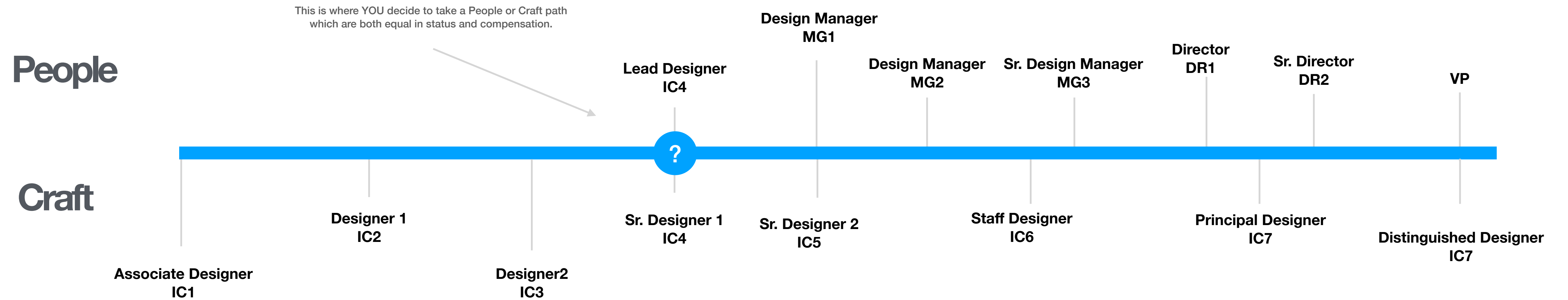


# Procure Design Careers

# Design Disciplines

UX Design | UX Research | Visual Design

## A Dual Path



# Skill, Expertise & Capability



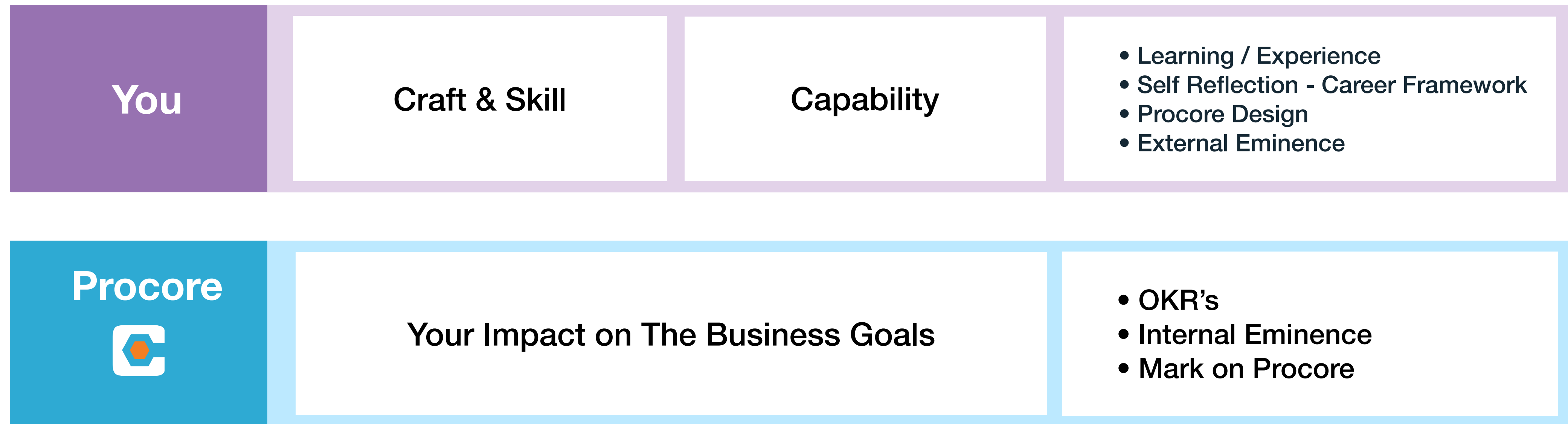
As Designers, we exercise these skills:

- Design Research
- User Experience Design
- Visual Design

These tactical skills can be taught.

# Relating this to you and your practice

You, as an individual will hopefully never get rid of that passion to make things, to design things. You own your skills and your craft. Procore is here to help you define, and refine in the context of business.



# The Design Disciplines

# Design Research

Translates business requirements into hypothesis, which is explored with users to uncover emotional connections which develop into actionable insights that drive both strategic and tactical decision-making.

The discipline specializes in discovering, analyzing, and socializing all of the factors that go into identifying a target set of users, their problems, and the potential solutions to those problems. They translate business requirements into research goals, and conduct research using qualitative and quantitative methods to develop actionable insights that drive both strategic and tactical decision-making.

Artifacts are delivered on a continuous basis to improve the quality of the design and product strategy throughout the entire lifecycle. Various research methods can be used to deliver on the goals within various delivery processes, the ability to express the principles of and make the business case for any one research method over another is essential.

Findings are communicated into actionable artifacts such as user personas, empathy maps, scenarios and journeys, mental models, market analysis, and much more. Note: it is not a goal to use one particular tool, but the appropriate tool is used to help the team take action.

