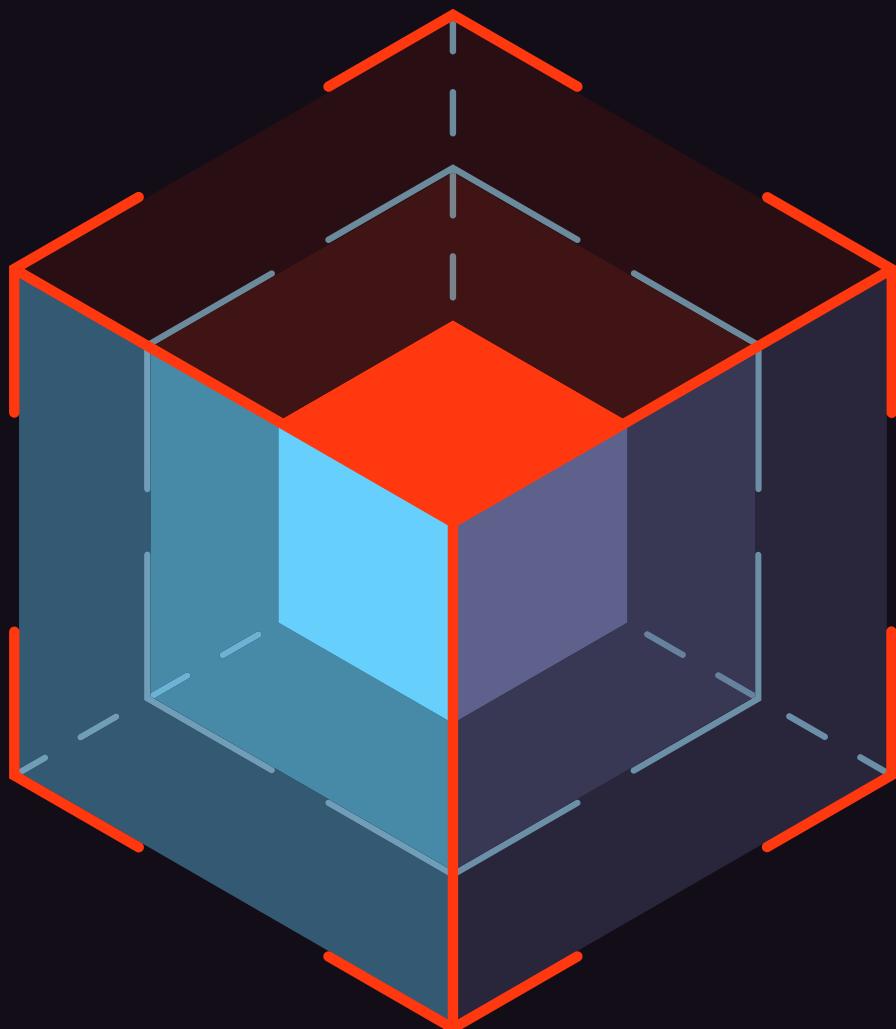


Scaling Design Thinking in the Enterprise

Best Practices From a 5-Year Case Study





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Author



Julie Baher, Sr. UX Director at Illumina

At Illumina, Julie leads a team dedicated to improving human health through design thinking. Previously, Julie led Citrix's CX team for SaaS products. She led design for enterprise products including XenClient, Cloud Platform and App Orchestration. Prior to Citrix, Julie ran the design team for the shared platform of Adobe's Creative Suite and led user research for Photoshop. She has designed everything from websites ([xerox.com](#)) to online education (online MBA program) to training programs (Charles Schwab, National Semiconductor) to computer networks (Onizuka Airforce base, ZiffDavis Labs).

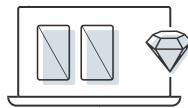
Design Systems in UXPin

UXPin

One platform for consistent design and development.

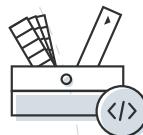


DESIGN SYSTEMS



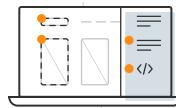
Design Language

Sync Sketch with UXPin for a consistent design language: fonts, colors, icons, assets, and more.



UI Patterns

Scale designs consistently with Symbols and interactive components.



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Documentation syncs everywhere and travels with library elements.

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A Few Quick Words

Now is a great time to be a design leader.

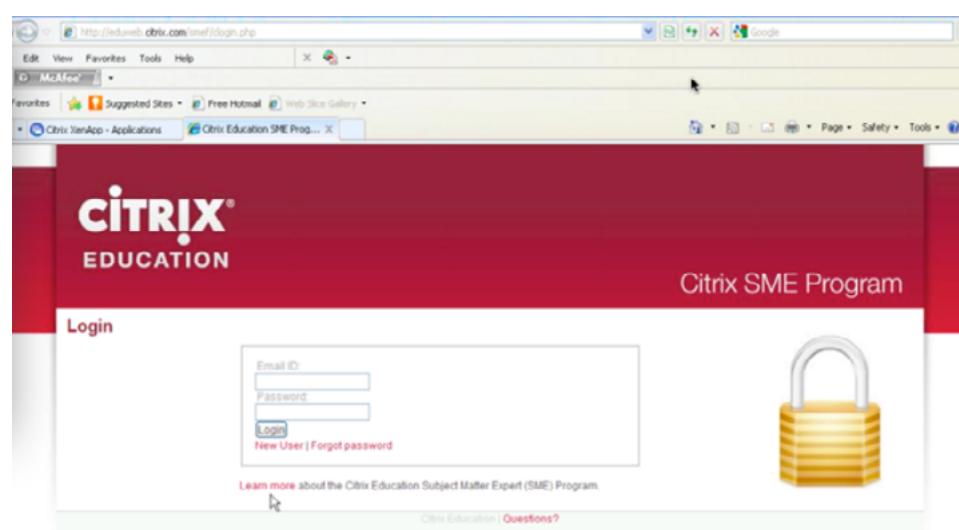
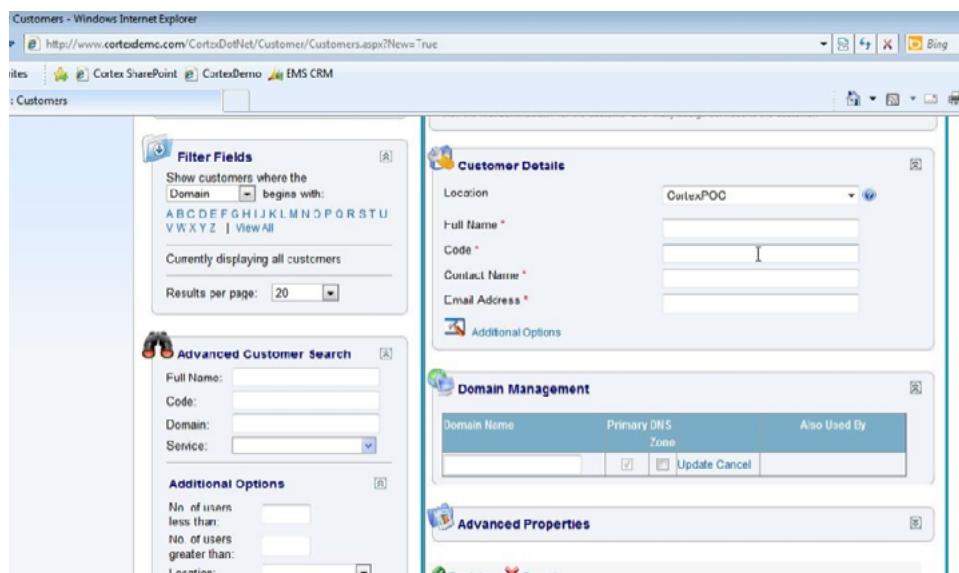
More engineering-driven organizations are realizing that design solves complicated problems, thereby establishing a competitive edge for their products and services.

