Narrative

Presenting software design in a design review

Narrative Workshop Series

jkolko@wonderfulnarrative.com

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Our major assumption

Your design work is not self-explanatory.

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Your design work is not self explanatory

Understanding software out of context is hard, or impossible, for most people.

Without *having an experience*, "screens as art" don't make sense

- Non-designers/non-engineers don't know how to read and evaluate a software flow when it's shown all at once, because software is never viewed as art
- We never encounter long screens—we only see a portion of the screen; long-screens are disorienting
- Micro-interactions, animations, and complex or subtle interstitials are only understandable when experienced

Systems thinking is hard

- Any one screen exists in a larger context of a system
- It's our job to hold the system in mind at once, and understand the relationship between items across screens
- Non-designers/non-engineers have never been trained in predicting "ripple effects" or thinking in modules and components

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Your design work is not self explanatory

Your audience will need help in judging if something is good or bad.

They will lack assessment criteria

When you present design work to non-designers, they will need help in:

- Focusing their criticism, and retaining that same focus over time
- Thinking from the perspective of a user
- Remembering that you are an expert

They will lack a mature vocabulary

You will receive language that isn't precise or actionable, and it's your responsibility to translate. Translation will:

- Ensure alignment
- Ensure that people feel heard
- Slowly instill a culture of design appreciation

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Your design work is not self explanatory

You'll present your design work in a variety of settings. The approach changes based on the setting.

Design critique & working sessions

Design is fluid

Change is good, and a multiplicity of opinions are welcome.

Stakeholder review & shareout

Design is persuasive

You are friendly but firm, flexible but confident; your work exists in a multidisciplinary context, and you selectively collaborate.

Approval meeting

Design is bulletproof

You are an expert. There are no surprises, because everyone already saw the work.

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Preparing for a design review

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Preparing for a design review

Identify the goals for the meeting, and write them down.

Design is fluid

- I need help solving a problem
- I need feedback on my work
- I want to share my work, because it impacts your work
- I want to know if what I'm designing is possible
- I want to know if what I'm designing is aligned with your agenda
- I want a hug

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Design is persuasive

- I need engineering to evaluate, scope or size my work
- I need product owners to see how my work addresses their requirements
- I want to advocate for what users want and need
- I need decisions to be made
- I want my work to be shared with others
- I want people to be excited

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Design is bulletproof

- I need approval
- I need others to know that there was approval

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Preparing for a design review

Do your research about the audience.

- Who will be there?
- What do they know?
- What do they care about?
- What do they fear?
- What's your relationship with them?

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Preparing for a design review

Design the meeting.

Whiteboard your plan

Goals

Agenda & timing

Attendees

Assumptions

Pre-work

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Write down your plan

In the email that you send

In the calendar invite you send

On a piece of paper that you hand out (if you are in person)

At the top of your Figma or Miro board

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Socialize the plan

Meet with people who will be in the meeting, and explain your goals

The meeting should not be a surprise

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The meeting should not be a surprise

Gatekeep the meeting

Be aware of how the invitation is shared

If the meeting gets too large, cancel it

If you are losing control of the meeting, cancel it

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Preparing for a design review

Organize your work.

Always walk through a scenario.

Always walk through a scenario.

Always walk through a scenario.

Always walk through a scenario!!

(A prototype is better than static screens—but still: always walk through a scenario!)

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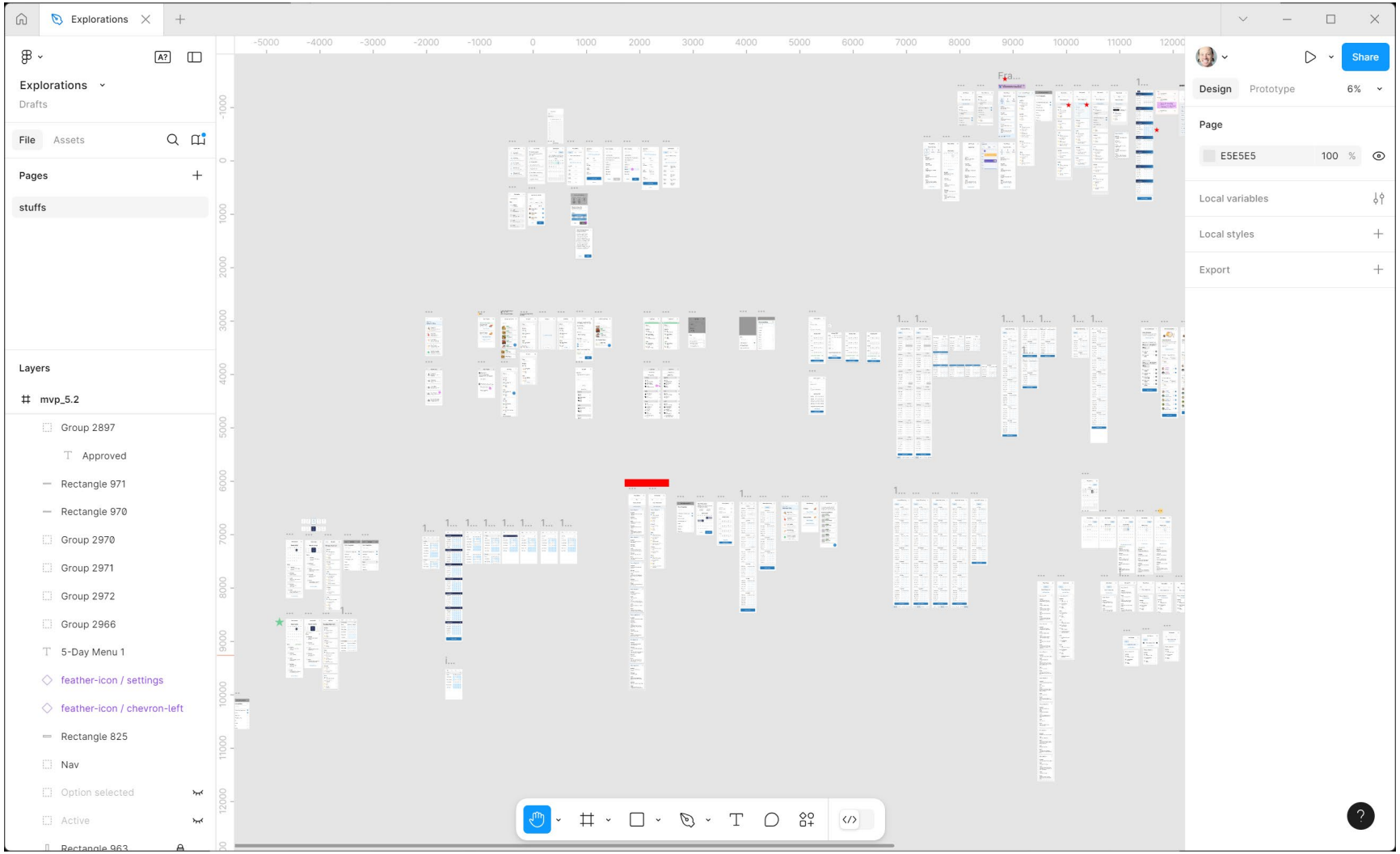
Clean your workspace.



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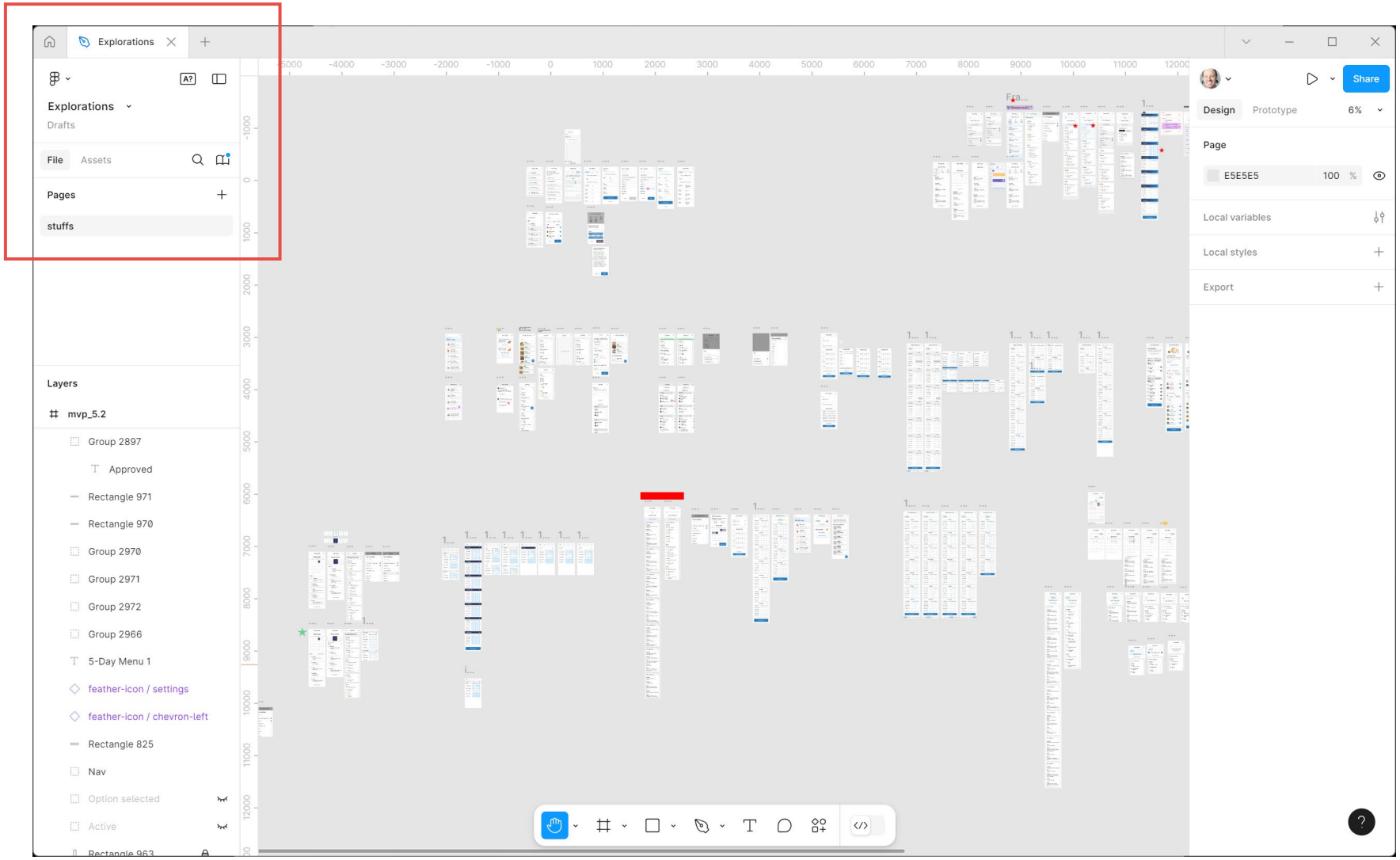

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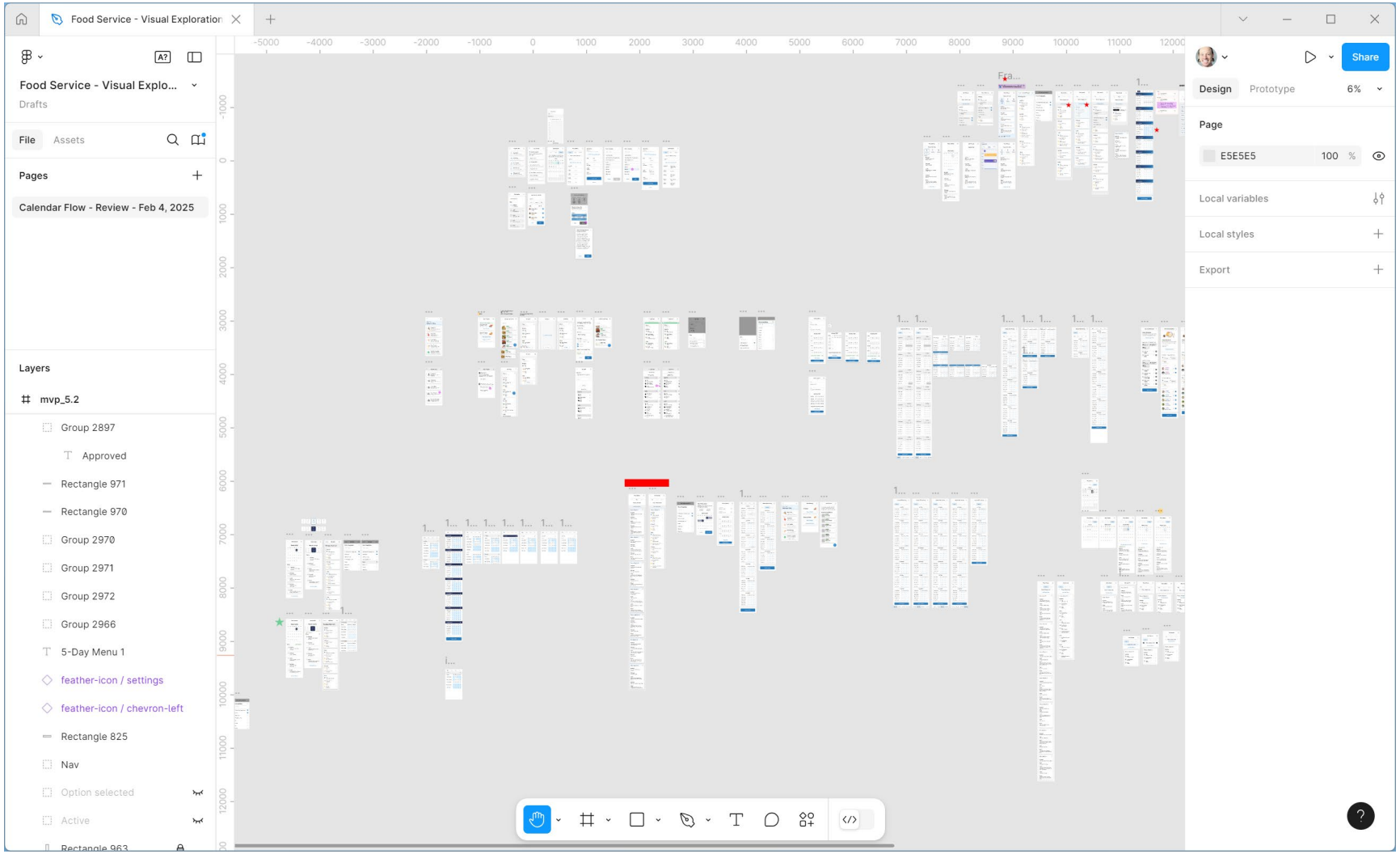