# User Experience Researcher Skills

<b>Design Personas, User Tasks &amp; Requirements</b>	Understand, customize, and apply User-centered Design technique to define user segments and understand their tasks, such as: field observation, interviewing, contextual research, Customer Requirements and Task Specifications, focus groups, user surveys and questionnaires, task and user analysis
<b>Design User Scenarios</b>	Design stories that are typical to what users will do when using the product/service or experience. Typical scenarios can be used by product owners, development and design and test the product.
<b>Perform User Research</b>	Apply knowledge of research methodologies to select a suitable approach for the research project. Design and create qualitative and quantitative studies. Conduct experiments, surveys, interviews, and/or ethnographic observations, perform content analysis, and/or collect case histories to gather valid data.
<b>Develop User Interface Concepts</b>	Develop new methods and techniques for computer-user interactions. These methods must create a user-friendly, intuitive, natural, or effective interface for users to a system or application. The process of developing the concepts involves creating storyboards, creating low-fidelity mock-ups, applying knowledge of speech, visual, graphical, and multimodal user interface theory and practice, and creating high-fidelity design that can be developed. Strong presentation skills are desirable.
<b>Perform Persona Research</b>	Analyze internal resources, conduct customer interviews, collate the data, and develop personas. Maintain a persona repository.
<b>Cognitive Psychology Social and Behavioral Sciences</b>	Construct and Plan a set of research objectives and with the underlying ability to undertake independent inquiry into aspects of social and cultural life, using appropriate methodologies.
<b>Perform Active Listening</b>	The ability to screen out distractions, like background activity and noise in order to hear what your audience is saying without judging the other person or jumping to a conclusion.
<b>Use Teaching to Motivate</b>	Documenting the results of your findings with a focus on teaching to motivate team to action rather than learning.
<b>Apply Observation Skills</b>	Employ the small detail and questions what seems out of place, by embracing child like curiosity Observational Skills will lead to insights that can be put to use with understanding the user and developing personas.
<b>Implement Ideas Effectively</b>	Advise based on research findings and ensure the effectiveness of your direction.

# User Experience Design

Specializes in the interpretation and synthesis of research and requirements; to craft stories around intended experiences which connect people in meaningful, enduring ways with our products and services.

By organizing the various requirements that need to be threaded together, it is the ability to quickly anticipate, communicate and influence what the user will see, hear or touch within a given experience that will contribute to the crispness of a story. It's not simply understanding all user touch-points and detailing the potential outcomes, it is about creating experiences and solutions that are valuable, effortless and enjoyable and successfully communicating those intentions to the business team and technical teams. The anticipation and evaluation of various interactions are explored and managed through various iterations and will contribute to the most beneficial experience for a user.

Communicate the intended experience through the delivery of artifacts such as concept maps and models, storyboards (wireframes), interaction hierarchies, taxonomies, pattern libraries, workflows and design specifications.



# User Experience Design Skills

<b>Design for Overall Performance &amp; Availability</b>	Design a solution that accounts for performance and availability issues on an end-to-end basis. Include elements that allow for overall scalability. Is at the ready with alternative designs to reach an accord.
<b>Design Interaction Concepts</b>	Develop new methods and techniques for people to interact with systems and services. The process of developing the concepts involves representing an audience's ecosystem and how the proposed concept will result in an experience that is valuable, effortless or enjoyable.
<b>Design Human to System Interaction</b>	Design with the knowledge of human-computer interactions in the context of understanding human motivations, relationships between systems and how the two interplay. Is familiar with the various leverage points within the overall system and is capable of manipulating them.
<b>Analyze for Effectiveness</b>	Analyze Design interactions and workflows that do not effectively enable effective task completion, communicate system functions, prevent user errors, and satisfy user needs and recommend positive outcomes.
<b>Apply System Thinking</b>	Apply general systems thinking concepts, such as system boundaries, subsystems and supra-systems, interactions among parts of a system to give rise to behavior, etc., in the process of understanding businesses / technology requirements and other enterprises as holistic entities within their environments.
<b>Design to Support Strategic Growth Plays</b>	Understand current strategic growth opportunities. Design solutions that take into account a user's ecosystem as it relates to Social, Mobile, Security, Data & it's visualization, Teaching systems of record and the systems they live in.
<b>Perform Competitive Analysis</b>	Analyze direct competitor offerings to create a benchmark on user communities, features, satisfaction, market share and products. But don't stop there, augment the research with analysis of the non-competitors your users utilize, this will provide insight into user expectation. Don't forget...your competition might be getting it wrong.
<b>Design Information</b>	Design information, based on a task and audience analysis and according to the UX Strategy. Verify the information design through an iterative process that includes input from clients and other disciplines. Organize and visualize the overarching model so that the act of ordering information forces a designer and the audience reviewing the materials to think through how all the disparate elements of an experience/product fit together.
<b>Design Navigation &amp; Interaction</b>	Design Navigation & Interaction Design the navigation and interaction of user interfaces, interactive prototypes, devices etc. This can include understanding the content, functions and relationships in an offering as well as designing wireframes, storyboards, behaviors and concept models.
<b>Task Flow Analysis</b>	Analyze the a user's task through the entire product lifecycle. Collaborate to develop the future state to maximize efficiencies, opportunities and delight that will document the entire scope and structure of task completion in the context of the entire system.
<b>Apply Behavioral Motivators</b>	Build empathy for users to understand their motivations, so to assist in decision facilitation, managing cognitive load and working with their attention & memory.
<b>Long tail / systems approach</b>	Plan for a long tail systematic approach to delivering an experience. Having the capacity for initiating an experience and building on it over time.
<b>Advise on a Sequential Consequence</b>	Advise on a Sequential Consequence Understanding the step by step process that a user will go through the system reactions and the consequential action thereafter and being able to analyze process and communicate where there would be delight, value and friction.
<b>Utilizing Uniformity To Build A Mental Model</b>	Using similar form or character of words and ideas, support and build on a desired mental model. Mental model are what users know (or think they know) about a system or group of activities.
<b>Support &amp; Plan for Various Contexts</b>	Build empathy and design for the various contexts a user might experience (culture, environment and activity)
<b>Design for Variable Content</b>	Design for Variable Content Design states within a dynamic system to allow for socially created content or other unknown variable-length content. Multi-device availability or Responsive are representations of designing for variable length and size.
<b>Design to Support Information Organization</b>	Document and Plan for an overarching system or applied method to organize content, data, action and navigation systems. Utilizing basic Gestalt principles relate the page structure so as to build a mental model for the user that is supportive of the overall experience.
<b>Document Scope, rapidly and in Low Fidelity</b>	As you visualize ideas they become easier to experience, see it first had and scope the magnitudes communicable to your team. Then you manipulate ideas, abandon ideas. The quicker you can generate the faster you can facilitate a discussion and decision.Wireframes are one diagramming method to capture different functions. Data & Content Structure, Complex relationships simplified, states of types of information that will demonstrate the desired overall picture of an intended mental model.