You might have heard of billion-dollar corporations like [IBM](#), [GE](#), and [3M](#) hiring C-level design leaders along with hundreds to thousands of designers. Of course, besides just hiring design talent, they hope the new wave of thinkers will instill a customer focus within every employee.

During my five years at [Citrix](#) between 2010 to 2015, I was fortunate to gain first-hand experience leading a transformation in product strategy to a customer-centered approach. It began when several senior executives attended the [design thinking bootcamp](#) at Stanford's d-school, returning with a new vision for our product development processes.

I was then tasked with solidifying design thinking as a core business competency across the 8,000-person organization. Quite the challenge, wouldn't you say?

The Before View



Ultimately this work led to a rethinking of how the company innovated and built products.

Through several programs, the customer became the center of our focus, from how we set the product roadmap to how we tuned the existing product set. We challenged ourselves to push beyond the status quo. We used tools from design thinking and [Lean Startup](#)—both of which center on customer engagement and feedback.

This change began in one corner of the organization (championed by the UX team), then grew across the company.

How user-oriented is your organization? What challenges would you face while spreading a user-centered practice beyond your UX team? Where would you start?

In this guide, I'll explain how my team helped build a more innovative culture at Citrix through practical design thinking. I've broken down the process into three main phases that you can scale up or down depending on your organization.

Let's get started!

Julie Baher
Sr. Director of UX at Illumina
(Former Group Director of CX at Citrix)

Design Thinking Beyond Buzzwords

While you practice design thinking every day, outsiders most likely see it as some form of magical thinking. At the very least, it's certainly a buzzword.

To make others care about the practice behind the buzzword, you need to relate it back to the business and show some real examples of its value. Cut through the jargon and describe it as a business process.

First, I'll explain how we boiled down design thinking into a 30-second value proposition, then I'll explain some of my favorite case studies as evidence of its effectiveness.

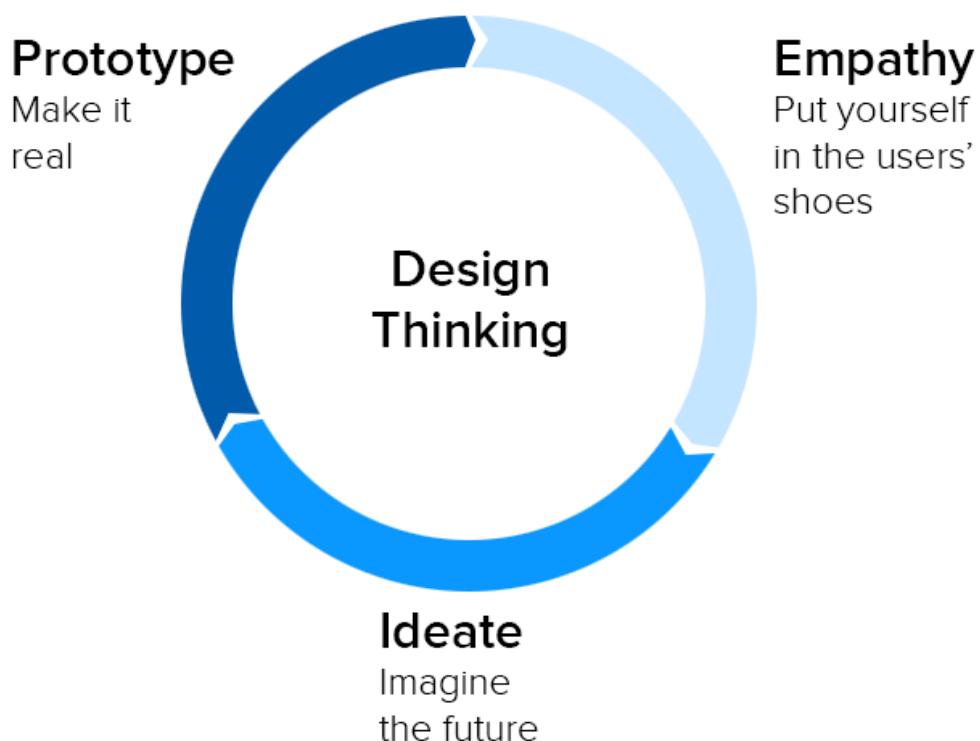
Design Thinking in 30 Seconds

Design thinking might feel convoluted from over-usage, but it's actually a very straightforward concept.

The core tenets are simply

1. focusing first on customer problems,
2. iterating on ideas, and
3. soliciting feedback to focus and refine those ideas.

At Citrix, we boiled down design thinking into key activities within the stages of Empathy, Ideate, and Prototype.



1. Here's how we explained the value of design thinking:

“For people in non-design roles, focus easily drifts away from the customer. They might focus on a schedule or an internal process.

Often, as companies scale, many employees have limited or no contact with the company's customer.

Luckily, through structured activities, we can teach people to re-focus on the problems that matter to customers and improve the bottom line.

Rather than latch onto the first solution, employees can better evaluate a multitude of options before committing resources. They'll be able to better avoid the vicious cycle of incremental effort with minimal customer impact.

As employees evaluate and explore ideas earlier, we'll waste less money on the wrong issues.”

2. And the elevator pitch version:

“Design thinking isn’t a philosophy. It’s a problem-solving strategy employees can learn to improve their business processes. With the right people teaching it, the company will see more profitable and innovative options appear when making decisions that can cost a lot of time and money.”

Design Thinking in Action

In many organizations, UX teams become facilitators and trainers of a design thinking movement. They help employees in other roles learn this new way of approaching problems.

But before you can lead design change, you need to:

- Know what you're pitching and how it benefits the bottom line.
- Understand how design thinking fits into the current system and culture.
- Know where to find crucial points of influence that make or break your efforts—it's very difficult to encourage shifts in process and perspective without a strong fan base.

To show how design thinking can transform products and services, we'll look at a few examples. These stories will help you understand

1. how design thinking impacts the business in a variety of industries and
2. how to craft your change strategy from idea to results.

1. GE Healthcare

Innovation Architect [Doug Deitz](#) transformed the MRI experience for children by creating a new offering at GE Healthcare.

Kids Were Terrified of Getting MRIs. Then One Man Figured Out a Better Way.

By Tom Kelley and David Kelley

   11.5k 43

Photo credit: [Slate](#)

A designer of MRI instruments, he watched a family bring their child in for an MRI. Looking on as the child cried, Doug re-examined his device—but this time from the child’s perspective. Bending down on his knees, he saw the experience in a whole new way.

It was terrifying.

The child’s reaction drove him to reimagine the experience.

Doug worked with a cross-functional team of healthcare providers, patients, and GE designers to transform the MRI design, as well as the testing room, to create a child-centered world where [the MRI became a canoe in a river](#). Not only did this reduce anxiety for the children and family, it saved the hospital medication costs since they sedated far fewer children.

2. Bank of America

Bank of America partnered with IDEO to help their customers save money. Traditionally, that means running a marketing campaign to encourage savings.

“Keep the Change” Account Service for Bank of America

A service innovation to attract and retain bank members

Facing the challenge of enticing people into opening new accounts, Bank of America came to IDEO in search of ethnography-based innovation opportunities. To better understand the desired market—boomerage women with kids—IDEO traveled with members of Bank of America’s innovation team across the United States, conducting observations in Atlanta, Baltimore, and San Francisco. They discovered that many people in both the target audience and the general public would often round up their financial transactions for speed and convenience. In addition, the team found that many moms had difficulty saving what money they had, whether due to a lack of resources or willpower.

