R	R	C	I		

Note: roles ≠ people or titles necessarily. One person, for example, could perform multiple roles

Note: [Full RACI Spreadsheet](#)

recommendations

PROCESSES & WORKFLOWS

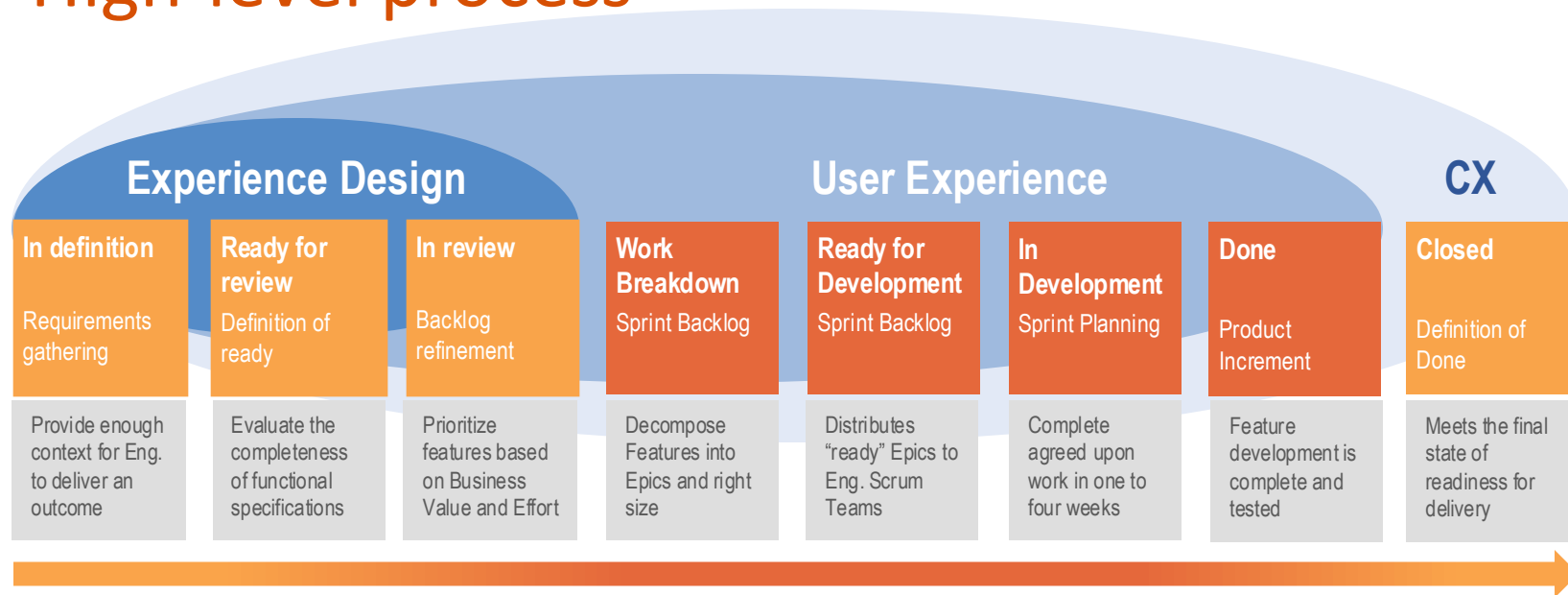
direction | process

Processes & workflows

- The following slides detail the overall processes that should be followed for UX in all workstreams once the migration to Scrum at Scale is complete
- First, they show a high-level view of the entire process from inception to publication
- Then, each portion of the overall process includes detailed annotations for each step
- Finally, a slide detail the specific editorial process that should be followed for editorial review to ensure consistency and drive adherence to the voice and tone and APEX UX writing style

direction | process

High-level process



What

Product Management curates a Product Backlog of "enabling" items that is just enough and just in time