# Visual Design

Works with a brand guideline or visual language system to translate the intended user experience to act as a guide for the user. The visual language initiates and maintains intended user behaviors, evokes intended emotional reactions, and leaves users with a positive reflection when interacting with our products and services.

The discipline of visual design communicates and explores choices of photography, motion, auditory, layout, color and style to support brands and the intended user experiences through artifacts such as mood boards, high & low fidelity mockups, prototypes and specifications.

Possess an attention to detail that establishes recognizable patterns for the user and also for the implementation team. It is the responsibility to establish patterns to facilitate independent, correct choices that will inevitably be made by the implementation team.

# Visual Design Skills

<b>Design Interfaces</b>	Combine knowledge of people and how a design can invite, engage and inform a person to interact with a system through some type of interface. Use the interface design to elicit an emotional response from the User to act or inform.
<b>Apply Visual &amp; Graphic Design Principles &amp; Techniques</b>	Apply principles and techniques of Graphic and Visual design including gestalt principles, layout, composition, interaction, illustration, typography, color theory, and emphasis. Apply these techniques to the design of but not limited to user experiences, product information, packaging, branding, and marketing collateral to name a few.
<b>Apply Branding Concepts &amp; Methodologies</b>	Know the concepts and methodologies used to manage the Procore brand. Includes the ability to: 1) Develop and implement the strategies, principles, standards and guidelines used to manage the Procore Brand, consult on best practices for naming Procore products/solutions; consult on best practices for managing and promoting products/solutions; understand and provide guidance to support Procore brand and corporate identity/design programs. 2) Define and maintain the elements which make up the brand's promise of value and gain market leadership, competitive advantage, leverage the brand position, and create greater buyer value and command.
<b>Develop Design Specification Documentation</b>	Write clear, unambiguous design specifications and other related documentation to be used for development.
<b>Use Visual Design Tools</b>	Use common set of tools to express, capture and collaborate visual design, structure and intention.
<b>Design Visual Style &amp; Guidelines</b>	Document the visual style of a product offering or part of an offering as it relates to the Design Language or Branding Guidelines. Develop guidelines that document and specify the visual style so as to enable others to act independently.
<b>Design Visual Metaphors &amp; Visualization</b>	Design visual metaphors that represent objects, actions, states, etc. Design visualizations (which may be either static or dynamic) that depict and illustrate complex structures, systems, processes and relationships that help tell a story.
<b>Develop Graphical Elements for Production Use</b>	Develop graphical elements for production. This applies for Interactive media, Material, or Print. Specification Documentation should following requirements for easily interpretable translation of designs. Decompose complex sets of screens for production.
<b>Design for Mobile</b>	Understand current mobile technologies. Design and develop experiences that are suitable for consumption in current mobile environments and devices. Planning for User's Context (cultural, activity and situation)
<b>Plan &amp; Deploy Grid System</b>	Develop or adhere to a systemic grid. Utilizing it as an armature to organize graphic elements in a rational, easy to absorb manner. Planning a grid in conjunction with the type of content, it's relationship to variable data sets and planned interaction will enable the development of a user's mental model.
<b>Design Responsively</b>	Develop & Plan for a design that will behave, look and interact in a recognizable way across multiple devices.
<b>Design for Obviousness</b>	Maintain complex systems while Designing for the obvious answer, help a user navigate & prioritize where to focus their attention utilizing color, space and proximity and other Gestalt Principles.
<b>Design Editorially</b>	Design with an editorial eye, quickly interchange ideas, edit and refine maximizing what only needs to be there. Nothing more than it needs to be. Hyper Critical of the minimum that will afford a user with the knowledge of how to feel confidently informed and how to take action.

# Accessibility (Inclusive) Skills

Consideration of the physical and linguistic needs of our users.

