Lean product design workshop
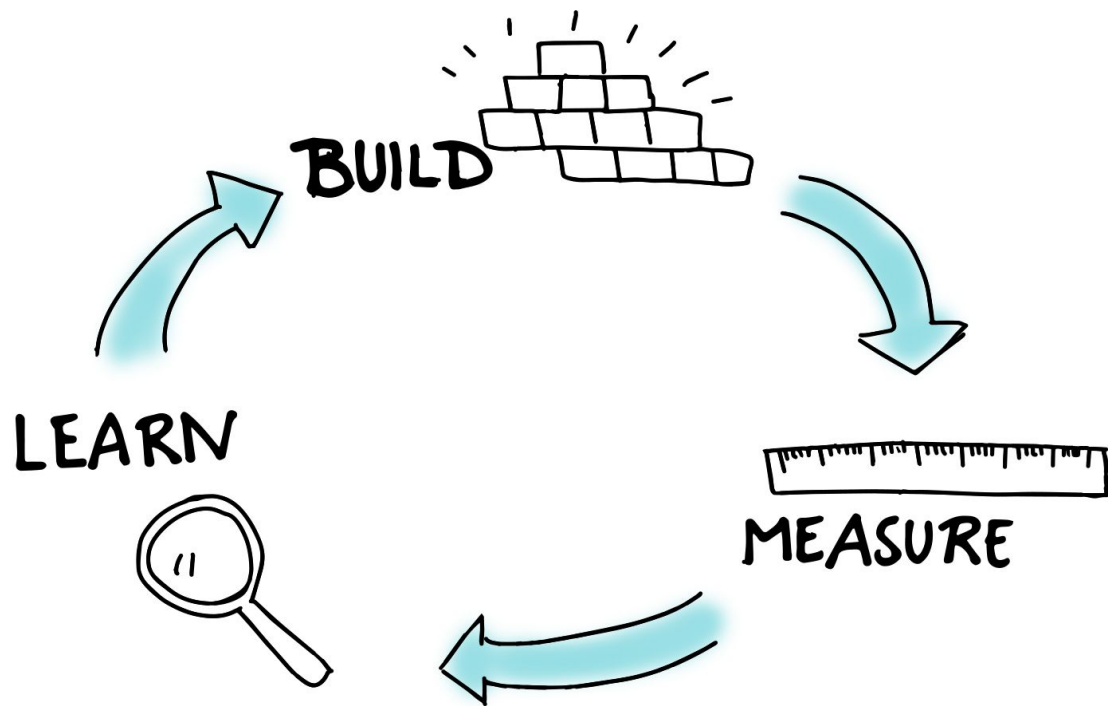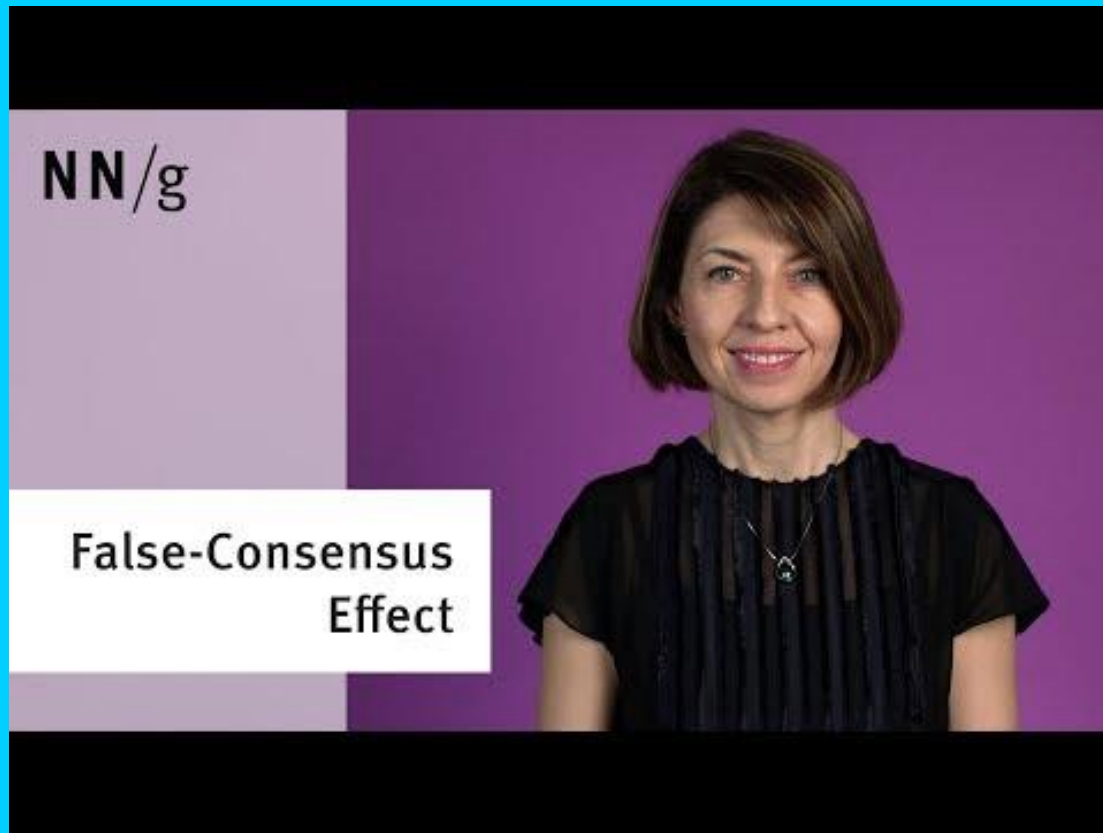
An approach to building products that shifts the focus from outputs to outcomes.

