

Developing interface design guidelines



A research note by **NAMAHN**

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Introduction

Trying to define company-wide guidelines for the design of software interfaces is nothing new. It is only logical that companies that develop interactive products would want to do this. From a marketing point of view, they want to give their products the distinctive “look and feel” that makes them recognisable and strengthens the product brand image or corporate identity. From a practical point of view, they do not want different development teams to reinvent the company style with each new product, because it is more costly, both in time and effort.

Despite their obvious benefits, successful company-wide design guidelines are a rare species. There are various reasons for this situation:

- Setting up the design guidelines (often termed a “style guide”) is an afterthought rather than a project in its own right, and, as such, lacks the resources required to make it a success.
- The team that develops the guidelines does not have enough authority to impose the guidelines on other development teams.
- The design guidelines project starts to drift because the guidelines document is not maintained and updated to be of any use in new development projects.
- The design guidelines are, in fact, not design guidelines at all; they are a style guide that describes logos, fonts and colors, rather than interface components and controls.

This Namahn research note addresses these as well as other problems that may arise when setting up a company-wide design guidelines project. In creating this research note, we have tried to give practical advice, based on the problems that we have encountered in numerous client projects.

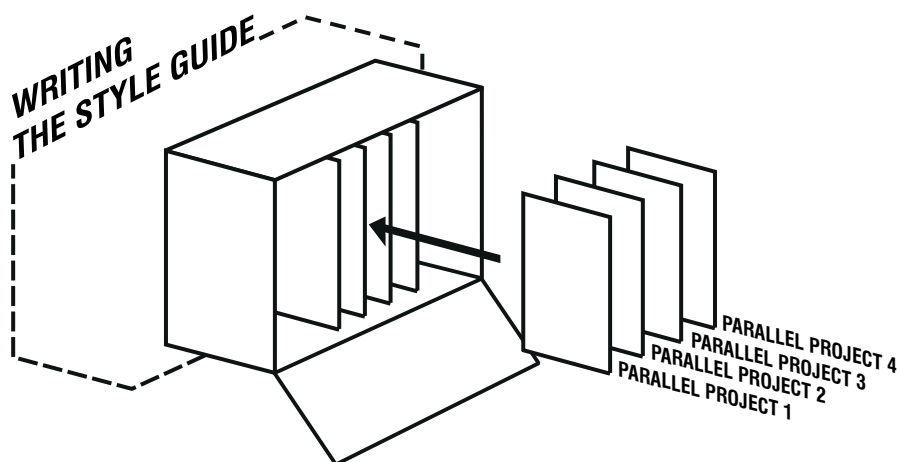
Make your guidelines project smart

Getting all the stakeholders (product manager, ICT manager, webmaster, developers, etc.) into a two hour meeting is easy. Getting everyone to agree that there is an urgent need for a company-wide application style guide is not too hard either: half an hour into the meeting, after you have gone through your presentation explaining the goal of the style guide project, everyone is probably nodding at the good initiative. The product manager likes the branding side of it, the ICT manager likes the reuse of code, and the developer likes the idea of just having to take interface components from a GUI library. But this initial enthusiasm is not enough.

Although all stakeholders may agree that a design guidelines project is a great initiative, they may not be aware of its full implications. You need to make them realise that the project will require an extra investment of their time and resources. Moreover, this effort will be ongoing; every new development project will require a similar investment. Stakeholders must also realise that the guidelines will restrict their “freedom” in some way, because all user interfaces that are developed thenceforth need to adhere to the guidelines.

Stakeholders need to commit to the project with a full awareness of all of the implications described here. But even this commitment is not enough to make your guidelines project successful. The hard part is making it SMART: specific, measurable, agreed, realistic, and time-bound.

A good way of making a project SMART is to link it to existing development projects in your company. The guidelines project runs in parallel to these other projects, and with every new development project a new cycle of updating and revising your guidelines is carried out.



