UX/UI Workflow

A Delivery Track Through the Salesforce Ecosystem



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What We'll Cover

1. **The Delivery Track**
   A five-car metaphor for how work moves from idea to production
2. **Each Car, In Detail**
   Who's on board, what happens, and what gets handed off
3. **Staffing the Project**
   When to bring UX/UI roles on — and when to roll them off
4. **Timeline & Effort**
   How time and budget typically break down across the journey
5. **Key Takeaways**
   Principles for scaling this process across projects

The Delivery Track: Five Cars, One Journey

Every project moves down the same track. Each car carries its own specialists — and hands off a concrete deliverable to the next.

1. Discovery

ON BOARD

Stakeholders, Users, BA, TA, Systems Analyst, User Researcher

HAND-OFF

Workshops gather requirements & priorities

2. Story Definition

ON BOARD

Business Analyst, Technical Analyst, Systems Analyst

HAND-OFF

Epics & features written and approved in Jira

3. Design

ON BOARD

Lo-Fi UX, Hi-Fi UX, UI Front-End Developer

HAND-OFF

Wireframes → prototypes → built UI framework

4. Build

ON BOARD

Scrum Master, Developers

HAND-OFF

Data binding & functionality in Dev Sandbox

5. QA & Validation

ON BOARD

QA Team, User Testing

HAND-OFF

Validated against requirements → promoted to Production

The track itself: Salesforce platform standards — SLDS, Lightning components, and org governance — run beneath every car and constrain what each one can deliver.

Car 1: Workshop & Discovery

Where requirements are born

1 WHO'S ON BOARD

- Stakeholders & Users
- Business Analyst
- Technical Analyst
- Systems Analyst
- User Researcher (optional)
- Lo-Fi UX Designer (optional — helps visualize concepts live)

WHAT HAPPENS HERE

- In-person / collaborative workshop sessions with stakeholders and users
- Collect and prioritize requirements for the new Salesforce application
- Sketch early concepts on the spot when stakeholders need to “see it” to decide
- Sessions typically run 1–2 weeks depending on project scope

HAND-OFF → Prioritized requirements, ready to be broken into epics and features

Car 2: Story Definition

Where requirements become trackable work

2 WHO'S ON BOARD

- Business Analyst
- Technical Analyst
- Systems Analyst

WHAT HAPPENS HERE

- Translate discovery requirements into epics and feature stories
- Track and document everything in Jira (or equivalent)
- Stories are reviewed and signed off by stakeholders before moving on
- Runs in parallel with later discovery sessions — stories flow to design as they're approved

HAND-OFF → Approved, sequenced feature stories in Jira

Car 3: Design

Where requirements take visual shape

3 WHO'S ON BOARD

- Lo-Fi UX Designer (wireframes)
- Hi-Fi UX Designer (prototypes)
- UI Front-End Developer

WHAT HAPPENS HERE

- Lo-Fi designer builds wireframes from Jira stories — approved by BA, signed off by stakeholders
- Hi-Fi designer evolves approved wireframes into high-fidelity, interactive prototypes
- UI Front-End Developer builds the framework in Dev Console / Page Builder
- This UI build lets backend developers focus purely on data binding, not layout or styling

HAND-OFF → Signed-off designs + a built-out UI framework, ready for functionality

Car 4: Build

Where the application comes to life

4 WHO'S ON BOARD

- Scrum Master
- Developers

WHAT HAPPENS HERE

- Pick up the UI Front-End Developer's handoff as a starting framework
- Work from the Jira feature story plus BA/stakeholder documentation
- Focus entirely on data binding and functionality — layout is already solved
- All work is built in the Salesforce Developer Sandbox

