

UXPin

The Guide to UX Leadership

Best Practices for Leading Impactful Teams



by

Principal Experience Strategist at Hewlett Packard Enterprise
Dave Malouf



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Author



Dave is currently the Principal Experience Strategist at HPE in their Helion Cloud Business Unit where he helps the organization create a viable insights and strategy practice based on empathy and data analytics. He has worked in front-end design for the past 20 years. In his previous role at Rackspace, Dave lead the interaction design team as a Sr. Manager of Product Design. His other roles have included senior UX positions and leadership roles at Motorola and Intralinks.

Dave is also an active speaker and writer. His work has been published at BoxesAndArrows.com, Core77.com, UXMatters.com, UIGarden.net and JohnnyHolland.com as well as in print for Interactions Magazine. He has spoken at IDSA, Interaction, IA Summit, UI Conf, and have taught workshops for private corporations and local UX organizations around the world.

He is also the Founder of the Interaction Design Association (IxDA), program co-chair of Rosenfeld Media's Enterprise UX conference, and a former Professor of Interaction Design at Savannah College of Art & Design (SCAD).

Introduction

In this guide, we won't convert you into a global UX leader overnight. No book can promise that.

The guide will, however, help senior practitioners better think about themselves as leaders, and help UX managers to accomplish the most important task for any design leader: driving results for the people and organization they work *for* and *with*.

Leading is simply the act of taking personal responsibility (with or without authority) to make sure that things go well within a context(s) you choose.

I'll explain tips for how to orient behavior and mindset for helping your organization and product team members be as successful as possible.

I've drawn the advice from my 20+ years of UX experience, including most recently leading product design teams at [Hewlett Packard Enterprise](#) and [Rackspace](#). My goal is to distill all my lessons into one compact guide that you can put into action right away.

Dave Malouf,
Principal Experience Strategist at HP Enterprise

Understanding Before Leading

Context, outcomes, and influence

If we know anything as designers, it's that empathy, understanding and meaning are vital to all that we design.

Being a leader of anything is really just another design project.

First, you need to understand the players (of which you are one big one), the environment(s), and what success looks like for those involved.

This means not just doing observational inquiry, but also learning from existing materials. You're basically combining the cognitive psychology of HCI research with your own practical ethnography.

We'll do this work together. From learning about yourself, to understanding the environment(s) in which you'll be leading, we'll learn the frameworks and methods I've discovered along my own winding journey.

Know Thyself First

For any leader, self-awareness is their most important trait.

I highly recommend the [Strengths Finder framework](#). It doesn't just tell you who you are, but suggests activities, tools, and mindsets for:

- Strategizing your own growth path
- Conducting your own gap analysis
- Figuring out how to fill your gaps through either learning, behavior change, or collaboration (my personal favorite)
- Analyzing the strengths of others to build relationships

But knowing yourself isn't an exercise done in isolation. You require peers and mentors to help you through reflection, criticism, and practice.

For instance, I have founded &/or created communities (like the [Interaction Design Association](#)) that are focused on peer level coaching and engagement. Local chapters of the [UXPA](#) are also useful for professional development. Falling into a group of diverse professionals has been the single most invaluable tool for my career as a leader.

Lead yourself first.

Learn Your Environment Through Others

It's easy for most people to swim through their daily experiences like fish swimming around the reef.

The reality is that, unlike fish, leaders of any type are not passive participants in an ecosystem. Design leaders focus on change. To catalyze that change requires an understanding of the building blocks that will be mixed together anew.

To start out, I can't recommend enough the book *First 90 Days* for grasping your universe and how to lead it. But more than any book out there, you can immediately apply user-centered design principles to better understand the contexts and people whom you work with and for.

Companies are social and cultural structures. Everything physical about an organization is just a reflection of the people inside. To succeed as a leader, you must be genuinely interested in other people. Empathy works both ways: for users, and for your colleagues.

Designer Pro Tip



One of the biggest mistakes new design leaders make is not understanding their company's business model. When you become a leader, it's not enough to understand design. You now need to understand how design moves the needle.

Christina Wodtke,
Owner of [Elegant Hack](#) and author of [Radical Focus](#)

Asking Questions With the Right People

As a first step, identify the 5 most influential people in the organization.

They may or may not be executive leaders. Reach out to them and ask for 1 hour of their time for an interview.

When you're done, try to repeat this process with at least 10 other people (depending on the size of your organization) over the course of 1-3 months. Include your peers, your direct manager(s), and their peers in those 10 people. You can certainly scale this down or up

according to your ability to stay on track with your first 30, 60, 90 days tasks.

Here are the 5 sets of questions to ask each person.

1. How did you get here? Why do you choose to be here?

By adding the line about “Why did you choose to be here?” you reveal so much about the story of the organization, its myths, and the surrounding culture.

At [Rackspace](#), the phrase repeated again and again from especially senior people was “There is just a huge opportunity here”. Now everyone wants to go where there is opportunity, right?

But the “there is a huge” part of that phrase pricked up my ears. Why is the opportunity described as “huge”?

Upon further inquiry, it turns out that senior people (even newly hired ones) were expressing their hope with a feeling of being overwhelmed with what they discovered. This isn’t necessarily bad, but it definitely reset my expectations about the scope of work needed to resource UX projects.

2. What is the most valuable thing our organization produces? How do we know we deliver that value for customers? What are the biggest obstacles stopping us from consistently delivering value?

These questions help reveal any lack of consensus on how your company adds value to customers.

For example, at Rackspace, the different product teams were certainly delivering value, but they all perceived and described their contributions to customers in different ways in my interviews.

You'll find that lack of consensus is a common issue across large organizations. Usually, the bigger the company, the more your role needs to bridge that gap.

3. If you were new, what 5 things would you wish you knew about the company? Why?

By asking this question early on with several people, I immediately noticed several patterns for scope and decisionmaking:

Pattern: Any project requiring more than a quarter probably won't survive.

Lesson learned: Think in small chunks, or your team will eventually burn out from dead-end projects.

Pattern: Rackspace is a relationship based organization.

Lesson learned: Dig deeper into why. At first, I thought I knew what the phrase meant, but I didn't really know Rackspace's emphasis on employee development until 6 months later. Can't learn everything the first time around.

Pattern: At Rackspace, consensus is how decisions are made.

Lesson learned: Use your influencing muscle carefully. Observe meetings, processes, communications, etc. to uncover the real influencers for a given team and focus your attention on those people. When I discovered an influencer for my work, the next step was figuring out how to connect. Sometimes that meant scheduling 1-on-1 meetings. Other times it just meant taking them out for coffee. It's just a form of politicking.

4. What are the next opportunities for you and the organization?

This question helps you understand if the person you're speaking with is future-oriented or not.

When interviewing direct reports, it helps to set apart those who are growth-oriented from those who like having a “job”.

5. Who else should I speak with to understand how the organization operates?

You learn two things from these lists: who is special, and who is an outlier.

The “special” people are the names repeated often across interviews. For instance, the VP of Product, the CMO, and the Director of Engineering might all mention the VP of Project Management.

The outliers, on the other hand, are the people who only certain individuals mention. For instance, the VP of Product might also mention a specific designer or support person, but that name never pops up elsewhere.

Don’t dismiss this person, however. This outlier may exert power through a process they manage or approve.

6. Documenting the Results

When conducting these interviews, I recommend the #1 tool in a designer’s toolbox: post-its.

I break down core concepts and constantly add to an ever-growing affinity diagram. As I do this, I sketch out visualizations and immediately discuss them with the interviewee.



By presenting visualized ideas to others, their reactions will not just be “yes/no”. They will also be “yes, *and...*” and “no, *but...*” Both are important to revealing hidden insights about the organization.

In my case, I did a lot of mind-mapping because most of the responses were related to connections between people, processes, and systems. When visualized with a mind-map, the connecting lines started to take shape, illustrating the system at Rackspace.

It very much confirmed that the company was truly not a hierarchical system at all.

When you’re done with your research in your first 30 days, you will have a clear picture of who and what your organization is all about and your place in that world.

Designer Pro Tip



Securing a win in your first 90 days buys you respect. It also sets you up to make harder arguments about quality.

First you orient yourself, get to know the players. Most designers are matrixed, so you have a literal boss and a business side boss.

Find a way to get each something they need badly. If you have to choose, choose the business side boss as your literal boss hired you and is already invested in you.

A win can be metric based, like increasing conversions, or on the soft side, like getting work delivered on time.

You could set a individual [OKR](#) around the issue you believe needs fixing. But it's not about OKRs. It's about credibility. You can't win an argument about something as subjective as quality unless you've already proven you understand business wants and needs.

Christina Wodtke,
Owner of [Elegant Hack](#) and author of [Radical Focus](#)

Define the Outcomes

Now that you know your environment, you can start planning.

Leading is not reacting. Leading is planning.