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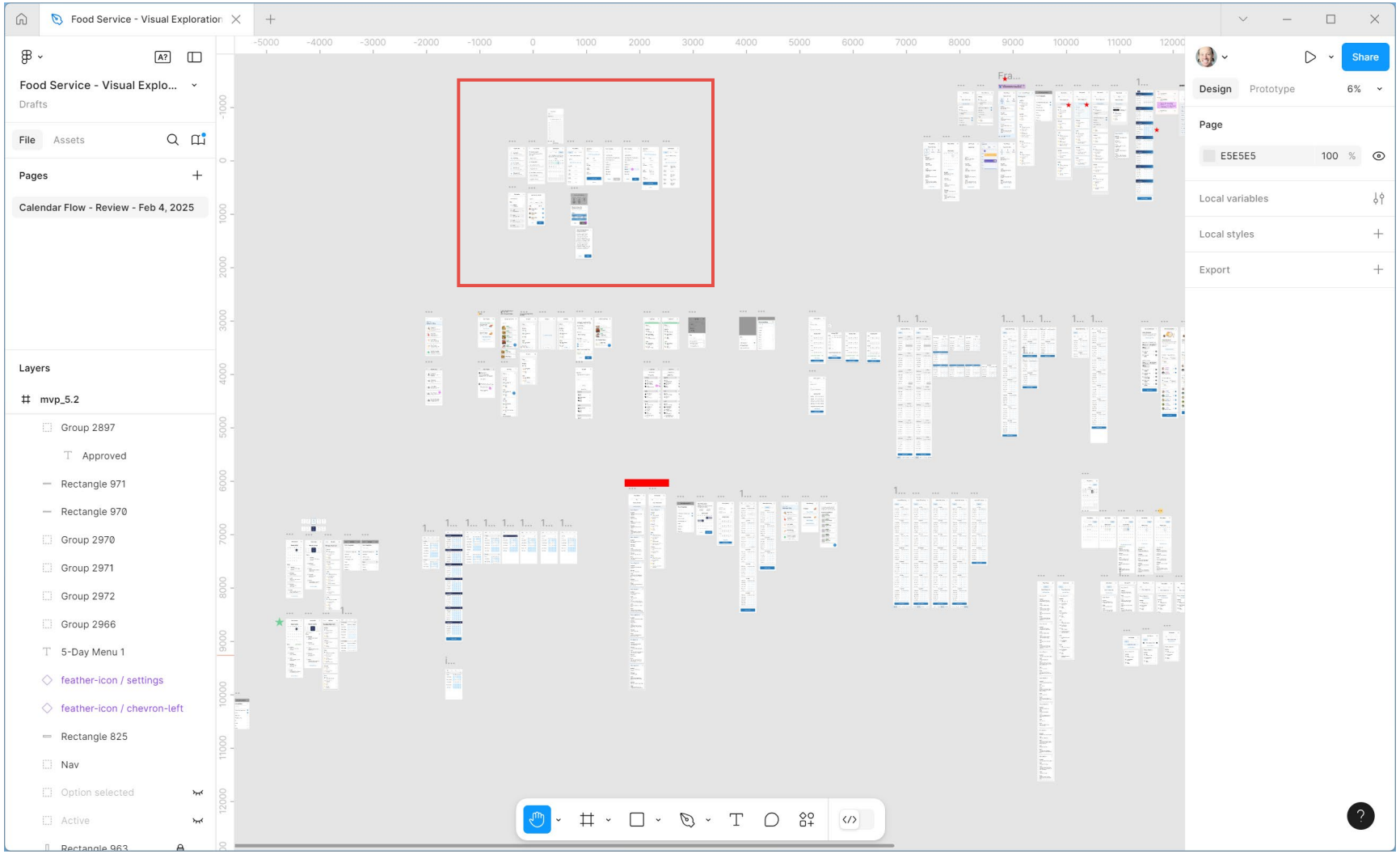

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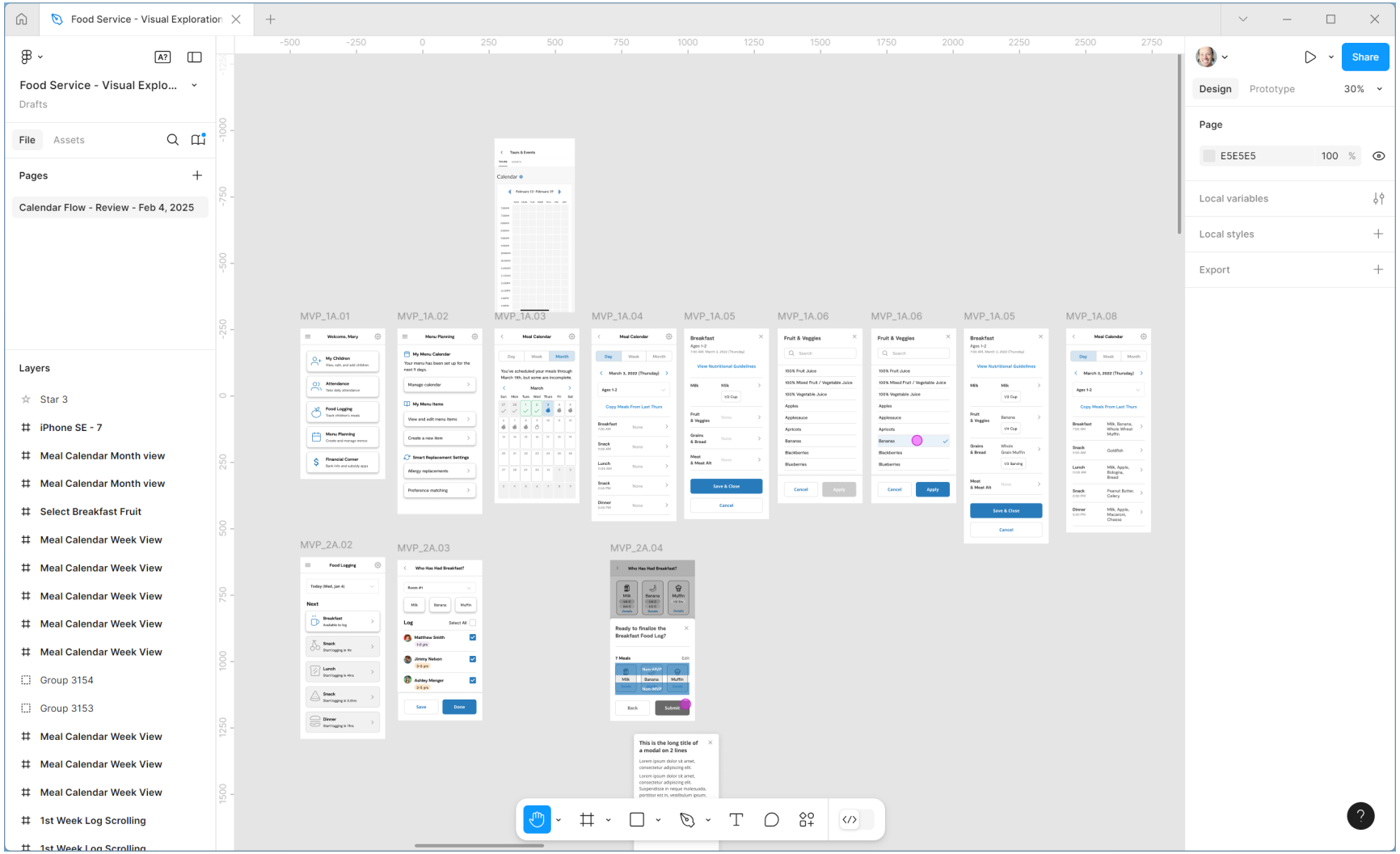

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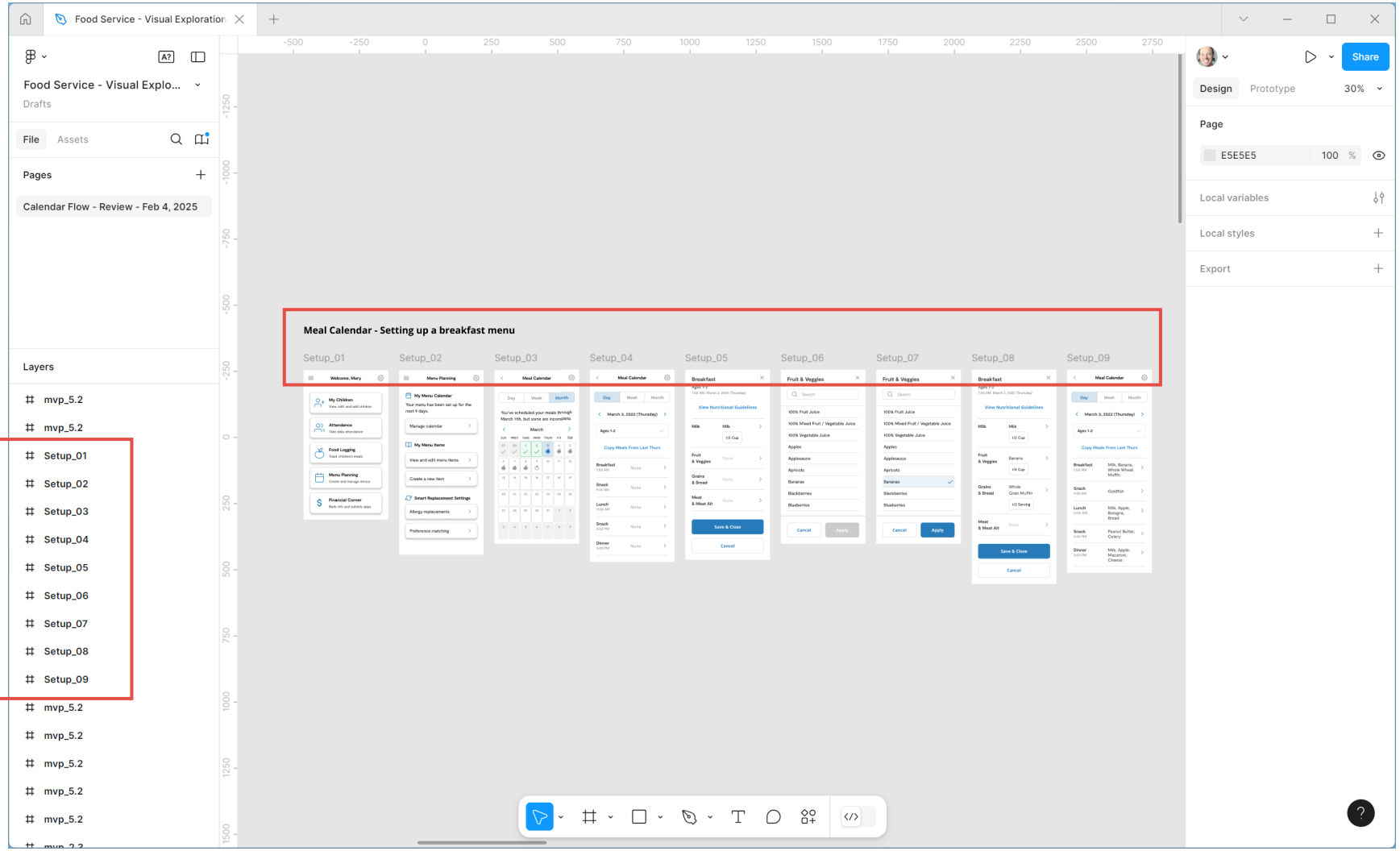