Make it a group effort, but keep authority clear

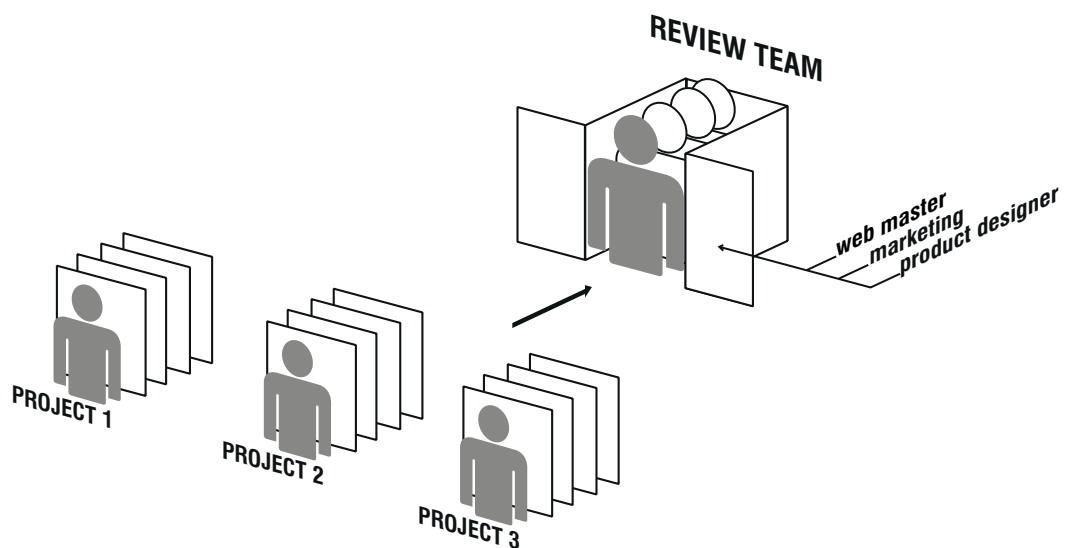
While the way you run the guidelines project is important, the people with whom you run it may be even more critical to its success. You need a stable and authoritative guidelines review team and you need to select its members carefully.

First of all, you need to make sure that all important stakeholders are represented in the review team. Think company-wide, and try to get an even distribution of technical, marketing and user-oriented team members. Once you have your review team members in mind, also make sure that:

- They are convinced of the importance of the project and committed to it.
- They have enough authority in the stakeholder group that they represent.
- They have sufficient time available.

Your core guidelines team needs to operate truly company-wide, rising above the agendas or particular needs of the different departments or business units. As Jeff Volzer from netNumina puts it on the CHI-WEB mailing list: “In the end, it has to have high-level participation across the divisions...” Such participation can be achieved by letting the guidelines team operate from within a department in your company that oversees all development projects. This could be a marketing department, but also a more technically-oriented group. If your current company structure does not allow this, you need to create an ad hoc group that is given the necessary authority.

The guidelines team has a stable core of members, working alongside active development project teams. Members of these active development teams are added to the guidelines team on an ad hoc basis.



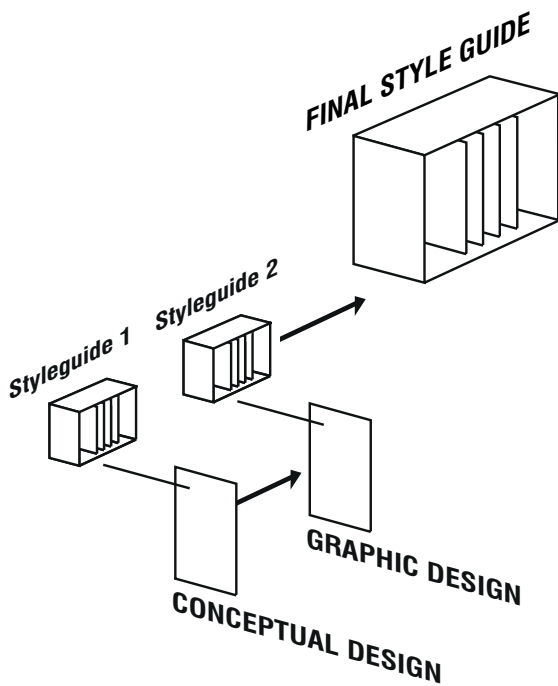
Get the workflow right

Writing interface design guidelines is an intensive job that requires the full attention of a dedicated interaction designer with good technical writing skills. In the project workflow, it comes at the end, when interaction design is finished and has been validated, both by the project team and the guidelines review team. If graphical design is needed for particular interface elements, it must also be concluded before these elements can be described in the guidelines.