Create a clear framework. For me, I try to outline:

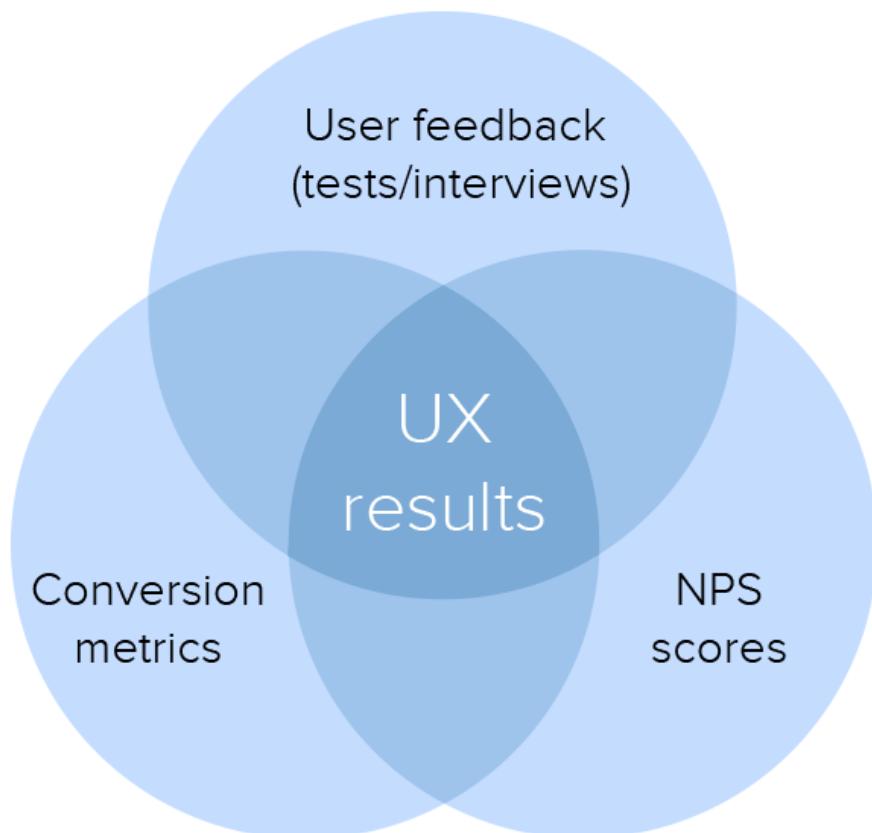
- The desired outcomes (e.g. increase sales by 10% in 3 months).
- How you will know through your senses that you achieved those outcomes.

The last part sounds intangible, but it's actually quite practical. Let me break it down below.

Mere KPIs, while useful, are not the same as sensory outcomes. It's one thing to be told you're going 60 MPH. It's another to see the road focused in front of you while blurry through the side windows.

You can also apply this to your work. It is one thing to reach sales numbers after a redesign. It's quite another to triangulate the results against NPS surveys and positive product reviews for a complete understanding.

What does success look like? When will you know you've arrived at some level of sufficient success?



In the most tactical sense at Rackspace, one of my core plans was to get organizational buy-in around what exactly a “managed cloud” service looks like for customers.

- Desired outcome: Changes in product roadmaps after a new vision I created was approved by product teams.
- How I knew through my senses: Witnessing the design team explain their rationale with data. Noticing more people discussing the roadmaps.

By first defining success, you can back plan how you and your collaborators will get there.

Plan for Influence

Planning for success requires more than a series of JIRA stories. You may conduct the following activities as you start executing UX work:

- Creating/building relationships with stakeholders (e.g. [stakeholder interviews](#))
- Visualizing assumptions
- Creating value proposition canvases (e.g. [Lean Canvas](#))
- Doing [culture mapping exercises](#)
- Running [design sprints](#) (ala Google Ventures)

But beyond standard design activities, you need to also plan for influence. Through counsel with mentors at Rackspace, I followed a staged plan:

- Reach out to my network of peers (first built with the interviews discussed earlier) and ask for their expertise on specific problems. Invite them to design workshops to share insights.
- Apply the learning from that workshop to create a focus (a story as a framework), and next steps. “Story as a framework” means that I’d present the problem as a narrative (characters, plot, setting) for faster stakeholder understanding.
- Bring the feedback from workshop participants (along with the story) to mentors and managers to close the feedback loop.
- Create a quick story presentation for support from managers, peers, and stakeholders. In our case, we created a video prototype.
- Iterate from feedback, field research, interviews, usability testing, and analytics. We eventually iterated the video prototype into a rapid digital prototype. You can use something as basic as [Keynote](#) or more collaborative and end-to-end like [UXPin](#).
- Invite key internal stakeholders when showing the rapid prototype to users. Ensure that stakeholders see the impact of the new vision (and the criticism).
- Return to the product teams with the most positive reactions and start carving out areas for more iteration. Execute.

The above framework helped me build influence by explaining a complex design problem as a simple story. Once stakeholders understood the story, I'd involve them at different stages as needed.

Conclusion

All the above may not feel like you're coding, or moving pixels, or out doing user research. The honest truth is that you'll be performing those activities anyway, especially if your current position is more junior in the leadership continuum.

Some may think that leading is being in the front of the boat rowing, instead of on the wheel steering.

The reality is that leading is all about doing. You can't lead without managing and you can't manage without leading. The questions are more to *what level* and in *what quality*.

Evangelizing UX

Building your flock of believers

Did you know that once you became a UX designer, you were joining a religion?

You didn't? Well, it is.

Once I've explained our religion of UX, we'll explore how to gain more believers.

The Religion of UX

Rituals

Contextual inquiry, affinity diagramming, usability tests, etc. are all bizarre rites barely understood by lay people.

Relics & Totems

We worship the spirits of human beings. We place their images all around us. We document their every move, and then hang those on

our walls. We carry around Moleskines and pen collections as if they are as sacred as the crucifix.

A Sacred Space

Like many religions, not everyone has access to the sacred space. But for those who do, it is a wondrous place. In our case it is called The Studio.



Liturgy

Our books document our dogma. I bet you can name your top 4 books that all UXers must read.

Of course, splinter groups are created from the dogma, but the overlaps connects us. We have our Interaction Designers, Information Architects, Visual Designers, and the most orthodox of the bunch, the HCI folks.

Faith

Neuroscience and psychology guide us, but we also love magic. The source of our magic is our steeped history and relationship to art. That balance and tension between science and art drives us. It keeps us passionate.

Evangelism and Truth

Like every faith, we spread or we die.

Whether you really believe that we are religion or not is irrelevant. You believe in *something* that most people don't, and that alone makes you a congregant.

Becoming a UX leader means you become clergy.

What is Your Red Pill?

“I can’t tell you what [user experience] is. I can only show you.”

When a concept as abstract as user experience needs to be explained in order to be supported, it will usually fail, unless you find a shared experience for the truth you want to share.

Maybe you’re the first UXer in a startup. You must constantly prove to others that you need more people. People will question you about the time required for your tasks. Why do you need more people as

“you’re only doing wireframes, right?” Or, my favorite: “If you just coded that, too, then I could remove a developer from my payroll”.

Maybe you’re in an enterprise with a team of 10, and a new product is launching. The VP of Product assumes the existing team can just take on the new work. Unfortunately, your team lacks confidence in the design so they’re pushing you for more research time.

So, one of your jobs at almost every stage of your career is to make others adopt your truth. You want others to be force multipliers for UX.

Let’s dive into a few useful tactics for spreading the good word of UX.

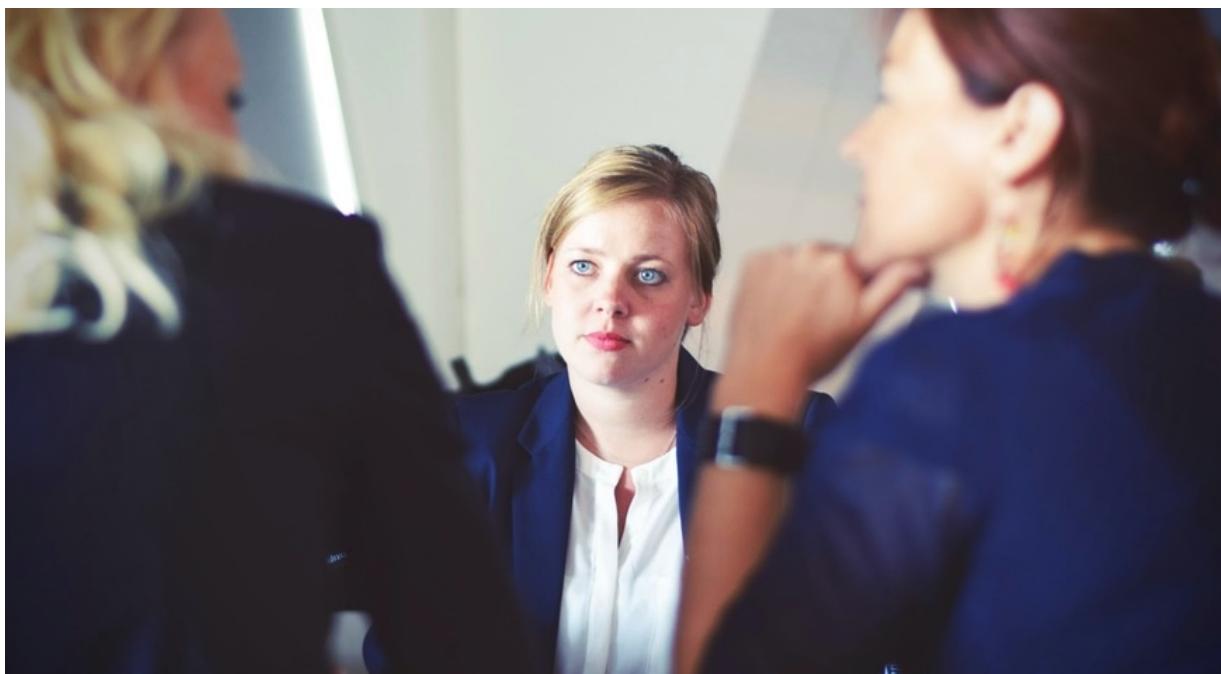
Adapt to the Maturity Level of the Business

A startup is clearly motivated by how “the possible” drives revenue growth. A large enterprise is concerned more with optimization and extension.