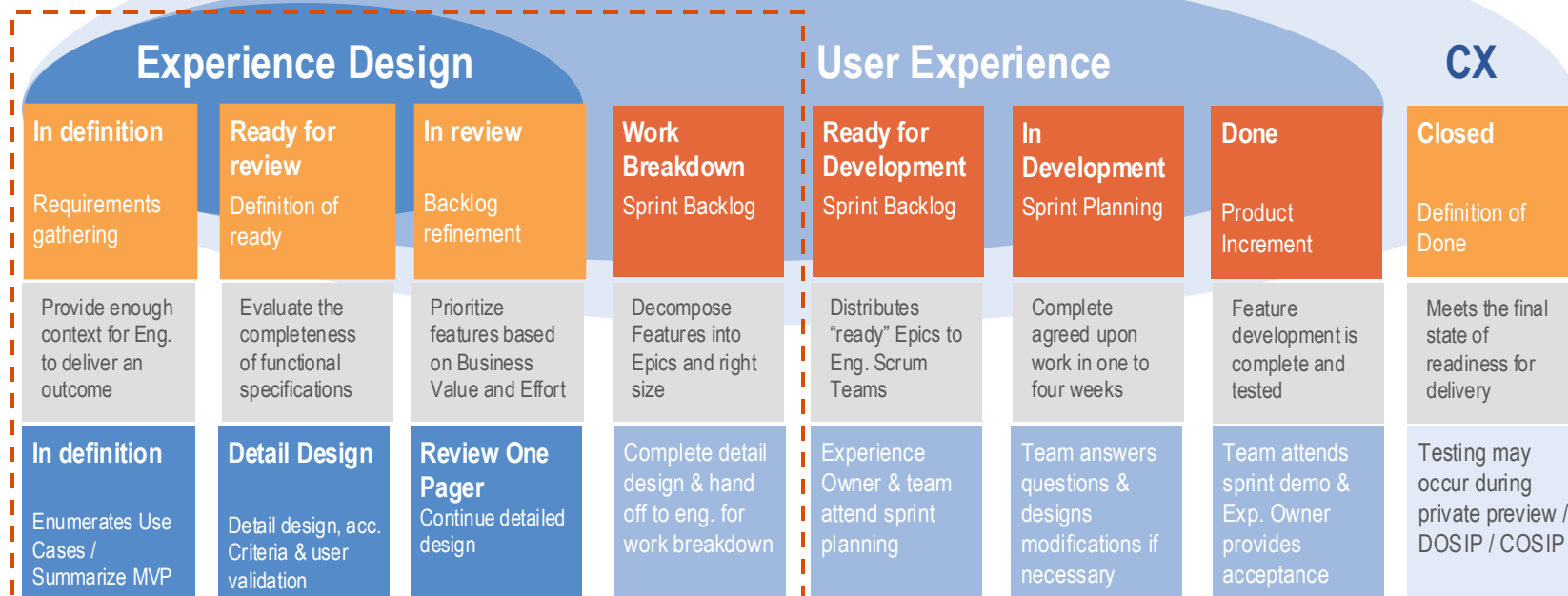
How

Engineering works to deliver an increment of value in fixed timeboxed version of continuous development

