DesignOps Global Conference 2020

Applying ResearchOps and DesignOps in globally distributed teams

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I am Pat and I lead the DesignOps practice for Intuit's 7 international teams.

But if you asked me about DesignOps 18 months ago…



Intuit is one of the oldest fin techs

It was founded in 1983!

You may have heard of QuickBooks.



The Challenge

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Wouldn't it be
awesome if
user testing, validation,
user research would
just happen?



The challenge within the challenge

How can we harmonise the E2E design processes in all 7 teams to increase operational and spending efficiency?



The challenge of challenges

How to introduce DesignOps to all the Design leads?

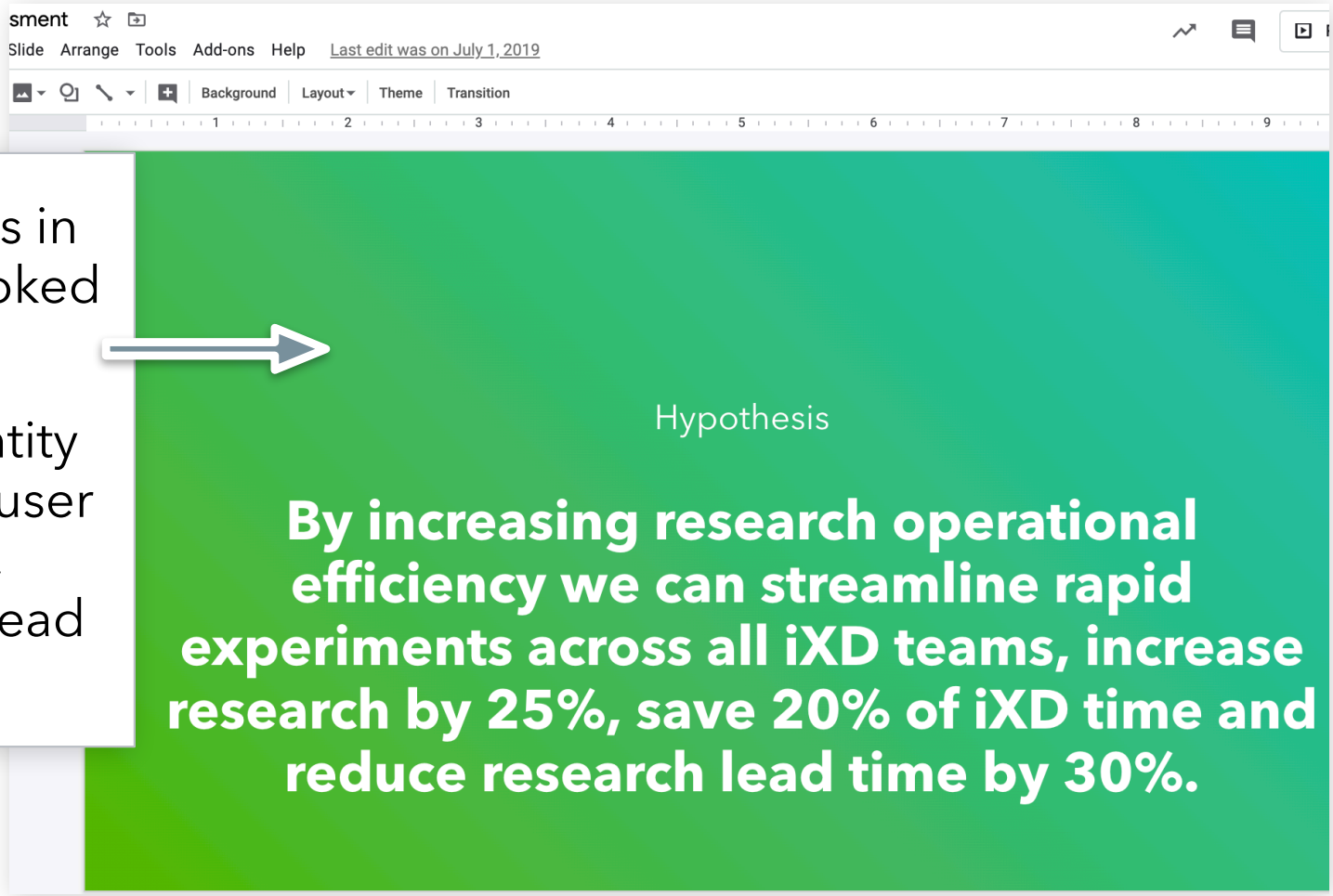


Where to begin?