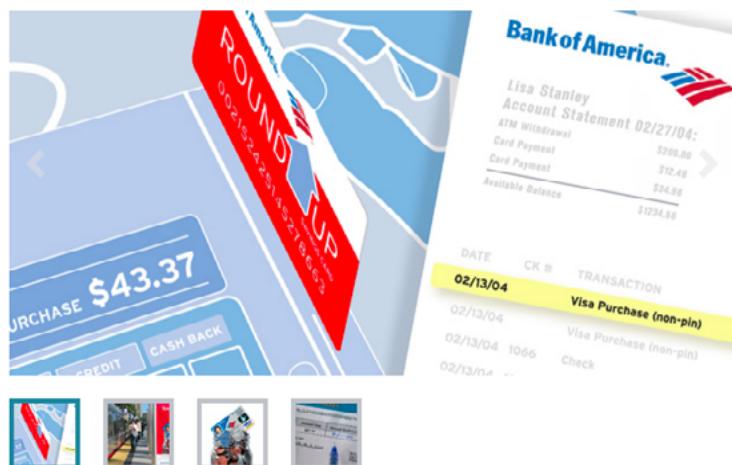


Photo credit: IDEO

Instead, based on consumer observations and interviews, **IDEO designed Keep the Change**—a program that led to the participation of 2.5 million existing customers and the opening of 700,000 new accounts.

Their program made it easy for customers to save money by rounding up purchases made on their debit cards to the nearest dollar and transferring the difference into the customer's' savings account from their checking account.

3. Intuit

At Intuit, a team applied design thinking to **create the Fasal app** to help Indian farmers get the best price for their produce.

Based on their observations and learnings from the farmers, they brainstormed solutions and then created a prototype app. Based on their SMS-based app pilot, they estimated that the new approach to sharing data about produce prices could net the farmers \$250-\$500 annually.

Within the first few months of launch, the app grew to 500,000 users who now earned more than 20% income. With a solid user base, Intuit can now monetize the app through third-party advertising.

Conclusion

With some examples to reference, now the real work starts.

To successfully implement design thinking across your own organization, you must first align with (or devise) a process for execution and collection of results. Next, you'll need to quantify those results.

In the remaining sections, I'll explain straightforward tips based on successful processes at Citrix.

Step 1: Recruit Your Core Supporters

Culture change isn't one-size-fits all, and it only happens with conscious effort and supporters.

I liken this to the adoption of Agile in engineering organizations. Today, we take it for granted that most software teams follow agile processes. The forgotten reality is that it only came about through concerted leadership, training, experimentation, and adaptation.

You need both top-down and bottom-up support to get started. That means obtaining executive buy-in and embedding well-placed influencers in the ranks.

I was fortunate to have a wonderful boss ([Catherine Courage](#)) who attended Stanford's d-school program and was also Citrix's VP of Product Design at the time. She helped identify important key collaborators, funded training and consulting, and was a constant champion.



Long-term progress of design culture at Citrix

Draw up a list of the key leaders and influencers in your organization. Ask yourself, where do you see seeds of innovation popping up? Who is looking to engage more with your customers? These folks are your early adopters.

Our strategy at Citrix was to get a few senior leaders (VP's of our product business units, marketing, finance and IT) on board early. Once they bought in, other leaders started *coming to us*, wanting to learn more and engage their teams.

Pitching to Leadership

Leaders only need to know two things:

1. what design thinking is, and
2. how it meets business goals.

When you approach them, explain everything in layman's terms with plenty of supporting information.

Highlight relatable examples of design thinking's business impact. Then, make the connection between examples from other companies and the challenges facing your organization.

What's on the executives top-of-mind? Did they recently suffer a failed product launch? Are customers complaining about a product or service? Has a new opportunity or market emerged?

You don't need to be the messenger yourself, and it doesn't necessarily need to be in the form of a PowerPoint deck. Of course, that is the cultural currency at many companies, so boil down your story to no more than 8-slides (executives like a short narrative!) and practice your pitch.

- Outline a challenge or opportunity the organization faces in the current quarter.
- Point out the 3 tenets of design thinking, then dive straight into the elevator pitch. Speak to the pains of your audience. For example, a VP of Engineering needs to deliver solutions on-schedule

and within scope. Requirements that change late in the process jeopardize their success. When you validate specifications earlier through prototypes, you minimize the risk of delays and costs.

- Demonstrate how similar companies or industries used design thinking to solve that problem (include numbers to show the results).
- Outline how design thinking applies to your company.
- Pitch a trial pilot project, ideally a 3 month or less project so you can return with the results. Either estimate desired business results (e.g. “increase sales conversion for new customers by 15% without affecting churn”), or emphasize that you’ll speak with all stakeholders to craft clear business goals.
- Ask for executive support for just the pilot.

Know where your organization fits along the [8 stages of UX maturity](#), and adapt your talking points accordingly. As a universal best practice, focus on the quick wins – don’t scare off potential champions by unveiling a grand plan for UX.



If executives still resist your pitch, don't give up just yet. It's normal for people to reject ideas until they've seen evidence of at least a small success.

As Dave Malouf [suggests](#), try breaking down your existing product into segmented units, then shop around a new vision for one unit with any UX allies outside of the design team.

Essentially, run your own small skunkworks project.

Once you build some consensus, try prototyping new ideas and testing with 3-5 users in 30-minute sessions on your own. Hold a quick session with stakeholders where you summarize the usability results and your recommended action plan.

type of food... San Francisco, CA Search 2

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 •

Food
Nightlife
Search

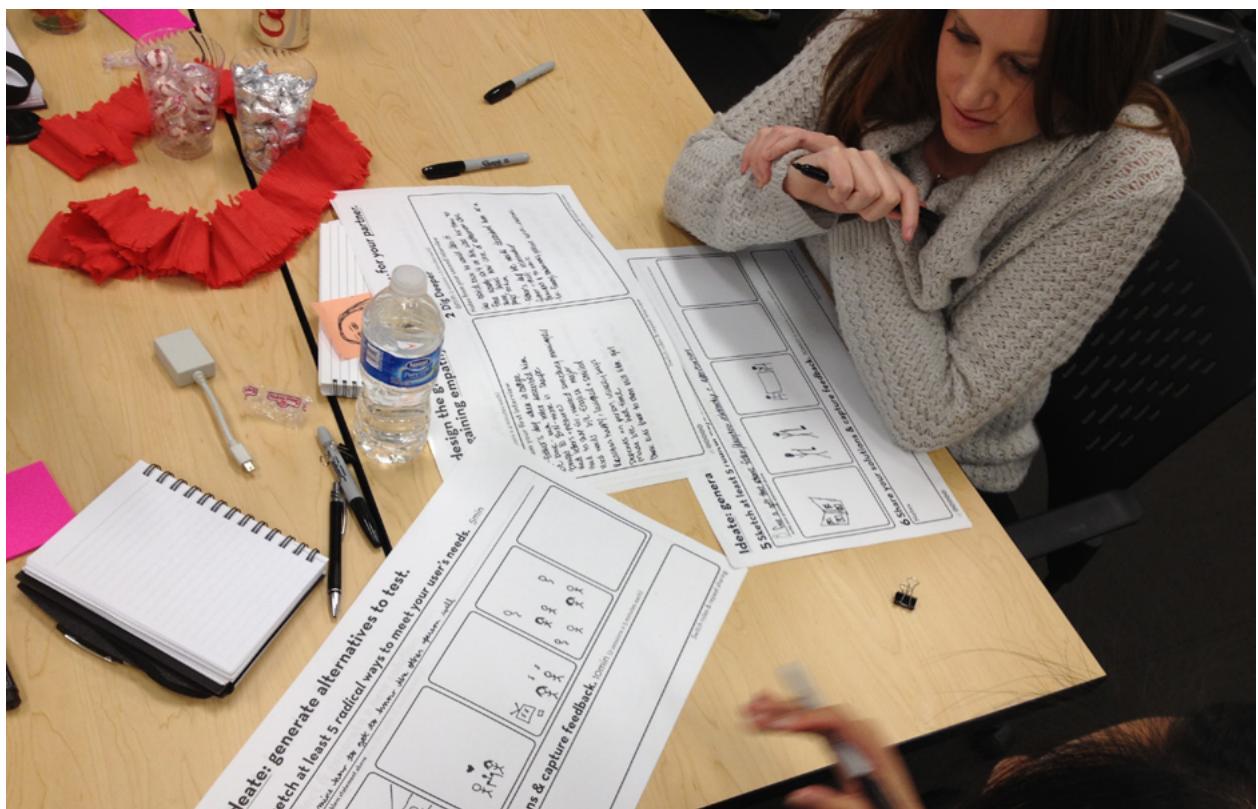
Marcin Treder, CEO of UXPin

Teaching Leadership

Once you get buy-in, it helps to teach leadership some introductory design thinking.

