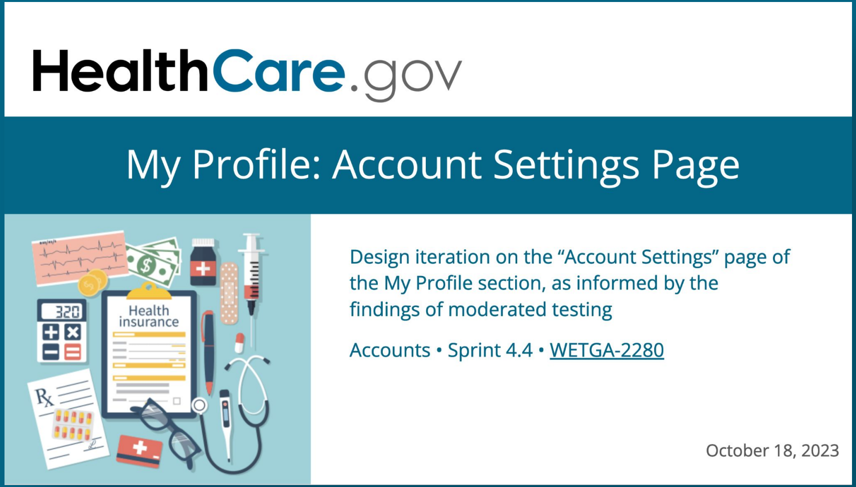
A Guide to the WDS Design Presentation Deck



Main concepts

Why do we use these decks?

We began using this format to help enable a smoother review and approval process by CMS stakeholders. The benefits over previous formats are:

- More sequential and logical storytelling
- Easier to navigate and read
- Discourages random feedback (versus Mural stickies, which encourage it)
- Frames work in a more concise, consistent, and straightforward way, making reviews and approvals easier

Storytelling sequence

Your narrative should answer these questions:

"What's this deck about?"

"What do you need from me?"

"What was the design problem & requirements?
How did you address them?
Why is this solution the right one?"

This will be most of the story

"What happens next?"

Related slides

- Title
- Contents
- About this effort

Related slides

- The big picture
- Problem & requirements
- Existing design
- Research overview
- Research takeaways
- Annotated designs
- More details

Related slides

- Next steps

Key things to remember

- The deck should **stand alone** as a storytelling artifact. Anyone on the team should be able to read and make sense of it.
- **Keep it simple.** Make your points in the fewest words and plainest language possible.
- Lean into your **UX skills!** You're creating an experience to enable frictionless review and decision-making.

Details and process

Naming and saving the file

- Use this naming pattern:

  [team] - [deck title] - [year PI]

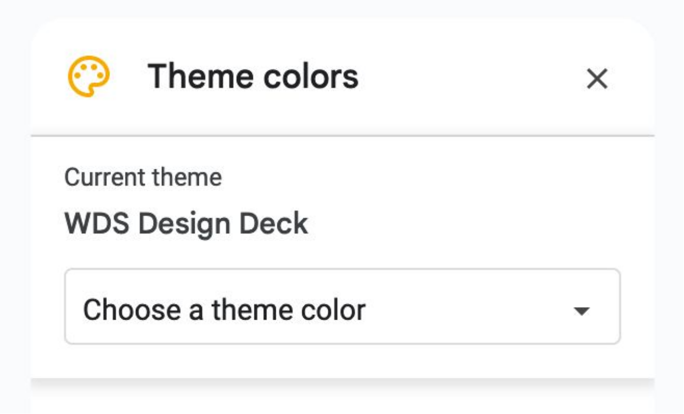
- Example:

  Accounts - Account Settings Page - 2023 4.4

- Save the deck to your product team's folder in the Products folder in the Ad Hoc Google Drive