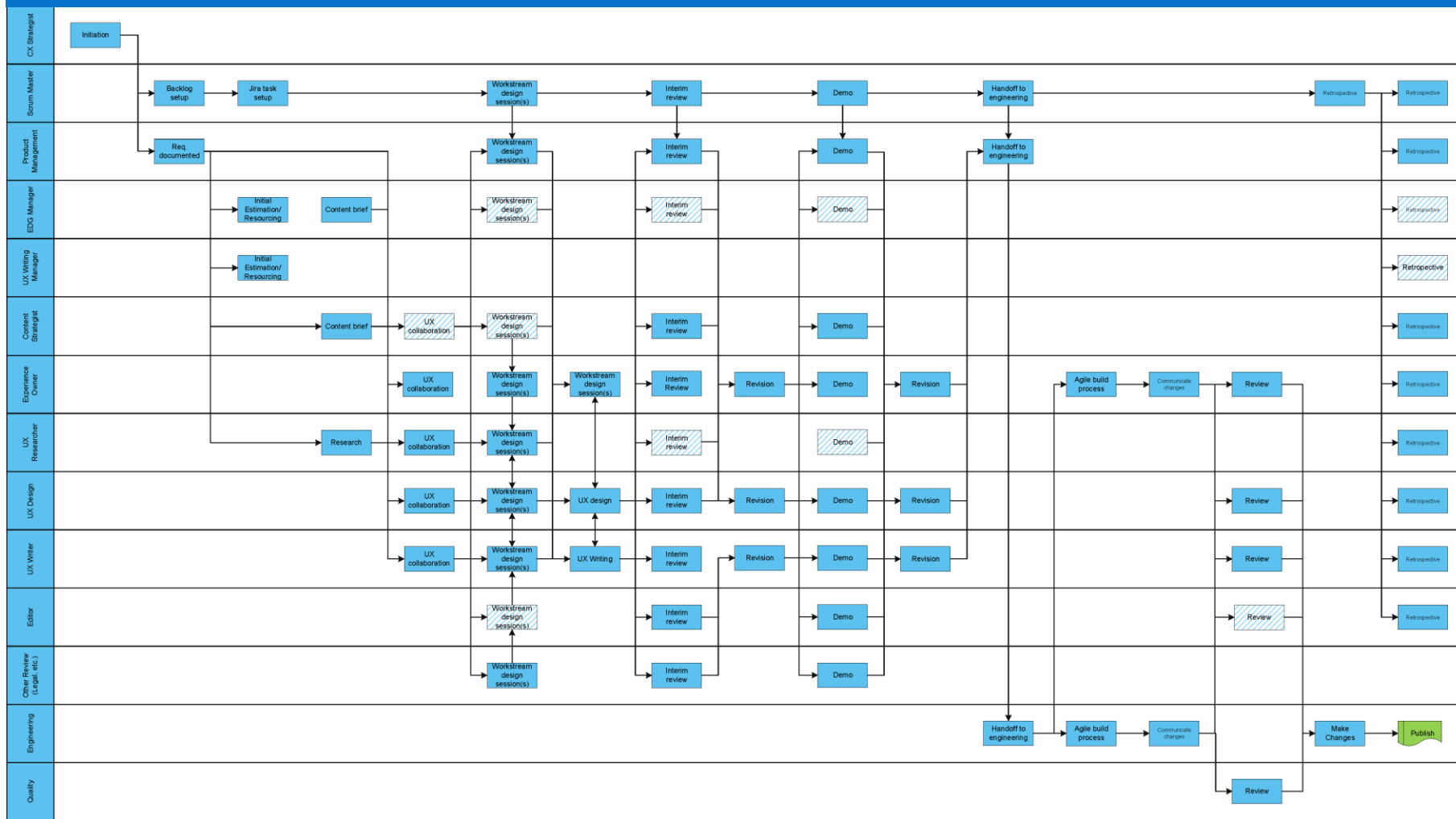
direction | process

Mid-level process

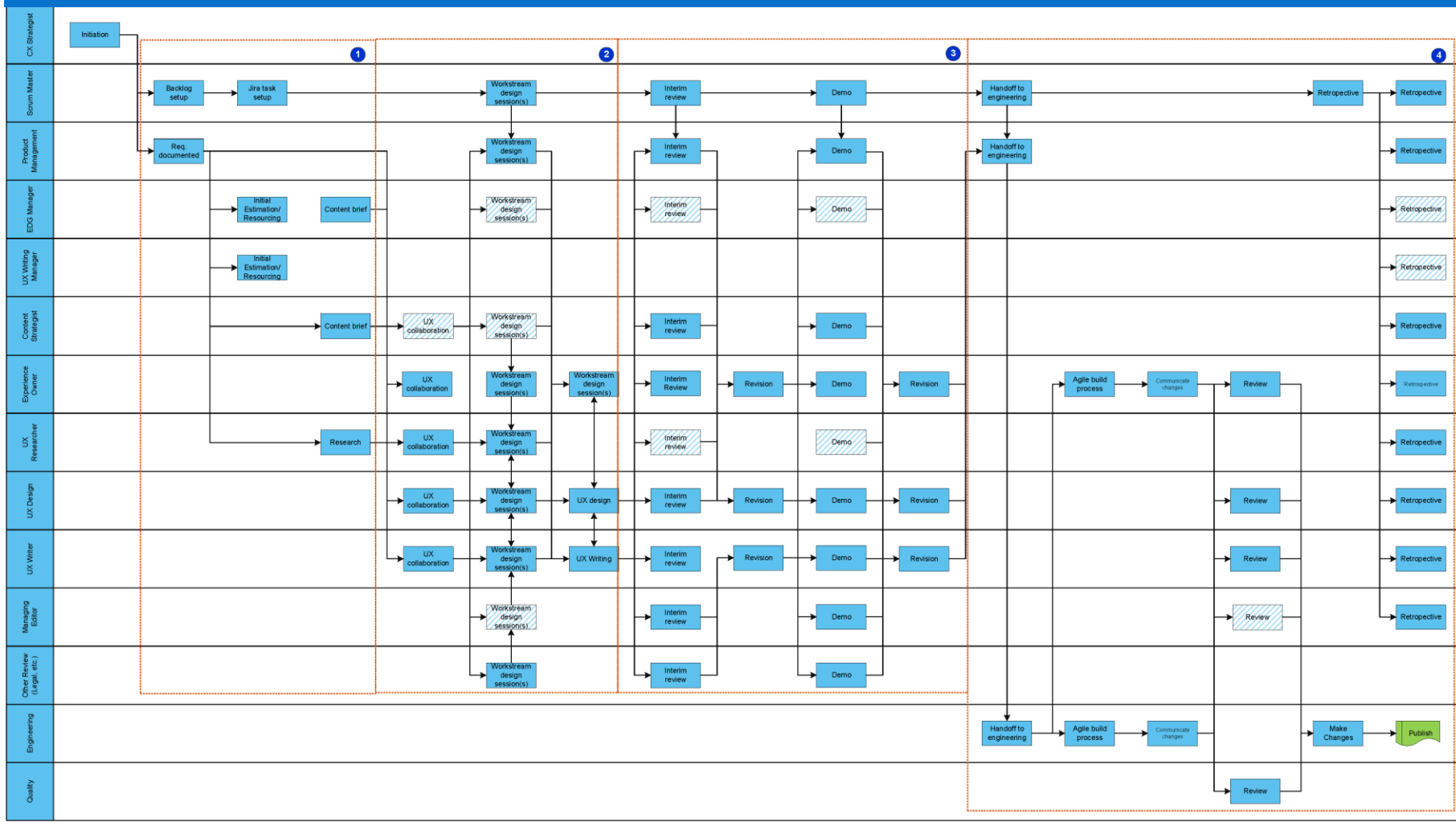
Focus of following pages



Detailed process



Detailed process



direction | process annotations

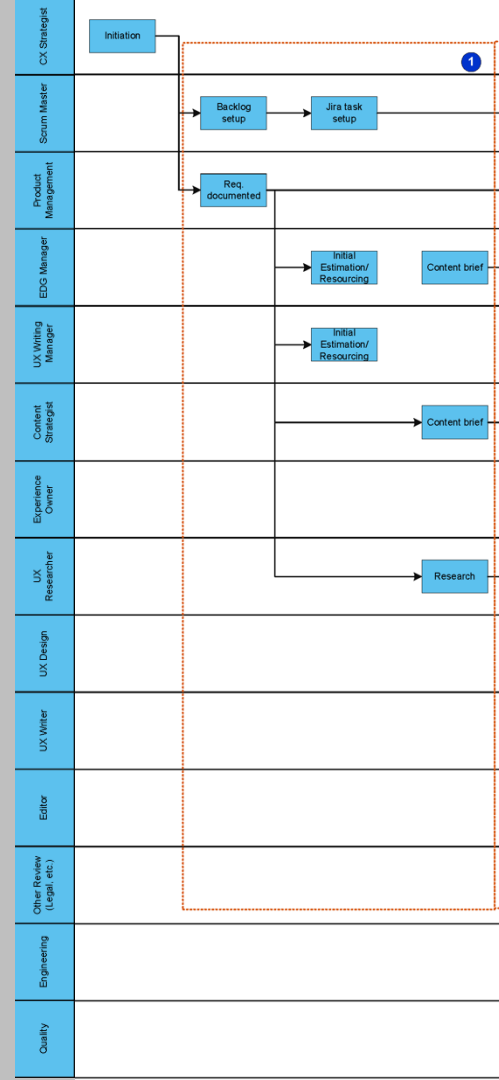
0 General

- All activities happen using an agile, scrum-at-scale process
- The Scrum Master is responsible to enforcing these processes, which include story grooming, story addition for UX activities, scheduling meetings and reviews, and leading a retrospective
- UX Designers, Researchers, and Writers will be assigned tasks in Jira for their activities and use it to track their progress
- UX Writing resources capture delta of effort from their initial estimates for future learning and velocity