At Citrix, we sent many of our leaders to the Stanford d-school executive bootcamps ([From Insights to Innovation](#) and [Customer Focused Innovation](#)). We also ran custom crafted design thinking introductory workshops with [Lime Design](#). These events connected executives and senior leaders with our purchasers and end-users, giving them direct experience with the tools of design thinking.

They soon realized we hadn't truly been listening to our customers when building our products.



Introductory design thinking workshop we lead at Citrix

Of course, you might lack the budget to hire outside consultants for workshops. Luckily, you can still run a 90-120 minute mini-workshop on your own with 4-8 executive stakeholders. We called it “the taste of design thinking”.

These “taste events” are a variation of the [Stanford Gift Giving exercise](#). The goal is to help participants experience a full design thinking cycle from empathy to prototyping in a short period of time.

What’s key is that these were interactive sessions, not long lectures.

- In brief, participants start in pairs and interview each other about a topic you provide. We usually picked a non-work topic such as designing your partner’s before-work morning routine.
- They then sketch ideas and prototype them. The big unveil is that they test the ideas with their partner.
- For the remaining 30 minutes, do a group debrief to discuss how empathy, prototyping and testing could apply to actual projects at your company.

Following the introductory workshop for our internal IT team, a senior technology director interviewed some new hires to help him create a better employee onboarding experience. Afterwards, he remarked, “I thought we were doing a great job for our employees. But now I see the new hire experience was terrible for some people.”

It was the first time he’d seen the experience through their eyes.

He went on to become our biggest evangelist, and all it took was a half-day workshop, an hour interviewing some new hires, and quickly reflecting on the experience.

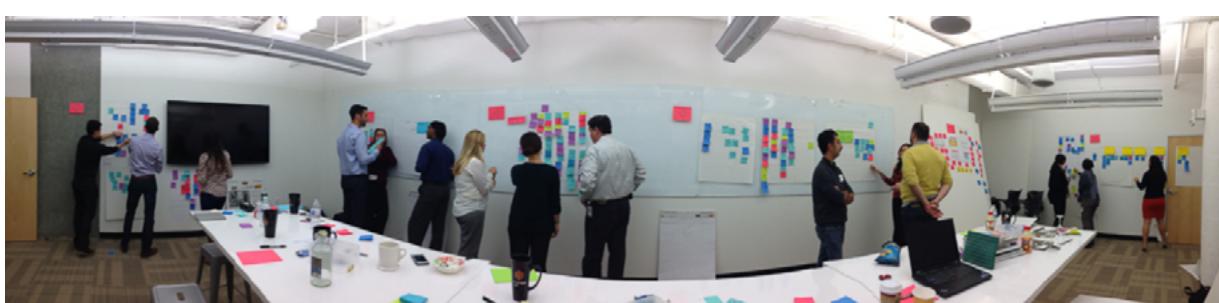
Build Your First Employee Fanbase

Once you have some leaders on board, prioritize the first groups or teams you want to influence. Start small and run a few pilots, learning from your experiences as you scale up. Treat evangelism as a design project – you must be willing to iterate on your approach.

1. Training

First, you'll need to introduce design thinking to employees. The training needs to be tightly coupled with helping them apply it to a real project. Take a learn-by-doing philosophy so that training is hands-on and is immediately applicable to real-world problems.

Use the same “taste of design thinking” workshop to introduce them with minimal investment. Don’t worry—later on, I’ll talk about how to scale it up.



Before you go too far in training everyone, you want to learn how well folks can apply their new techniques to actual projects. So, you'll want to shift gears between training activities and applications of design thinking.

2. Project Work

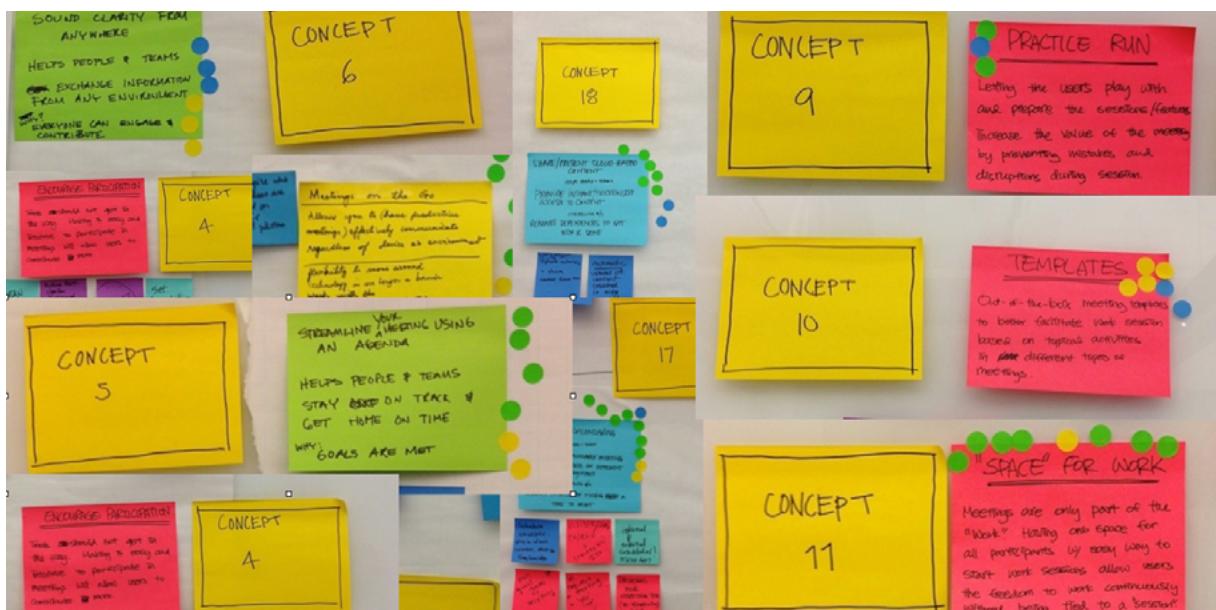
You'll also need a first success story, so you'll need to jump in and do a project.

At Citrix, our first project was working with the Customer Education team. They wanted to improve their existing course offerings. As our first internal customer, we led them through an introductory design thinking class. Over the next few months, we continued to coach and mentor their team as they applied the concepts to redesigning their courses.

In the introductory class, we guided the team through the complete design thinking cycle during the 2-hour “taste of design thinking” workshop. It helps to teach concepts by using a topic unrelated to everyday work, helping people to absorb ideas with an open mind.

Next, segue from general concepts to specific, work-related application. I recommend you pre-plan the scope of the team project. A good starting project allows for creativity in the solution space. It should be something important to the business, but not so broad that you're boiling the ocean.

For our Customer Education team, rather than try to redesign all their training products, we zoomed in on the upcoming release of our **XenDesktop** training course. These training courses teach IT professionals how to install and configure the product on their servers. During the process, we didn't specify the platform of the solution (online, classroom, etc). We purposely left the solution space wide open early on so that the end result emerges via the design process.