Template and theme

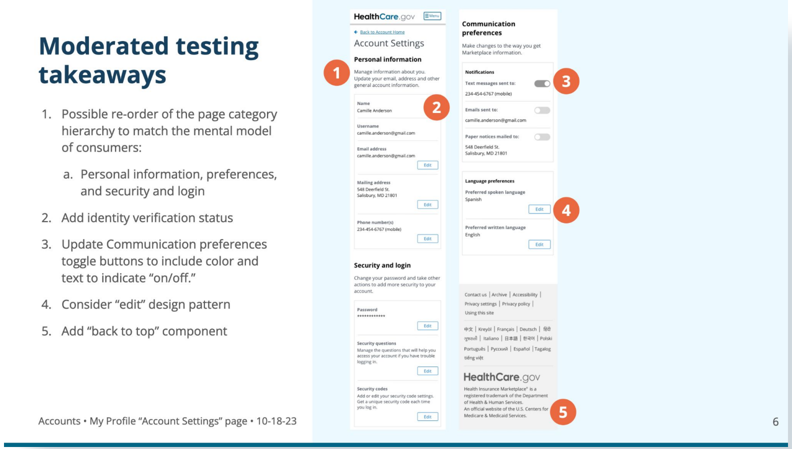
- This template uses a custom theme called “WDS Design Deck” which is derived from the “hc.gov” theme.
- It should work well out-of-the-box with no modifications.



Research slides

If we cite the client’s existing research in a presentation, we should include a few slides to support that. These should use the “Annotated Mockup” layout and include three parts:

1. **Existing design.** The current state of the page or feature.
2. **Research overview.** What was tested?
3. **Research takeaways.** What were the findings and how did we apply them to the design?



[See example here]

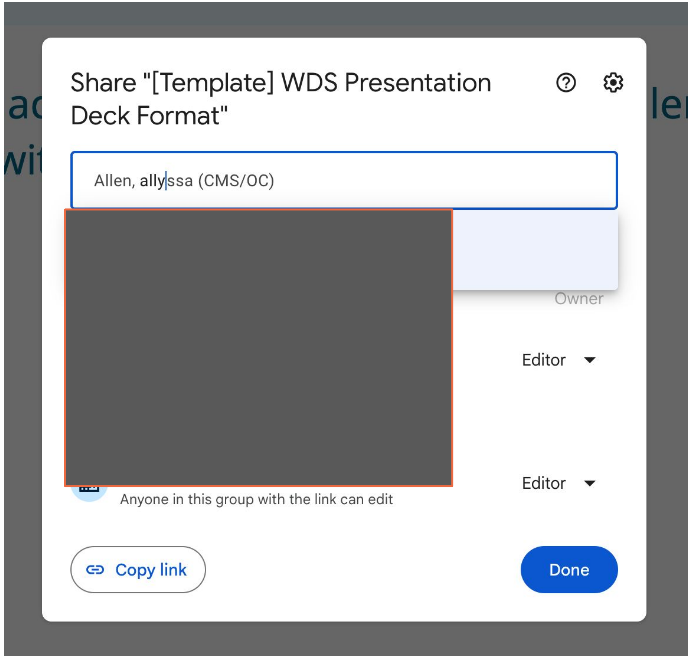
Other validations

Another means to validate a design approach is when it's been used successfully in M.gov or elsewhere within HC.gov. Here are a couple examples of how to do so:

- M.gov has used the "save username" feature widely since 2022 and has helped reduce login error by X% (linked to relevant data).
- The Educate team implemented a similar feature in the SEP screener in response to analytics reporting (linked to report)

Sharing the deck

- Most of CMS cannot access Google Docs, but <<Client UX Lead>> can. You can share a file with her as shown.
- You do not need to export the deck unless asked. <<Client UX Lead>> generally prefers to do this herself.



Copy and paste if needed

<<Client UX Lead>> email address

Sequence of stakeholder review

1. <<Client UX Lead>> Present deck to <<Client UX Lead>> in office hours or submit for async review (in Slack) if time is short.
2. <<Client Research Lead>> If presenting a design based on existing client research, <<Client Research Lead>> needs to review it. Upon <<Client UX Lead>> approval, export the deck as a PDF and share it in your team's main Slack channel, tagging <<Client Research Lead>> and requesting he verify these specific things:
   a. "Are we interpreting these research findings correctly?"
   b. "Are we applying them correctly to the design?"
3. Content review and others. Can be done concurrently with <<Client Research Lead>> review, just tag whomever you need in the Slack message.

