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Design sprints

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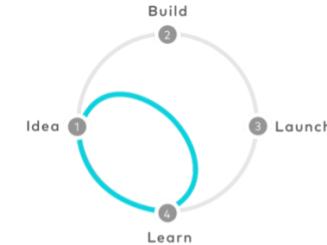
What is design sprint?

It is a **five-day process** for answering critical business questions through design, prototyping and testing ideas with customers.



Design sprint

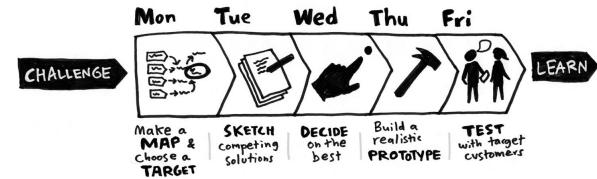
- Working together in a sprint, you can shortcut the endless-debate cycle and compress months of time into a single week.
- You'll get clear data from a realistic prototype instead of waiting to launch a minimal product to understand if an idea is any good.



Why?



- ➊ Focus on client first without technical limitations
- ➋ Focus on most important goals and move faster
- ➌ Design exercise is generative rather than evaluative



Source: <https://www.thesprintbook.com/the-design-sprint>

Why design sprint doesn't work?

Reasons why design sprint in its **traditional form** might not work:

- 1 **Time** - *It is tough to get time from all key stakeholders for 5 full days*
- 2 **Focus** - *Solutioning on UX level without diverting attention to technical details might not be welcomed, especially during discovery phase of project*
- 3 **Virtual** - *Virtual sessions make it tough for participants to not be distracted.*

What can you do?

You can still run design sprints by splitting the sessions into individual exercises that makes sense for your team.

1 Time

- Schedule individual sessions for each exercise.
- Leverage working alone or with smaller group for certain exercises.
- Ask participants to prepare ahead, when possible.

2 Focus

- Set expectations with team on the goal for each exercise.
- If team diverts to deeper technical discussions, make a note, park the conversation for another session and bring them back to the topic on hand.

3 Virtual

- Create a virtual board equivalent to whiteboards and give access to all participants
- Encourage participants to keep camera on for the session
- Make use of MIRO boards, virtual sticky notes, virtual timers, etc. to make the session more interactive

Design sprint - Choices pre-enrolment

A case study

Team challenges

Before design sprints were adapted, team faced several challenges.

- UX team was not involved as part of readiness sessions, forcing us to catch-up after project is onboarded.
- Requirements did not get translated properly to the UX team.
- Team lacked common understanding of project goals & objectives.
- Designs are adjusted around technical requirements as opposed to user requirements due to catching up late in the process.
- Lack of lead time for proper design discovery and user testing resulted in additional design iterations.
- Tougher to identify and eliminate sub-par designs sooner due to time constraints.



Solution



Getting involved

- We asked questions that team might have already discussed during ideation/readiness phase.
- We emphasized the importance of UX team being part of stakeholder refinement sessions during readiness.
- We highlighted that the time spent now will eliminate the need for separate UX requirement gathering sessions later.



Action plan

- UX focused conversations were scheduled before technical requirement gathering sessions.
- We added value by having concept sketches to better guide technical discussions.
- We highlighted the value of having a standard design process to guide concept sketching.
- Agreement received from the team on the purpose of design sprint, required participants and time commitment required.



Design sprinting

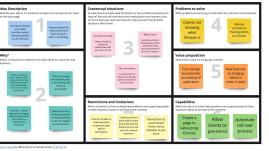
- Team met for one hour every Monday to focus on building the pre-enrolment requirements and features
- Project MIRO board was set up and team was encouraged to add all ideas without waiting until the meeting (Team brain dump)
- Agenda for each session is decided 3 days prior and team was asked to complete pre-work before the session, when required.

Result

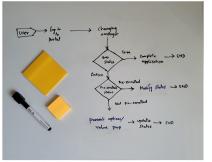
Design	Pros	Cons
	<p>Users find the flow easy to navigate</p> <p>How easy is the app 4/5 - 3 5/5 - 2</p> <p>How helpful is the 3/5 - 2 4/5 - 2 5/5 - 2</p> <p>Review</p> <p>Review the funds selected for each of your products based on your current investments.</p> <p>The actual dollar amount of your transfer request will fluctuate and will be recalculated during processing.</p> <p>LIRA RSP TFSA</p>	<p>Users are confused about DCPP - how much is locked vs unlocked.</p> <p>Users would want to know definitions for jargons like LIRA, RRSP</p> <p>Page is overwhelming.</p> <p>Step 2 of 8</p> <p>Your locked-in retirement accounts</p> <p>Locked-In Retirement Account (LIRA)</p> <p>Grow your savings until you're ready to retire.</p> <p>Own. Not the disability 3 times to go were quite hard to</p> <p>fund and matched</p> <p>Defined Contribution Pension Plan \$10,225.60*</p> <p>Note: Some or all of this balance may be locked in.</p> <p>How easy is the app 4/5 - 2 5/5 - 3</p> <p>How helpful is the 4/5 - 3 5/5 - 2</p> <p>We found matching funds for all your current investments.</p> <p>I don't want to transfer this product now</p>
	<p>Pros intuitively click section</p> <p>Users were able to quickly find the workplace products category</p> <p>Users found the tabs useful and user friendly</p> <p>How easy is the app 4/5 - 2 5/5 - 3</p> <p>How helpful is the 4/5 - 3 5/5 - 2</p>	<p>Products below from your workplace plan are locked in and will form your Locked In Retirement Account (LIRA).</p> <p>Defined Contribution Pension Plan \$10,225.60*</p> <p>* This balance may be split between LIRA and RRSP.</p> <p>All funds have a match in Choices.</p> <p>View fund details</p> <p>I don't want to transfer this product now</p>