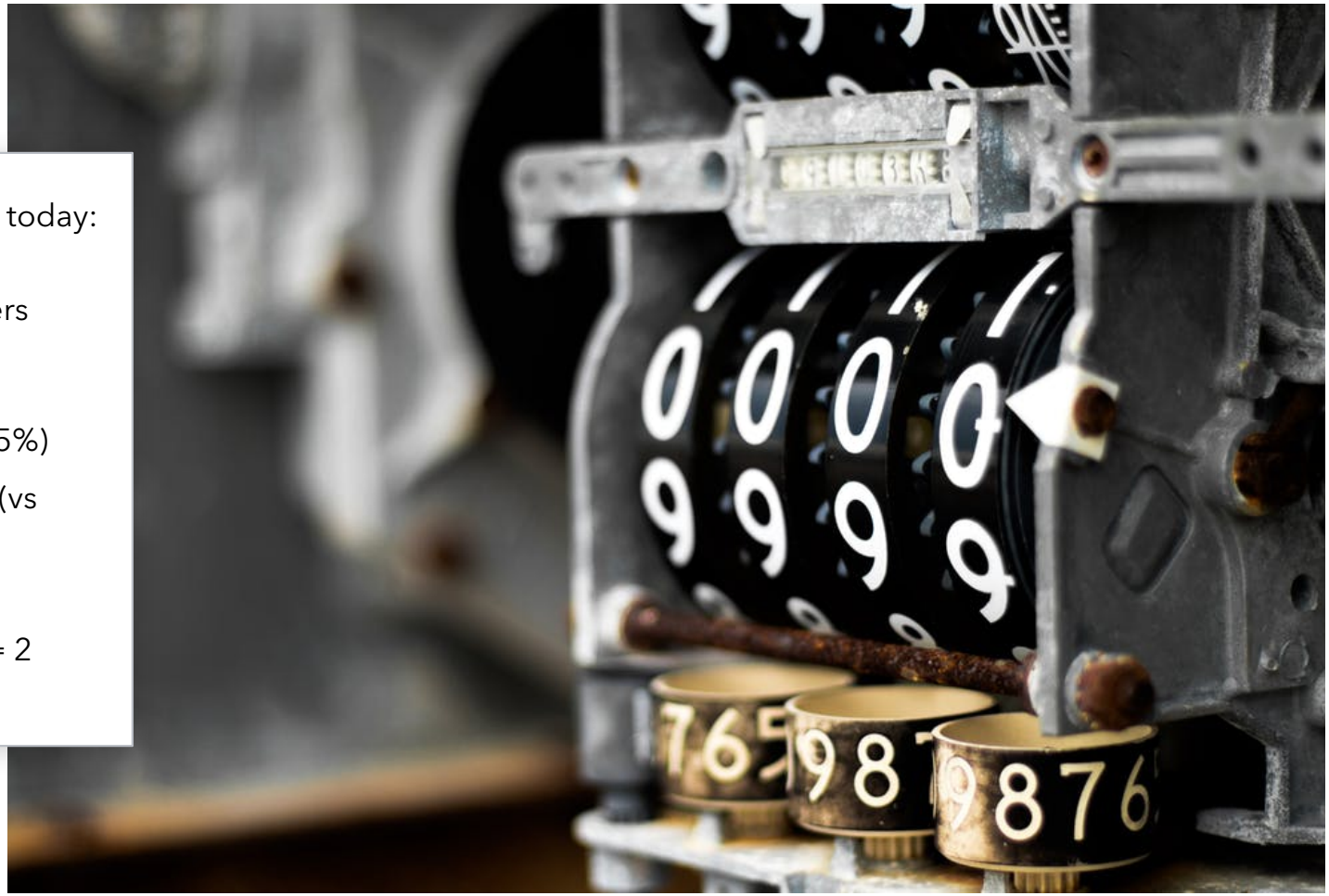
The hypothesis in May 2019 looked like this