Example slides

HealthCare.gov

Reduce size to 28pt if your title needs to break onto two lines

My Profile: Account Settings Page

Keep this summary to 3 or 4 lines, tops

Design iteration on the “Account Settings” page of the My Profile section, as informed by the findings of moderated testing

Accounts • Sprint 4.4 • Ticket/Epic # & Link

-24

October 18, 2023

About this effort

Use sentence case for slide titles

We’ll present

- Recommended improvements to the “Account Settings” page based on the findings of moderated testing conducted in 4.1:
    a. Re-ordering of page elements
    b. Verification status available at all breakpoints
    c. Unified and more consistent “edit” pattern
    d. Add “back to top” navigation

Brief rundown of what you’ll be showing

Our goal

- Obtain leadership approval

A clear & well-articulated goal for the presentation is essential. Leadership approval is typically what we need.

The big picture [simple]

Summary of Epic or Objective to provide larger context of the work

Part of My Account Evolution (TICKET #/LINK) that aligns with FFM theme #5: “Continuing technology modernization”

Completed efforts

Discovery and stakeholder workshops to guide work on My Apps and Coverage within My Account

2021 PI 2-3

In partnership with the Connect team, DR/L&M completed moderated testing of Account Home designs and assumptions

2023 PI 4.1

Two “completed” items are ideal but one is okay if necessary

Current

Propose design improvements to “Account Settings” page (previously “My Profile”)

2023 PI 4.4

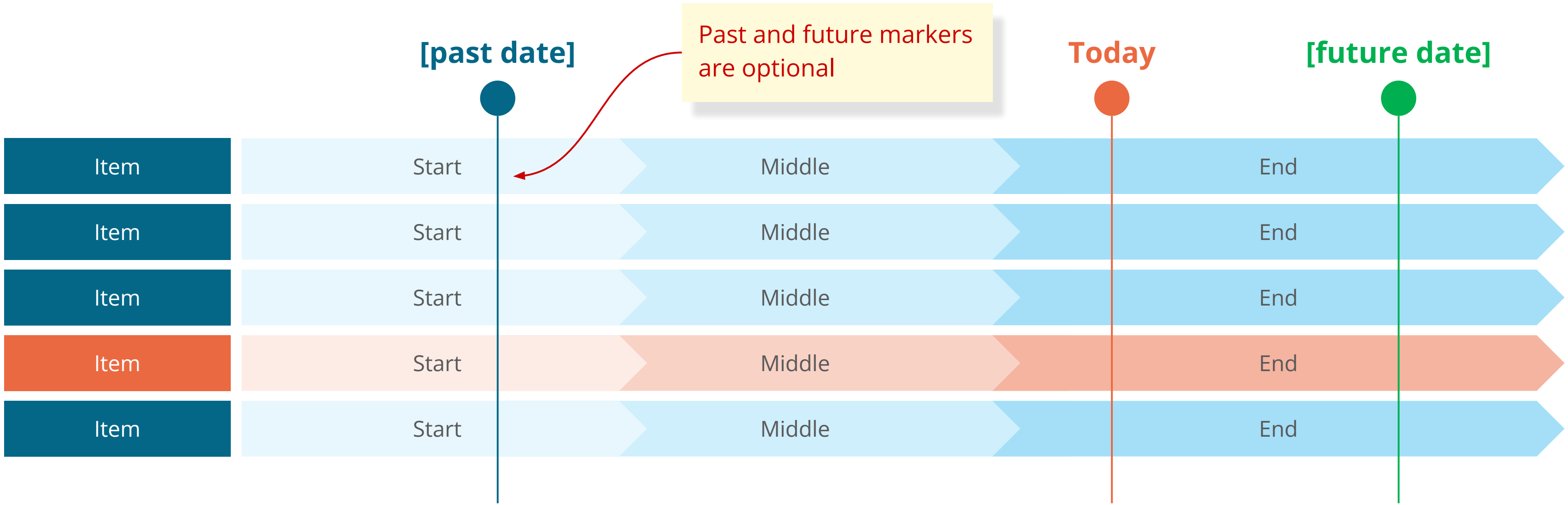
Future possibilities

Implementation of Account Settings

- Integration with modernized backend services (EE and SLS)
- Possible integration with Communication Preferences under MapS-519

The big picture [complex]

This Message Center design work (TICKET #/LINK) is part of the My Account Evolution (TICKET #/LINK) plan to implement an updated My Account user experience using only legacy services.



