UX Project Phase Transition Guidance

The purpose of this document is to provide guidance on how to compile deliverables and transfer knowledge to USPTO when closing out a project.

* Project UX artifacts, grouped in folders by topic
* Document 1– Narrative of UX deliverables
* Document 2– End of project summary and discussion
* Workshop

# File folder structure - Project UX artifacts grouped by topic

* **01 Working Files** (should be closed out and moved to appropriate folder, note if the file was never finished/used in final product. E.g. halfway through scenario and scope of project was cut. Still include it as the project may add scope back in later.)
* **02 Design**
* **03 Research**
* **04 Admin**
* **05 Background**
* **06 Other** (Only if required, e.g. large audio/video files that might be stored separately from other files being zipped because of size)

# Document 1–Narrative of UX Deliverables

*See “Project Name – UX Deliverables Narrative” for an example.*

Describe UX artifacts created during the project, by task order number.

* Item #
* Section #
* Item Name
* Description
* Link to file

# Document 2– End of project summary and discussion

*(see “Project Name – UX Project Summary for example”)*

Create an overview and summation document about the project. This will inform the next person working on the same or related projects. The goal is not to repeat information contained in the artifacts, but to instead orient others on the work done and relay additional information that would be useful for future efforts.

Suggestions for topics to cover:

* A top-five list of UX-related takeaways
* Overview of what the overall focus was for the project/project-phase
* Summation of what UX work was done
* Issues
* Successes
* Recommendations
* Lessons learned
* Any other insights you think would be helpful

Customize these sections for the knowledge transfer needs of your project. For instance in the example document, there were lessons learned on combining Agile and UX during the project. It is important to pass this type of knowledge on.

# Workshop

Typically a half day workshop led by the project UX team. Audience are government UX staff and project UX leads from across USPTO.

Suggest having projection and WebEx of live software and artifacts. Describe artifacts, walk though project summary, show software, etc.