Increase Quantity & Quality of user research, decreasing lead time



This is how success looks like today:

- Teams engaged with 4x users compared to previous year
- + 72% in the number of experiments and tests (vs 25%)
- Lead time reduced by 65% (vs 30%)
- Reduced spending by 60%
- 430 working days gained (= 2 FTE)



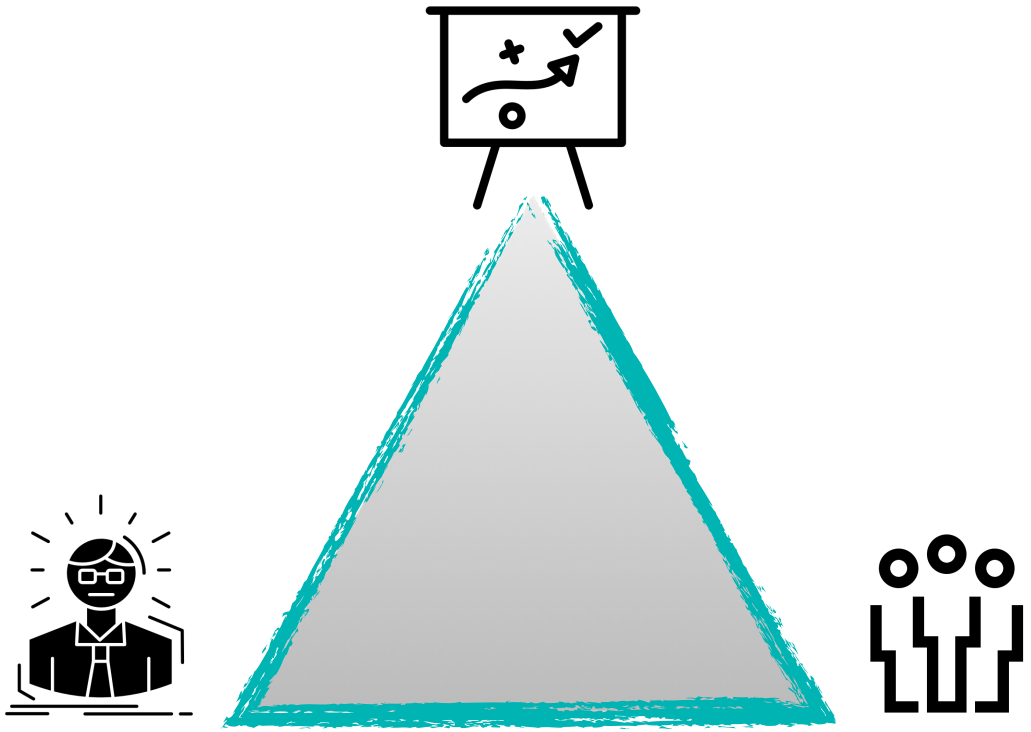
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Challenge one: onboarding Design Leaders

Who does DesignOps support?

All DesignOps' actions are a balancing act between the business priorities, Design Managers goals, and the teams' needs.

Every DesignOps action focuses on one or more of these areas.