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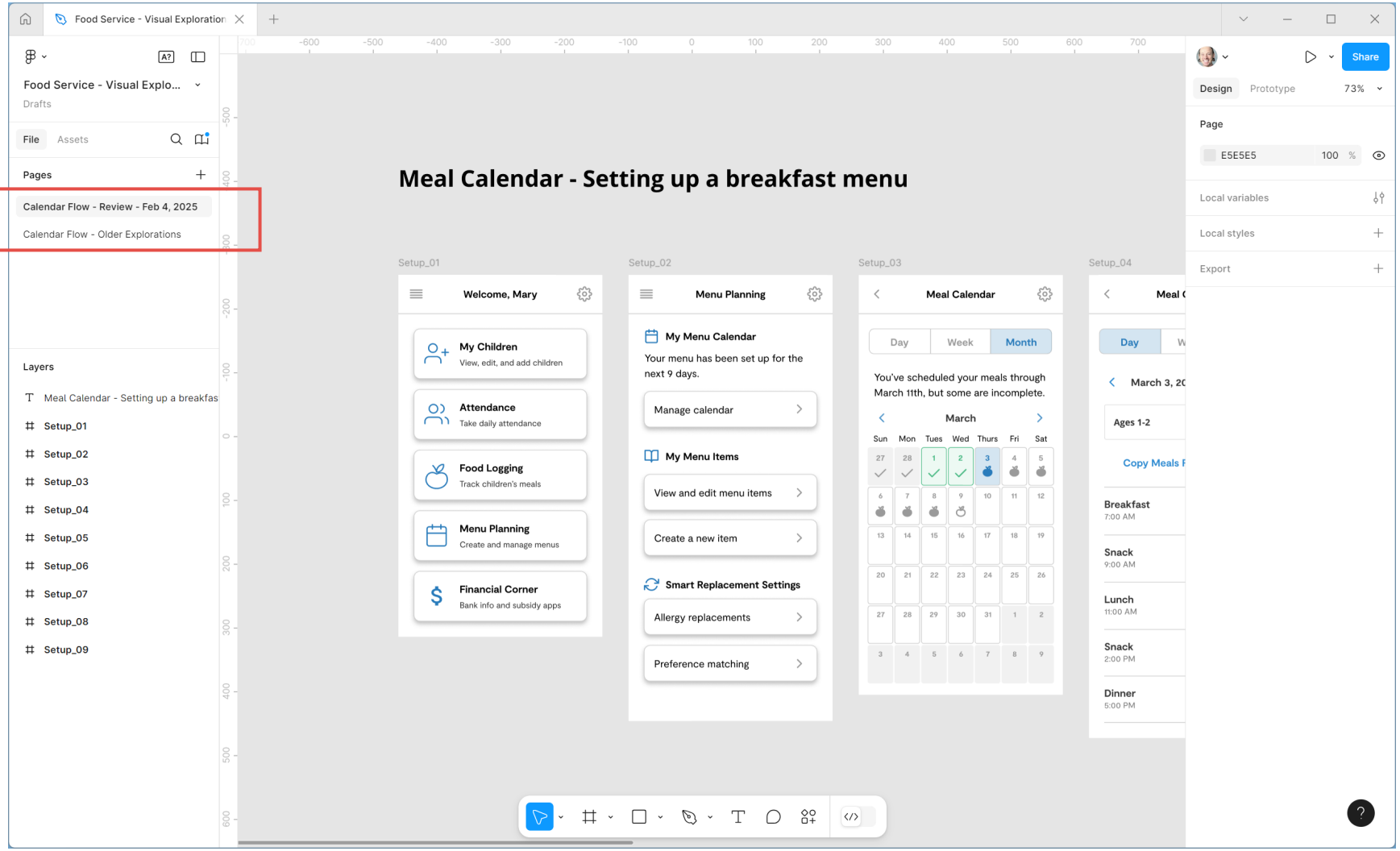

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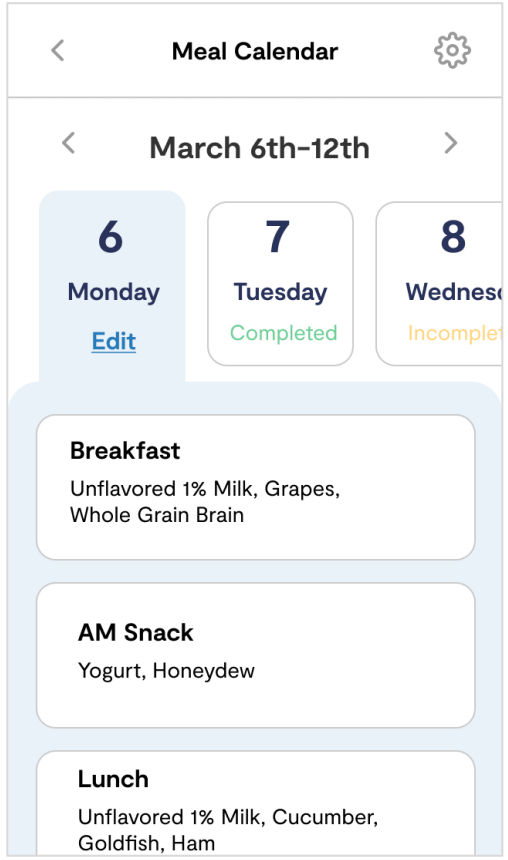
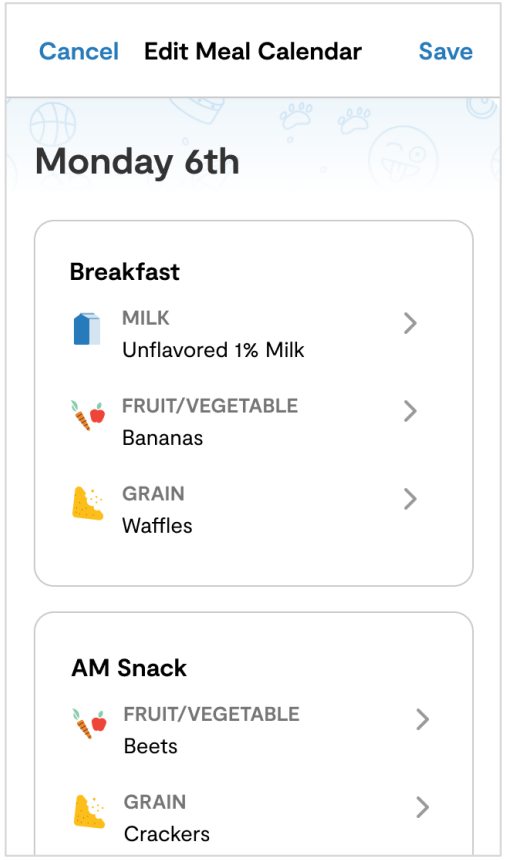
Preparing for a design review

Role-play. How will you respond to...

I don't like the colors.





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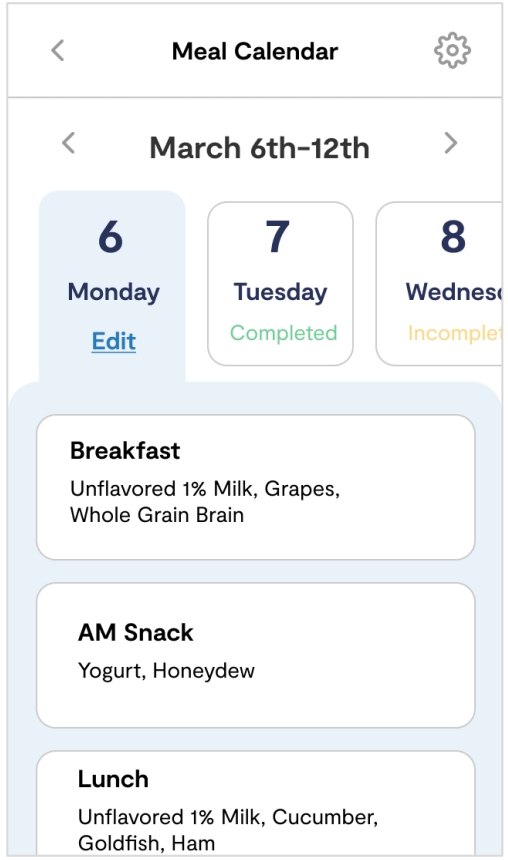
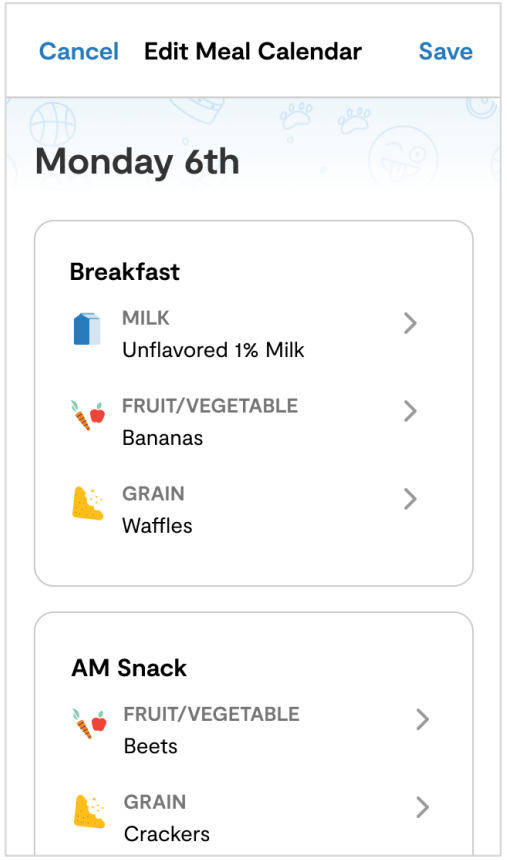
Preparing for a design review

Role-play. How will you respond to...

Schools would never offer Grapes for breakfast.





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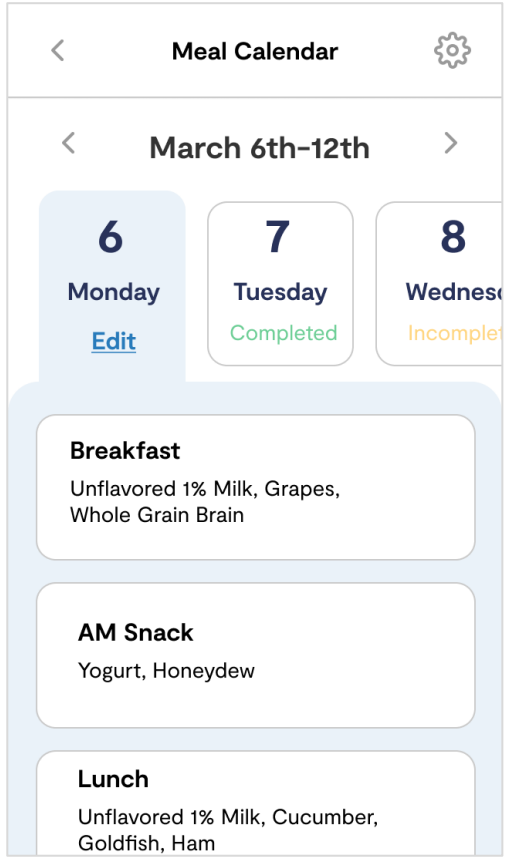
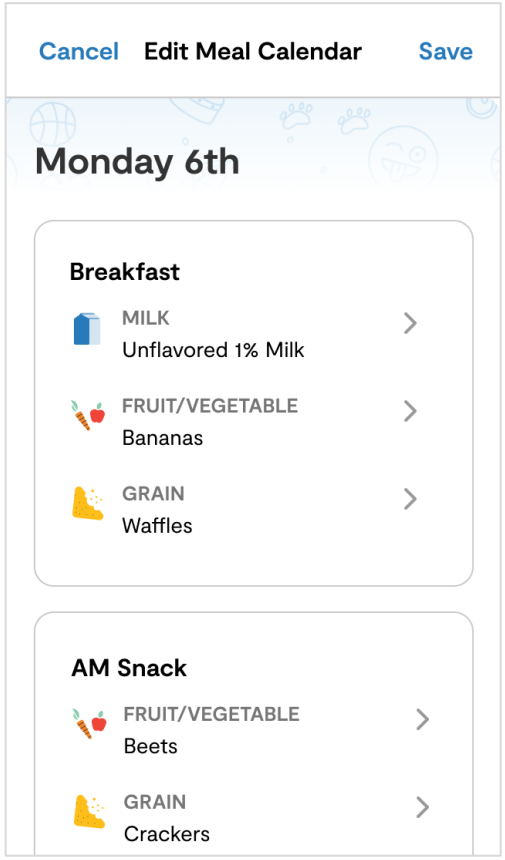
Role-play. How will you respond to...

Users won't know to tap the large date number.