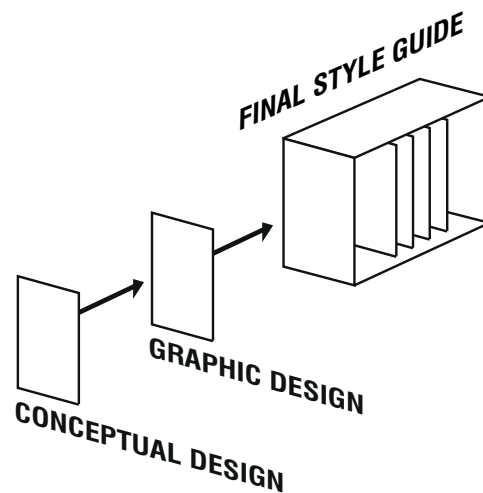
Ideally, the writer of your guidelines is also the interaction designer responsible for your current design, and even has some graphical skills. As long as there is only one development project running alongside the guidelines initiative, he or she may be able to handle work from both the guidelines project and the development project.

However, as soon as more development projects are started up that have to comply with the guidelines or that add new design elements to them, the whole process may become difficult to manage from within the guidelines review team. Then you will need to split roles between the writer of your guidelines (who is a member of the guidelines team) and the interaction designer (who is on your development project team).

Getting the workflow right means that you need to have consensus on the conceptual design, the behavior, and the graphical design of all the interface components that you want to describe in the guidelines.



Wrong practice



Right practice

Study existing guidelines carefully and refer to them

Every design guidelines initiative should start with a study phase. The first thing to study is existing guidelines, both internal and external to the organisation.

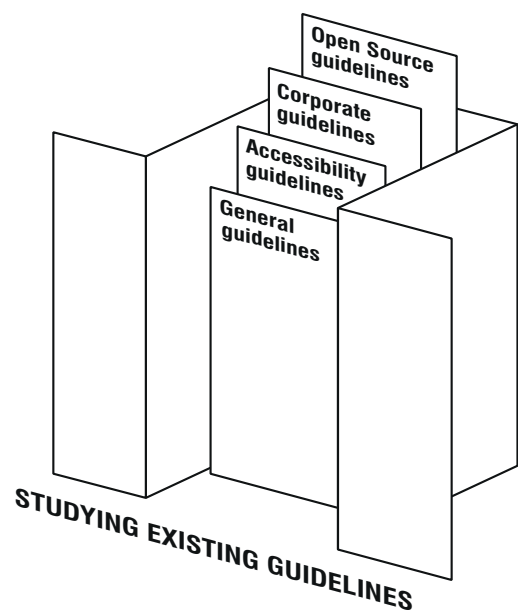
Obviously, the writer of your guidelines needs to be aware of any similar guidelines initiatives, past or present, that exist in your organisation. If they exist, he or she needs to study them carefully to see how they could be of use in the current project. Also, it can be very helpful to interview people in the company that have set up guidelines projects in the past because you can learn from their successes and failures.

When looking for internal guidelines, cast your net widely: they can range from basic rules for color use or style guides for marketing materials to interaction design principles for existing applications.

Apart from internal input, an author of guidelines needs to be fully aware of existing guidelines for the development platform(s) for which he or she is writing.