Assess where your company lies along the [8 stages of UX maturity](#) so that you can start building buy-in with the most influential groups first.

For example, when I was in a management role over a decade ago at a startup, the executive team was eager to grow towards IPO or

acquisition. One of their big liabilities was a system burdened with legacy and tech debt. The company was motivated to refactor the technology stack and better differentiate their core experience.



Given their rapid timeline, they were most responsive to ideas that were immediately feasible.

This motivation led me to a two-pronged set of realistic tactics.

- On one side, I worked closely with the CTO and his engineering team to talk about how best we could work together. We drafted an agile plan for execution to first show that our UX strategy was immediately actionable.
- On the other side, a new sales team was eager to ensure the value proposition was right for the new market. I explained how the UX strategy would help differentiate the product, and they helped clarify how certain customer segments might respond.

In this way, I earned buy-in from the two most influential sides in this context: Production (the builders) and Sales (the earners). Since both sides were historically allied with executive partners, I received budget much more quickly when presenting the strategy as a unified plan.

Build Your First Flock

An evangelist is only as good as the stretch of their voice.

You can't be everywhere. If you're trying to scale across increasingly larger organizations as your career grows, you must build a group of disciples to shepherd their own flocks.

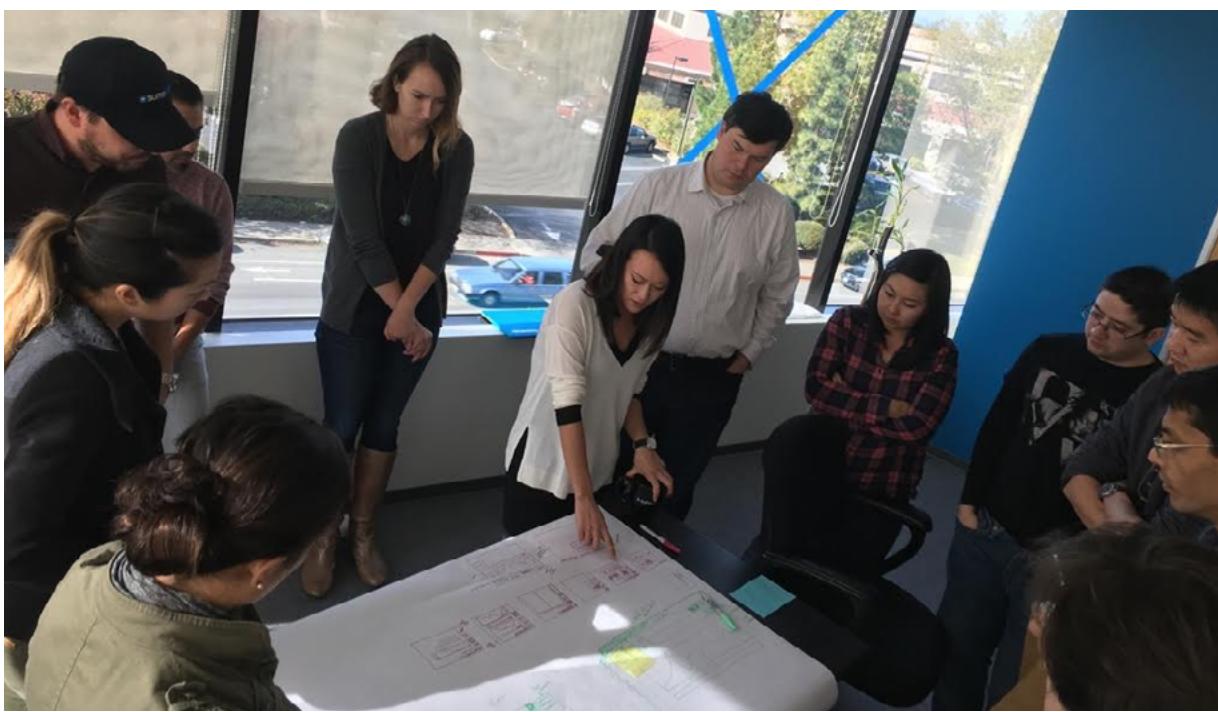


Photo credit: [UXPin customer Sumo Logic](#)

The first step is, obviously, about getting your own flock.

Of course you can hire for that. But you need two things: purpose and cash. You probably have an abundance of the first and almost none of the second.

Here are the steps as I've experienced them.

1. Clarity

Anyone influential must understand your purpose as clearly as you do.

As I'm jumping into my current strategic role at [HPE Helion](#), I've tried to place myself next to the following message,

By helping our organization understand what our customers value, the Insights and Strategy team will increase customer satisfaction, reduce churn, and increase sales.

Most of this messaging occurs in the meetings and 1:1 conversations I have, but it's also like any political stump speech. Focus on the keywords and use them whenever you can.

If you read the above the keywords are **helping, value, strategy**. And then the ending emphasizes tangible ROI.

2. Vision

Vision is the story of your desired outcomes.

What will the organization look like if it was able to achieve your goals? How will customers' lives be impacted?

Your story must be dramatic, emotional, engaging. It needs to draw people in. People need to make the story their own while still retaining the core message.

The story should push boundaries, but not offend sensibilities.

When trying to build a strategic practice at Rackspace, we needed to gain support. We literally created a video prototype in Keynote of a new story that remained true to company values and its value proposition, was based on feasible design, and showed how the strategy would improve the lives of employees and users.

You can also try a more bite-sized approach. Segment your product into smaller units. Take a very small unit (e.g. a feature) and create a new vision for impact on the organization and customers. Shop it around as support is gained, validate it internally, and maybe even, covertly, externally.

Keep a record of your successes—and then slowly expand on your successes until you reach the decision makers or the people who influence decision-makers.

Designer Pro Tip



Sometimes, a new design vision isn't enough on its own (even if it's just for a small product segment). People may require evidence of success before they support a new strategy.

In that case, consider prototyping your new vision and testing small changes as a side project. If you're a [UXPin](#) user, prototype and record your tests inside the platform, then invite your allies and stakeholders to see the user's reactions.

The screenshot shows a red-themed UI component. On the left, there's a search bar with a location placeholder "San Francisco, CA" and a "Search" button. A blue circular badge with the number "2" is positioned above the search button. To the right, a sidebar displays three user comments:

- Marcin Treder:** According to our user research, users prefer to use search for most common tasks. To emphasize how important search is and for easier access - I've decided to place search in the middle of the site with lots of space around it.
a day ago • • 2
- Kamil Zięba:** Like it! Now it really stands out!
a day ago •
- Jerry Cao:** Don't you think that the button's color should make better contrast with the background?
an hour ago •

Ip: **San Francisco**

The screenshot shows a sidebar with a search input field and a comment section. The search field has the placeholder "Search". Below it, a comment from "Jerry Cao" is visible:

Jerry Cao: Don't you think that the button's color should make better contrast with the background?
an hour ago •

Afterwards, invite the executive stakeholder to a 15-30 minute in-person session to suggest next steps. Mention who supports your ideas and describe how the stakeholder can scale up your process. If you house your deliverables in the platform, you can also reference the decisionmaking role of each artifact.

Marcin Treder, CEO of UXPin

3. Ability

This is where “leader as doer” is so important.

In most of the organizations, “bias towards action” is a common reframe. But what is action? They don’t mean any old verb. What they mean is “make something I can see, relate to (and most importantly), **use**.²¹”

When I was at [Intralinks](#) over 10 years ago, I was leading a team of 4 or so. Sales-protectionism required that we constantly needed to prove our abilities. Of course, convincing sales was just a means to the end of proving we were trustworthy to upper leadership.

Since the company was less UX-mature, I needed to prove the new vision by first showing a quick win.

In the first few weeks, my main vision was showing stakeholders we needed to move from an object-based system (one that focused

on file lists) to one more focused on activities. But instead of showing all the product flaws, I eased my way by first explaining how we could tweak a niche area for a new persona. We built a new UI for the niche feature, and new conversations started sparking between designers, product, engineering, and even sales.

These new conversations evolved until multiple teams started questioning the current standards for “good enough” or “working” features. By that time, it was much easier to convince executives that a new interaction model was viable and feasible.

Budgets were unlocked, people’s time opened up, and we were able to get access to end-users. Leadership pushed account representatives to loosen their hold on the customers. As a byproduct, we also set a new precedent of empathy for our different customers.

4. Internal Empathy

Speaking of empathy, we designers spend so much time on users that we sometimes forget it takes a village to realize a design.

Can you as just easily put yourself in your collaborators’ shoes?

Demonstrate that you have your stakeholder’s back. Actively observe them. Internalize the criteria managers use to evaluate them. When designing for a future outcome, account for their needs.

For example, in the larger vision work I did for Rackspace, we ensured that one of the primary characters in our video prototype was

always a Rackspace employee (in this case, a support operative). We imbued in that character the primary values of the organization, as well as showed that they win when the customer wins.