<b>Apply Knowledge of Global NLS Requirements</b>	Understand and describe the National Language Support (NLS) requirements of the different geographies around the world. Describe the advantages of NLS design in enhancing the maintenance, support, and development of multi-geographic product implementations. Support the client team and the international customers to ensure that they take into consideration the NLS requirements during product selection, solution design, and creation.
<b>Advise on NLS &amp; Country-Unique Requirements</b>	Understand the National Language Support (NLS) required for the different geographies around the world. Understand which of the solution areas differ from country to country and how they differ. Understand country law and regulations which originated the differences.
<b>Advise on Translation Solutions</b>	Provide advice and counsel to clients regarding translation solutions. Understand translation solutions and recommend actions that may resolve the client's problems or issues within this area. Have direct client experience with translation solutions.
<b>Develop Globalization Plan</b>	Develop Globalization Plan incorporating the appropriate components: such as: managing global teams: National Language Support: global billing: time zone and date problems: network design access: global transaction monitoring: import-export issues: global security issues: revenue and income tax issues (government requirements): customer ownership (contract management: customer satisfaction): bandwidth: standards: application development concerns: cultural differences: and global users (exposure worldwide).
<b>Apply Globalization Principles</b>	Understand and apply the standards and guidelines for writing code and testing products that will be sold worldwide.
<b>Code for Accessibility</b>	Design or modify software that can be used to increase, maintain, or assist the functional capabilities of people with disabilities. Understand and follow the accessibility standards.
<b>Use Accessibility Tools</b>	Use accessibility audit tools and appropriately apply results.
<b>Develop Globalization Plan</b>	Develop Globalization Plan incorporating the appropriate components: such as: managing global teams: National Language Support: global billing: time zone and date problems: network design access: global transaction monitoring: import-export issues: global security issues: revenue and income tax issues (government requirements): customer ownership (contract management: customer satisfaction): bandwidth: standards: application development concerns: cultural differences: and global users (exposure worldwide).

# **THE ABILITIES FRAMEWORK**

**The future is not something that happens to you.  
The future is something you do.**

## Why Use A Framework?

**Standardized Language For Design Careers at Procore**

**Recognize Individual Career As A Design Project**

**Structured Goal Setting**

**Efficient 1:1's**

**Promotion Cycles With Minimal Debate**



# Design Abilities Can Be Attained and Measured



## No Skill

The designer has no academic or practical knowledge of the subject.



## Acquired

The designer has gained knowledge of the subject through formal or informal education, training, mentoring, experiences or other skill development activities and has limited, if any, application of the skill on any engagement or project.



## Applied

The designer has repeated, successful application of the skill on engagements or projects.



## Mastered

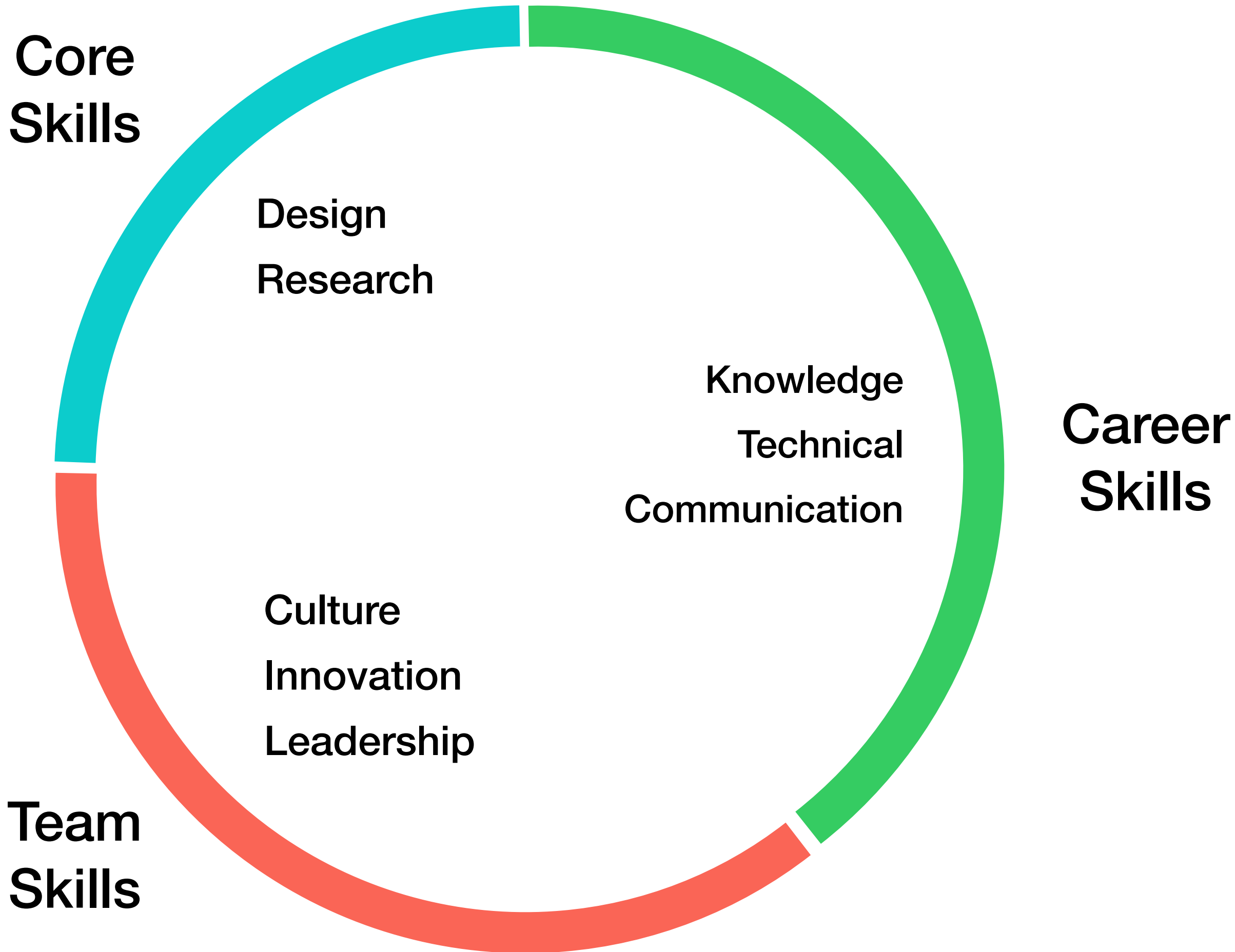
The designer has comprehensive, in-depth knowledge of the subject and extensive successful applications of the skill on engagements or projects. The designer has demonstrated the ability to mentor, teach and lead the application of this skill and function as a subject matter expert.



