



# UX CONTENT TEAM PLANNING

HELEN MEYERS

# Introduction

With 25% team growth in one month, our content team needed to:

- Understand team assumptions and questions
- Define better roles and responsibilities to reduce duplicative effort
- Improve internal and external team relationships

As strategy lead, I facilitated 3 design thinking sessions:

- "When you assume"
- "A day in the life"
- "How might we"

Based on the sessions, I created:

- A roles and responsibilities matrix
- A prioritized list of team improvements
- Working groups to pilot new ideas



# Introduction (cont.)

This presentation:

- Presents the results of this leadership effort
- Summarizes the design thinking sessions
- Highlights the prioritized team improvements list
- Shows the roles/responsibilities matrix I created
- Excerpts working group session content

# Results

As a result of the work I did to lead these efforts, the content team:

- Reduced duplicate work by 20%. Estimated cost savings of \$240,000/month
- Engaged in the project life cycle months earlier, reducing rework of wrong UI content. Estimated cost savings of \$12,000 per project per month
- Increased team morale (measured by employee net promoter scores) by 30%

*"You have an uncanny ability to draw information out of people that they didn't know they had and brainstorm through extremely difficult projects and problems." - BR*

*"From strategizing overall content process with the team, to serving as a mentor and advisor to both writers and designers, you have showed true leadership across the board." - DG*

*"Your ability to lead through engaging and inspiring people creates a greater sense of team and purpose." - KP*

# Principles

The CEO of our organization defined a list of principles for all of us to strive to uphold. I shared these principles at the kick-off of our design thinking series as a touchstone for the team.

1. *Come and innovate every day.*
2. *Do something kind for a teammate for which you won't get credit.*
3. *Take time for yourself every day; work on your skills and get better.*

John Donovan, CEO AT&T Communications

# Design Thinking Session 1

For the first design thinking session, I introduced the principles of design thinking based on materials from IBM, IDEO, and Stanford's d.school. The session focused on team questions and assumptions.

## Agenda

- Icebreaker
- What is design thinking?
- Assumptions and questions activity
- Converge (grouping activity)
- Playback

# Icebreaker

As a warm-up to the design thinking sessions I like to start with a humorous cartoon that aligns with our session purpose. I also lead the group through an icebreaker activity to get them ready for ideation.



Source: Dilbert.com, from 6-4-15 strip

**Warm-up: Word pictures**

**Description:** Everyone has a pad of sticky-notes and a marker. I'm going to say a word and you'll have about 1 minute to sketch out the first thing that comes to mind when I say the word.

**Words:** Buoyant, fragile, convenient, rush, prime

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# What is design thinking?

*“Design thinking is a versatile problem-solving framework used to develop and deliver compelling client experiences, user-centric solutions, and targeted market outcomes – faster and better than ever.”*

Tim Brown, CEO IDEO

# Design thinking principles



## Focus on user outcomes

What are the goals a user is trying to accomplish? What tasks help the user accomplish those goals? How does the user feel?



## Empowered, multidisciplinary teams

Diverse teams generate more ideas, increasing your chance of a breakthrough. This leads to a wider set of outcomes. Total engagement by team members brings energy.