direction | process annotations

1 Grooming

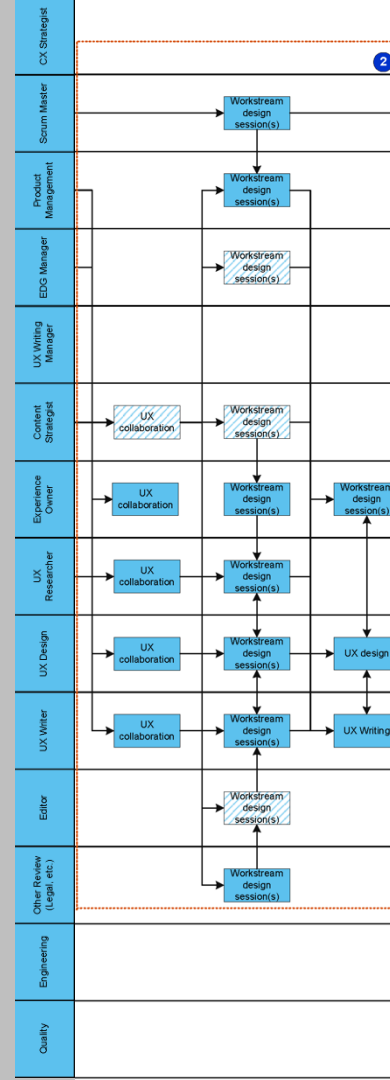
- CX and Product Manager sets issue/feature priorities.
- Content Strategist and EDG Manager create content and experience brief in story; Content Strategist performs content mapping
- Product Manager populates requirements in Jira and review with UX
- UX Design and Writing, Experience Owner, and Product Manager review and talk through top priority issues/features
- UX Writer and UX Design estimate for tasks
- UX Research conducts research based on discussion



direction | process annotations

2 Design

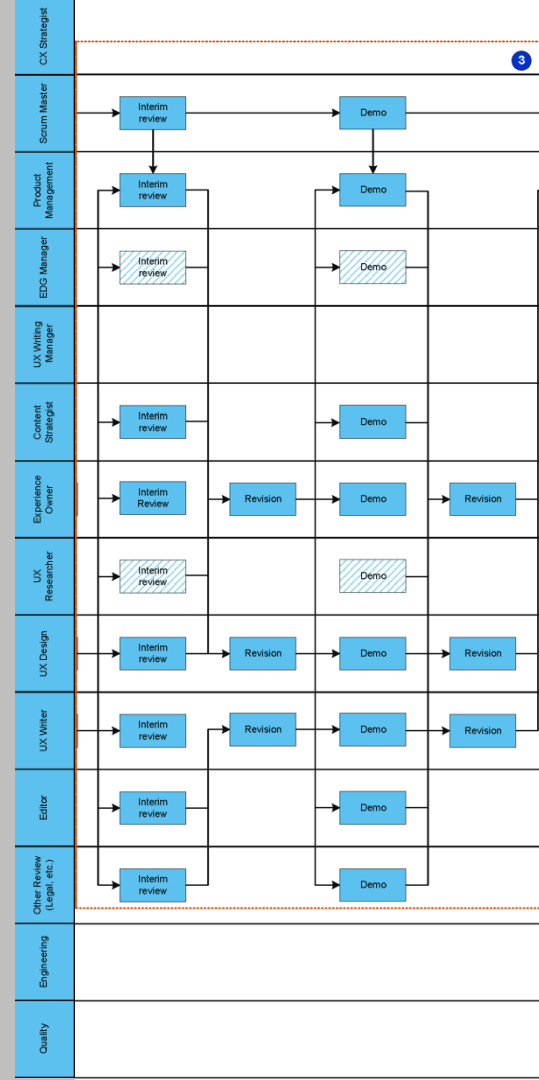
- UX Designer and UX Writer create first draft in Figma together during UX collaboration sessions
- Product Manager participates in succeeding workstream meetings
- SMEs consulted during workstream meetings (questions, clarifications)
- Product Manager and Experience Owner review design in workstream meetings, with the Content Strategist or Editor, as needed