Spread Your Message Through Others

As an evangelist, you're only as powerful as the number of leaders you harness around you. This means you move from voice, to coach, from front of the stage to the side of the stage.

1. Empower other voices

Create and use platforms that allow your disciples to make their own name and create their unique voice. Create opportunities like lunch and learns and [customer councils](#) where your disciples preach the good sermon for all to soak in.

2. Shine a light on others

Call out the success of those around you. Don't always focus on your own voice.

When you get a quick win, explain the specific outcomes (e.g. reduced customer support tickets by 30%).

Explain who helped execute each tactic, especially if they're outside the immediate design team. Give credit away. They will pay you back many times over.

3. Turn from player to coach

Start mentoring people. When you can't mentor, educate.

For designers, give them your lessons not just in the topic of specialization, but in how to grow as a UX evangelist. Teach them the lessons you've hard won. Don't make them start from scratch. Tend to your flock.

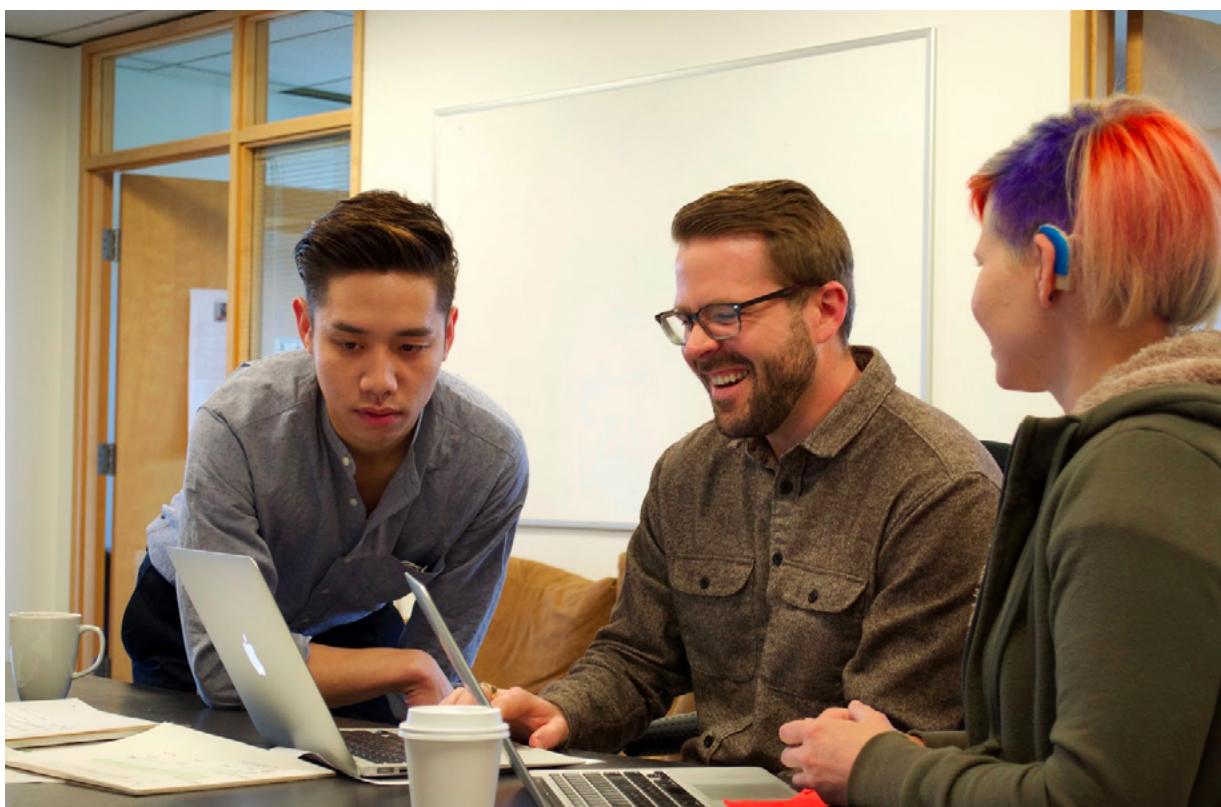


Photo credit: [UXPin](#) customer LiquidPlanner

For non-designers, be generous with your knowledge and time. Present case studies from related industries (not just the usual suspects like Uber or Google). For example, when MS Office 2007 was ramping up, I followed the blog of the UX team intensely to share with others the lessons of a company striving to be more design-focused.

Share design insights from business publications. When evangelizing design, it's much more convincing to share material from [Fast Company](#), [Gartner](#), and [Harvard Business Review](#) than from only UX publications.

Conclusion

Whether you're dropped into leading 5 people or starting from scratch, your ability to build a following and create disciples directly impacts your success.

Based on what you know about yourself and your environment, create a plan where your voice is most effective. Then shift your plans to make others more effective.

The skills needed here are empathy, communications, strategy, and a strong sense of self.

Leading People

Mentoring, coaching, developing designers

At some point, people will follow you, listen to you, or otherwise be engaged with what you’re trying to achieve.

Leadership comes naturally to some. The other 99% of us have to work hard at it.

Leading Without Authority

More than likely, your first taste of leading is “leading without authority.” Imagine your first project kickoff.

You’re perhaps a mid-level designer in a room of senior designers, management, and seasoned members of other departments. How will you get people to not just listen to you, but take you seriously and follow you? As someone with no “rank,” you still have the power to lead “without authority.”

Use soft skills to stand out in the crowd. Title and seniority don't automatically make someone a good leader. It's how you come across, and what you have to say, that attracts the right attention.

1. Facilitate the solution

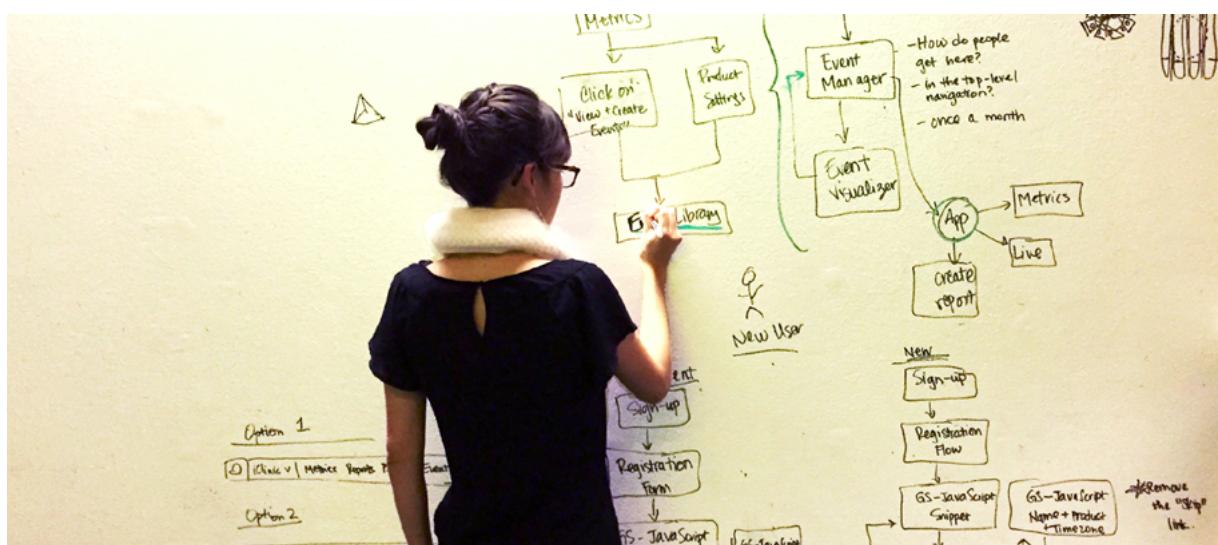
Pointing out problems is easy for most of us, but people focused on solving problems get the most attention.

You may not be in a position to actually have the solution—especially if you're a more junior practitioner.

In these cases, being solution-oriented doesn't mean uncovering the solution yourself, but helping the group do that. Using tools like the “[5 Whys](#)” or facilitated visualizations can help teams working on discovery, problem framing, and solution synthesis.

2. Own the marker

You won't just pull solutions out of a hat. We work within complex contexts as we design complex systems. It always requires a team.



Leadership is then defined by the person who drives the problem understanding phase.

Doing this well requires understanding the “10 levels of zoom” in any direction. You can move the team forward by creating new angles to help them frame the problem space.

By owning the marker –literally holding onto the marker at the whiteboard–you put yourself at the center in the room. Owning the marker isn’t about owning all of your ideas. Be a synthesizer, framer, and facilitator who helps the room–and team–move forward.

3. Be at service

Nothing gets you attention as much as being the “step up person.”

Don’t step up for everything, but do step up for the things that map against your abilities. If you have the slightest capability to do well given your time constraints and skills, step up if no one has or can (or even if the wrong person has).

4. Get credit

Make sure you’re being noticed for your work, contributions, and efforts. If you aren’t being noticed, you aren’t making an impression as an up-and-coming leader.

Always be humble, but know when to stand up and put yourself forward. Put it in your status reports. Bring it up in scrum meet-

ings. Nudge your manager to talk about your projects in team all-hands, etc.

Designer Pro Tip



Being a good designer does not make you a good leader. If you want to step up to leadership, first think back to all your bad managers. Avoid all those mistakes.