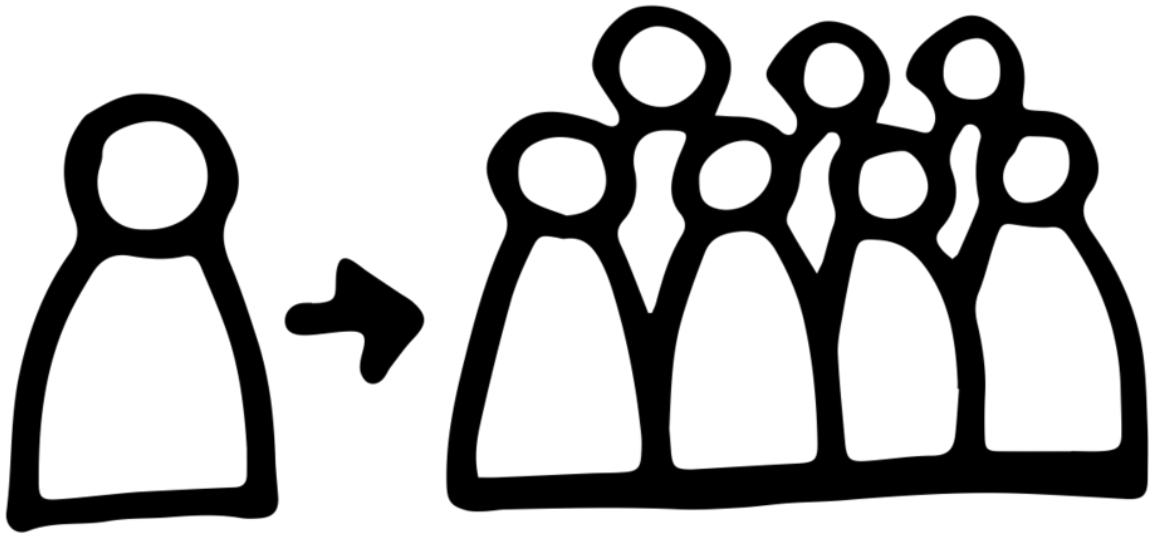


What is DesignOps' unit of reference?

DesignOps's basic focus is the *Team*.

It's not about the single individual,

it's about the team as a unit of potential and opportunities.



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Challenge Two: Building the vision and the roadmap

Although all teams shared the same design principles…

All teams faced different problems and they all solved them differently.





Lesson Learnt #1

Distributed teams are not *remote* teams.

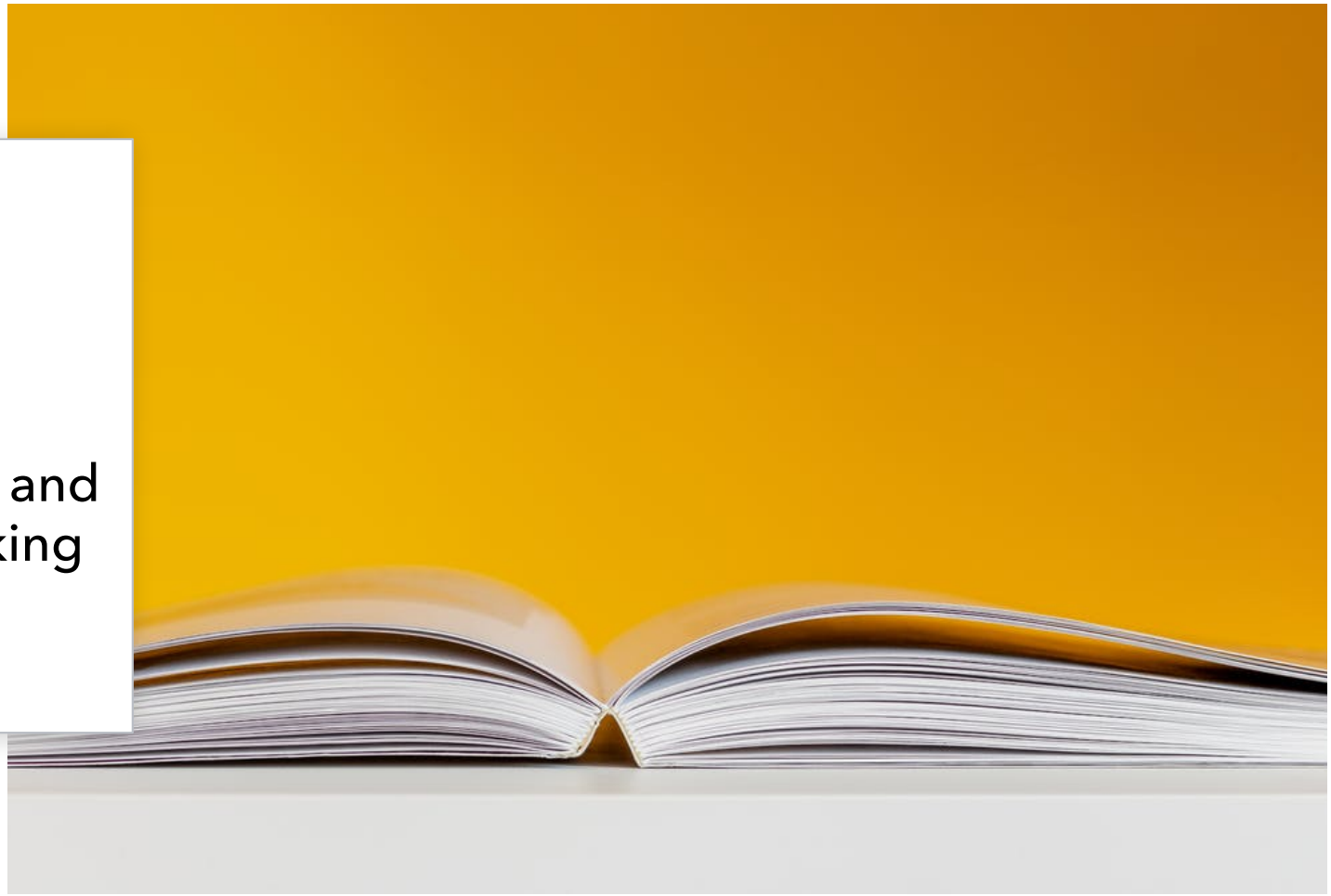
The only *distance* in distributed teams is the lack of engagement and trust.