direction | process annotations

3 Reviews

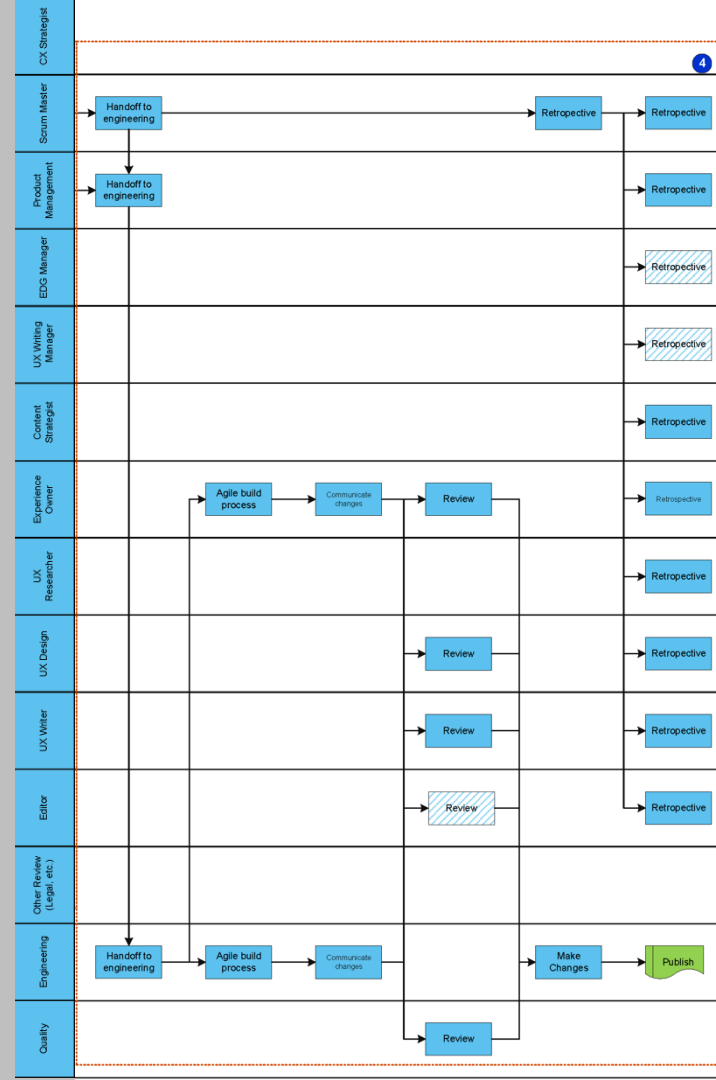
- UX Designer and UX Writer lead interim review with all stakeholders, including SMEs, Product Manager, Content Strategist (as necessary), EDG Manager (as necessary), UX Researcher (as necessary), Experience Owner, and Editor
- UX Owner and Content Strategist review before during initial review process
- UX Designer and UX Writer gather feedback and incorporate revisions for final review (MVP Demo)
- UX Designer and UX Writer lead MVP demo with all stakeholders, including SMEs, Product Manager, Content Strategist/Editor (as necessary), EDG Manager (as necessary), and UX Researcher
- UX Designer and UX Writer gather feedback and incorporate revisions for final handoff to engineering by Product Manager



direction | process annotations

4 Build & QA

- Product Manager prepares documentation required for Engineering build the feature
- During implementation, Engineering will ask questions of Experience Owner who will route them to appropriate stakeholders
- Engineering will communicate if changes were needed during build
- Experience Owner will participate in build process and bring UX Design and UX Writing for review of any. They will adjust the designs, including the writing as necessary
- Quality will all review built feature, and communicate any changes
- Engineering can then publish the feature with any required changes to production



direction | process annotations

Specific editorial workflow

Editing the UX copy is a specific sub-process with specific actors that should occur within the overall sprint process, specifically in the interim reviews and demos:

1. The content strategist or editor and the Core Team should review the UX copy and request revisions
2. The UX Writer should then address those revisions
3. The cycle should repeat for as many as two iterations, with a final editorial review by the content strategist/editor before final legal review

Note: roles $\neq$ people or titles necessarily. For example, editorial review could be performed by a content strategist or another member of the writing team.