When working with your pilot team, create a short project brief before diving in very far. These key questions help guide the discussion towards actionable insights:

1. Why do we think this challenge is worth tackling? Why now?
2. Who are your target users? Who might benefit inside the company?
3. Are there any dependencies on other groups? (Tip: you may want to include a representative from that group in your project team)

4. What constraints will the team face? (technology, timing, budget)
5. How will we measure success? (Tip: encourage specific goals like “Reduce churn by 6% in the first 3 months”)

As our project progressed, we discovered that the Customer Education team found the broad exploratory phase of design thinking unsettling. They were accustomed to detailed schedules, plans, and roadmaps.

Since we didn't know the solution yet, the team held off on activities they normally do at the start of a project, such as scheduling, scoping, and budgeting. As a designer, you probably aren't afraid of a blank canvas to “go broad before going narrow”. But since many people are hesitant, reassure them that everything will eventually come into focus.

To adapt to various ways of working and microcultures, we included more hand-holding in our training materials as well as scaffolded each phase with clear activities and outcomes for the project teams. These materials helped teams cope with the uncertainty and open-ended nature of ideation.



Designers and design leaders need to see themselves as a facilitator for gathering, shaping, and testing input.

Consider holding 1:1 sessions with vocal stakeholders. During design reviews, let them air their thoughts, but if they dive too deep into prescriptive advice, tell them you care so much about their ideas that you want to dedicate focused time to discuss.

Sometimes, you'll find that stakeholders might even reconsider since they realize they need to separate personal opinions from facts. It seems like a paradox, but sometimes being overly open actually helps people better accept dissenting opinions.

Daniel Castro, Design Director at [Sumo Logic](#)

3. Adapt to Microcultures

At Citrix we found micro-cultures across our US and global locations, meaning some teams required more or less guidance to suit their needs.

I like to describe this as doing internal ethnography on your work culture. Similar to how you develop personas, note the dynamics of different teams and locations.

You'll probably start seeing some patterns across teams:

- What does the team value?
- Are they a hierarchical or flat group?
- How do they make decisions? By consensus? By one leader?
- Do they gravitate to structure and rules or do they forge their own path?

- Do they have lots of contact outside the company, or are they insular and inward-focused?

These attributes help you determine which aspects of design thinking will come easy and which require more follow up.

Some teams naturally spend time talking with customers, so you won't need to focus as much on empathy (although, they need to "listen" to customers...so check that they can actually articulate insights about their interactions). More technical teams may possess the skills for prototyping, which means you'll focus more on helping them evaluate their builds against customer needs.

Conclusion

Both teaching and coaching are key to building a design thinking movement. Start with a well scoped project or two and use those to learn about your company as well as hone your approach.

You'll make mistakes, and that's okay. We made our fair share – the experience is a learning process so be open to change.

As you gain momentum, you'll want to move on to think about how to scale up your efforts.

Step 2: Converting the Organization

So how do you go from one team to scaling design thinking across an entire organization?

To spread the word, try a mix of formal and informal activities.

Formal Activities and Events

Leverage any (and all) of the existing internal systems at your company.

Look at your corporate calendar. What upcoming events could you establish a presence, give a quick 15-30 minute talk, or run a 30-minute workshop? When are employees naturally brought together? What are the communication channels at your company (Internal newsletters/Slack/Yammer/etc.)?

Here's a few successful tactics from our work at Citrix:

- Two of our designer/editors wrote brief monthly articles in the company intranet about our design thinking progress and results.
- As we exposed various employees to design thinking across different departments, I often knew who owned the agenda for team meetings and group all-hands. I'd talk to the meeting lead for 10 minutes to give an overview of design thinking, soliciting employees to sign up for training classes. Use your executive pitch deck as a template, then add a few more slides for success stories.
- I worked with our Leadership & Development team to include our “taste of design thinking” workshop in the company’s internal employee course portal (larger companies like Citrix use a Learning Management System, but posters around the office work as well). You can just as easily upload the workshop guidelines into a cloud folder for employee reference and new hire onboarding.
- We also held the “taste of design thinking” sessions at our annual sales kickoff events, our customer service annual meeting, and at Citrix customer conferences (where we invited actual customers to participate and learn).

When it comes to formal training programs, if you have budget, it's also great to hire a consultancy to help create training.

For our initial workshops we partnered with the [Lime Design](#) consultancy. Other options are the [Stanford d-School](#) or LUMA Institute (UXPin customer Autodesk actually uses LUMA for all their employ-

ees). The cost was not ongoing—after our first few workshops, we knew enough to run our own workshops.

IT Personas

Job description	<p>Billy IT System Architect</p> <ul style="list-style-type: none"> Design and develop enterprise-wide architecture solution that aligns with business needs and strategy Work with project teams, business partners, and vendors to identify solutions that align with the new architectural strategy and streamline the existing architecture Define baselines and key success metrics for technology solutions Provide design guidance and documentation to ensure successful implementation and rollout of new technologies 	<p>Jonathan Server Operations</p> <ul style="list-style-type: none"> Deploy and implement application servers for Citrix and non-Citrix applications; create procedures for server and application maintenance (reboots, server patching, etc.) Monitor and maintain application servers (patching, application updates, guidelines for application monitoring metrics, etc.) Troubleshoot escalated issues (server side issues, final level of support for end-user issues, maintain SLAs) Work with third party vendors to resolve issues 	<p>Dora Desktop Operations</p> <ul style="list-style-type: none"> Create corporate and departmental desktop images that will be used across the company Develop image rollout guidelines (lab, QA, production, etc.) Create plan to deliver desktops and applications to business units Lead image rollouts, patches, and rollbacks 	<p>Tony Regional IT Support</p> <ul style="list-style-type: none"> Troubleshoot and resolve escalated tickets for software, hardware, network, and telecom issues Follow procedures for known issues and requests Provide support (on-site and off-site) for two office locations 	<p>Walter IT Service Desk</p> <ul style="list-style-type: none"> First line of defense for IT support Answers phones and email queues Follows triage guidelines and procedures to troubleshoot common issues Documents and tracks user issues and resolutions
Goals	<ul style="list-style-type: none"> Drive the organization toward scalable technologies that meet end-user and business needs Streamline environment to improve performance, scalability, cost savings, and time Be seen as industry expert 	<ul style="list-style-type: none"> Streamline IT process by automating operational tasks Understand strategic improvements Become application/infrastructure architect 	<ul style="list-style-type: none"> Continue to improve knowledge of MSFT technologies Meet SLA and OLA commitments Be seen as Windows desktop expert Advance to strategic role similar to architect 	<ul style="list-style-type: none"> Learn and grow by doing more challenging and dynamic work Have a job that allows him to try out different technologies Learn new applications and skills; improve marketability in other jobs 	<ul style="list-style-type: none"> Be seen as a dedicated employee Ensure job security Learn new applications and skills that will make him marketable in other jobs

IT Buyer's Personas at Citrix

High-Level Journey Maps



High-level journey map for Citrix end-users

High/Lows and Opportunities Journey Map



Detailed journey map for Citrix end-users.

Even if you don't have budget for an external firm, you'll find plenty of resources and toolkits online.