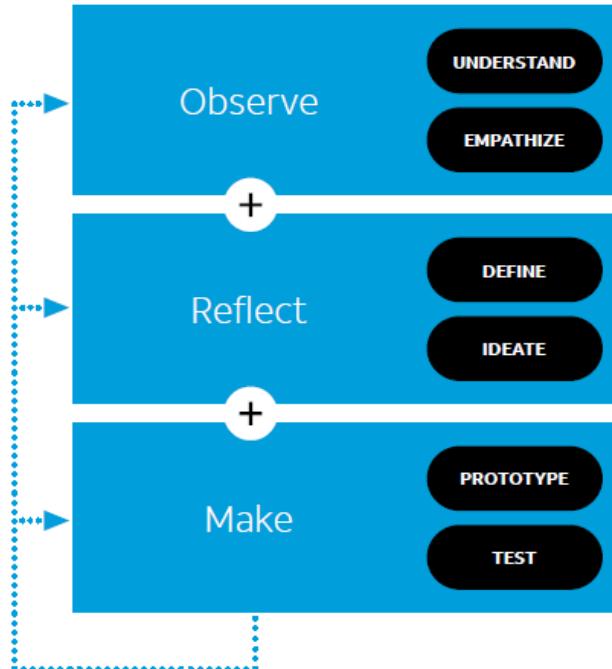


## Continuous delivery and learning

Everything is a prototype, even in-market solutions. Making mistakes is OK, in fact doing it early enough saves time and money. Solicit feedback from users, validate the solution.

# Design thinking loop

The design thinking loop is a continuous process of understanding user needs and then defining, ideating, and validating solutions to drive real outcomes. This loop is cyclical and non-linear.



## Phase 1: Observe

Learn about an issue or opportunity and conduct research. Engage customers and examine behaviors, interactions, and environments to empathize with the target audience and understand their real needs.

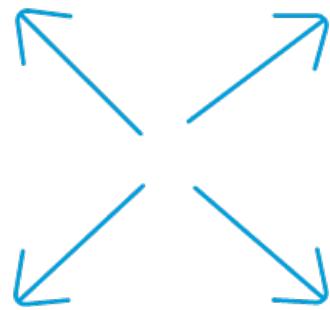
## Phase 2: Reflect

Define the problem clearly and identify how to deliver a better solution. Ideate based on users' wants and needs. The more ideas the better.

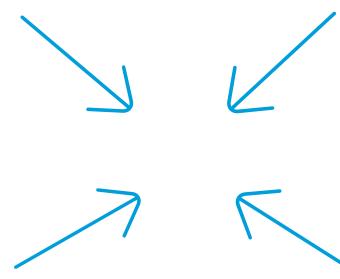
## Phase 3: Make

Prototype solutions. Accept failing early and often. Analyze and refine solutions and validate what works.