Do not presume that your new job title allows you to lead a team. It takes time to build that level of trust and respect with your team. So take it slowly.

[Chris Thelwell](#), Head of UX at Envato

How Design Leaders Build Teams

Building a team that scales over time is one of the biggest challenges for any leader.

The first order of business is to understand the factors at play and imagine the future.

1. Visualize your team's future

Block out some time to sit and focus on the big picture—to sketch out your team vs. the workload vs. imagined changes to the rest of your organization.

Work with collaborators to ensure the vision is feasible (given the workload and organization). Accept that the only constant in the future is that it isn't predictable.

Start off by looking at roadmaps across your organization's portfolio of products and services, then drill down into each one to understand the tasks requested of you and your future team. From there, work with your collaborators to create broad estimates and roughly determine the scope of work required, plus the number of UX team members you'll need.

At some point you need to start with an estimate of the resource required against that roadmap.

Let's say you see 6 projects emerging over the next 6 months to a year. You take that map and layer over it your recruiting durations. How long does it take you to recruit and ramp up a new hire? What resource can you attach to each project?

| Projects | Resource Type | % needed | Person/Source | Kick Off |
|-----------|-----------------|----------|---------------|--------------|
| Project A | IxD | 100% | Employee A | weeks out |
| | Researcher | 25% | Employee B | |
| | Visual Designer | 20% | Employee C | |
| Project B | IxD | 100% | NEEDED | 2 months out |
| | Researcher | 50% | Employee B | |
| | Visual Designer | 40% | Employee C | |
| Project C | IxD | 50% | Employee B | weeks out |
| | Visual Designer | 10% | Employee C | |
| Project D | IxD | 50% | Employee B | 2 months out |
| | Visual Designer | 20% | NEEDED | |

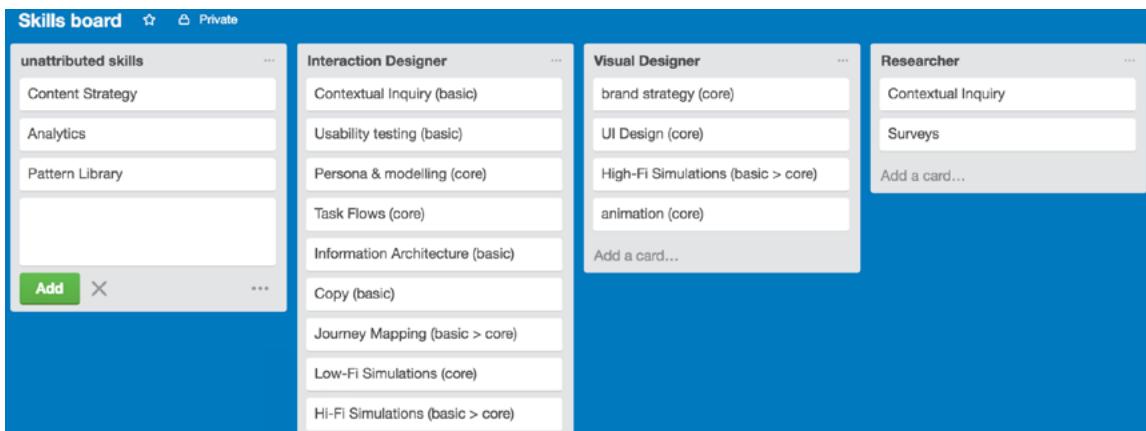
If time is a problem because projects surprise you, you should supplement hiring with contractor availability. Sticking with the same contractors shortens ramp up time.

2. Break out the skills you need

Once you have a picture of the future, you then deconstruct the skills required to achieve that vision.

Some skills may not be in your domain, but you need to list them just so you know you've got them all. Create an affinity chart of the skills broken down by category. Ask for cross-functional leaders to evaluate them, add to them, and re-categorize as you all see fit.

Lay out the skills (not the roles) you need because our attempts at categorizing what we do (especially in our world of digital design, titles, roles) has been a complete failure (ironic, I know).



As you can see in the above image, I laid out the skills first in an “unattributed skills” list. Then I use my expected roles and ensure that all the skills line up to titles that I’m confident I can hire for. This is incomplete on purpose since the details and role groups depend on your context.

Clearly document all the skills you need. Some may seem like universal skills, but you’ll find it will make a difference later on as an evaluation checklist.

3. Start your recruiting

Now, you build job descriptions.

Consider how roles will change during the time of the vision you set out. You also need to imagine how people will be promoted and gain leadership for themselves. Finally, you need to consider how you’ll need to change and grow as a leader to keep up with your team.

The trick is hiring for short term needs with an eye for longer term needs.

When you hire your first 3–5 people, you'll most likely hire broad generalists (since no single function will have enough work to separately hire, say, a visual designer, an interaction designer, and a researcher). You may even need people who do all three of those things – plus front-end development.

The question is how and when you prepare to start specializing within the organization. Like the evolution of any organism, at some point, cells need to specialize more and more. Specialization needs clear pathways for career growth and promotion, too.

Designer Pro Tip



At [Asana](#) (a 230+ employee company), we hire generalists on product and marketing program work. We assign one program designer for every PM or marketing program. We also have a team of specialists including illustrators, motion graphics experts, brand designers and prototypers. The specialists work horizontally across marketing and product programs to ensure consistency and to make the important moments in the experience exceptional.

Amanda Linden, Head of Design at [Asana](#)

4. Evaluate and hire the right candidates

When it comes to actual candidate evaluation, the best methods do two things: focus on skills and outcomes, and consider the needs of everyone working with this individual.

How does a candidate tell their story about how their skills lead to direct outcomes/results in their work?

When looking for a culture fit, beware that you don't make the mistake of "hiring people like me".

For this purpose, the book *Hire With Your Head* is a great read.

Designer Pro Tip



As a UX hiring manager, the most important criteria is team fit. The team itself is our most valuable asset at Envato, so I need to make sure the potential hire strengthens the whole team. The wrong person will disrupt everyone, slow us down and reduce our quality. Others might even want to leave. You can teach skills and build experience. You can't teach personality.

Chris Thelwell, Head of UX at Envato

Managing and Coaching Designers

Once you have a team, leadership boils down to how well you oversee and develop direct reports.

1. Become a buffer

Give air cover. Take the heat about negative team perception, and defend the team without them knowing.

Remember that translating messages from executives is about making it relevant. A strategy about meeting margin growth through reducing redundancy needs to translate into something that directly affects how the design team changes workflow. For example, you can explain that the team needs to now create a design system to help developers scale code over time.

Often as designers we get fixated with the answers we came up with. Then we feel demoralized when we are told, “But that doesn’t work for the business.”

When I was managing the design team at Intralinks, we were trying to increase our offering into new spaces. By explaining the constraints of the design problems as a business driver, instead of something we should feel victim to, we energized the team and worked towards some pretty neat designs that didn’t cost nearly as much.

2. The One-on-One (1:1)

There are three types of 1:1 meetings you should be holding on a regular basis that include (but may not be limited to) your team:

- With your direct reports.
- With your peers.
- With your supervisor.

Meet weekly with each member of your team and bi-weekly with your peers. (You can add other people, should you feel regular contact is important.)

Direct reports should own this meeting. The agenda of the meeting needs to focus on how their current work addresses their short and long term career needs – it's not a status update. This is a coaching session, first and foremost.

Meeting with peers on a regular basis helps you limit surprises, not to mention uncover situations where you can help. Control the pace and own these meetings.

For 1:1s with your manager, take what your direct reports said, then flip the roles. Everyone needs coaching and you're not excluded – no matter how senior you are. Hold yourself responsible for making sure that your manager doesn't highjack the meeting.

You'll also want to meet with these roles on a regular basis:

- Technology heads
- Key cross-functional people
- Human resources representatives.

Technology heads (monthly)

Stay up-to-date on the technology of the business, its progress, and trends. Meeting with people inside the technology groups of the organization will help you prepare for what is coming your way. Own the agenda of these meetings, but let them pivot in reaction with the conversation flow.

Consider asking the following questions:

- What are the expected upcoming roadblocks? (Especially between your teams and theirs).
- As a manager, what issues do you face related to your team's development? Is there any way I can help?

Key cross-functional people (monthly)

Whether this is product management, sales & marketing, or customer service/engagement, you must connect yourself to the pulse of the organization.

Each one of these departments helps you develop insight into the business and keep ahead of problems. They will also help you set your team's long-term agenda.

Here is a generalized list of questions to stay on track with each department:

- How can my team help with any problems your team is experiencing?
- What is your schedule? (Does it line up as expected with your own?)
- What issues are keeping you awake at night?

Human resources representatives (monthly or bi-weekly)

Most leaders seem to forget these meetings. Believe it or not, HR is an amazing resource for you.

Reviewing your staffing, current performance, and future needs against the business demands gives you a source of reflection from a key advisor available to you. Too few managers really use their HR team in this strategic way.

This is less about questions and more about a chance to get good council. Consider discussing the following points:

- My team is having these pains, do you have any suggestions for helping us get back on track?
- Here are my recruiting needs. How can we meet those needs more quickly?
- Is there anything coming down the pike that I'll need to be communicating to my team soon? What can I do to prepare now?

Developing Your Designers

There's a half-true statement bandied about among managers: "People don't leave jobs. People leave their managers."