Here are some of my favorites for building up your design facilitator toolkit:

- [Stanford d-School Methods](#)
- [Design Thinking for Educators Toolkit](#)
- [Extreme by Design Resources](#)
- [Ideo's Design Thinking Resources](#)
- [Coursera's "Design Thinking for Innovation" online course](#)

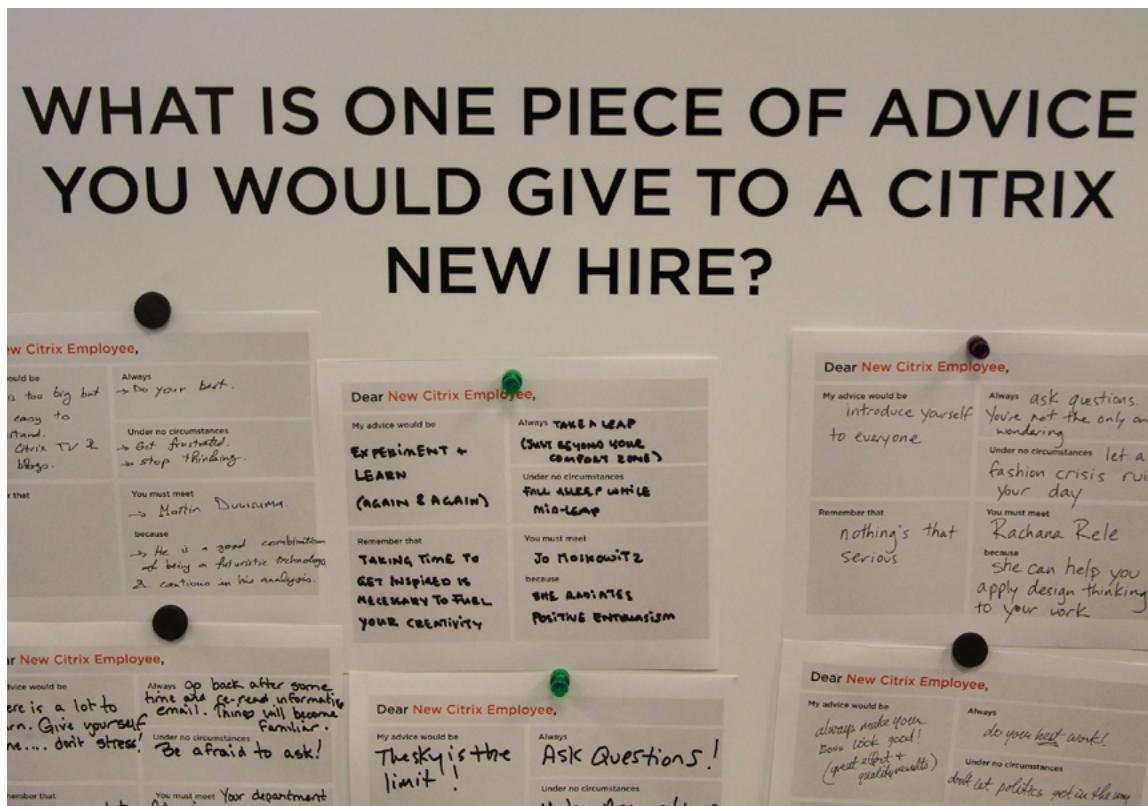
Informal Activities

In addition to the formalized training experiences, we developed some unique informal learning events.

One of my favorite ideas was leveraging lunch time at our cafeterias for a [pop-up design studio](#). It's always a challenge to find time for employees to do training (we all have day jobs, right?). So lunch is the perfect time to sneak in some learning. The tactic works for office spaces of any size.



- We created a series of short activities to engage employees in the key concepts. To tie them to an immediate project (instead of it just being a “blue-sky design activity”), we engaged our HR Corporate Citizenship team to deliver them insights for onboarding and corporate responsibility projects.



- Led by one of my colleagues, we created a pop-up design studio in the cafeteria in our US and UK offices. With some portable white boards and simple materials, our pop-up studio came to life.



- As employees entered the café, they walked through our interactive exercises. For example, employees at one station shared 6-word stories of how they contribute to the community while also reading about how others volunteered. At another, they brainstormed how Citrix could help with social causes (at the end, we rewarded participation with cupcakes – food always helps!).

The participants could visit as many stations as they wanted and the whole experience required less than 20 minutes. Not only did the event introduce employees to some of the key mindsets of design thinking, we delivered quick value to a business group (HR).

Over 150 people participated across our Santa Clara, Fort Lauderdale and UK offices during the three pop-ups we held. Of course, if the pop-up session isn't feasible, you can try simple lunch-and-learns.

Once a week, hold a 30-minute session during lunch with one department to explain the practical value of design thinking. Use your pitch deck as a template, modifying the benefits to suit the department. Mention any inspiring products (and any relevant metrics), then ask attendees about products they enjoy and why. If you ran any side prototyping experiments, show the before and after results in the session.

Commit to a Plan and Train Other Trainers

As you teach more people about design thinking, you need a plan to scale your efforts.

Set goals for how many employees and which employee groups you want to reach each year. Which offices? What roles? Where can you start to show the greatest impact the quickest? These questions should guide your roadmap toward real business results.

At Citrix, we aimed to train around 50 employees in the first year and then scaled up to 3,000 in the second year. So how did we grow so quickly? So far, I've only shared examples of the work that my small team drove.

To expand the effort and grow our cadre of evangelists, we created a train-the-trainer program.



As we worked across the company, we quickly identified other passionate employees who were natural evangelists of design thinking. We added an apprentice model so they could progress from being participants in a workshop to coaching a team and then eventually leading training.

For those who wanted to become trainers, we asked that they help with one workshop a quarter (a 2-3 day commitment). Initially, there was no incentive for employees to participate. We wanted those who were genuinely motivated. Several years into our design thinking movement, our HR department added “design-driven” as one of the guiding principles for employees (eventually becoming part of their performance evaluations).

Over 3 years, we added 15 more volunteer trainers to our network.

We offered specialized courses for this select group on how to design and facilitate workshops. If budget allows, I highly recommend [Thiagi's Interactive Training workshop](#).

If you lack the budget, the following free resources are incredibly practical:

- [Good Kickoff Meetings](#)
- [How to Run and Plan the Perfect UX Workshop](#)
- [Facilitating Great Design](#)
- [Facilitating Collaborative Design Workshops: A Step by Step Guide](#)
- [The Design Workshop: Bringing It All Together](#)

Step 3: Following Through With Lean Startup

Design thinking helps everyone focus on the right problem to solve. To then teach others to create the right solution, it helps to borrow a few tactics from [Lean Startup](#).

Lean Startup provides a framework for presenting an idea alongside a business model, getting market feedback and continuing to refine, or pivot entirely.

Both design thinking and Lean Startup help define your offering.



Design thinking starts from user empathy, arrives at several ideas, then ends in a prototype. If your idea is a digital product, you might create prototypes with your team in a collaborative platform like [UXPin](#). If it's a physical product, you might create a prototype with 3D printing or manufacturing-on-demand. Or, if it's a service, you might run a limited pilot.

To quickly understand the overlap between Lean Startup and design thinking, the Nordstrom Innovation Lab created a [useful diagram](#) showing how the two processes fit together.

Once you've arrived at that prototype, Lean Startup starts to work in parallel with design thinking. Lean Startup helps answer the question of how you'll turn the product idea into a business for the target market. Both practices share the same methods of testing, iterating and refining.

Xen Desktop: Uncovering the Right Problem

To continue with the example from Citrix:

- As we worked with the Education team, they created several new ideas to deliver better training. Once they built a few prototypes, we ran several testing sessions with customers. This first stage lasted around 6 weeks.
- We gave the team specific assignments for each part of design thinking. For example, team members (from multiple backgrounds)

were assigned to a certain number of customer interviews. As we ideated on the customer input, the team was assigned to create simple prototypes of new concepts. We scheduled regular meetings to consolidate learnings as we went along.

- Once the concept was refined, it was moved into testing where operations team members could join in and help launch our pilot. This took several months, as there was quite a lot of work to develop a course (your mileage may vary depending on what you build).
- Finally, we ran pilots of the course in our training center where 8-12 customers attended in-person.

So, what were the results?

We launched a new course for [Xen Desktop](#) that helped them better understand their options first. In the past, training was too product-focused, walking users through features screen-by-screen. This was akin to following a very strict recipe assuming the users already knew what they were cooking.