# Session process



Diverge



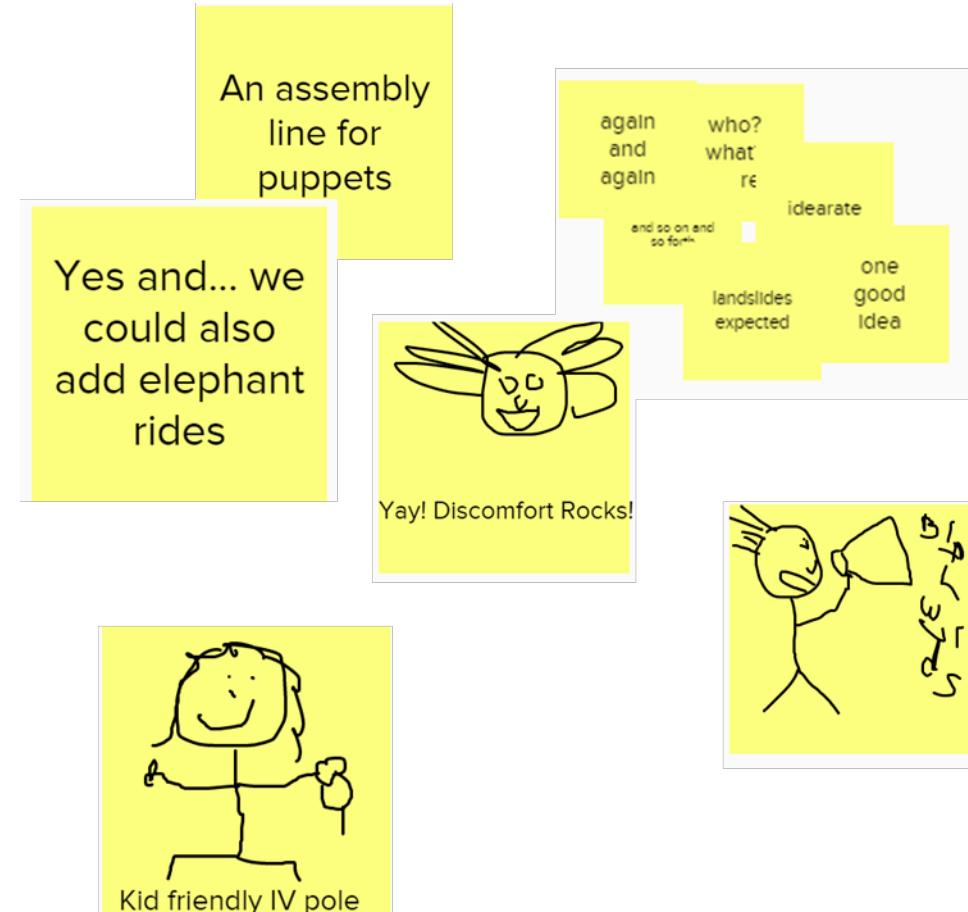
Converge



Playback

# Principles of ideation

- Less talking, more writing
- Less writing, more drawing
- Quantity over quality
- Stay focused on the topic
- Ideate before you assess
- Every voice is heard
- No idea is too wild
- Everyone pitches in to fill the gaps
- Have one conversation at a time
- Yes, and...
- It's OK not to have all the answers
- Don't get caught up in the details yet
- Embrace discomfort



# Assumptions and questions

This activity helps give us a “reality check” to identify and prioritize the assumptions being made, what things we’ve been guessing about, and what we still don’t know.

## High risk, low risk, certain, uncertain

- Write an assumption or question per sticky note
- Be honest, an unasked question will forever go unanswered
- Plot on grid
- Small group discussion and reposition (remove duplicates)
- Items in the upper-right quadrant are the assumptions and questions that are most urgently in need of validation and inquiry.

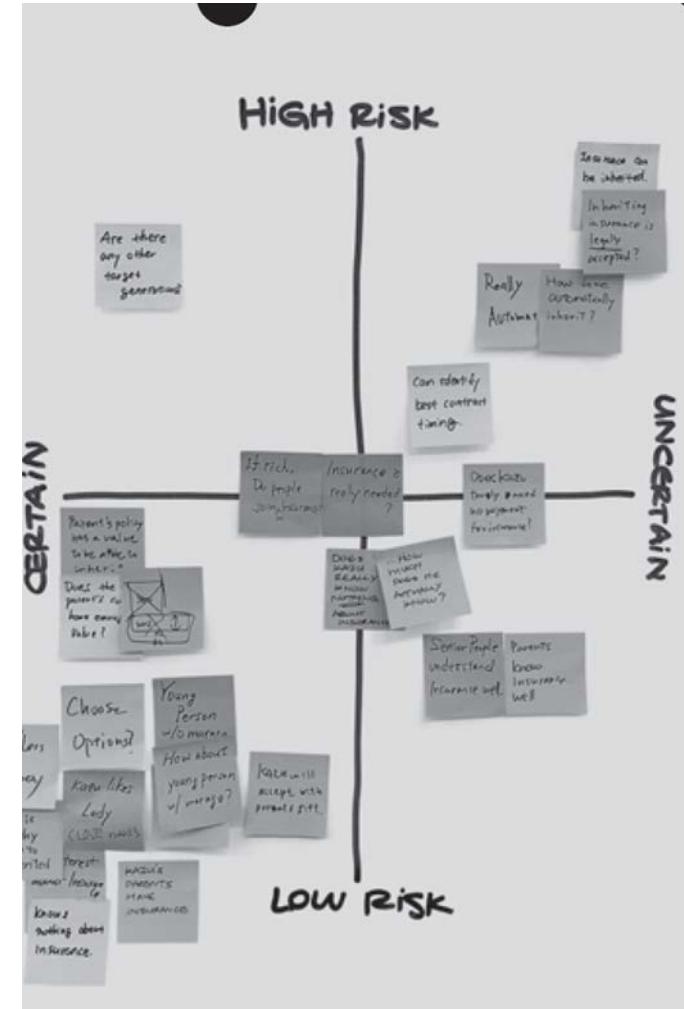


Photo credit: IBM Design Thinking

# Design Thinking Session 2

Session 2 focused on identifying all the tasks a content team member performs over the course of the day/week/month/project.