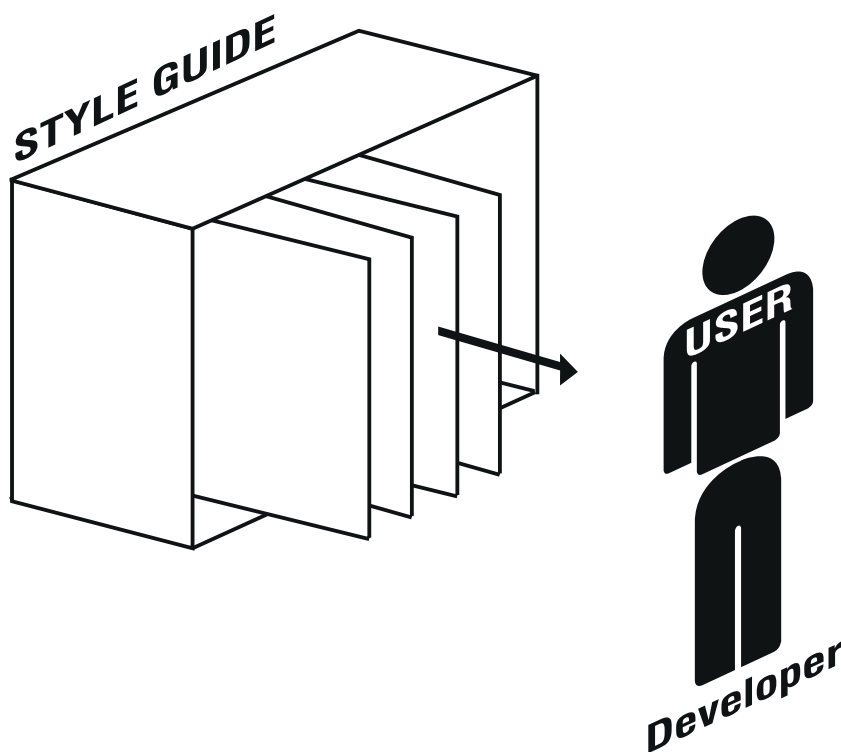
When writing guidelines for web sites or web applications, a tried and true style guide such as Patrick Lynch's Web Style Guide is invaluable.

And of course any author of guidelines for the Windows platform should be familiar with the MS Windows User Experience. Even if the design teams have chosen for a "customised" look and feel to make your applications stand out against others, there are numerous interaction components and behaviors that you will probably not want to invent from scratch, such as shortcut and access keys, selection behavior, or the basic design of visual elements.



Once you have found references that you want to use, you will probably be tempted to simply copy them verbatim in your own design guidelines document. We advise against this practice. Instead, refer to your sources, so that your reader is aware of the guidelines that you fall back on. At the same time, make sure that your references are precise and to the point. For example, a developer may lose motivation after reading that "all selection behavior in the application complies with Windows standards".

Treat your developer with all the respect an end-user deserves



Apart from studying other guidelines, the guidelines author needs to be aware of the development platform for which the guidelines will be used. Moreover, he needs to be aware of the fact that the real end-user of the guidelines is not the review team but the developer that needs to implement the guidelines.

Hence, the guidelines writer needs to study the technical aspects of the development platform and see if and how the guidelines can fit in. As he or she would do for any other end-user, the author has to know what the developer's needs are: what does the developer need to "invent" every time he develops an interface, what are the attributes and terminology used in the development platform?

By seeing the developer as the end-user, you will also see your guidelines as the "interactive product" that they really are. This also means that the usability of guidelines needs to be validated and tested.

On the CHI-WEB mailing list, Simon Raistrick, who is an ISO editor on a large style guide project, makes a similar observation, and points us to an interesting paper from 1990 by Flavio de Souza and Nigel Bevan: "Something a lot of people forget is that the style guide needs to be relevant to the people using it. We need to treat the style guide like a product in itself, by thinking about whom the audience for the guide is, what they want, etc. – applying all the usability stuff to the style guide audience. There's an interesting paper on this by one of my colleagues:

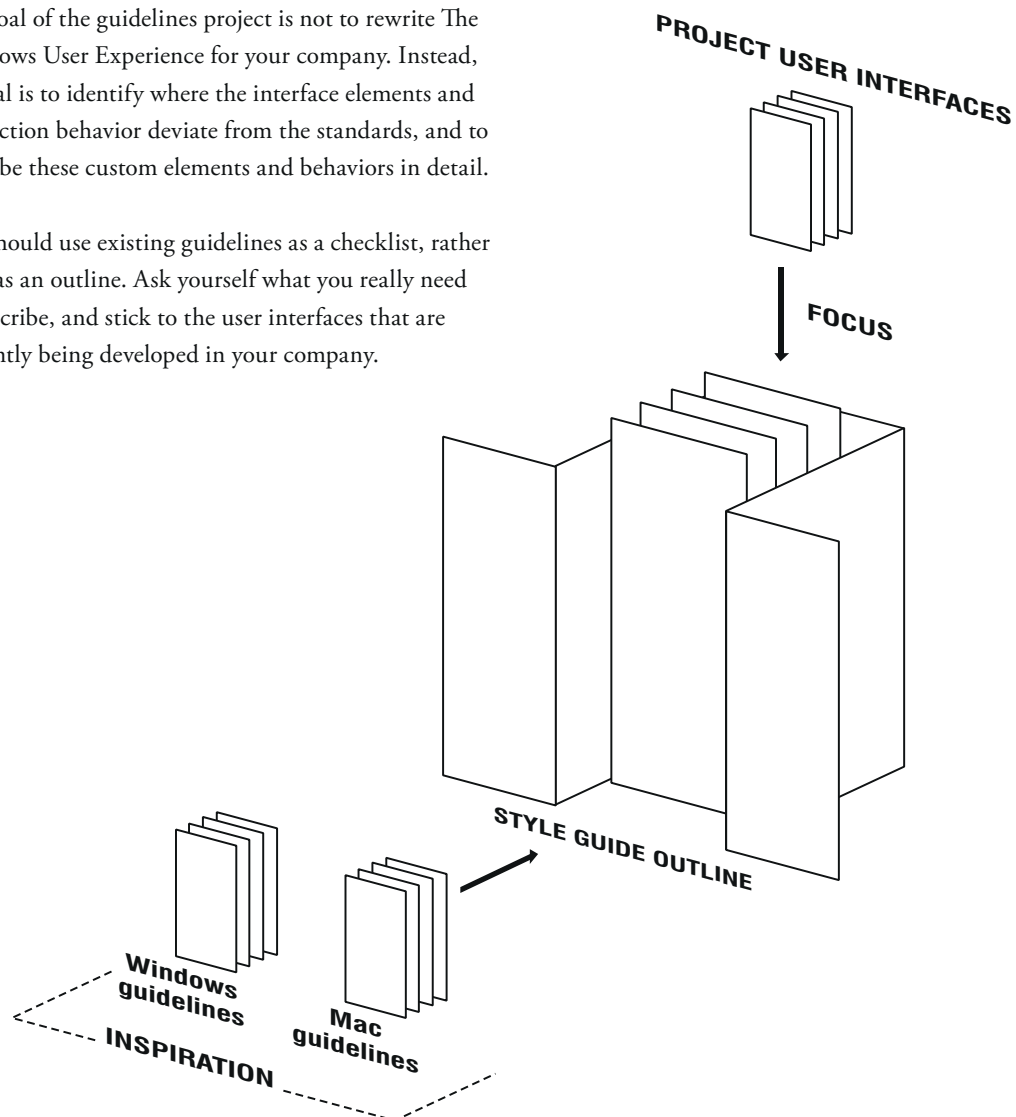
<http://www.usability.serco.com/papers/useofguidelines.pdf>"

Make a realistic outline

Of course, when starting to work on the guidelines, an author will want to make a good first impression on the review team. Hence, he or she may be tempted to present them with an impressive outline, borrowed from The Windows User Experience or the Macintosh Human Interface Guidelines. This is probably not a good idea.

The goal of the guidelines project is not to rewrite The Windows User Experience for your company. Instead, its goal is to identify where the interface elements and interaction behavior deviate from the standards, and to describe these custom elements and behaviors in detail.

You should use existing guidelines as a checklist, rather than as an outline. Ask yourself what you really need to describe, and stick to the user interfaces that are currently being developed in your company.



Be precise, but flexible

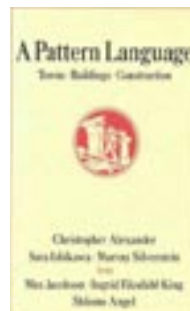
Finally, we would like to add some advice on the actual content of the style guide:

- Do not only describe the GUI elements, but also their use in an interface. It is not enough to describe the lexical elements of the interface (labels, controls, colors and fonts). The hard part is to describe the syntax (where and how they should be used in the interface).
- Focus on the framework first, but don't forget the details. For example, guidelines for web applications need to describe every page type in detail, not only the home page and a few content pages.
- Check the usability of the guidelines with their end users and adapt the content as needed.

Thinking in patterns

An excellent way of structuring the content of design guidelines is by using so-called "design patterns". It is a notion that was borrowed from architecture, where it was introduced by Christopher Alexander in "A Pattern Language - Towns, Buildings, Construction" in 1977. In this book, Alexander describes architectural patterns that can be used for building communities and houses that enhance the life experience of its inhabitants.

The last few years, Alexander's notion of design patterns is being adopted by the interaction design community, as in the object-oriented software development community. In both contexts, the re-use of patterns is envisaged.



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