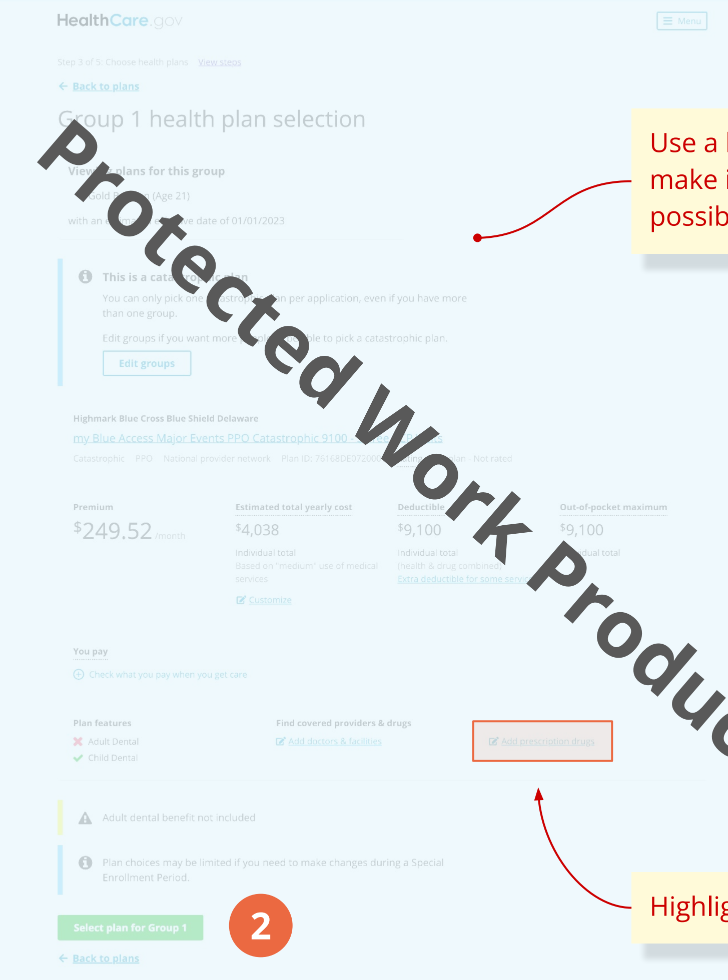
Issue part 1

Plan selection

1. The **info alert** is easy to miss, and undersells the breakage that will occur.
2. Users are still allowed to **select** the plan, creating the breakage.

Numbered list keyed to number markers

1



2

Use a high-res image and make it as large as possible within this frame

Highlighting element

Next steps

Every deck should have “next steps”

Milestone	Done by
Obtain approval from <<Client UX Lead>>	11/22
Engage with CSG on content needs	Week of 11/20
CMS leadership approval (obtained by <<Client UX Lead>>)	End of 5.1
Development begins	Start of 5.2
Expected launch	End of 5.5

See the Connect UX Roadmap for more details

Link to UX roadmap if available

For more details

Use “details” slide if you have related items that might be helpful. Better to link to longform content than include in the deck itself.

- Jira tickets
- Account Settings - Moderated Testing Takeaways & UX Recommendations
- Sketch file
- Content deck

Example decks

Some successful examples from the team:

- Apply - Clarify Relevant Tax Year (good presentation of before/after designs)
- Accounts - Account Settings Page
- Enroll - Cat Plan Enrollment Blocker
- Apply - Analytics Findings for Resume In-Progress App