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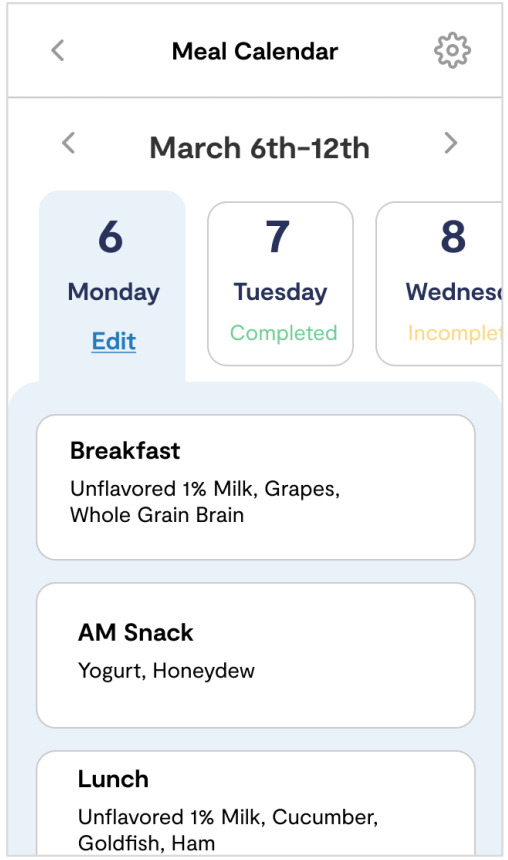
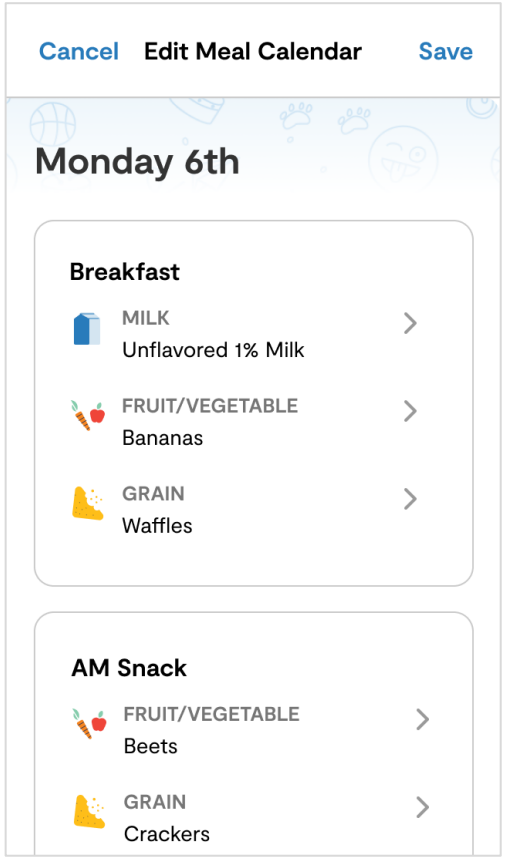
Preparing for a design review

Role-play. How will you respond to...

The icons are too childlike.





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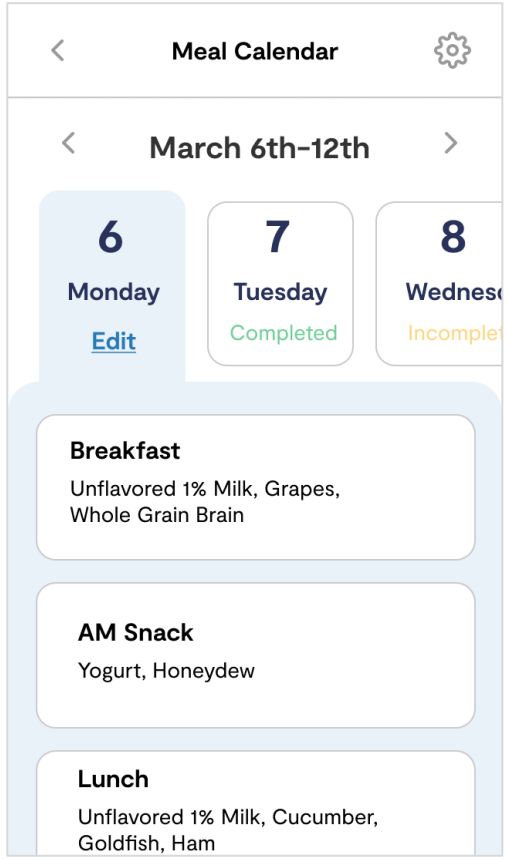
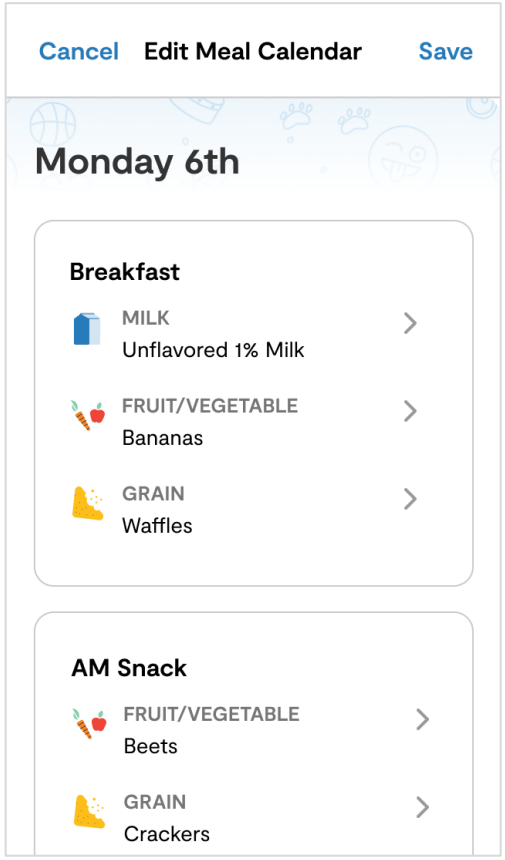
Role-play. How will you respond to...

The Save button is too small.





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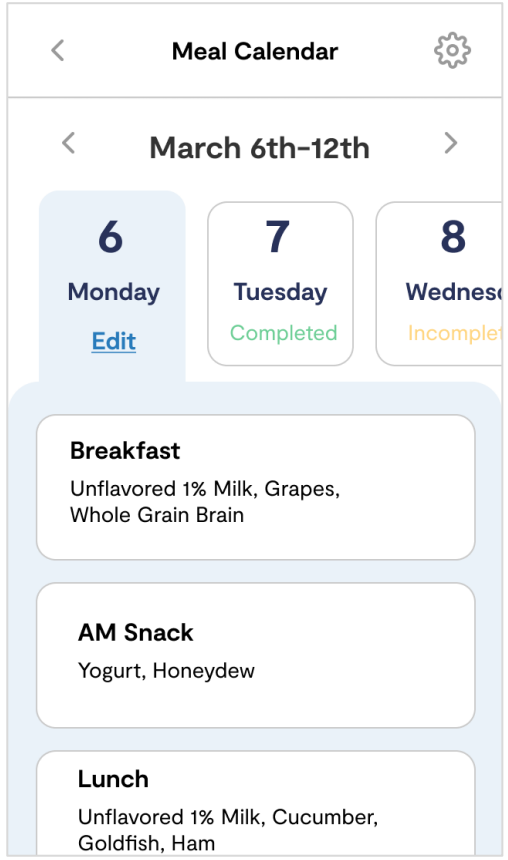
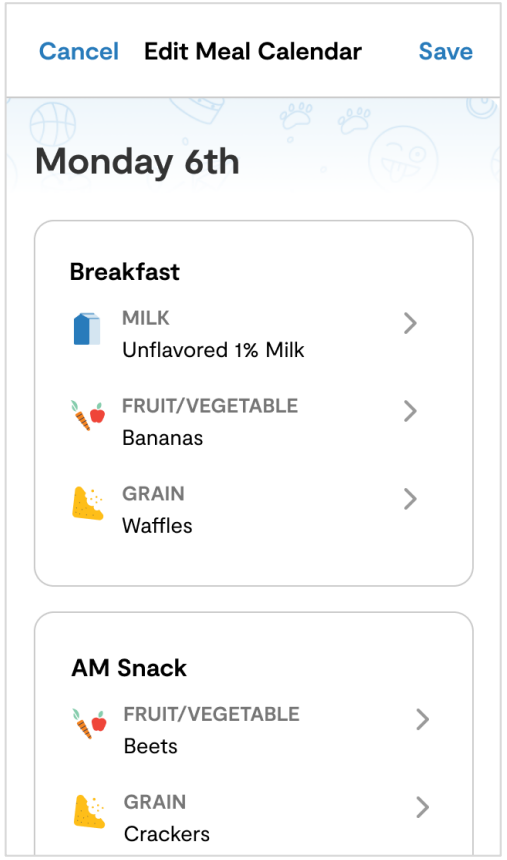
Role-play. How will you respond to...

I thought we weren't doing Meal Calendars in this release.





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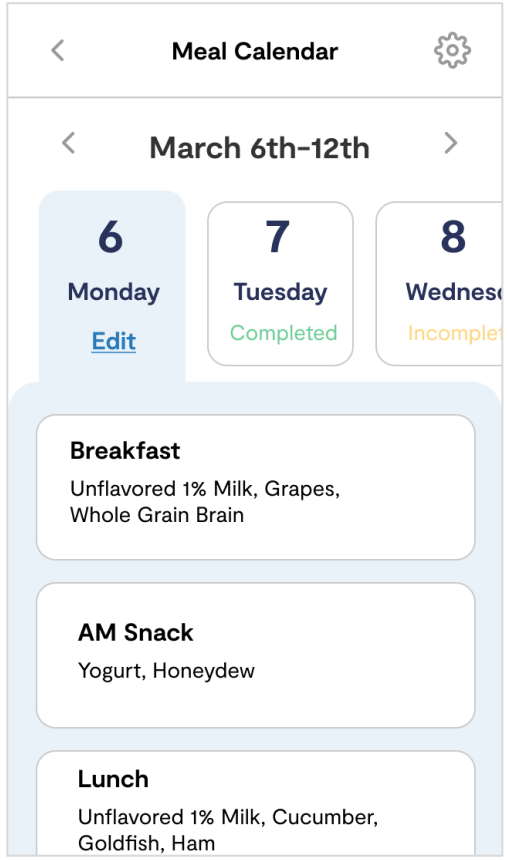
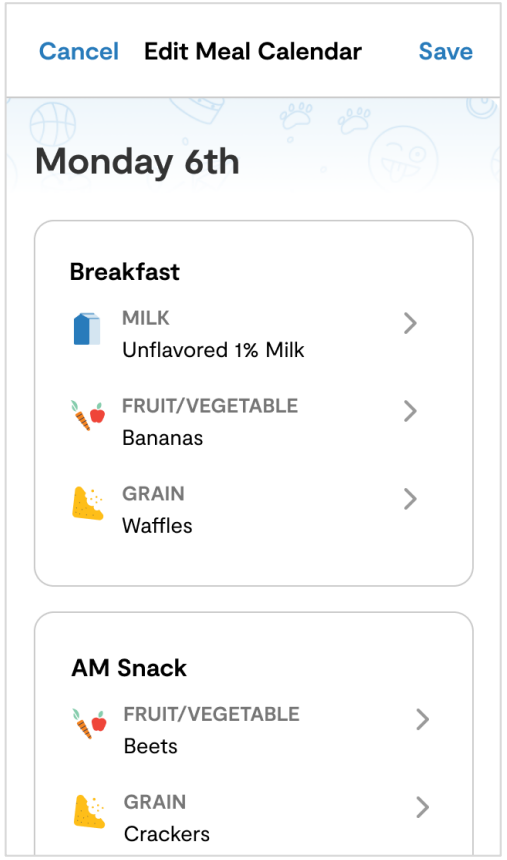
Preparing for a design review

Role-play. How will you respond to...

Where does the data come from for this?





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Running the design review—introduction

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Running the design review—introduction

Describe the problem you are trying to solve, succinctly.

✓ Our focus for this flow is on food allergy substitution. The problem this solves is ensuring that children are provided food safely, and that a childcare provider remains compliant with regulations.

My goal is to make it easy for them to replace an item that a child is allergic to, with an item they aren't allergic to.

✗ These are screens about meal planning.

✗ This is my design work.

✗ Teachers build meal plans, and those have ingredients. Different plans have lots of ingredients, so it's important that they can find them. There are all sorts of things that they think about when they do it, and it's really complicated. Sometimes they make mistakes so we have to make room for that, but also we have to make it quick. It's important that they can find things, but they don't always know what they are looking for. So it was really hard trying to come up with different ideas. We tried a lot of things. We spent a lot of time on it. We.....

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Running the design review—introduction

Describe the user, their context of use, and assumptions you've made about them.

✓ I've designed these for a childcare provider, who runs a daycare from her home.

This type of daycare typically has 10-14 children.

The childcare provider is responsible for feeding the children breakfast, lunch, dinner, and two snacks.

The childcare provider purchases food ahead of time. In order to receive reimbursement for their purchase, they are required to log the meals, indicating which students received food.

I've made the assumption that the childcare provider has a mobile phone, has already established an account, and has used the system before at last 3 times.

✗ Mary is a childcare provider.

✗

- Mary is 34 years old.
- She drives a Prius.
- She makes between $40,000 and $50,000 a year.
- Her favorite food is pizza.
- She has average technical abilities.
- She is married, with three children.

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Running the design review—introduction

Set expectations for what the audience will see, and who has already seen it.

✓ I'm going to show you screens that a childcare provider will encounter during their experience.

The screens have our branding and UI colors and styles applied to them.

The content is generally real and representative of the data we can pull from the database, but some of the details are placeholder, like the faces of the children.

We've already reviewed these screens with product and engineering, and both feel comfortable with the flow and the level of implementation effort.

✗ I'm going to show comps.

✗ I'm going to show wires.

✗ Just focus on the flow, not the words.

✗ These aren't done yet.

