WORKFLOW · SAMPLE ENGAGEMENT

Ten working days, *start to signed-off.*

A four-journey audit, scoped and delivered using only the files in the kit.

This is the engagement shape the kit is built around. It is not the only way to run an audit, but it is the sequence the templates assume — and the one that keeps a ten-day audit from turning into a six-week one. Each phase names the artefacts you produce and what the client actually sees.

01 Scope

Day 1–2 · Two working days

Turn a conversation into a signed, bounded engagement.

WHAT YOU DO
— Discovery call — 45 minutes, prompts from Module 05
— Journey inventory — which four journeys, why these four
— Scoping worksheet completed with the client in the room
— Proposal and statement of work issued the same day

WHAT YOU PRODUCE
— Signed statement of work
— Agreed journey list
— Access and stakeholder map

CLIENT EXPERIENCE The client sees a one-page scope and a price, not a deck.

02 Fieldwork

Day 3–6 · Four working days

Collect evidence, not opinions. Score as you go, not afterwards.

WHAT YOU DO
— Heuristic pass against the 40 criteria, per journey
— Keyboard-only and screen-reader passes on the critical path
— Evidence captured with a reference for every rating
— Two reviewers score independently, then reconcile

WHAT YOU PRODUCE
— Evaluation sheet — 160 ratings
— Evidence library with references
— Provisional findings register

CLIENT EXPERIENCE The client sees nothing yet. Silence during fieldwork is deliberate.

03 Synthesis

Day 7–8 · Two working days

Convert 160 ratings into a defensible score and a ranked register.

WHAT YOU DO
— Dimension scores and weighted journey scores
— Coverage check — the 70% gate before any headline number
— Findings merged, de-duplicated, severity called
— Impact × effort scored in the prioritisation engine

WHAT YOU PRODUCE
— UX health score with coverage
— Ranked findings register
— Impact–effort matrix

CLIENT EXPERIENCE The client sees the score and the two blockers before the readout.

04 Delivery

Day 9–10 · Two working days

Present, defend, and hand off something engineering can pick up.

WHAT YOU DO
— 45-minute readout using the presentation framework
— Recommendations in payback order, with effort attached
— 30/60/90 roadmap agreed in the room
— Handoff pack with acceptance criteria per recommendation

WHAT YOU PRODUCE
— Executive report — 10 pages
— 18-slide readout deck
— 30/60/90 roadmap
— Engineering handoff pack

CLIENT EXPERIENCE The client sees a decision, not a document dump.

WHAT THE TEN DAYS ASSUME

— Access to a working build, not screenshots. Half of the accessibility and task-completion criteria cannot be scored from images.

— One decision-maker who can sign the statement of work inside two days. A ten-day audit dies in procurement.

— Four journeys, forty criteria, two reviewers. Change any of the three and the arithmetic changes with it.

— The client commits a single 45-minute readout slot on day nine, booked on day one.