## Agenda

- Icebreaker (fill a swimming pool)
- Principles of ideation review
- A day in the life activity
- Converge (grouping activity)
- Playback

# A day in the life

This activity helps determine what tasks the user (in this case content team members) do over the course of a day

## My life

- Focus on job tasks
- Document the actual current experience
- Be honest & thorough
- 1 item per sticky note

## User perspective

- Doing
- Thinking
- Feeling



Photo credit: IBM Design Thinking

# Design Thinking Session 3

For our 3<sup>rd</sup> design thinking session we generated ideas for “how might we improve internal and external team relationships.” After the ideation, we grouped similar concepts and voted on what the team should prioritize for the 4<sup>th</sup> quarter. This process bubbled up 6 overarching ideas that working groups convened to brainstorm around.

## Agenda

- Icebreaker (draw a telephone/design a way to communicate between people)
- Principles of ideation review
- How might we... activity
- Converge (grouping activity)
- Voting on priorities
- Playback



# Frame problems as questions

*Design thinking is a process for creative problem solving. It starts with people and their needs.-Tim Brown, IDEO*

## How might we...

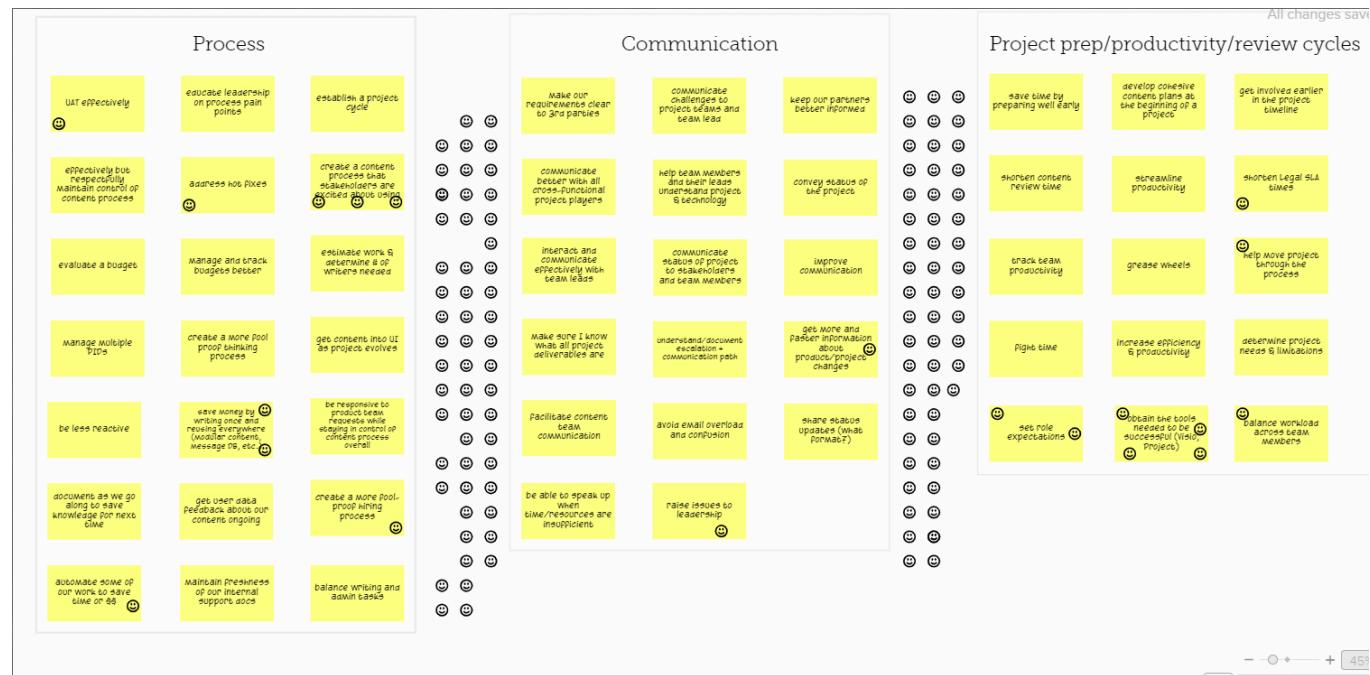
How = solutions oriented

Might = encourages optimism

We = is collaborative

# Outcomes

Each design thinking session generated artifacts that I created and distributed to the team. The next few slides show examples of those artifacts.



Mural board created in the "how might we" design thinking session. This shows the board after grouping. The team is voting on priorities.

# Outcomes, cont.

Design thinking sessions can generate different types of artifacts.

Process	Communication	Project Prep/productivity/review cycles	Collaboration	Scheduling & Tracking	Quality/Delivery
4. create a content process that stakeholders are excited about using	...get more and faster info about product/project changes	3. Obtain the tools needed to be successful (Visio, Project)	...help other teams understand our roles	1. Create a top down tracking mechanism/process	2. Maintain content after publishing
...save money by writing once and reusing everywhere (modular content, message database, etc.)	...raise issues to leadership	...set role expectations	...come to agreements	5. Establish realistic schedules	...stay creative