Distributed teams are organized and capable to efficiently operate across geos and time zones by:

- Developing and exploiting ***asynchronous*** processes & communication
- Making time zones work *for* them to increase operational efficiencies with up to 3x 8hours cycles a day
- Creating x-functional and x-geo synergies based on win-wins
- Building efficient relationship through tools that foster ***meaningful*** conversations

Step 1:

Assess the teams and the ways of working



Start with the *What*, focus on the *Why-s*, and *the How-s*

How: Map, assess, and measure the state of the art of your teams



Top learnings:

Each team has their own challenges determined by the local context and specific challenges.
Learn enough to be part of each team.

- Effort distribution per geo and per role
- Convergent and divergent ways of working
- Bottlenecks and the enablers
- Unmet needs
- Current spending
- Tools' impact and usage
- Team culture



Lesson Learnt #2

Teams' shared pains are opportunities to create synergies.

Distributed teams may feel isolated due to the lack of visibility over other teams. Help team members to:

- Focus on what they share with people from other geos
- Connect teams across the geos based on Win-Win
- Build personal connection to foster collaboration
- Foster knowledge sharing across teams and regions

Distance levels the effort to connect and engage with distributed team mates:

we are all one click away from everyone else.

Step 2:

Empathize with the stakeholders

(all of them)





Lesson Learnt #3

Efficiencies are created through effective collaboration both with the design teams and with both local and global x-functional teams.

It's not just about the design team, it's *also* about everyone's experience ***with*** the Design team!

The Design Team's Experience

How: Lots of Coffee and 1:1 meetings with the design teams and other teams



Top Learnings:

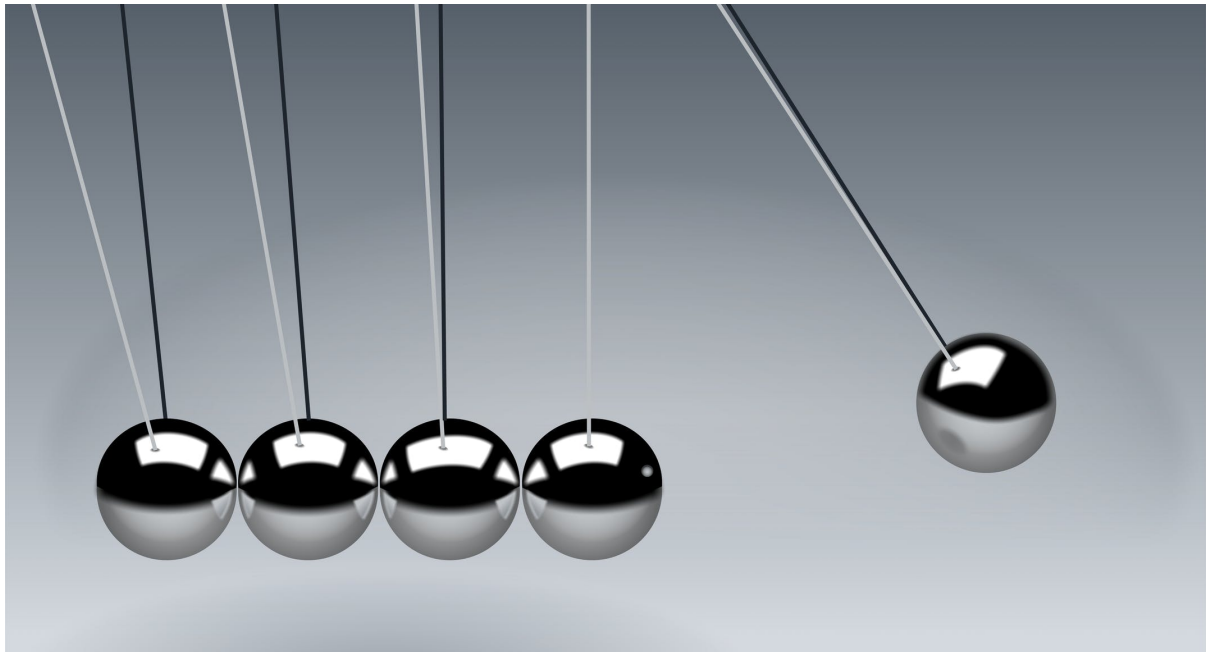
- The research and design E2E process in every region
- Local tools' ecosystems
- Local context
- X-function relationships
- X geo communication

Step 3:
Make sense of it!



Analyse and put the learnings in action

How: More Coffee to prioritize and create a solid roadmap



Use the learnings to develop a 12 months' action plan that includes:

- KPIs
- Risks & contingency plans
- Opportunities
- A PLAN for EVERYTHING
  - Roll out plan
  - Onboarding plans (by tools / geo)
  - Engagement plan
  - Training plans (with vendors)
  - Evaluation plan



Lesson Learnt #4

Change is a *participative* experience that requires:

- Listening
- Engaging
- Empowering individuals
- Distributing roles
- Sharing opportunities

A successful change is the one done *with* the team, not *for* the team.

More so when planning change across 7 distributed teams and driving transformative initiatives.

Challenge Three:
Execute

Be Quick but not in a hurry!

(J. Wooden)



Execute, Measure, Steer [Repeat]

How: Test your plans, never assume, always measure



Meet your new obsession:

- *DATA*
  - *Team / subteam*
  - *Region*
  - *Goal*
- Analytics
- Understand the *Why*
- Review the plans and KPIs
- Steer or change if needed
- Repeat every quarter, with all teams, every time



Lesson Learnt #5

Behaviours are not immediately visible in distributed teams and feedback may be slower. Even successful projects may hide inefficiencies.

An assessment strategy is the the single strongest tool to ensure incremental improvements and consistency across different teams.

Planned and timely feedback are key to develop:

- Training strategies with vendors to improve tools' adoption and engagement
- Targeted actions to support local teams
- X-geo plans and tiger teams to tackled shared problems

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DesignOps is the most critical function in your business

Efficient (distributed) teams do not ***happen***.

They are **designed**.



Success in DesignOps lies in the ability to

identify the biggest impact you can make on your team,

support the design leaders to be successful

while creating operational and spending efficiencies that will make the business happy.



DesignOps is in the business of Happiness!

DesignOps Makes Designers Happy

Happy Designers Make good Design

Good Design makes happy Customers

Happy customers make happy Stakeholders!