From our customer empathy work, we learned that IT professionals first needed greater context before even thinking about deploying the product. They needed to weigh different deployment options and assess their current infrastructure to customize the deployment approach.

The design thinking work led to a new set of principles for Xen Desktop courses:

- Offer a “Tell me, Show me, Let me” experience with easily digestible pieces.
- Quickly establish the instructor's credibility.
- Rely less on lecture, and more on discussion and hands-on labs.
- Provide resources students can take home.
- Offer reinforcement exercises (same types of exercises, but with less hand holding to demonstrate proficiency).
- Create a community between students and instructors.
- Offer the opportunity to "Ask an Expert" (either product team member, someone recognized in the field or who previously took the class).

Based on those insights, the Citrix Education Team reworked the content to teach this upfront analysis. The new courses were now only 20% lecture and 80% interactive exercises. They added more hands-on opportunities for students to practice their skills. Additionally, they created “learning to-go” which were take home materials for customers to use back in the office. They also launched a community for the trainees.

The results showed in NPS scores increasing by roughly 30%.

GoTo Meeting: Testing the Freemium Hypothesis

In the previous example, the business model remain unchanged.

For GoTo Meeting, however, we prototyped several experimental products. One was a freemium cloud version of GoTo Meeting. We launched an MVP, then fine-tuned KPIs for many months. During that time, we ran different experiments to test if we could increase paid conversions to the full offering. We tracked and optimized for:

- Direct signups and freemium app usage
- Frequency of freemium app use
- Upgrades to paid plans

The new freemium model proved successful enough that it's now [part of the core product line](#).

Making the Process Work for You

Here's how to make design thinking and Lean Startup work for your established organization:

- **Start small** – Corporations are naturally immune to change. Don't be afraid to compromise early on. The Xen Desktop project was a bite-sized pilot where we involved just a handful of employees and customers. However, we adjusted the timeline for the realities of the enterprise, which is why it required months rather than weeks to improve the experience.

- **Immediately unpack assumptions** – The wrong assumptions will cost millions. If you do nothing else, plan a 30-minute session at the beginning to reveal knowledge gaps. The activity helps prime people for experimentation. Simply ask: “For our ideas to succeed, what must be true?”. Oftentimes, people aren’t even aware of assumptions until they see them tallied in front of them.
- **Not all prototypes are created equal** – Stakeholders might not understand that prototypes don’t always reflect intended builds. Since you’ll be testing several prototypes with the Lean Startup method, explain to stakeholders the context of each experiment. You may kill a lo-fi prototype after testing, so explain that it’s only meant for learning. Since a later mid-fi or hi-fi prototype will probably be implemented, mention that they represent viable decisions.
- **Clearly explain your experiments to your manager** – In a corporate environment, it’s almost a taboo to admit that you’ll fail. Set realistic expectations upfront with your manager by explaining the intended timelines, costs, and desired learnings of each experiment. In every subsequent 1:1, communicate specific insights from user interviews or usability tests (and how they helped invalidate potentially expensive ideas).



I'm a big fan, not just of the Lean and Agile philosophy, but also the related discipline of [Extreme Programming](#) which includes

things like test-driven development, pair programming, and continuous deployment.

The key is a hypothesis-driven process: "If we make this change, we predict it will have this effect. Now let's test to see if we were right or wrong."

You want to design a small complete thing (not an under-designed thing) as a quick experiment. You can then use Agile processes to break down that complete thing into bite-sized tasks for engineers.

*Laura Klein, Principal at [Users Know](#)
& Author of [Lean UX for Startups](#)*

Conclusion

Whereas UX testing focuses on improving the design, Lean Startup tests not only the product but the business model and market fit.

So while the product might be very usable, you might find that the original target audience just isn't interested. You'll need to either (a) change your prototype or (b) change your audience.

Similarly, you can try attaching different business models (subscription, license, freemium, etc...) to your prototype to see which resonates with your audience.

An easy way to do this is prototyping the website that goes along with your concept. In 30-minute to 1-hour sessions, encourage users to think aloud as they explore the marketing content, business model and any existing visuals for your concept. Triangulate the feedback against your user interview learnings – then you'll have input on both your idea and business model.

Ongoing: Measuring Success

As you start the pilot project, you'll need to measure success for spreading design thinking and its impact on projects.

Circulate the initial goals with all the stakeholders, then update them periodically until the project concludes.

Measuring Design Thinking Outreach

To measure the outreach of our design thinking effort, we tracked:

- Number of employees trained.
- Number of locations/offices reached.
- Total number of instructional hours a year.
- Number of trainers/evangelists across the company.
- Number of ideas generated.
- Number of experiments run.

Measuring the Bottom Line of Design Thinking

To measure the bottom-line impact, we examined a variety of project-level metrics:

- Money saved by the organization as a result of productivity increase.
- Changes in NPS scores.
- Changes in call support volumes.

You can also use other measures such as sales, product reviews, or new markets served over a specific period if time (30, 60, 90 days).

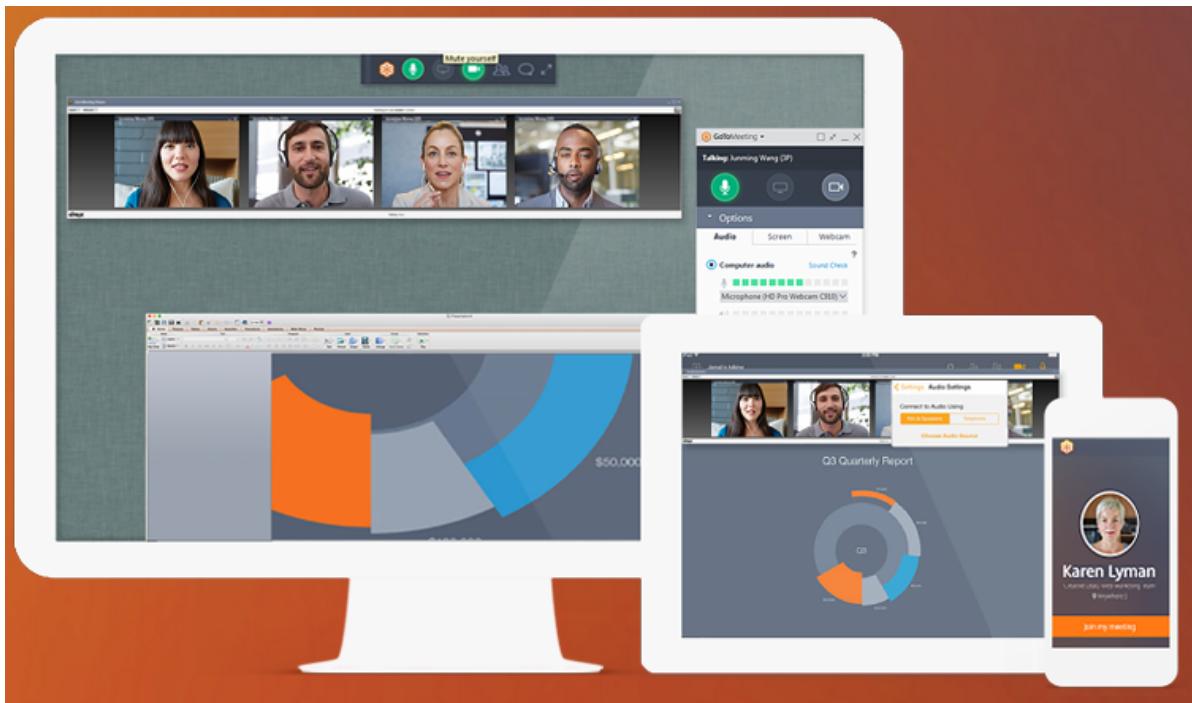
For the Xen Desktop project, we planned to track customer satisfaction with the new courses, their ability to be self-sufficient with their products (support calls volume) and sales of training courses. We hit all these goals (especially the 30% increase in NPS scores).