## Innovative Leadership

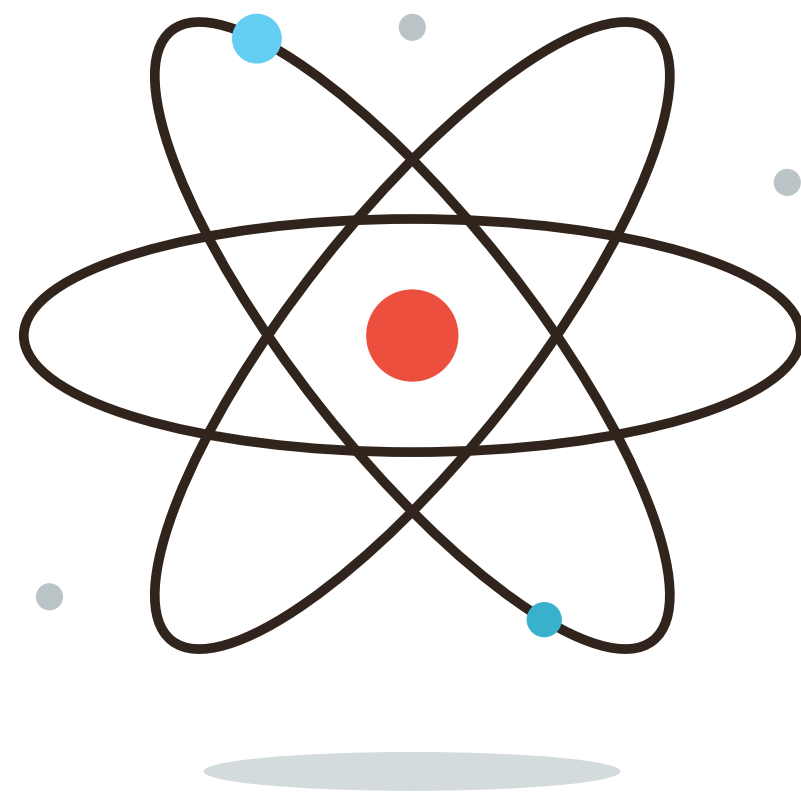
Innovative leaders have earned reputations as both masters and innovators , internally and/or externally in this skill area. Their help is sought to build and implement novel solutions to exceptionally difficult and complex challenges — for a business, clients, or society at large