18F

BUILD

MEASURE

LEARN

The core of lean product design is hypothesis-driven development.

It's all about user needs.

Only by testing and learning about our users can we create systems that are right for those who will actually use them.

The Lean product design process

1 Problem Statement

2 Assumptions

3 Personas

4 Hypotheses

5 Prioritization

First, the problem statement.

Problem statements are made up of three elements:

1. **Current goals**
2. **The problem**
3. **An explicit request for improvement**

Our problem statement

The public side of TSP.gov was designed to achieve ***retirement readiness education***. We have observed that the product isn't meeting *these goals*, which is causing ***low engagement among P's and B's***. How might we improve ***TSP.gov*** so that our users are more successful based on an ***increase in the number of people finding the information they were looking for***?

Assumptions worksheet

User assumptions

- **Who is the user?**

  Agency and service representatives, beneficiaries, servicemembers, active and separated federal employees, post-retirement employees, early, mid, and late career participants, financially novice+advanced savers.

- **Where does our product fit in the user's work or life?**

  Novice: Rarely interact, set-and-forget, get in and get out.
  Advanced: Coming every day. Mainly just logging in to MyAccount side, except to check fund performance.
  Reps: As-needed as part of work duty.

- **What problems does our product solve?**

  Demystify saving for retirement through the TSP.

Assumptions worksheet
User assumptions

- ## When and how is our product used?
  Whenever a participant needs to interact with TSP. Public side used during work day, social media outside of work day.
  New employees: signing up after joining
  Mid-career: life events -- buying house, death in family, spouse out of work, servicemember PCS (permanent change of station), changing jobs
  Late-career: catch-up contributions, "can I retire yet?", reactive planning, annuities, beneficiaries
  Large changes to the market can trigger an interaction
  Novice users: general education, learning about funds
  Advanced users: regularly using site, actively tracking+moderating market+portfolio. Make changes to portfolio when they feel prudent.
  Agency service reps: using for their work.

- ## What features are important?
  Novice+early+mid+late career: easy-to-understand directions.
  Seeing personalized info articulated to match a specific goal
  Mobile access
  Advanced: Data. Charts, multiple views, ability to see trends. Personalized information along w existing investments. More information about the funds themselves: what are they comprised of?
  Agency rep: Technical system information for reporting. Bulletins.

- ## How should our product look and behave?
  Easy. Clear. Authoritative. Not-intimidating. Approachable. Positive. Hopeful. Empowering. Life coach-ish. Instructive. Tailored?

Assumptions worksheet

Organization assumptions

1. I believe FRTIB's users have a need to _____.
2. These needs can be solved with _____.
3. My initial users are (or will be) _____.
4. The #1 value a user wants to get out of my service is _____.
5. The user can also get these additional benefits _____.
6. My biggest product risk is _____.
7. We will solve this through _____.
8. What other assumptions do we have that, if proven false, will cause our project to fail?

Personas are a tool used to bring users to the table. They provide an **honesty check** for the team's work.

Name & Sketch

Dave the Day Trader
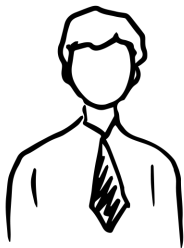
Demographic & biographical details

- 29 years old
- Navy veteran
- USDA IT specialist
- Married with one child
- Lives in Fairfax, Virginia
- Holds a B.A. from a 4-year university

Behaviors & actions

- Logs into TSP.gov every day
- Changes allocations depending upon day-to-day performance
- Spends most time on TSP.gov in MyAccount
- Does not "set and forget"

Needs & paint points

- Needs data to make smart financial decisions
- Wants to be able to stay on top of minute-to-minute fund prices on a mobile device
- Wants to be able to change allocations via mobile

18F

Let's write personas for our users!

18F

Output, outcome, impact

Output
What we build. (Easy to measure.)

Outcome

The observable change after we deliver output. (Harder to measure.)

Impact

The change we see over time. (Very hard to attribute.)

What key performance indicators (KPIs) and metrics determine the success of our product?

18F

What features will serve our users and create our desired outcomes?

18F

A hypothesis states a clear vision for the work and shifts the conversation between team members and their managers from outputs to outcomes.