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Running the design review—showing the work

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Running the design review—showing the work

Establish the rules, and then lead the audience through a narrative: a story of how someone will experience your design.

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For example... (my talk track)

I’m going to show you seven screens, in a flow. I will walk through the whole flow without stopping, and then come back to the beginning so we can discuss what you’ve seen.

Please hold your questions and comments until we come back to the beginning.

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For example... (my talk track)

Our focus for this flow is on food allergy substitution. The problem this solves is ensuring that children are provided food safely, and that a childcare provider remains compliant with regulations.

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For example... (my talk track)

Mary is a childcare provider; she has a room of 10 children. She is logging breakfast for the children, and has already started. She has a child that is allergic to apples.

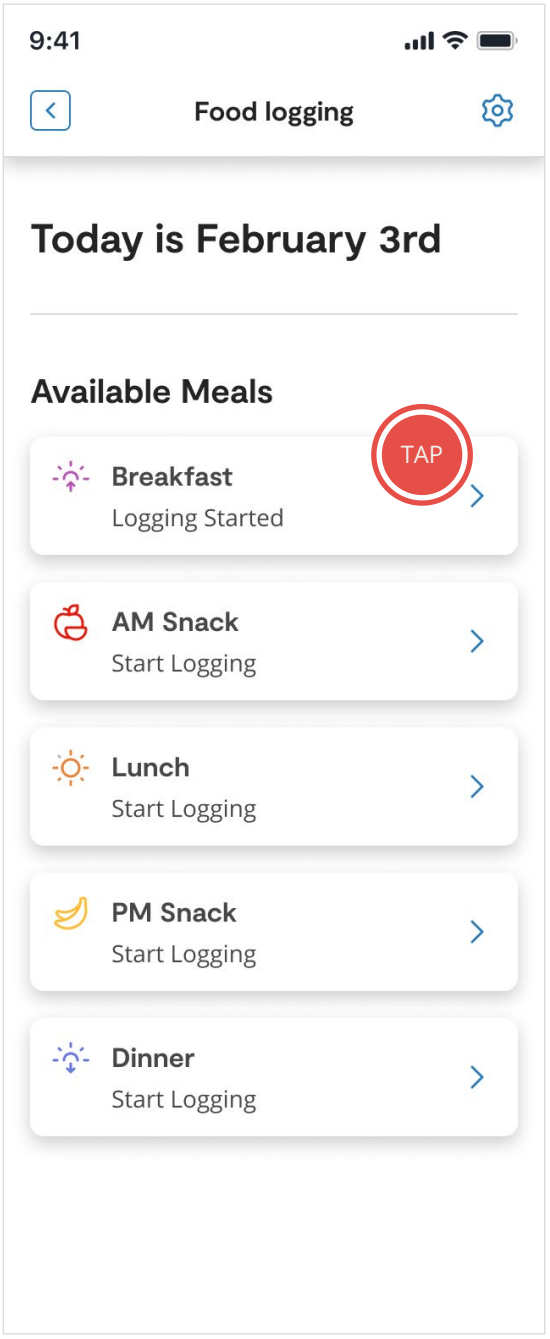
Mary's goal is to swap out apples for another food, just for that specific child.

For example... (my talk track)

Mary starts at the Food Logging screen. She sees a list of the meals that the children will have during the day.

The text indicates that breakfast logging has already started.

She taps on Breakfast to view the list of children.



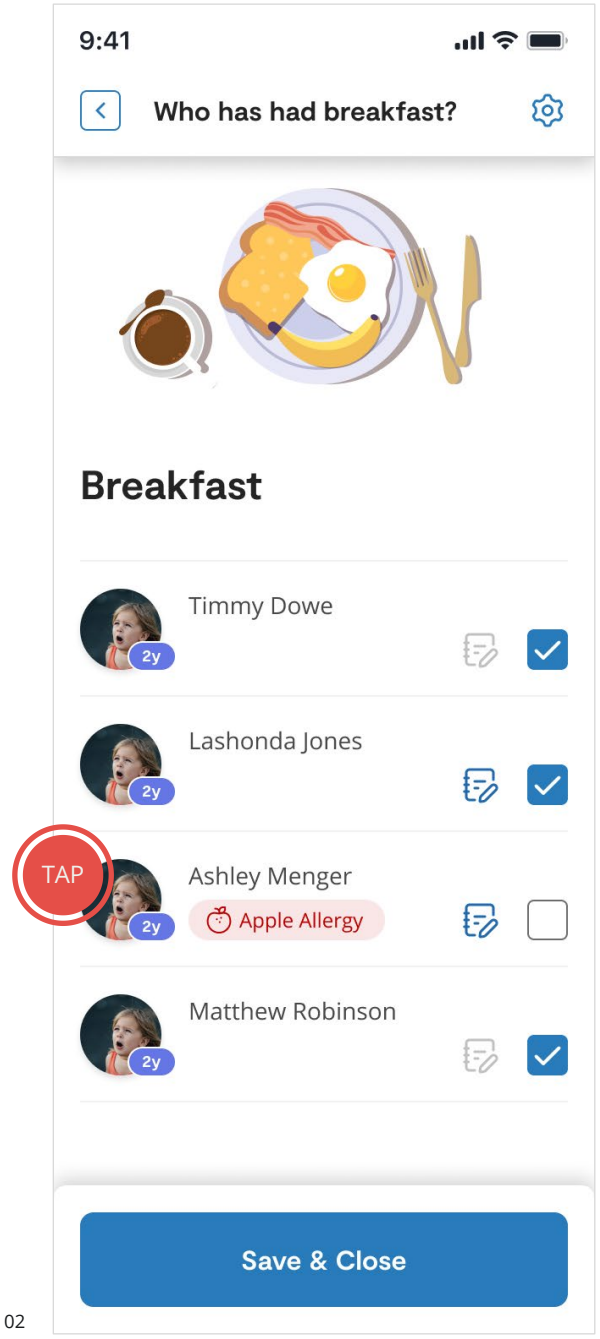
For example... (my talk track)

The list of children is displayed.

Mary has already logged that three children—Timmy, Lashonda, and Matthew—have had breakfast.

She is going to log Ashley's breakfast. She sees an indicator that Ashley is allergic to Apples.

Mary taps on Ashley to log her breakfast.

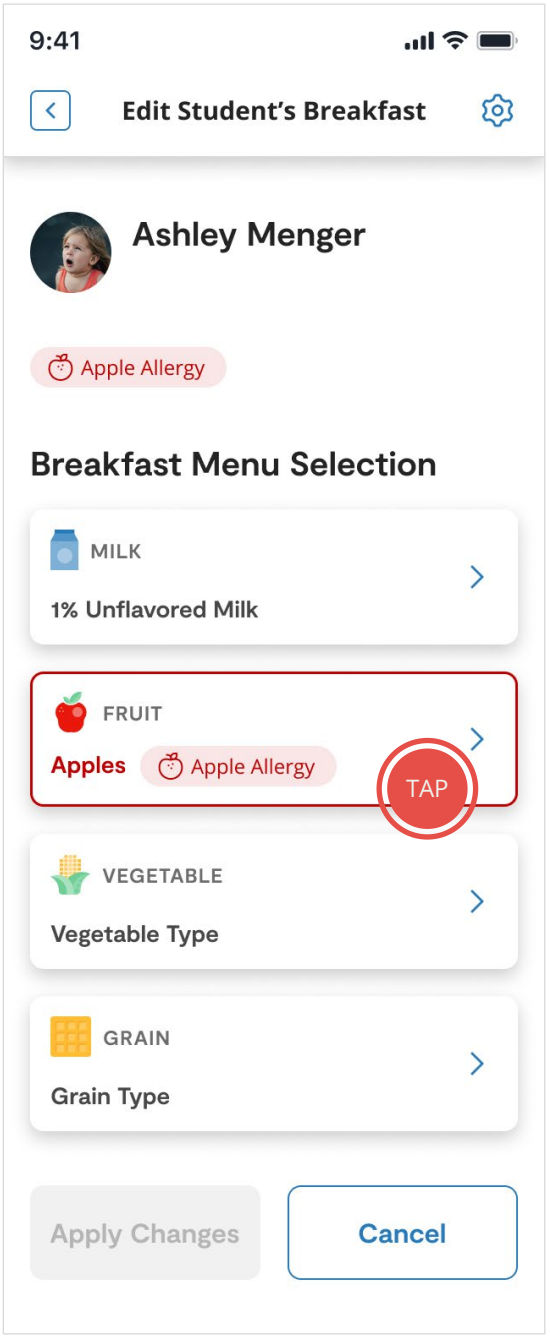


For example... (my talk track)

Ashley's breakfast menu is displayed, but logging is incomplete because Ashley has a food allergy.

The indicator at the top of the screen, and on the Fruit row, describe that Ashley is allergic to apples.

Mary taps on the allergen to change apples to something else.



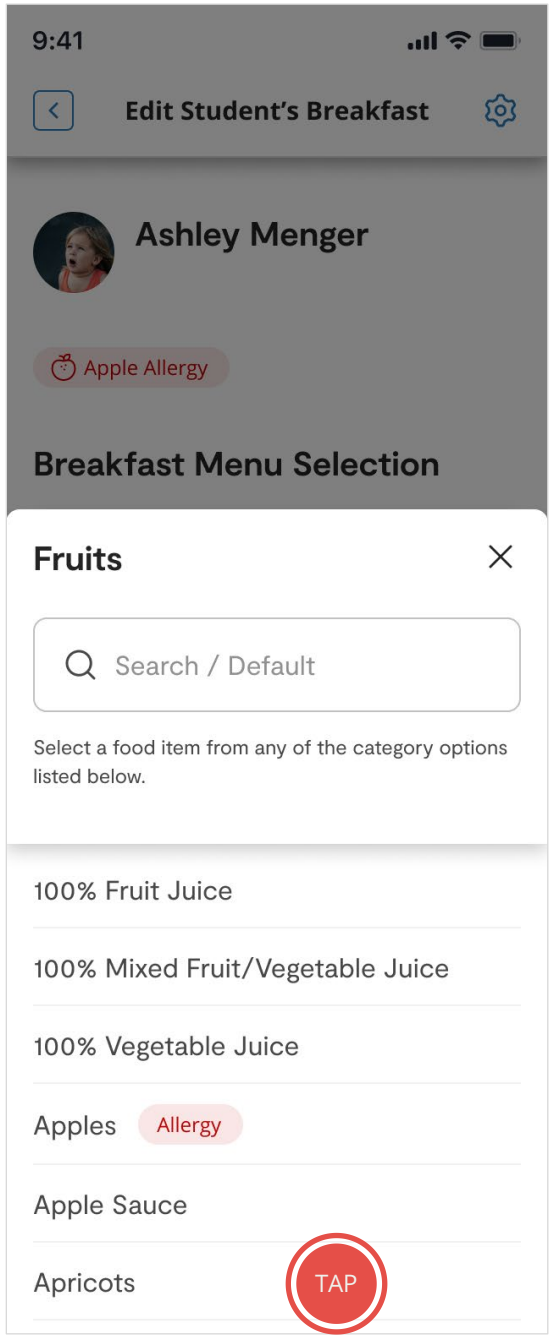
For example... (my talk track)

The selection of Fruits is displayed as an overlay on top of Ashley's breakfast details.

Next to Apples, Mary sees the word Allergy, reminding her not to select that item.

Mary can search for a fruit by name, or select a fruit from the list.

Mary selects apricots as a replacement for apples.

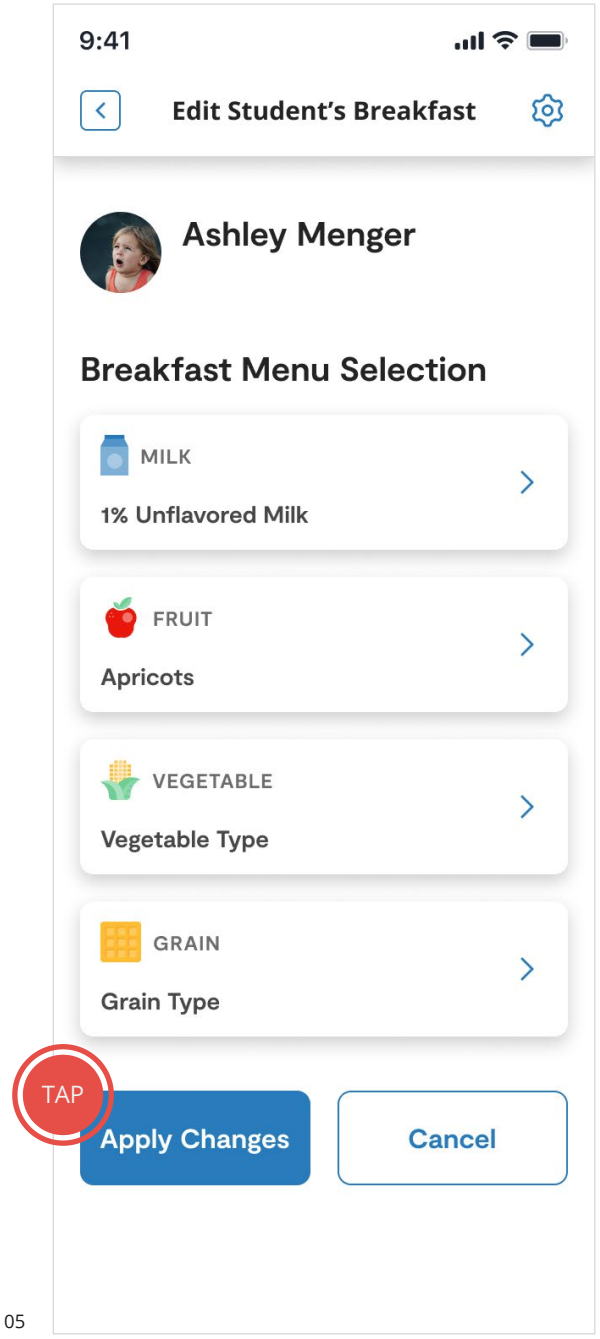


For example... (my talk track)

Ashley's breakfast selection is displayed. Apples have been replaced with apricots, and the Allergy alert indictor has been removed.