# ABILITIES FRAMEWORK





# RESEARCH



## **Impact**

You drive the research and strategic direction

## **Communication**

Your message is clearly conveyed, heard, and respected

## **Empathy**

Your bring customer data to life

## **Methodologies**

You know when and which method to use

## **Knowledge**

You continue to improve product expertise

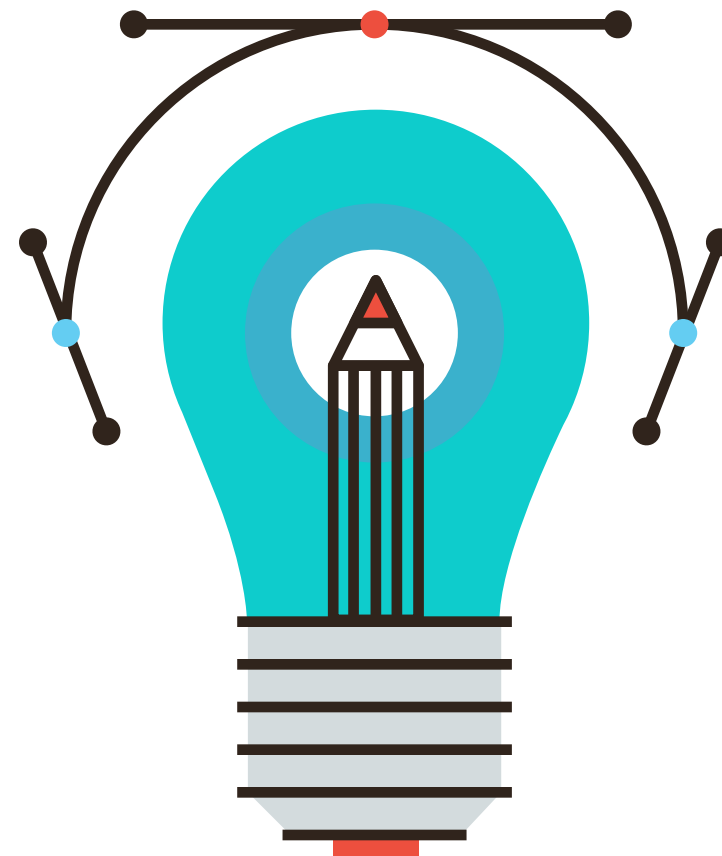
## **Roadmap**

You accurately plan the research for a release

## **Domain**

You understand the problem space and customer

# DESIGN



## **Impact**

You drive the design and delivery

## **Interaction**

From concepts to whiteboards to prototyping

## **Visual**

You make beautiful products

## **Prototyping**

You know when and which method to use

## **Tools**

You're on top of your game for the requisite tools

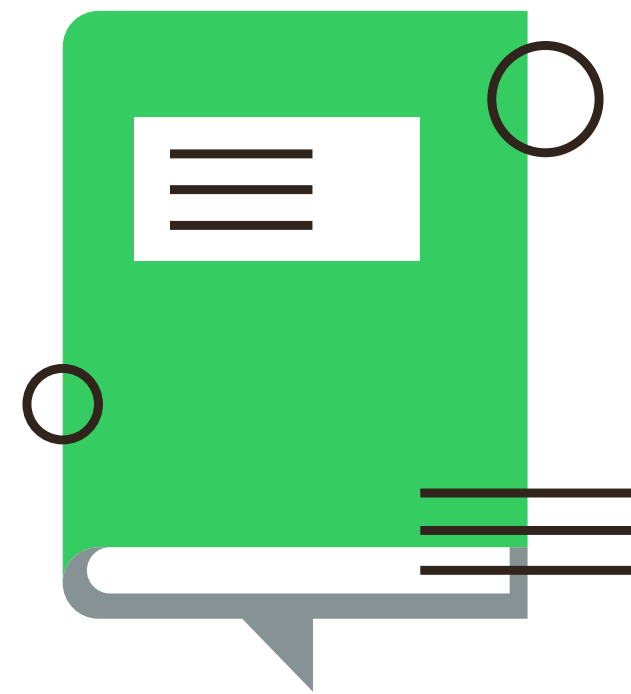
## **Process**

You utilize them effectively and appropriately

## **Research**

Your design process is driven by insights

# KNOWLEDGE



## **Customer**

You know the Personas, company types, sizes, etc. for your product area. You know how your customers use your product.

## **Product**

You know your product(s) and product lines

## **Industry/Competitive**

You know the overall industry and related products

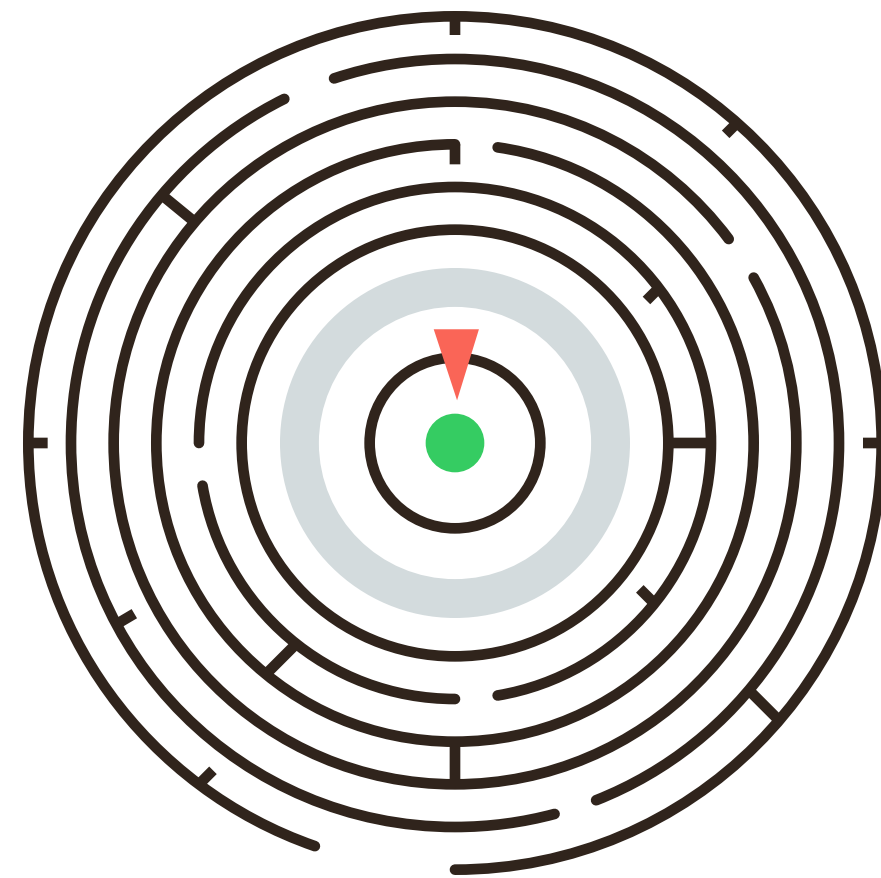
## **Company/Business**

You know the why/how/what of your company vision and how you compete within your industry or market

## **Organization Awareness**

You can effectively navigate the organization. You know how UX operates and fits into the company at large.

# TECHNICAL



## Systems Thinking

You are an architect at heart. You bring new perspective to problems to provide system-level insights and innovation.

## Analytics - Interana/Full Story/New Relic

You leverage a rich collection of tools to increase design and research effectiveness.

## UI Performance Tracking & Measuring

Measurement, performance, and tracking requirements are part the of your designs.

## HTML

You can code quickly and semantically.

## CSS

You can control your semantic code effectively to create pixel-perfect designs.