In another project with our Legal team where we redesigned the experience of compliance training, we estimated that the new approach (both a process and product solution) saved the company several million dollars per year in employee time.

You might save time, save money, or reduce the number of customer complaints or service calls. Every business cares about those metrics.

In another high-profile project (GoTo Meeting redesign), we used before/after measures of Net Promoter Score and decrease in call

support volume to show improvements (10 points, and 66% decrease, respectively).



Circulating the Results

As you work with teams on their projects, or even if they run the projects themselves, I recommend you track the benefits to the company. Celebrate your wins and publish them around the office.

At the conclusion of every project, we wrote a brief article for our intranet outlining the success metrics and highlighting employee efforts.

Also, with the project lead with whom we partnered, we presented the results to their executive leadership (usually in a 1-hour meet-

ing). This let us craft a memorable narrative, but also helped boost the project lead in front of their bosses. Leadership saw how the lead quickly applied new skills to improve an actual business project, and we deepened our advocacy with the lead.

If executive leadership can't spare the time for a one-hour "retro" meeting, a simple email works just as well. Show the designer as the facilitator, and the project lead as the hero:

- Summarize the overall process (overall timeline and key activities).
- Bullet the challenges and how the project lead used key activities to reveal insights.
- Bullet out the business results.
- End the email with any specific suggestions for the leader's team processes.

In doing so, the designer looks more like a business consultant, while the project lead looks like an even more valuable team asset. The more project leads and leaders you involve, the more the process sells itself.

Final Words

Growing design thinking from its roots in UX to a company's core competency is a journey. There's no right or wrong path.

As you set out, adapt your tools and approach to fit your company's unique culture and UX maturity.

Track success and present ROI to the people who matter. Along the way, integrate design thinking with other key approaches, such as Lean Startup, to ensure successful follow-through.

And, when all else fails, trust the process. Use the tools of customer empathy to learn about your own organization. Test and iterate your design thinking rollout plan. Keep learning from your failures, and don't forget to celebrate your successes.

To see how SumoLogic used a design platform to scale their UX process, check out the case study in the next section.

Enterprise UX Process Case Study

Speeding Up Design Reviews By 300%

THE CHALLENGE

Based in the Bay Area with 250+ employees and \$161 million in venture capital funding, [Sumo Logic](#) serves some of the top enterprises in the world. The company's analytics platform visualizes more than 100 petabytes of data per day, helping businesses harness the power of machine data to streamline operations.



In 2015, Sumo Logic hired their first UX team comprised of design leaders, interaction designers, visual designers, and UX architects.

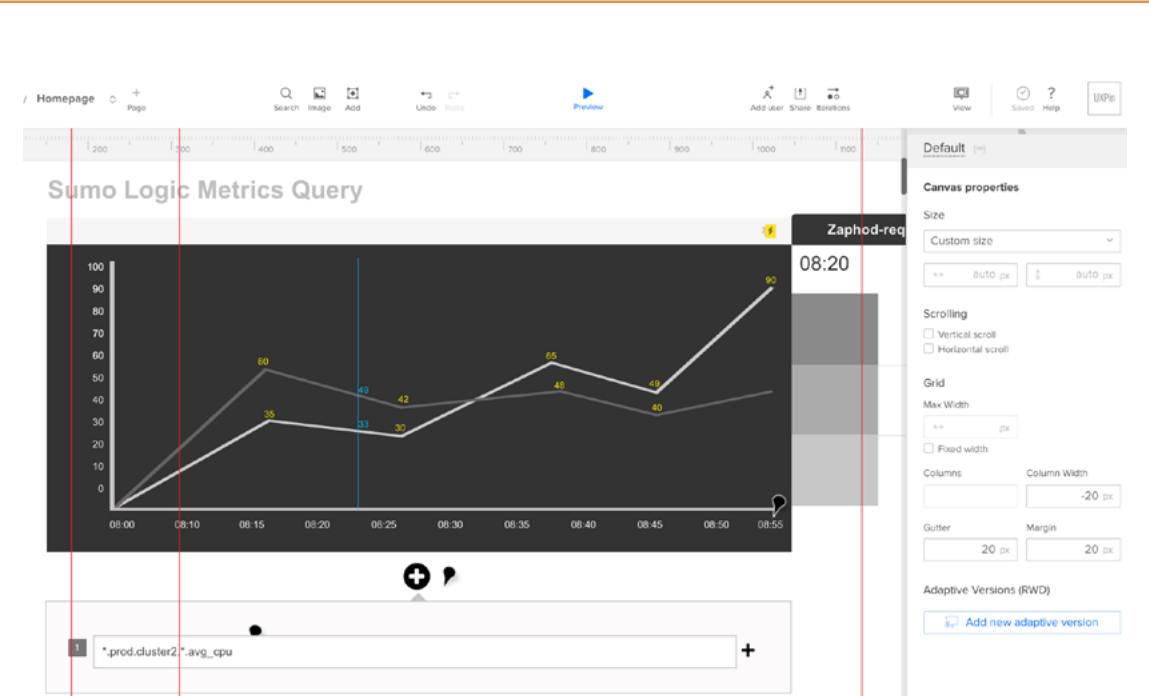
The company had been using Axure for wireframing but Design Director Daniel Castro quickly found that the solution did not allow for easy design modification and did not encourage collaboration.

Tired of sharing PDFs back and forth, the company needed a collaborative UX platform that could scale along with their teams and processes.

THE SOLUTION

For the first six months, Design Director Daniel Castro and his team spent much of their time holding happy hours and offering show-and-tells of great UX design.

In a culture already used to collaborative tools such as [Slack](#), the slow process of emailing thoughts on static designs was stifling. Castro had begun using [UXPin](#) at his previous job, and knew it would offer his Sumo Logic team the collaboration tools they needed.



Sumo Logic prototype created in UXPin for their Unified Logs Metrics product



“We are constantly collaborating with engineering and product managers and it used to take a significant amount of time to work together going back and forth,” Castro said. “UXPin allows us to easily show the flow and main components of our projects. We can share a link and everyone can communicate with our key stakeholders, expanding on each other’s comments and allowing us to manage feedback contextually without redundancy. It’s like a visual version of our thought process. We can even make comments on a pixel level. This has made our review process three times as fast.”

“UXPin has played a vital role in creating a design-oriented culture at Sumo Logic,” Castro added. “The team is great to work with, and I’m excited to see what we can do next.”

THE RESULTS

- Design modification is **quick and simple** with UXPin, instead of the limiting modifications possible with Axure wireframing.
- Design reviews are **three times as fast and now contextual** using UXPin to collaborate instead of emailing static PDFs.
- UXPin is “like gold” when trying to get approval from stakeholders on projects, **halving the effort** needed to communicate with stakeholders.

Want UXPin to help your team? Start a [free trial now](#).

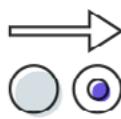
The Full-Stack UX Platform

Your entire UX process in one place



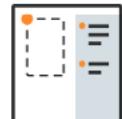
Design:

Create lifelike prototypes quickly with Photoshop and Sketch integration.



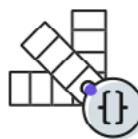
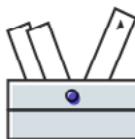
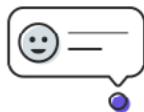
Iterate:

Built-in version control improves efficiency and eliminates confusion.



Document:

Cleanly annotate your designs. Insert custom code snippets that travel with elements.



Collaborate:

Get feedback and co-design on any project anywhere.

Scale:

Automate consistency and documentation with design systems (syncs with Sketch).

Implement:

Auto-generate style guides, assets, and specs for developers.

[Try UXPin now](#)