...UAT effectively	...make our requirements clear to 3rd parties	...shorten Legal SLA times	...produce UI content in conjunction with UX design	...negotiate when schedules slip	...resolve inconsistencies in our content
...address hot fixes!!	...communicate challenges to project teams and team lead	...help move project thru the process	...work with other content folks on project when I'm not the team lead	...create a project schedule	...drive true consistency and continuity across projects without a CMS tool
...Create a more fool-proof hiring process	...keep our partners better informed	...balance workload across team members	...Inspire SMEs to read content docs	...track project documents for delivery	...track rework
...educate leadership on process pain points	...communicate better with all cross-functional project players	...save time by preparing well early	...improve collaboration cross-functionally	...track and communicate scope changes	...reduce rework
...establish a project cycle	...help team members and their leads understand project & technology	...develop cohesive content plans at the beginning of a project	...collaborate with the larger project team	...track actual hours vs. project estimate	...ensure quality
...effectively but respectfully maintain control of content process	...convey status of the project	...get involved earlier in the project timeline	...conduct team reviews more efficiently	...keep scope from creeping	...keep the team focused on creating quality content
...evaluate a budget	...interact & communicate effectively with team leads	...shorten content review time	...better negotiate with project teams on scope creep	...accurately track costs	...ensure all work delivered on time
...manage and track budgets better	...communicate status of project to stakeholders and team members	...streamline productivity	...work more efficiently with the dev team	...track deliverables	...have more control of the look & feel of help topics
...estimate work & determine # of writers needed	...improve communication	...track team productivity	...leverage strengths of team members	...prioritize work among the group	...deliver content more quickly

This is an Excel spreadsheet of the top ideas generated in the “How might we...” session. The boxes indicate the goals chosen for 4<sup>th</sup> quarter focus.