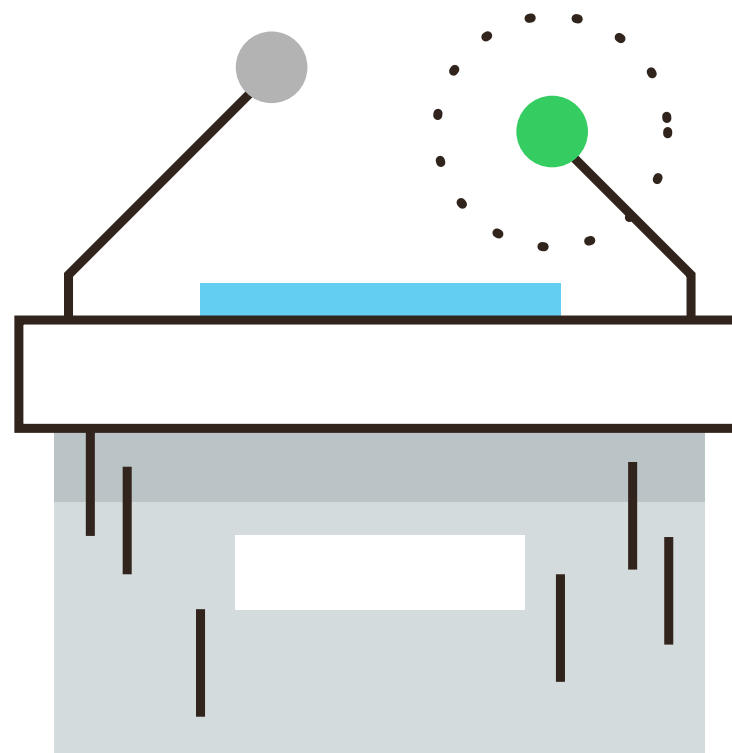
## JavaScript/Framer.js

Your prototypes are rich, interactive & feel like a real product.

## Jira

You write, track, groom, and effectively manage development tickets.

# COMMUNICATION



## **Daily**

You're transparent with your manager and teams

## **Presentations**

From Keynotes to prototypes...you communicate effectively

## **Written**

From emails to slack to blogs...you are a clear, concise, compelling and convincing writer

## **Meetings**

You involve the right people at the right time. You clearly communicate action items and decisions

## **Resourcefulness**

You leverage the company and network to remove blockers

## **Leveraging Feedback/Reviews**

You collect feedback and apply it to gain insights and build relationships

# LEADERSHIP



## **Product**

You know your product inside and out. Competitors too.

## **Mentoring**

You take time to help co-workers develop their skills.

## **Process**

You know the process, how to use it and help your coworkers identify opportunities to improve.

## **Design/Research**

You are sought for your expertise. You are a multiplying factor in the quality of work produced by your teammates and co-workers.

## **Customer**

You have a detailed understanding of your customers, their needs, and day-to-day tasks.

# CULTURE



## **Optimism**

You bring a positive, collaborative and engaging attitude to your work and the team.

## **Ownership**

You take ownership without instruction.

## **Openness**

You are honest and open to your team, your manager, and yourself.

## **Solution Focused**

Identifying problems is easy. You're driven to find solutions.

## **Team Builder**

You reach out and build relationships beyond your core team. You build relationships across disciplines.

## **Customer Outreach**

You behave professionally, cordially and enthusiastically when interacting with customers. Curiosity is your guide.

## **Motivator**

You actively support your team members - both professionally and personally.

# INNOVATION



## **Futurist**

You think beyond the current scope of your road map. You invent entirely new business opportunities.

## **Technology**

You are in touch with the latest gadgets, trends, technology, competitors, frameworks, etc.

## **Patents**

You actively identify opportunities to protect your intellectual property.

## **Process**

You recognize that invention goes far beyond products. You are constantly looking for new ways to practice your craft.

## **Fearless**

You are fearless. You are dauntless in your next to deliver better experiences.



# Performance Guidance For Designers - Goal Setting

Establish 3 to 5 goals that are shorter-term, aligned to business objectives and track to results - not just activity ... repeat at least once a quarter.

1. What do you want to accomplish?
2. What might get in your way?
3. How will you know when you've achieved your goal?

# Goal Setting

Building out your goals takes time, but the basic premises are very simple:

- Know what your mission critical goals are, and limit them in number so you stay focused
- Break down those bigger goals into discrete milestones
- If possible, turn those milestones into quantifiable metrics
- Connecting your goals lets your progress flow throughout your team and your company, and leads to greater achievement

# Sample Goals

- 1: Leverage the Procore Design System to deliver designs that measurably increase user delight, as tracked by uptrends in [Net Promoter Score](#) surveys for the platform or for a service you work on. Reduce detractors by paying attention to design details, working to personally insure polish in the product.**
- 2. Learn how to design effectively in mixed fidelity, knowing when and how to scale each of the 5 dimensions of fidelity: Visual Refinement, Breadth of Functionality, Depth of Functionality, Interactivity, Data Model. Learn to build design artifacts that show motion, animations, transitions, etc.**
- 3. Visit at least 2 job sites each quarter for context specific inquiry and observation.**
- 4. Attend 1 workshop (online or in person) to grow my skill set in either prototyping, Sketch, UI, XAML or FE code, or UX design.**
- 5. Help to implement a design system that includes Sketch - InVision - Slack and make available to all other designers. Have 1 designer be on-boarded using the system as a guide to how we do design at Procore. Host a lunch and learn about this to explain how the system works and how to best effectively utilize these resources.**

# Example of an OKR - Objectives & Key Results

## Objective:

**Conduct Effective Design Handoffs: Empower my product manager with design documents for future projects and developers with detailed UI states for upcoming work.**

## Key Results:

Faster and higher quality release cycles

- Increase design-to-development productivity by X%
- Reduce number of post release UX/UI defects by X%
- Reduce the amount of debate and clarifying communication by X% during sprint planning, grooming, and product definition