recommendations

SPRINT CADENCE

direction | sprint cadence

Sprint schedule

Sprints are two- or four-week period(s) in which all work relating to that story are performed before hand-off to Engineering

	D1	D2	D3	D4	D5
Pre-Sprint	DPM Intake, Story Grooming. Roadmap View and resourcing				
Period 1 (Week 1 / Weeks 1-2)	Kickoff / Debrief	◆ Stand Up		◆ Stand Up	
		UX Collaboration		Workstream Sessions	
			CS/Ed Sync		CS/Ed Sync
Period 2 (Week 2 / Weeks 3-4)	Interim Review	◆ Stand Up		◆ Stand Up	
	Workstream Sessions				
				CS/Ed Rev	Demo
					Revision
Post-Sprint	Hand off to Engineering, Build, QA, Sprint Retrospective, Defect Fixing				

direction

COMPONENT PRIORITIZATION

direction | prioritization

Prioritization matrix

Action	Currently Exists	Area	Priority	Effort	Rank
Clearly define roles (definitions) and responsibilities (RACI)	N	APEX	HIGH	LOW	
Clearly define content role descriptions and detail differences	N	APEX	MEDIUM	MEDIUM	
Using Figma to author and revise content <i>in situ</i>	Y*	UX Writing	HIGH	LOW	
Use Figma comments for reviews by SMEs and other stakeholders	Y	SMEs	HIGH	MEDIUM	
Creating UX tasks in JIRA	N	Scrum	HIGH	LOW	
Assigning UX resources to tasks in JIRA	N	Scrum	HIGH	LOW	
Tracking status and actuals in JIRA	N	Scrum	MEDIUM	LOW	
Introduce reserved time for UX collaboration	N	Scrum	MEDIUM	LOW	
Limit review iterations with Sprint timeline or cadence	N	APEX	MEDIUM	HIGH	
Use workstream sessions to refine initial designs	Y	APEX	HIGH	LOW	
Introduce editorial style for APEX	N	APEX	HIGH	HIGH	
Write to editorial style and voice and tone created	N	UX Writing	HIGH	LOW	
Regular (biweekly) work sharing sessions for UX Writers	N	UX Writing	MEDIUM	MEDIUM	

direction | prioritization

Prioritization matrix

Action	Currently Exists	Area	Priority	Effort	Rank
Kickoff for workstream, post grooming	N	Scrum	MEDIUM	LOW	
Semi-weekly status (stand ups) meetings to identify progress and blockers	N	Scrum	MEDIUM	MEDIUM	
Institute final editorial review of UX copy to ensure brand and style adherence	N	UX Writing	MEDIUM	MEDIUM	
Institute scrum at scale cadence and meetings	Y	Scrum	HIGH	HIGH	
Story grooming	Y*	Scrum	HIGH	MEDIUM	
Estimation	Y	Scrum	HIGH	LOW	
Kickoff/Debrief	Y*	Scrum	HIGH	LOW	
Semi-weekly status STAND-UP meetings	N	Scrum	HIGH	LOW	
Retrospective	Y*	Scrum	HIGH	LOW	
Bi-weekly work sharing meetings	Y*	APEX	MEDIUM	MEDIUM	
Use Miro for UX collaboration	N	UX	LOW	LOW	
Integrate Figma plug-in for Acrolinks	N	APEX	LOW	UNKNOWN	

direction

ASSESSING EFFECTIVENESS

direction | assessing effectiveness

UX writing effectiveness in scrum

- Providing UX Writers with the tools and resources they need to succeed is imperative. These include the following:
 - Voice & tone guide ✓
 - Style Guide **IP (Team owned)**
 - Figma access ✓
 - JIRA assignments ✓
- Providing them with the following framework will help position them for success with the organization and will help other participants in the review process understand what success looks like

direction | assessing effectiveness

KPIs and measures

KPI	Type	Measurement	Target
Assess estimates versus actuals	Quantitative	Delta of time spent	90% of estimates match actuals reported
Assess adherence to APEX style and general usage	Qualitative/ Quantitative (TBD)	Is writing consistently aligned with Style Guide	Very little substantive or grammataical editing required by editor to match style
Number of iterations required to handoff to Engineering	Quantitative	Delta from standard number of iterations	Two iterations from demo
Acting as Experience Owner for Engineering processes	Qualitative	Successfully ensuring appropriate resources are engaged to vet any changes during build process	Features built with full UX participation and agreement
Reading level of UX copy	Quantitative	Tools to measure that reading level of copy doesn't target	8 th grade
User comprehension of copy	Quantitative/ Qualitative	Results of usability testing of content to determine user comprehension	90% comprehension scores
Acrolinks adherence	Quantitative	Is writing consistently aligned with Acrolinx	No refactoring required by editor from Acrolinx