# Outcomes, cont.

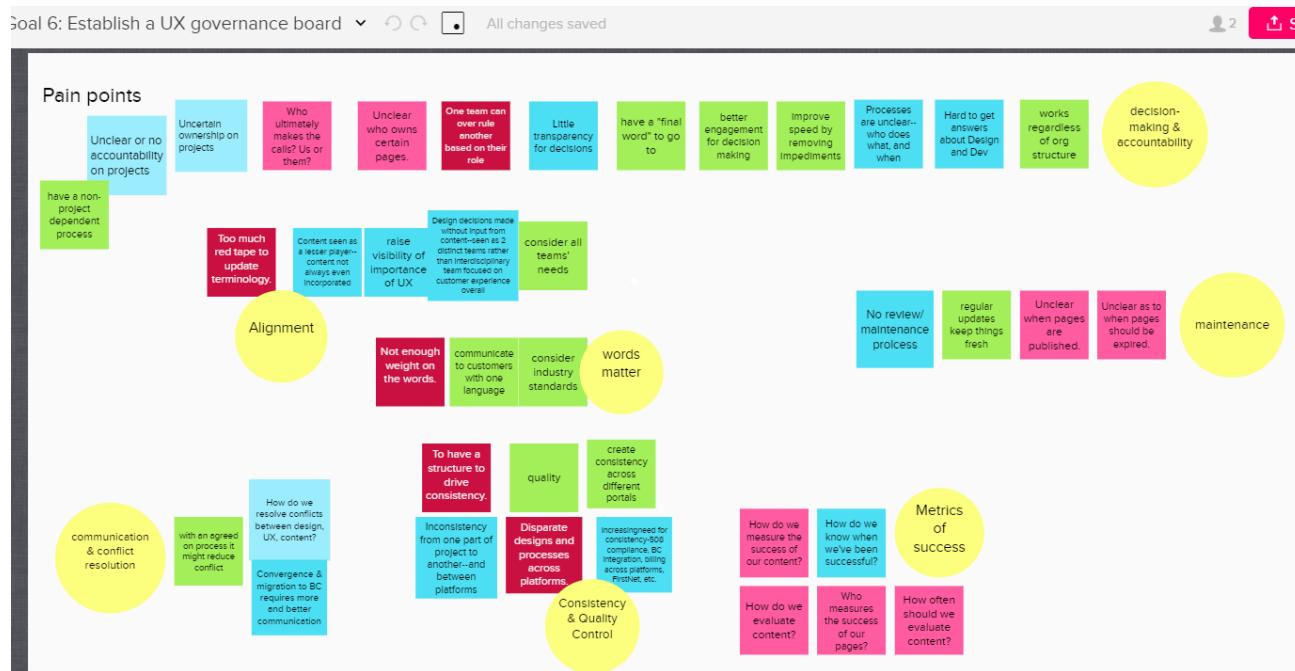
A top priority of the design thinking sessions was to better delineate the roles and responsibilities of content team members.

Tasks/Responsibilities	Roles							
	Strategy	Project Manager	Team Lead	Project lead	UI Writer	Support Writer	Project Editing Lead	Editor
Team								
Handle content changes post-launch		I	I	A	R	R	R	R
Identify & evaluate potential work	R	R	R					
Organize overall team projects & assign talent			R					
Help talent load balance			R	C	C	C	C	C
Monitor projects' roadmap			R	A				
Monitor resources/schedule/budget overall		A	R	C				
Negotiate with others to give talent what they need			R					
Remove roadblocks			R	R			R	
Help team problem solve (or try to)	R	R	R	R	R	R	R	R
Identify process improvements			R	R				
Improve processes		R	R	R				
Collaborate with other leads to drive consistency	R		R	R			A	
Share responsibility for overall quality of project			R	R	R	R	R	R
Evaluate quality of content - spot checks				R	C	C	C	C
Planning	R	R	R	R				
Take time to look at big picture - long-term vision	R	R	R					
Think deeply about projects/processes	R	R	R	C			C	
Encourage and support team members			R	A			R	
Mentor FTE team members			R					
Work request/tracking management		R	R					
Track, evaluate, and improve customer satisfaction	A	R	R	R	R	R	R	R

I created this RACI (responsible/accountable/consulted/informed) chart from the results of the "a day in the life" design thinking session.

# Outcomes, cont.

With our priorities identified, working groups convened to brainstorm issues and ideas.



I created Mural boards for each goal and a PPT presentation for the group kick-off sessions. This is an example of one of the group's working session.



Thank You!!