Personally, I've left jobs even when I loved my managers, so I know this statement is only partially true. A good manager is actually at the heart of why people stay.

The managers we remember most are the ones who helped us grow.

Focus on these two areas on when developing your team.

- Short-term tactics.
- Long-term development.

1. Short Term Tactics

Discuss assignments in full detail, then have them lead you through the places where they expect the work to be easy, or possibly a stretch. Dig down and understand what they mean with each answer and whether or not that maps against your own experience.

There is even an entire framework developed for this purpose that I highly recommend called [Situational Leadership II](#) (Don't forget the "II"—it matters.) The framework helps a leader and a team member assess their situation and figure out the right level, type of guidance, and support they need.

1:1 meetings also help you hold each other accountable through its shared language. This will set up the near-inevitable periodic evaluations that inform bonuses and pay increases.

2. Long-Term Development

For your junior direct reports, long-term development is about helping them understand possibilities.

Whenever I work with someone new, I always ask them “What do you want to do in 5 years?” It’s a nice time frame, one where hopefully a new employee still sees themselves at the company, yet also far enough out where the level of achievement is really up to them.

In these conversations, you need to create a job matrix (see below) that outlines the levels of each employee against the skills, behaviors, and outcomes expected from someone at that level. This way, everyone in the organization sees their growth path. They know what’s needed to move from step 1 to 3 in a period of time.

Senior Interaction Designer 5-7 years experience. Approximate time in role to level up ~ 2 years.

| Purpose | Craft | Creative & Critical Thinking | Leadership |
|--|---|--|--|
| <i>I have goals — What I do serves something larger than myself. I have a desire to improve the world.</i> | <i>I am skilled — I want to get better at something that matters.</i> | <i>I am a translator — I interpret complex and abstract concepts into solutions that create clarity.</i> | <i>I am a leader — I am engaged with my team and my community. I direct my life and career.</i> |
| Skilled practitioner, recommended team member, Task List. Expected Deliverables. Level of Quality & interaction | Intermediate to advanced mastery ([level] of knowledge and skill in core discipline). | Analytical Can move back and forth between analogy and reality and help others understand. | Recognized as having a point of view. They have a strong point of view Are able to create followership around that point of view Have impact with that point of view |
| Practitioner (versus manager/leader) Level of experience Breadth of knowledge and in what topics Skills and level of expertise | Sound understanding Of methods & scope With specific level of quality/fidelity | Critical. How do they use both ideation and criticism in their work. | Collaborative Within and across teams. |
| Has samples that demonstrate ability List of abstract skills their portfolio and story can tell the world and their team. | Consistently selects most appropriate tools They have a complex toolkit that they can pull out across different contexts. | | Thought Leadership. Contributes both internally and externally to group perception of leadership in design |
| | Applies some industry/functional knowledge to daily work. They demonstrate a solid connection to the industry & problem space(s) that they work in. | | Mentors. Teaches others. |
| | Developing Lead level skills. List of leader skills expected and at what quality level. | | |

Indicators/ Ranges shown are a work in progress.

| Contributor | PURPOSE/ ROLE | Director |
|--------------|---|-----------|
| Learner | CRAFT ○ | Master |
| Tactical | CREATIVE & CRITICAL THINKING | Strategic |
| Personal/1:1 | ○ LEADERSHIP | Community |

A few details to note in the above image:

1. Each role has number of years experience, but also number of years expected in that position before growth to next level.
2. I've plotted out where core qualities should fall on a spectrum of proficiency.
3. I've summarized each core quality with a simple quote that represents mastery.

Like any strategic agenda, the patterns are the same:

- Understand the vision.
- See the possible paths for achievement.
- Pick the initial steps along the way.
- Set clear goals explaining impact on the individual and business.
- Evaluate and adjust as you go.

Managing Up & Across

I'm sure many people are familiar with the phrase "managing up." In my experience, what it means is owning your relationship with your manager.

But how do you do that? Well, leading is making sure things go well, right?

Here are some basic tips (that you'll also find helpful with cross-functional peers).

1. Don't make people guess what you mean.

There's a training opportunity for you here—it's called [Precision Q&A](#). The gist of it is that you can always better clarify your words and intent.

If I say I need a tall building, that's great, but how tall is tall? Shouldn't I give scale? Isn't there a big difference between a 10-story building and a 100-story building? Or, if I ask for something, perhaps I should mention who it's for and why it's required?

In other words, be crystal clear when making requests.

Being a leader also means listening to requests. Own the responsibility of clarity there, as well. Ensure you fully understand what you think you heard. If nothing else, repeat the request back to the person in your own words to double-check.

2. Be visible in what you and your team do.

People usually don't notice what happens in their peripheral awareness, especially if it doesn't catch their attention.

That's why it's so essential to highlight your contributions, promote your team, and speak up about their business value. (And especially, don't ever take credit for other people's work.)

Designer Pro Tip



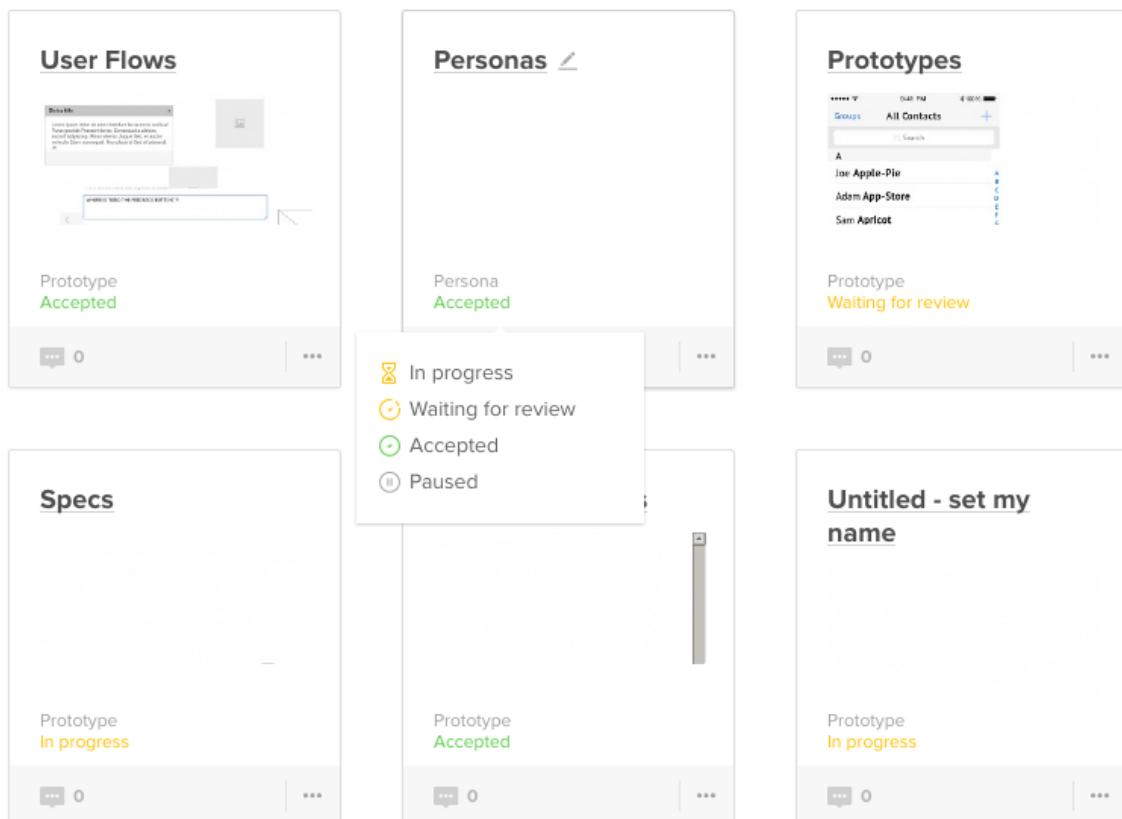
When sending out a weekly status email to the larger management team, I highly recommend the following tips by [Christina Wodtke](#):

- Start by explaining your level of confidence in the team meeting quarterly [OKRs](#) (objectives and key results).

- List last week's priorities, and explain if you did or didn't achieve them. Then list out and briefly explain next week's priorities.
- Clearly call out any blockers or risks to projects.

When we use [UXPin](#), we minimize back-and-forth email chains with project notifications. To keep our notifications straightforward, our internal team only sets the following statuses:

- In progress
- Waiting for review
- Accepted
- Paused



Marcin Treder, CEO of UXPin

Conclusion

Leading requires followers. These followers need to respect and value you. The best way to do this is to build them up, protect them, and forge new paths so they can grow.