direction

RESOURCES & TEAM

direction | resources and team make-up

Rightsizing resources

- In most successful corporate environments, the ratio of UX Writers to UX Designers is somewhere between 1:2 and 1:4 based on business needs.^{*,†} A greater disparity would lead to UX writers not having the time to be intimately involved throughout the process
- With that guideline, the APEX UX Writing team has attained a right-sized ratio with UX Design at 1:3 based on the work being performed and the expected activities UX Writers participate in beyond just writing the copy (i.e., design collaboration, scrum activities, QA, and the like)
- However, APEX should add additional content strategists (1-2) to help the overall team attain its goals because content strategy currently has multiple focus areas. Ideally, content strategy should be represented at a ratio of approximately 1:2 with UX Writers

direction | resources and team make-up

Content strategy resources

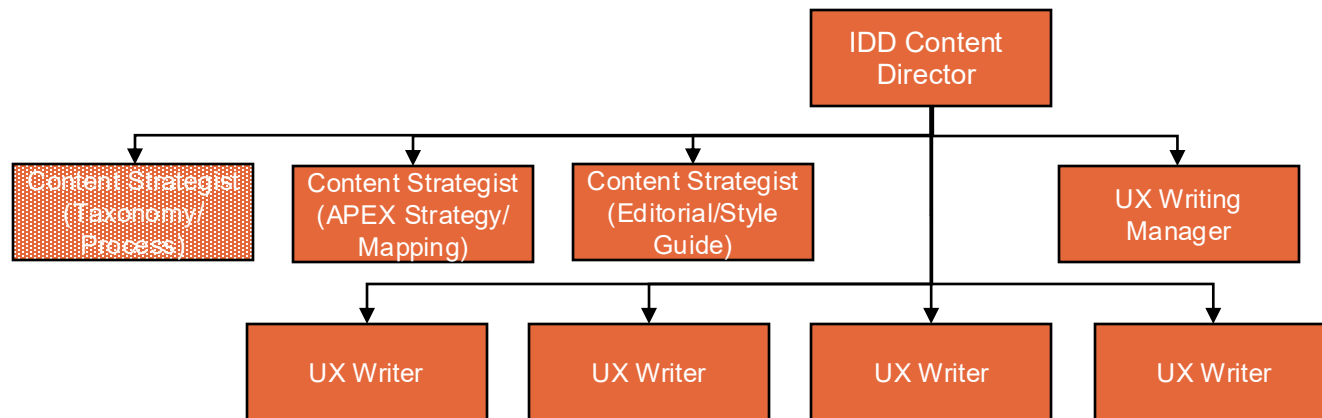
Content Strategy team responsibilities

- The first should focus on the overall APEX content strategy, including non-console content, to connect it to the UX Writing at the workstream, and to perform content mapping for UX designs
- The second should focus on editorial adherence to usage, style, and brand. This resource will also own the APE UX Writing Style Guide and voice and tone documentation
- The future third content strategist would support the first two roles, as well as focusing on taxonomy, metadata, and continued process improvements

direction | resources and team make-up

UX Writing team members

- With the recent addition of UX Writers, the APEX UX Writing team has attained a right-sized ration with UX Design.
- Content Strategy team composition: two content strategists immediate/near-term and one medium/long-term as the UX Writing team grows. This will help the overall team attain its goals



direction **NEXT STEPS**

tools & process evaluation | next steps

Next steps

Use prioritization matrix to document recommended short- and long-term improvements to the process and how tools are used within it:

- Continue populating style guide
- Detail how non-console content requests will be handled within the framework of these recommendations
- Further investigate potential tools (may also require technical analysis):
 1. Potentially using WalkMe for overlays and help
 2. Investigating a plug-in for Acrolinx
 3. Researching CloudIQ's approach to help content



Thank you