Now, Mary can tap Apply Changes to save her substitution and return to the list of children.

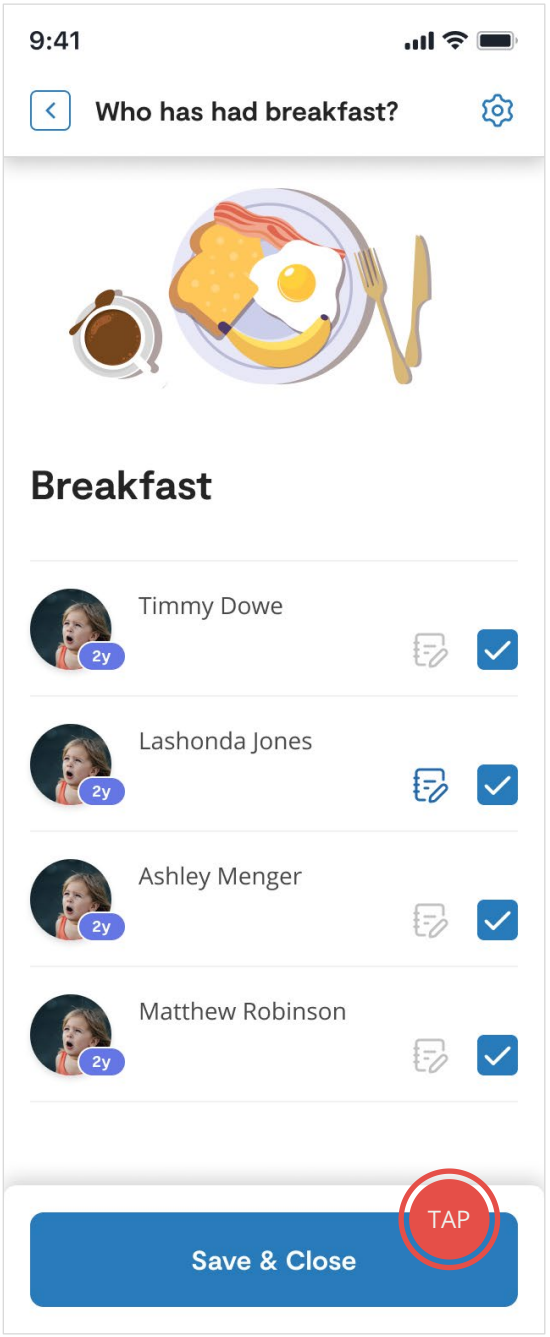
She taps Apply Changes.



For example... (my talk track)

The list of children is displayed, showing that Mary has logged all of their breakfasts.

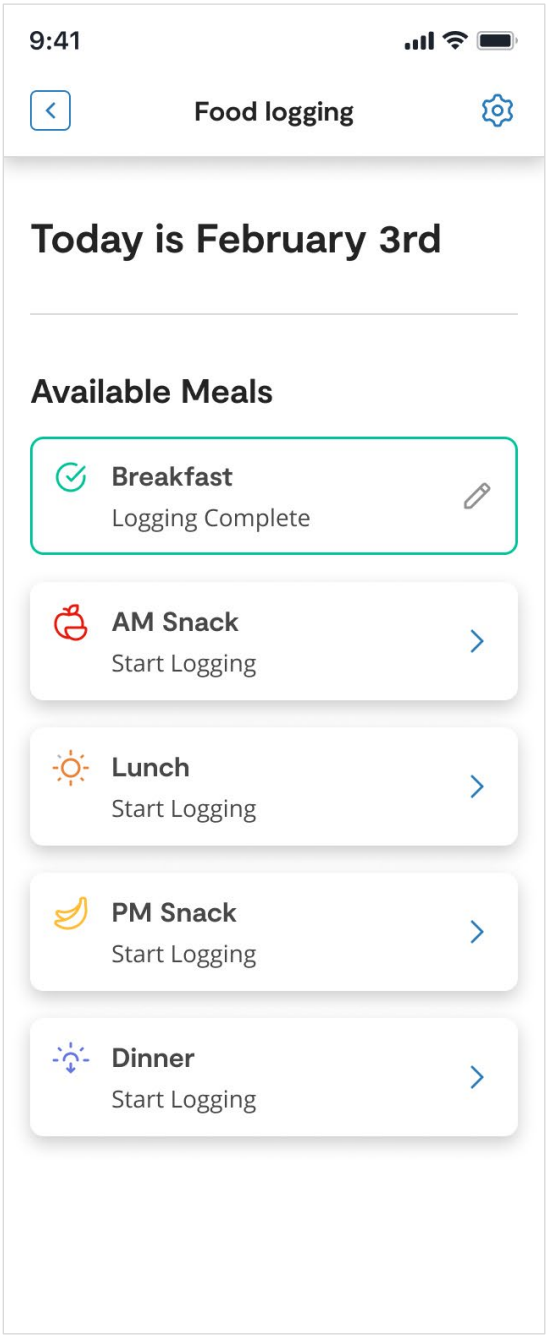
Because Mary is done, she taps Save & Close to complete Breakfast logging and return to the main Meal Logging screen.



For example... (my talk track)

The Meal Logging screen is displayed.

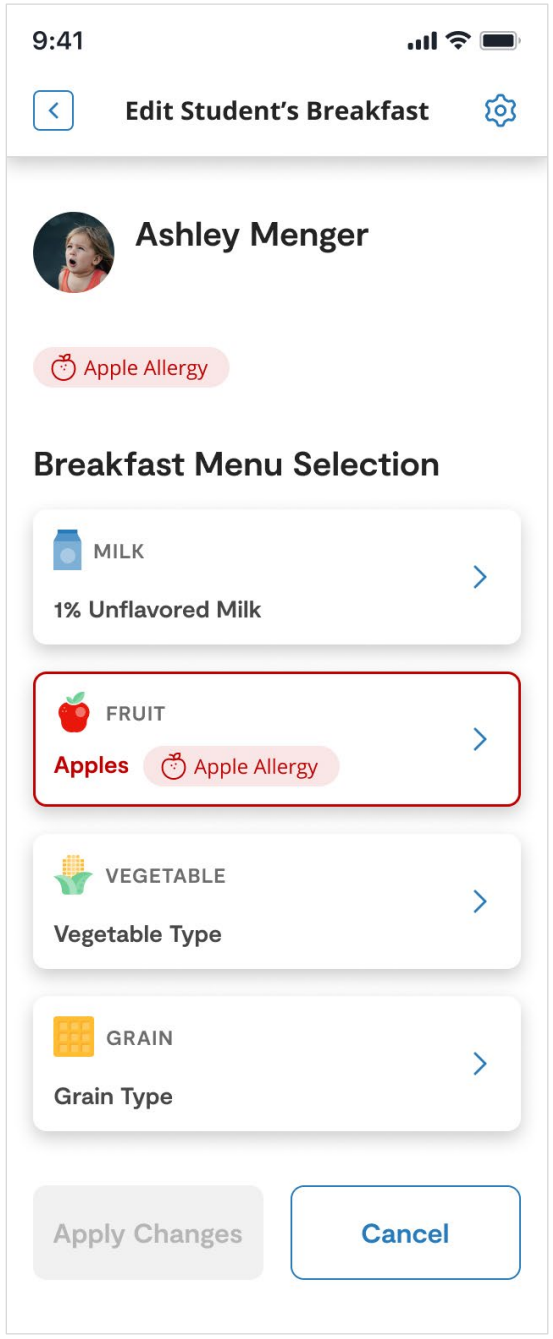
Now, the Breakfast item has a checkmark and a solid outline, indicating that Mary has completed logging breakfast.



For example... (my talk track)

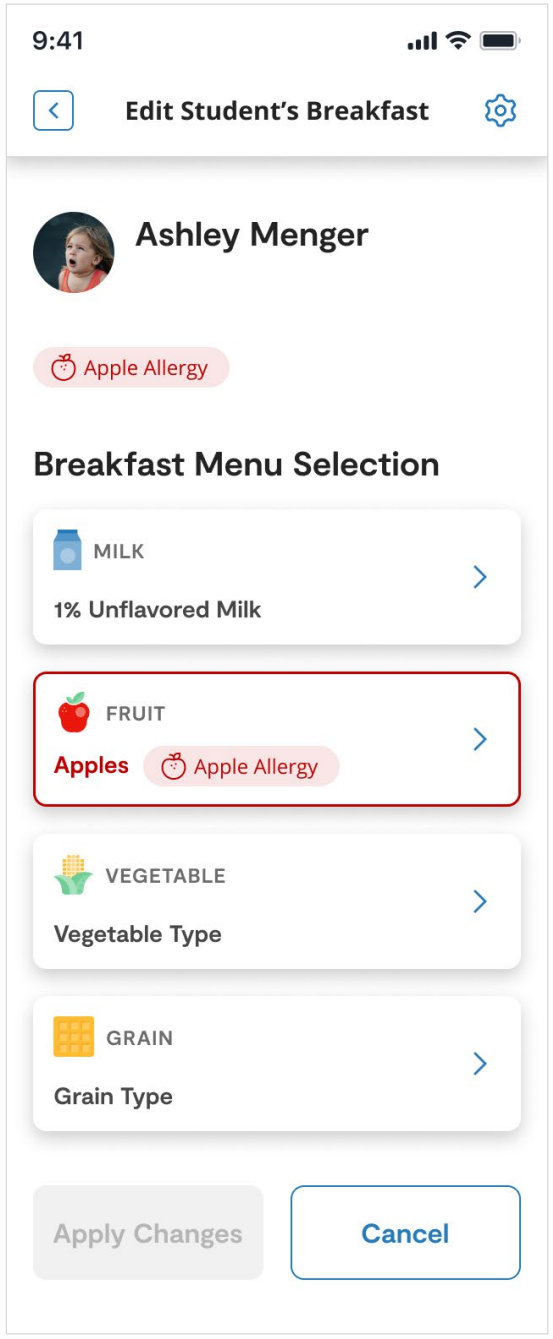
Now that you've seen the flow, I want to discuss the work. I want to specifically focus on the allergen information indicator, and would like to understand the technical complexity of what we're proposing.

This is the primary screen to reference:



For example... (my talk track)

Note that at this point, we are unable to change the visual design, as it's been approved and is in production. So, please refrain from providing comments about the colors, icons, typography, and other visual elements.



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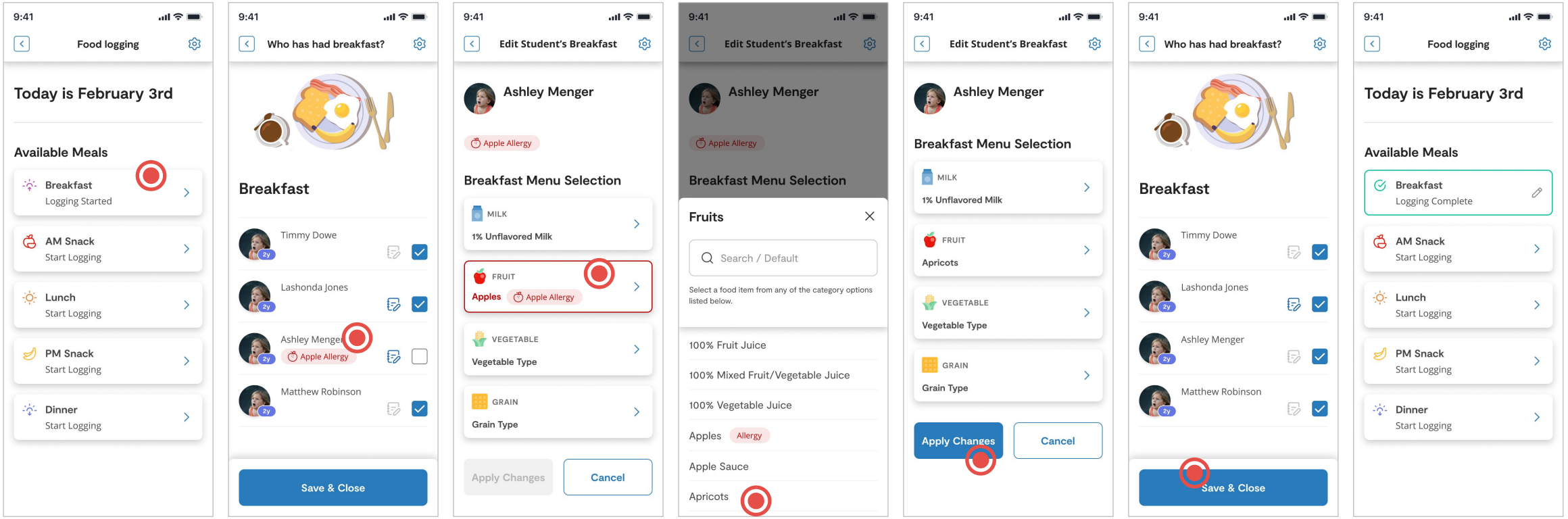
For example... (my talk track)

To guide our discussion, here are all of the screens you saw:



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Running the design review—showing the work

Slow wayyyyyyy down.