Like everything so far in this book, this requires specific actions:

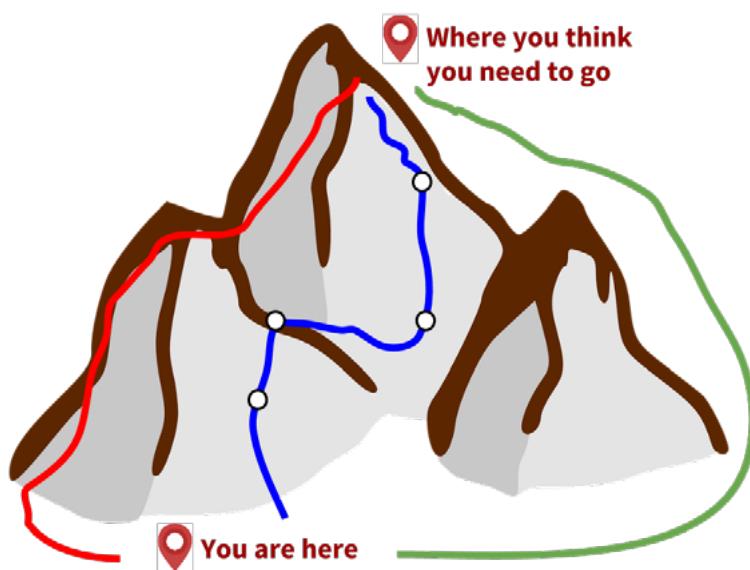
- Analysis
- Vision
- Planning
- Evaluation
- Communication

To see that anything goes well at scale requires good people next to you, behind you, and in front of you. Taking ownership of your 360 degrees of relationships is the strongest guiding principle for success.

Crafting UX Strategy

Purpose ► Peak ► Path ► Point ► Plan

The alternatives to strategic decision-making are kind of scary, if you ask me. When there's no data, no planning, no vision, and no path, all you have is a direction that *sounds* strategic.



Case in point: the “grand tactic” – a.k.a. “Hail Mary.” These projects come from on high because someone single-mindedly wants them to happen. There is no destination, no sense of preparedness, and no planning. Or how about “hill grabbing” – capturing small bites of the market simply because it’s possible.

Strategy, on the other hand is based on greater purpose, where the pieces make up a greater whole; measurement, analysis, & evaluation happen at key moments; and finally, the ends and the means work in harmony toward a greater impact.

Great strategists seem to be oracles, born with powers to see what's coming. In reality, they analyze information and put it to work; they have a solid grasp of context—the probabilities tightly connected to the pulse of their market—and are prepared to act. They've learned the subtle art of looking around corners.



*In the fields of observation chance favors
only the prepared mind.*

Louis Pasteur

So, what is strategy?

- Doing your homework/continual observation
- Using frameworks to process what you know and observe
- Analyzing information and putting it to use
- Learning and improving all the time
- Grasping context and looking at all options

What isn't strategy?

- Forging ahead without data
- No contingency
- No direction, purpose, or vision
- Productivity for productivity's sake

- Direction without measures of success
- Brand positioning

Scoping Your Strategic Framework

You can't make assumptions and expect to reach your goals.

When we have a **Purpose** and set goals for ourselves (like hiking to the top of a mountain), we identify our objective (the **Peak**), then determine the best way (the **Path**) to reach that goal and how we'll carry out that **Plan** (the tactics).

Every strategy needs a solid framework to get started and stay on track. Sticking with the metaphor of a climb, let's look at the 5 core elements of strategic frameworks.

1. **Purpose** – Why am I climbing this thing in the first place?

Is the goal clearly stated and understood? Has it been validated as something worthwhile to pursue? For whom? Does the team working toward this goal understand its purpose?

2. **Peak** – Choose your destination – or at least aim in a general direction. You may sometimes hear of companies focusing on their “North.”

3. **Path** – How you get to the peak matters.

How you climb the mountain matters. The path needs to help the organization not just meet financial targets, but also mature the organization in the process.

4. Point – Opportunity to pause, analyze, and measure.

Points on the path aren't merely deliverables or activities. They should regularly confirm and/or adjust your goals and the path toward that goal.

5. Plan – Every expedition needs a plan for tactics.

I need the right training & equipment. I may need other people (Who should I bring versus station remotely?). Do I need to let others know where I'm going?

A lot of people mistake the Path for the Plan. True, each activity is a step toward the goal, but tactics are only one part of the strategy. The path is *not* a collection of tactics.

Constantly re-evaluate your framework to keep your strategy on track.

Step 1: Purpose and Peak

Purpose ties into your vision of the intended outcome. It's the first thing you define. I always start there.

Defining purpose means asking questions like:

- Why are we here?
- What value will we create?
- Who benefits from this value?
- Why will they care?
-

The **Peak** or vision (your intended outcome/destination) **clarifies your purpose**:

- Communicate the pain felt if the purpose is not achieved.
- Demonstrate **one** way the problem(s) get solved.
- Show how the problem's solution adds value to users.
- Propose a realistic means of achieving the solution.
- Clarify any data that supports the purpose.

To make any peak truly valuable, it needs emotional and tangible merit. It can't be expressed as a collection of features. Features only list the ingredients in your recipe – they don't convey the whole experience. This is why artifacts like roadmaps and “layer cake” graphics can't express value meaningfully to stakeholders.

Here's an example from an initiative I led at Rackspace.

To define the purpose and peak, I dug into what “Managed Cloud” actually meant. I gathered a cross-functional group of people together for 2 days. First, we dove into “What is ‘managed’?” We deconstructed the term to identify the value for our customers.

I had to break through a lot of jargon bear traps—you know, the ones that leave you saying, “But that isn’t what ‘managed’ means. You’re making up random meanings.” Reflect people’s definitions back to them so that they gain a better understanding.

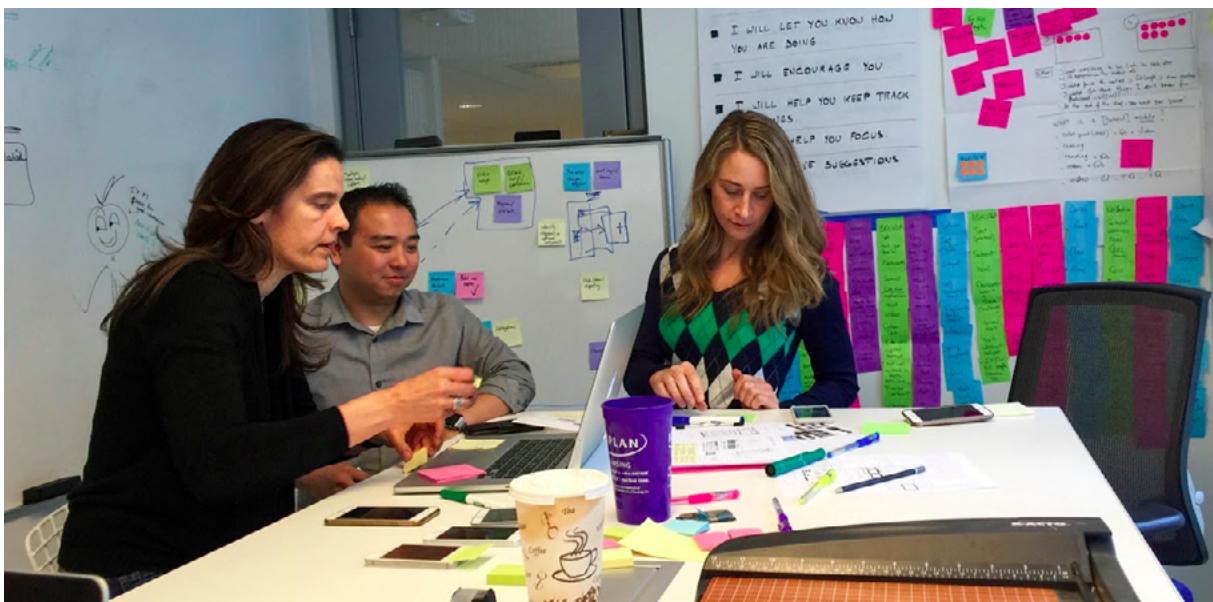


Photo credit: Kaplan Test Prep UX team.

I then led the team through a storytelling exercise, where each person created a story with a customer (a Rackspace employee) and a scenario that reflected the new value. People didn’t simply tell fanciful stories. They explained what was wrong today and how we might improve that situation. By seeing the negative stories against a brighter future, our Purpose became more relevant and approachable.

We then captured that story in a shareable artifact that could discuss with other departments. In this case, we created a short photo essay with voice narration. A simple vision prototype.

We played the video in front of internal and external stakeholders and got a tremendous amount of positive feedback about what was working and what wasn't. Once we connected user research to the points made in the video, buy-in soared. Product design, product management, and engineering all started prioritizing backlog items based on our new Purpose and Peak.

Step 2: Charting Your Path

The Path you choose to reach your destination isn't the only feasible route. Each possibility requires weighing a variety of factors before adjusting course. Don't decide your Path by thinking the "end justifies the means."

1. Weighing the Options

Let's look at our mountain again:



Let's say the red line has the following properties:

- Cheap.
- Fast.
- Quality (whatever that means to the organization).

Sounds like a good option. But is it? What if we throw in some factors that may or may not work for you?

- Requires reassigning key players from other projects (of lower priority, of course).
- Creates technical debt without a plan for paying it back.
- Doesn't account for team development (to be ready for the next thing).
- The product releases on time, but lacks coordination with parallel sales & support efforts.
- Fewer points in the process to validate assumptions or apply lessons learned.
- No ability to instrument deliverables and offerings.

Does the red path still look appealing? What other options (and factors) can we consider?

If we go with the blue line, the path looks like this:

- A bit more expensive (short term).

- Takes longer to get to market – *but more confidence that we deliver value.*
- *Results in better quality than we'd otherwise get – which leads to surpassing customer-based KPIs (like NPS changes).*
- Provides definite answers to the bullet points associated with the red trail.

By taking the blue trail, you ship in a way that delivers the greatest value for both you and your customers.

2. Choosing the Right Path

How do you find the right path?