HAND-OFF → A functioning feature, built and ready for validation

Car 5: QA & Validation

Where the feature earns its green light

5 **WHO'S ON BOARD**

- QA Team
- User Testing

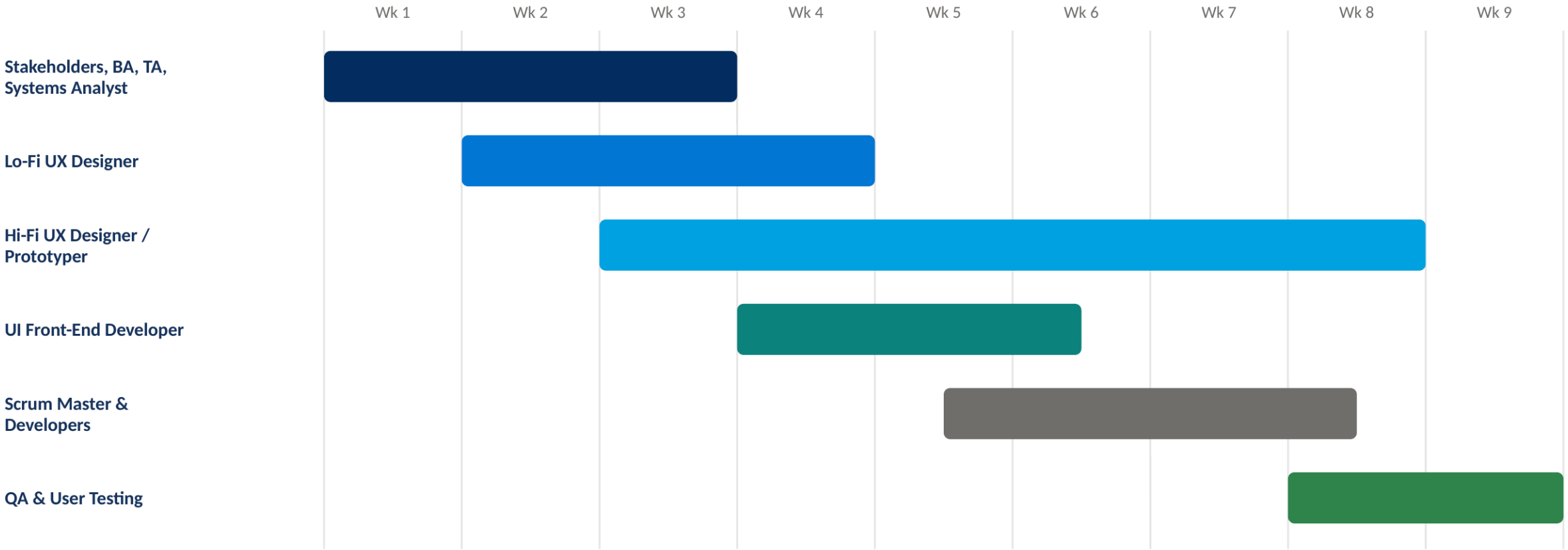
WHAT HAPPENS HERE

- Compare the delivered feature against wireframes and prototypes
- Validate against the requirements and documentation captured in Jira
- Flag gaps back to development for correction
- On approval, the feature is promoted from sandbox to the Production org

HAND-OFF → Green checkmark → promoted to Production

Staffing the Project: When to Bring the UX/UI Team On

Roles don't onboard all at once — and they don't all roll off together. Example below assumes a 2-week discovery window.



Budget-constrained projects: one designer can cover both Lo-Fi and Hi-Fi work. Where roles are split, the Lo-Fi designer typically rolls off once the last feature's wireframes are signed off; the Hi-Fi designer stays on through the end of QA, until every feature is green-lit for production.

Timeline & Effort by Phase

A typical UX/UI-to-production journey runs 6–8 weeks, not counting pre-work or workshops.



Discovery

Workshops, requirements gathering, prioritization

1–2 wks
typical duration

Story Definition

Epics and features authored and approved in Jira

0.5–1 wk
typical duration

Design

Wireframes, prototypes, and the UI framework build

2–3 wks
typical duration

Build

Data binding and functionality in the Dev Sandbox

2–3 wks
typical duration

QA & Validation

Validation against requirements, promotion to Production

1–2 wks
typical duration

Key Takeaways

1

One track, clear hand-offs

Every car has a defined deliverable that moves the next car forward — nothing starts on guesswork.

2

Staff to the work, not the calendar

Bring specialists on when there's real work for them, and roll them off when their car is done.

3

Design removes ambiguity before code

Separating layout/styling from data binding keeps developers focused and reduces rework.

4

QA is the gate, not an afterthought

Nothing reaches Production without validation against the original requirements.