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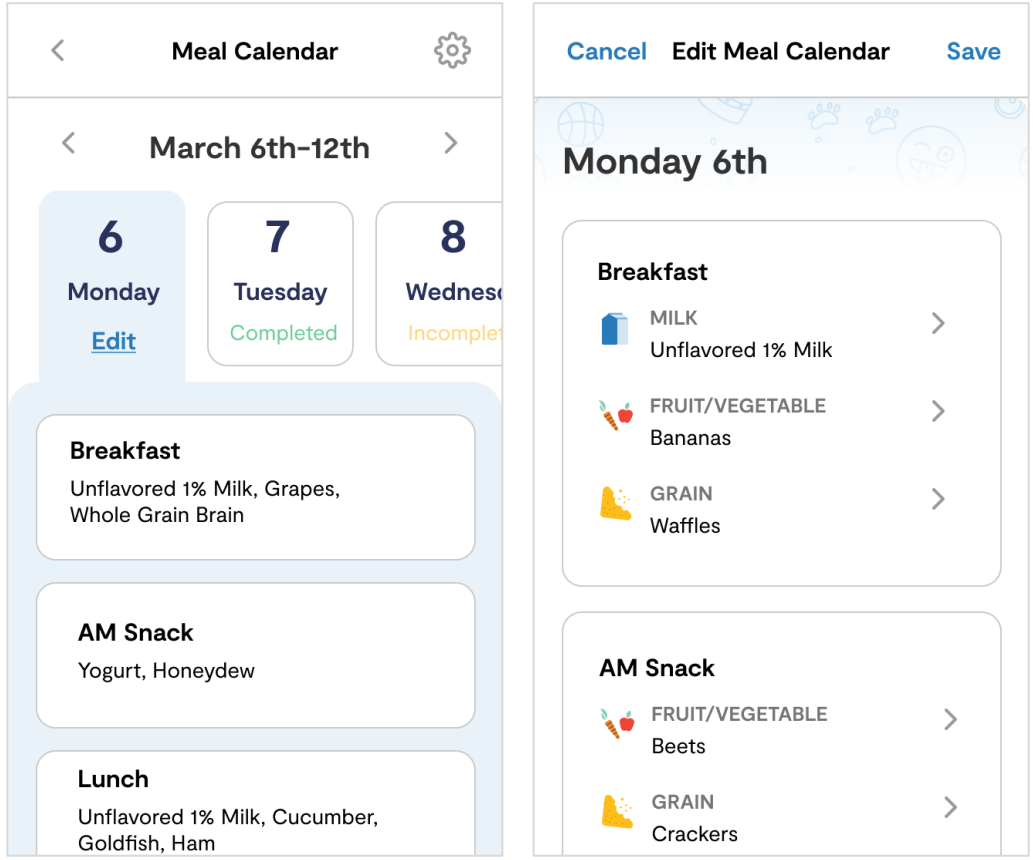
Running the design review—showing the work

During the conversation, translate and confirm.

I don't like the colors.



You may be responding to the contrast—the light blue background, or the light text.

Is that right?

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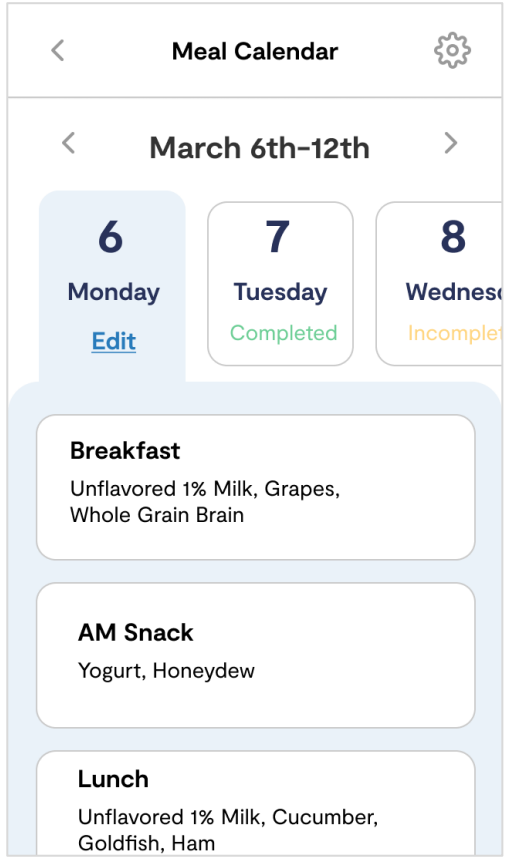
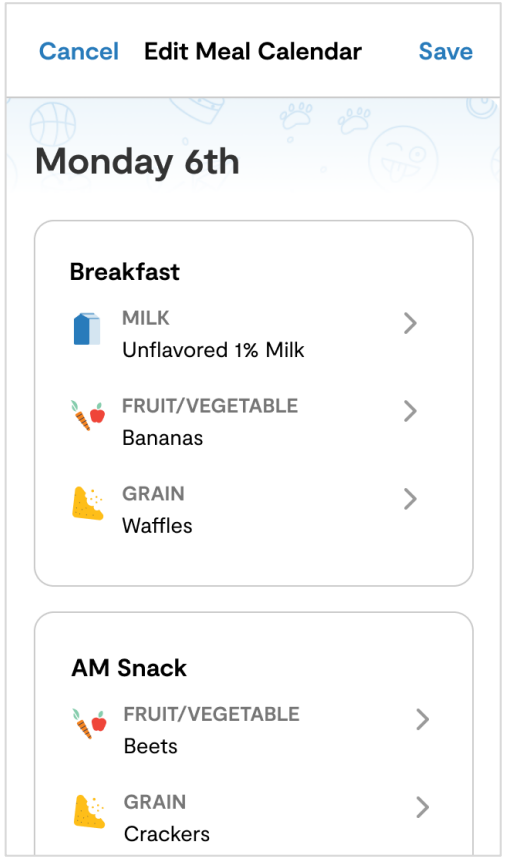
Running the design review—showing the work

During the conversation, translate and confirm.

Schools would never offer Grapes for breakfast.





It sounds like the content we used in the fake screens isn't accurate.

Is that right?

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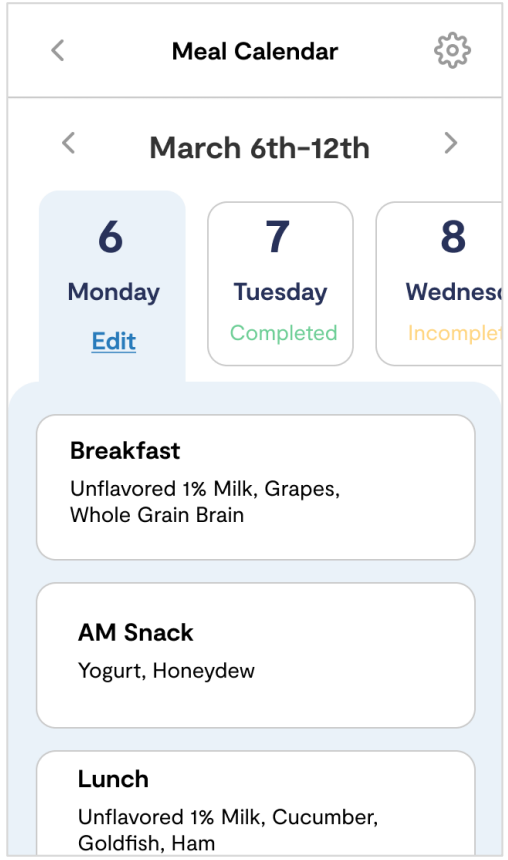
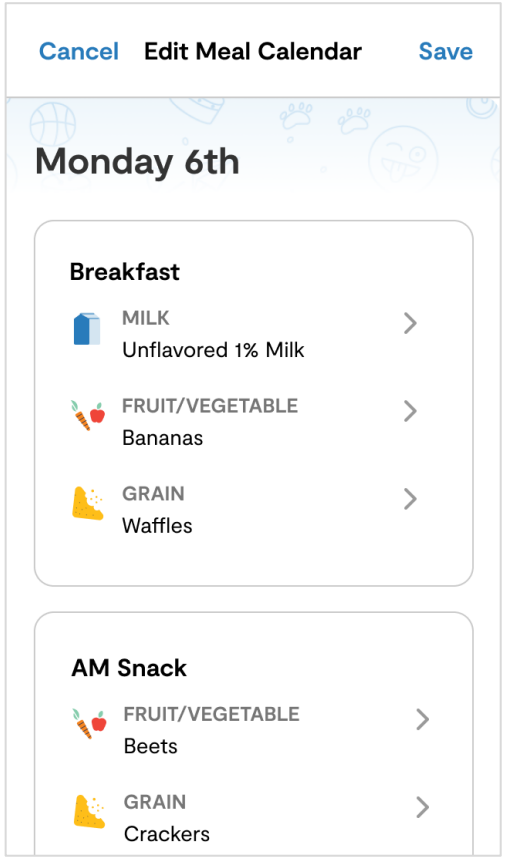
Running the design review—showing the work

During the conversation, translate and confirm.

Users won't know to tap the large date number.





It seems like you are concerned that, since we used tabs instead of buttons, users may not recognize them as actionable.

Is that right?

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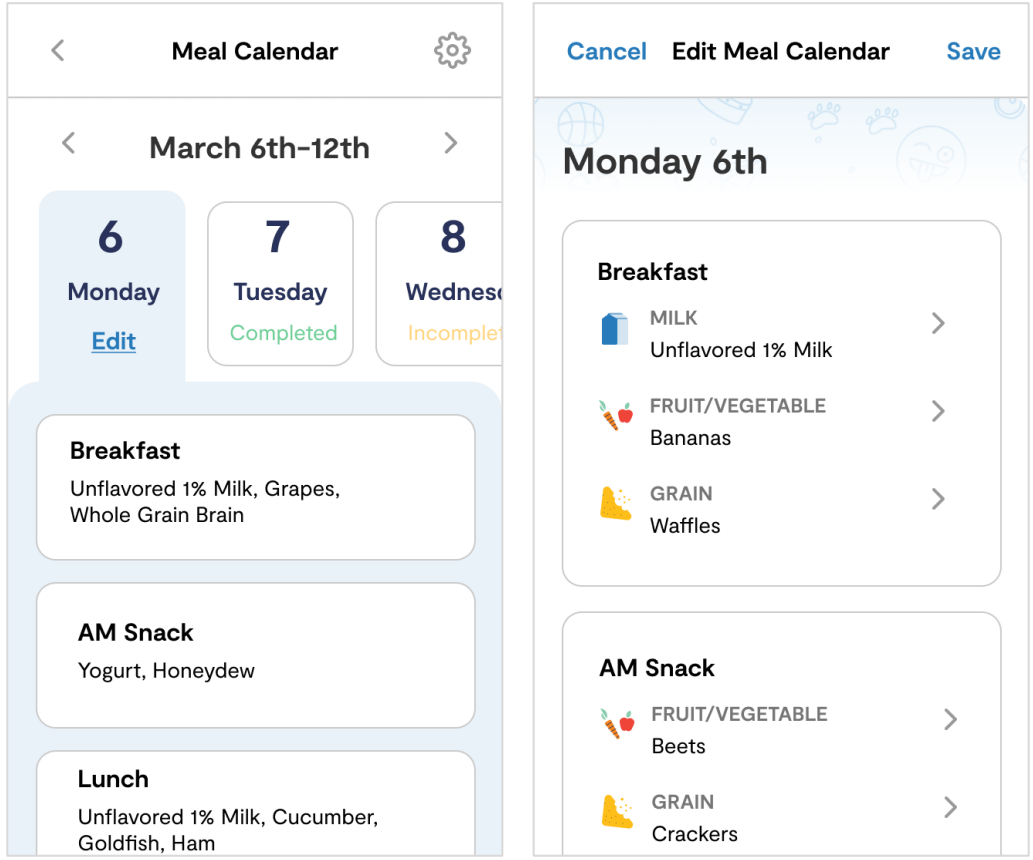
Running the design review—showing the work

During the conversation, translate and confirm.

The icons are too childlike.



The icons from our approved library are abstractions of the real items—the apple is apple-like, but not a photo of an apple.

Is that what you are responding to?