Key Take aways

Understand & design for the external factors:

- Make time zones work for you
- Design a-synchronic processes to increase:
    - operational efficiency
    - communication and collaboration
    - team cohesion & culture

Map the context and know your space

- Look at your teams both from internal and external points of view and assess:
    - the market
    - the team and the experience with the team
    - the ecosystems
    - performance & spending
- Capitalise on similarities across regions and teams to build a shared strategy and synergies

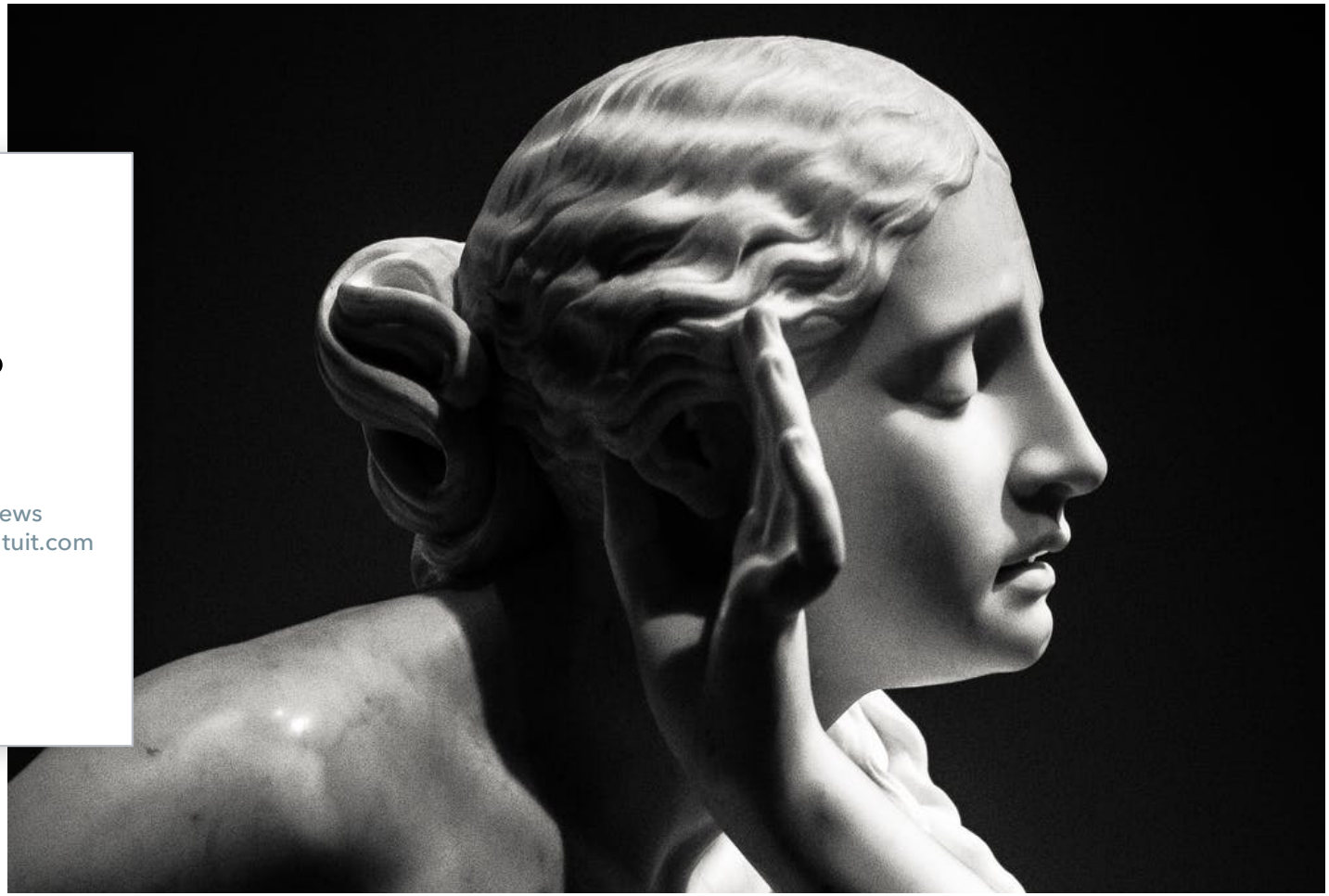
Listen, engage, empower the teams

- Connect and listen as a *habit*
- Empower the teams to *lead* and to *be* the change
- Foster a knowledge sharing culture to spread emerging best practices



Questions?

You can tweet me @Legoviews
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Thank You!

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