Start by understanding your own organization. “Know thyself” is a key tenet of leadership growth. The same goes for an organization.

Know your organization’s culture, business, competition, capabilities, etc. Simple [SWOT analysis helps](#), as well as the resourcing matrix explained in the previous chapter. Another tool I find tremendously useful is the “[Culture Map](#),” as popularized by XPLANE. In this canvas, you uncover how the more intangible aspects of culture impact outcomes.

As you evaluate your options, consider the following criteria:

- How much technical and UX debt are we creating? Is it acceptable given our current state? How do we plan to pay it off?

- What other projects need to be deprioritized to accommodate our path? What will that cost the organization?
- How much time are we afforded to validate our assumptions periodically?
- Are we allowing enough time and leeway for non-design stakeholders to understand decisions (or weigh in with their own)?

Step 3: Creating Evaluation Point(s)

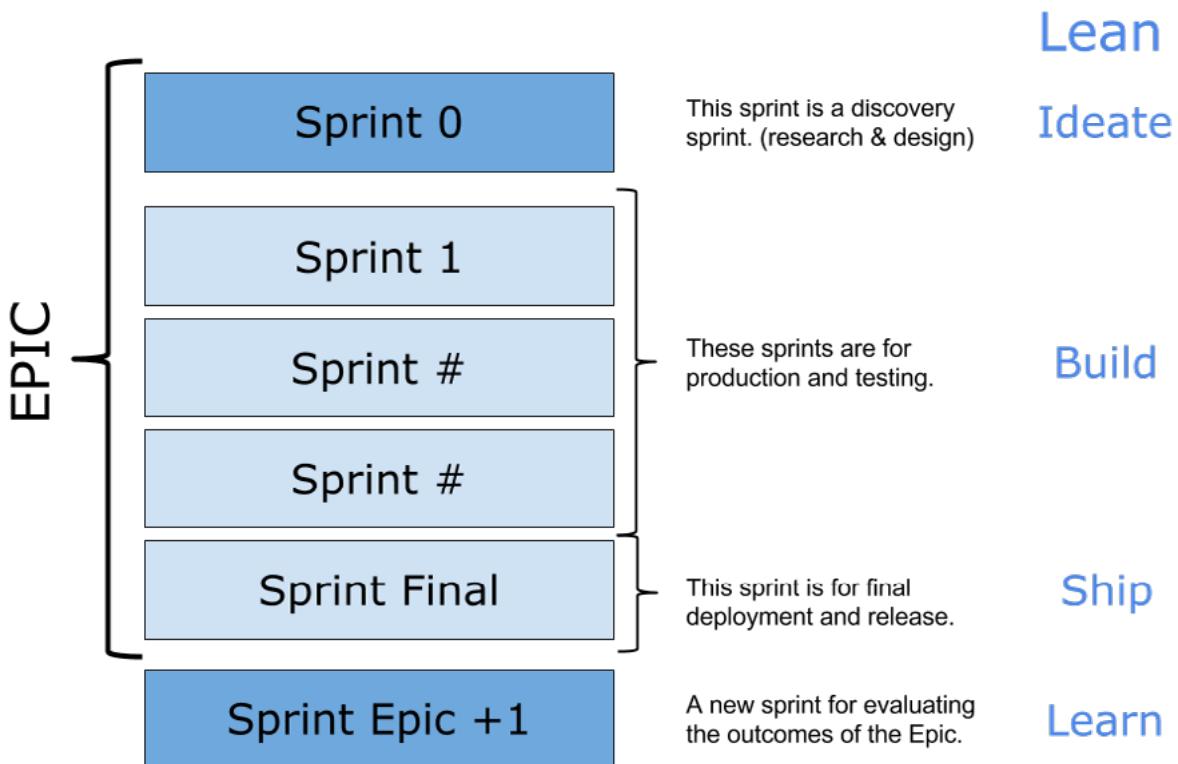
Back in the days before GPS, we followed directions to get around, and the quality varied greatly depending on the person, their navigation skills, and their familiarity with the area.

At some point, you need to confirm you're on course. Re-evaluate successes and failures, not to mention refine your target Peak.

We follow a cognitive process called “[OODA](#)”: Observe, Orient, Decide, Act. OODA (I pronounce it “OO-dah”) takes place at a stopping point to allow for:

- Data collection
- Analysis of that data
- Reflection on the analysis
- Synthesis of a set of hypotheses
- Evaluation of hypothesis value
- Amendment to the existing plan based on new insights

In an Agile process, let's say that each segment of your path is the equivalent of an epic. Your strategic stopping point is then the “Sprint Epic +1” (shown below).



Just like how we use the “Sprint 0” for UX research and discovery, we schedule a “sprint epic +1” to reflect on the past epic based on agreed upon metrics. Beyond a basic post-mortem or retrospective, we dedicate a full sprint length for analysts, designers, and product team members to dive deep into each success and mistake – then adjust the path accordingly.

We review the whole epic because the tight timing of a sprint might hide deeper insights around the overall vision. The extra time is a worthwhile investment in giving everyone a larger perspective beyond features.

Step 4: Plan to Validate Assumptions

Your success at the **Points** in your path is 100% affected by how well you **Plan**.

The best way to create a plan is to work backwards to answer the question, “What do I need to achieve this?”

Start by creating post-its for the beginning and the end, sticking them to the biggest wall you can find. This methodology is called “back planning.” You start with your intended outcome, then keep evaluating backward until you reach the point where you know you’ll have what you need to start.

Below, I’ll explain how I might complete this exercise in an enterprise setting for an IT ticketing system.

1. The final outcome

Help customer IT managers better communicate with our IT operators across multiple channels. The new system isn’t just for messaging, but incorporates workflow management that reacts to decision making, and allows end-users to customize governance. Our goal is increasing NPS scores by 10 points.

2. Our current state

Currently, we only offer email notifications with no contextual information. The notifications don’t always target the right person on the customer’s team.

Our IT operators send notifications with a basic ticketing system:

- Little customization
- Only works on a desktop browser
- Can only send in bulk to one person. The IT manager recipient then needs to resend to people on their team.

3. Our rough plan

Now that we know the beginning and end, we start filling in the gaps between. You can work backwards or forwards (I prefer working backwards).

In this case, working backwards, I first deconstruct both the experience and functionality of the end point as best I can:

1. We need a mobile application that scales to tablet.

- If we have one already, what can/can't it do that maps against the end point?
- I'll need to research what platforms my customers are using, but will probably have to use the top two major platforms.

2. We need to create or buy a [business process management engine](#).

- We'll need to create scenarios of governance, co-designing these with our customers.
- Once we understand the scenarios we can map against build or buy scenarios.

3. A notification engine based on a new monitoring stack will be needed.

- Trend analysis to aid in predictions
- Graphics engine to better add visual context to notifications (build or buy question to discuss with development and product management)

4. Our IT operators need a compatible console of their own to work with the new notification system.

- Does the existing system have the necessary APIs to work with the new business process management engine?

While these ideas might change once you start designing and testing, you at least create a plan for stakeholder discussion. For each of these line items, you start answering the question, or at least outlining the requirements and success criteria.

You start creating a backlog. “Based on where we are today, what do I need to start working on this backlog item?” You just keep repeating these steps until the dots are connected into a series of loosely defined epics and sprints.

During this planning, you’ll also reveal questions not directly related to the product. These questions relate to other strategic considerations around team building, culture, customer management, etc.

For example, if no existing team was familiar with mobile development or responsive design systems, you now need to also start planning for training or recruiting to fulfill that competency. Another example is aligning sales, support, and delivery teams so that they receive training materials to understand the new customer experience. You may need to plan some quick sessions with different leaders to explain how teams can deliver on a “new era of open communications, and empowered customers”.

Both of these types of change management require time, deliberation, acculturation, and planning.

And of course, lastly, you need to also write in your research needs for generating ideas and validating design concepts.

Conclusion

Strategy is “intent with purpose.”

In the stirring introduction of the “Think Different” ad campaign (the first led by Steve Jobs after his return to Apple), purpose was touted as the one missing element in all the years he was away. Apple was playing a numbers game chasing speed and space (CPU & hard drives), and it wasn’t driving revenue.

The ad campaign wasn’t merely about selling. It was about *being*.

With “Think Different,” Apple re-associated itself with the woman throwing a sledge hammer at the screen. It was also a call to Apple’s own workers about the organization’s values. What followed was some of the best design and engineering the organization ever produced, resulting 5 years later in the iPod (the precursor to the mobile revolution).

But that is just the top of the mountain. Organizations like IBM, GE, Honeywell, Intuit, CapitalOne, USAA, and many others have all dedicated tremendous resources toward design as an organizational and executive competency.

As design teams grow in large organizations, so too does the demand for good design leaders. To stay competitive today, design leaders can’t just be masters of process. They need to craft a digestible vision that aligns with the bottom line, vet it against customers and stakeholders, and create a clear plan for fulfillment.

Use your tools of story and visual artifacts to bring visions to life. Develop your team to build (and even challenge) that vision. And always remember to communicate how everything connects with the greater goals of the business.

- 🕒 Create and collaborate with your entire team in one place
- 🕒 Get real time project updates with our Slack integration
- 🕒 Go from lo-fi to hi-fi in a single tool
- 🕒 Import files from Photoshop and Sketch

[Start using it now!](#)