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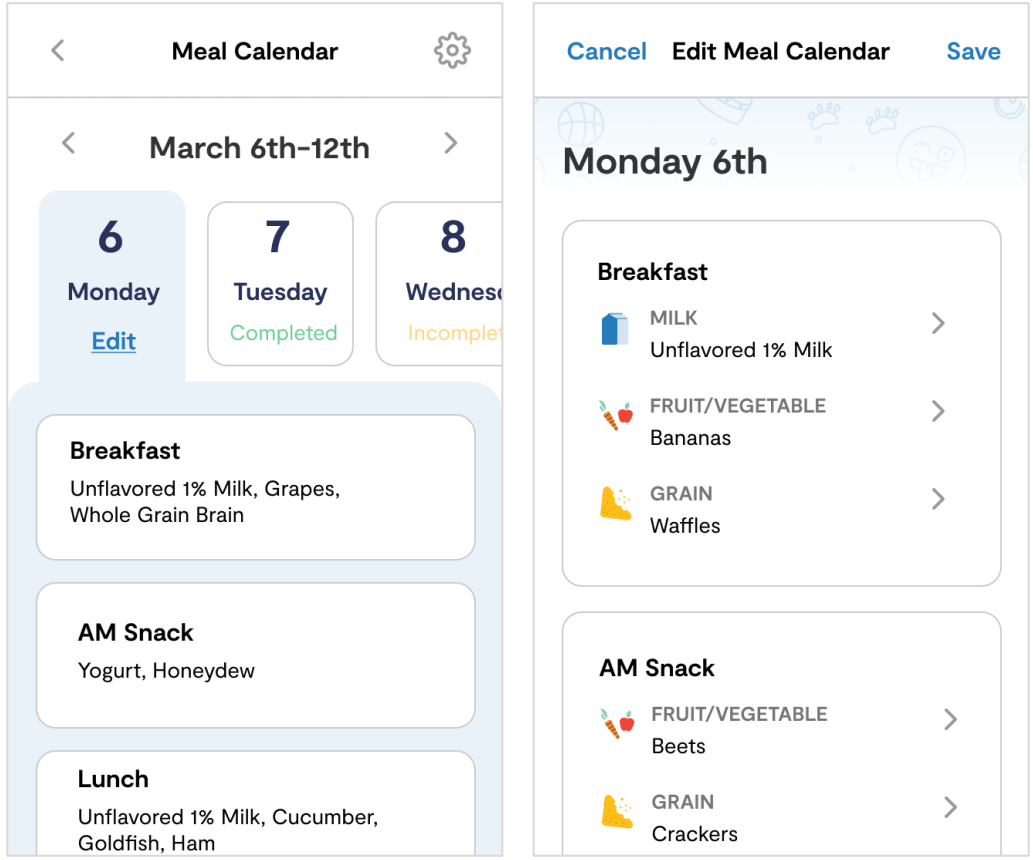
Running the design review—showing the work

During the conversation, translate and confirm.

The Save button is too small.



It seems that you are concerned users may miss the Save button in the corner, which mirrors the pattern of the phone OS.

Is that what you are responding to?

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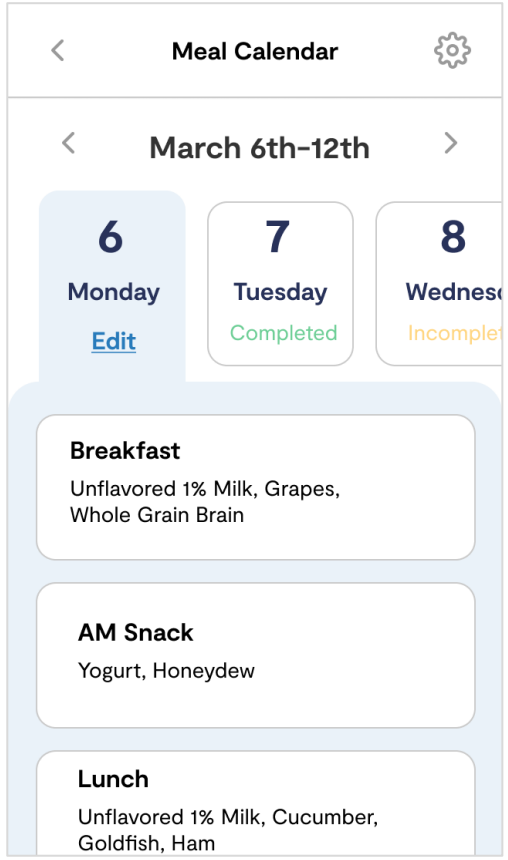
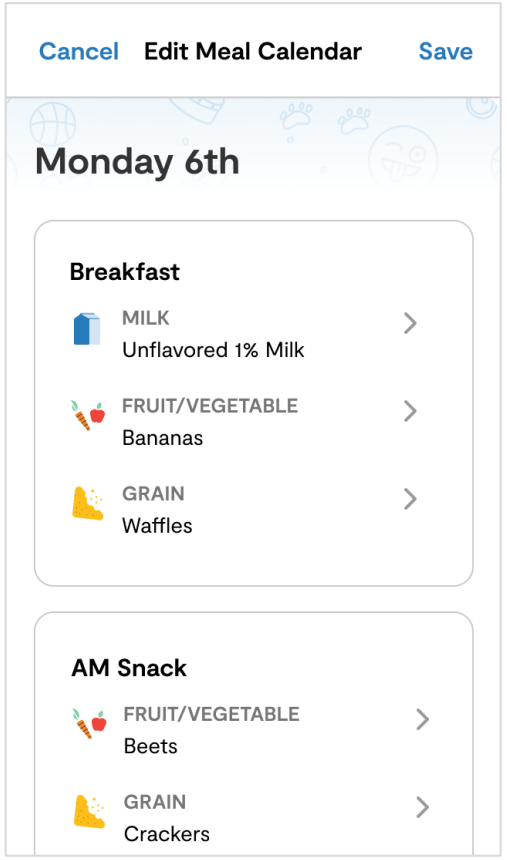
Running the design review—showing the work

During the conversation, translate and confirm.

I thought we weren't doing Meal Calendars in this release.





I'm hearing that there may be a disconnect between what we're working on, and the product roadmap.

Is that right?

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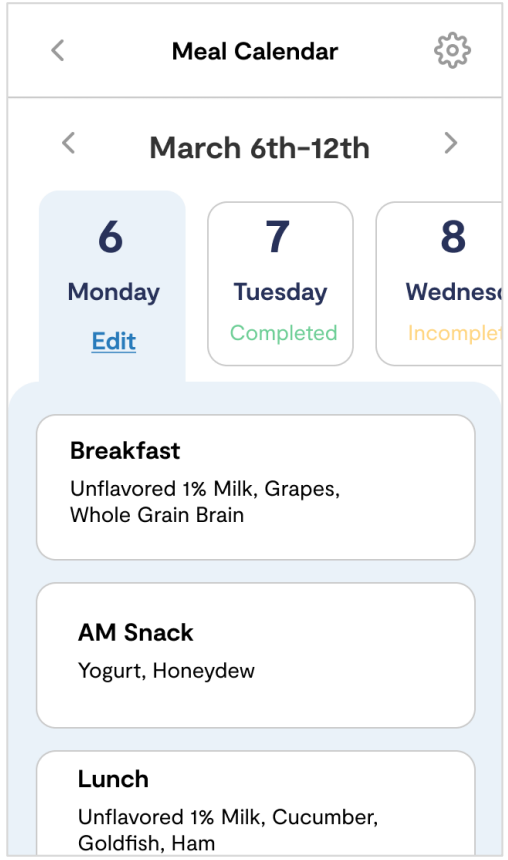
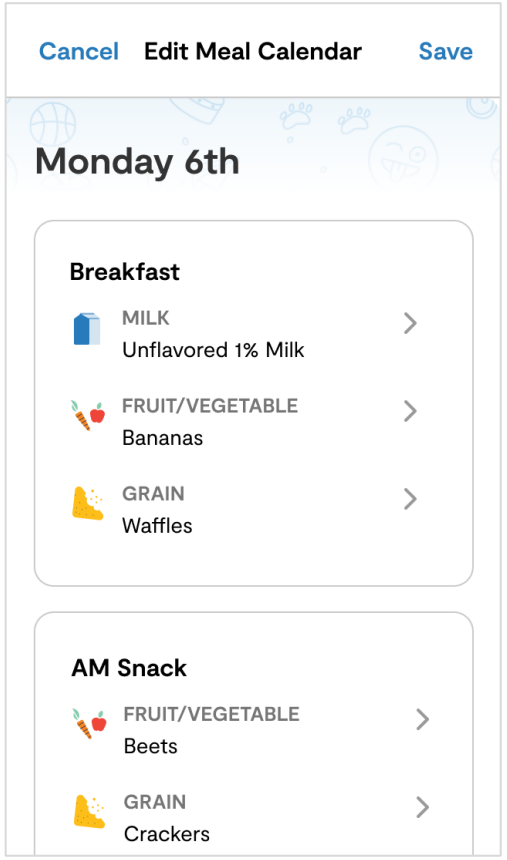
Running the design review—showing the work

During the conversation, translate and confirm.

Where does the data come from for this?





It sounds like there's a concern about the APIs and data availability.

Is that right?

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Running the design review—showing the work

Be strategic in your responses. What happens if you say...

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Anticipate questions about your decision making, and head them off ahead of time (maybe).

Use other tools to pre-empt discussion

- Show alternatives, if you made them
- Show user testing, if you did it

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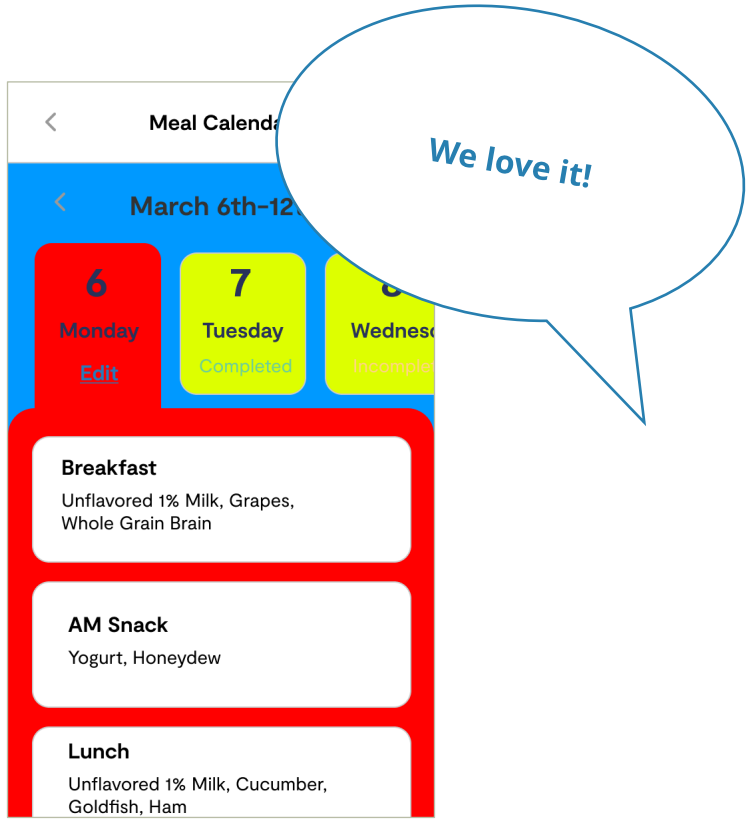
Running the design review—showing the work

If you show it, be prepared to make it.

Defer decisions until later

If you aren't ready to commit to something based on the conversations, defer your commitment, but offer a clear indication of when your decision will be made.



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Running the design review—showing the work

Figma is extraordinarily disorienting for non-designers.

Make the tool invisible.

No one has a mental model of your Figma canvas—and they shouldn't need one.

- Don't zoom and pan around
- Hide the controls
- Hide the comment bubbles

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Running the design review—showing the work

Take notes, visibly.

In real time, type...

- What people say, using their specific works
- Conclusions from a conversational thread
- Decisions
- Areas that need more exploration

The comment tool in Figma is difficult for non-designers to understand. Use a text box.

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Running the design review—showing the work

Support your team.

A design review is a group effort

Even if you aren't the one directly presenting, it's still your job to answer questions, insert commentary in support of the work, and (selectively) defend or explain decisions.

If you see your teammate struggling, help them.

Be the notetaker

If your teammate is presenting, take charge of note-taking. Act as a scribe, and when necessary, interject questions into the conversation to add clarity to your notes.

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After the design review is over

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After the design review is over

Share your materials, and publish your notes.

Share your materials (maybe)

Consider: what will happen if you send the work? What will happen if you don't the work?

- Send the work in a self-explanatory format. Do not send a link to a Figma canvas, except to designers.
- Include context, *in* the document.
- Expect that your work will be socialized beyond the recipients.
- Consider using a document tracking tool, like docsend, to see who opens the content.

Publish your notes

Send your notes to the attendees.

- Revise your notes, and write them in a clear and succinct manner in an email.
- Identify decisions that were made, next steps, and actions that were assigned.
- Emphasize the name of the person who has committed to doing something, by using **color**.

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After the design review is over

Snoop around and find out what people thought.

Schedule 1:1, informal discussions

Reach out to attendees and have short conversations with them. Ask:

- What did you take away from the design review?
- Do you have any concerns about the outcome of the meeting?

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Remember our presentation tenants

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Don’t forget...

Every presentation is a chance for you to gain or lose something.

Every presentation is a structured conversation—even if you are the only one talking.

You feed the energy in the room. Your participants consume it.

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Thank you!

jkolko@wonderfulnarrative.com