# Sample OKRs

## Objective:

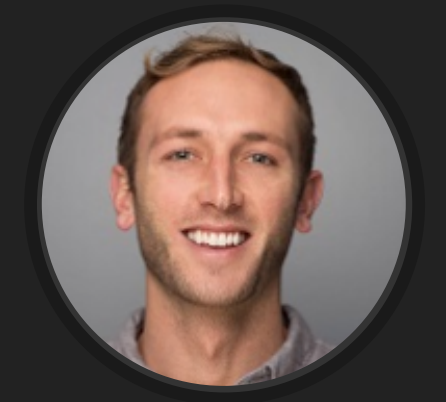
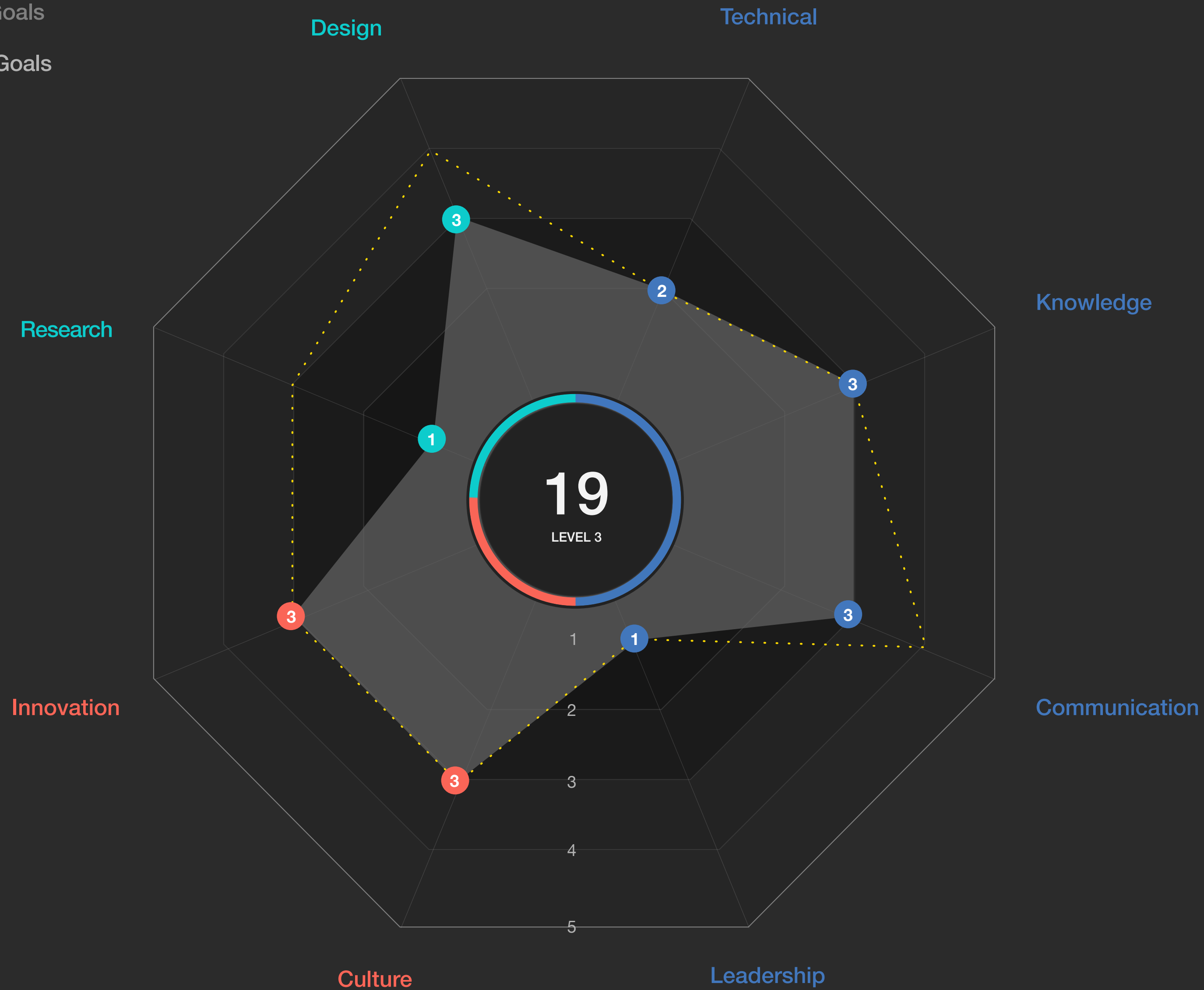
**Continue Leading Quantitative Research Efforts:** Refine your quantitative research best practices and propagate among the UX and broader R&D department. This includes performing pure quantitative research in cross-tool analysis that looks to break down the strict silo's between team and better tell the story of how are user's move through the broader Procore product.

## Key Results:

- Equip 2 designers with the tools & methods to conduct quantitative research to make well informed product design decisions.
- Reduce subjective design decisions by X%.
- Influence designers to ask critical questions through evidence of using quantitative data in their design critiques, UX presentations, and product UX specifications.
- Pair with a UX Researcher to conduct tool agnostic quantitative research that is presentable in a PDF to be shared.

# ASSESSMENT

- ..... Desired Goals
- Attained Goals



Rob Hamlin  
UX DESIGNER

4 of 10

CORE SKILLS



9 of 20

PERSONAL SKILLS



6 of 10

TEAM SKILLS



**Your career is the one project you exclusively own.  
Make it a great one!**