Before design sprints:

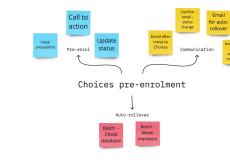
- 11 design iterations and 8 user tests
- Decisions documented in multiple places leading to information loss
- Weeks spent on re-design



Problem Statement / Risks / Constraints



User journey



Feature map



One-click signup



Personalization



1. One-click signup
2. One line benefits

Layout

After design sprints:

- 2 design iterations and 1 user test (in progress)
- All decisions are documented in MIRO until user stories are created in JIRA
- Shared understanding of project goals

Practicing design sprint - 1

Understanding the problem



Life's brighter under the sun

Understanding the problem

First step in any successful project is to slow down, share what you know, understand the problem and prioritize before jumping into solution mode.

Key exercises

- ➊ Define the problem statement (1 hr)
- ➋ Define long term and short term goals (1 hr)
- ➌ Document risks, assumptions, questions (pre-work before session, review time – 0.5 hr)
- ➍ Draw a user journey map and pick a target to focus (1hr)

Problem statement:

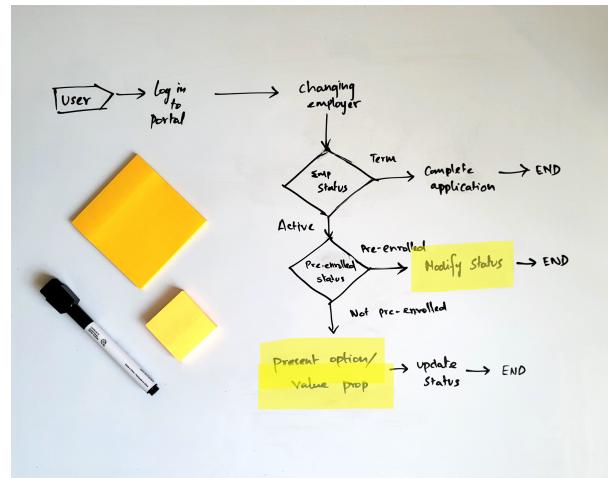
Sun Life's reactive approach to engage with clients after they terminate is untimely and costly.

Goals:

Members pre-enrolled to Choices before termination. Cost reduction by automating the rollover process.

Questions:

1. Can member select funds during pre-enrolment?
2. How will products added after pre-enrolling be handled?



Source: https://miro.com/app/board/o9J_lAIMRog=/

Practicing design sprint - 2

Sketch the solutions



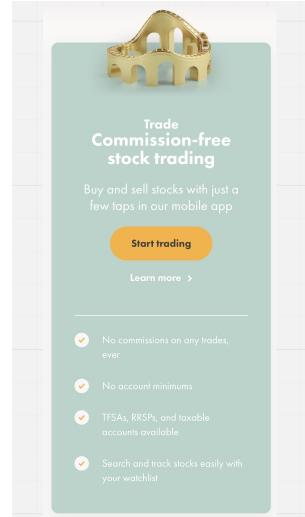
Life's brighter under the sun

Sketch the solutions

- This is an important step for our team in making sure all team members felt valued and heard in the design process.
- By sketching all the possible solutions upfront, it was easy to identify and eliminate sub-par designs right away.
- Any kind of design from wireframes, paper prototypes to competitive application screenshots were added and reviewed.

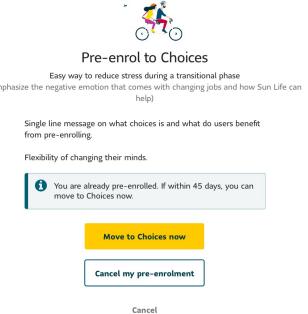
Key exercises

- Ⓐ Drawing inspirations from other products (pre-work before session, review time - 0.5 hr)
- Ⓑ Lightning demos – 2 minutes per design to explain what they like from the competitive product (0.5 hr)
- Ⓒ Solution sketching – all members of team are encouraged to draw the ideal solution for problem identified (pre-work before session)



Big idea:

- No form fields
- One click sign up
- Simple and clean presentation of benefits



Why Choices?

- Ⓐ Different plan, same experience, same/similar funds
- Ⓑ Personalized ongoing guidance from our licensed consultants
- Ⓒ Competitive fees

Why pre-enrol?

- Ⓐ Foolproof way to reduce stress
- Ⓑ Reminder emails during transition if you want to update investments
- Ⓒ Competitive fees

Practicing design sprint - 3

Select desired solution



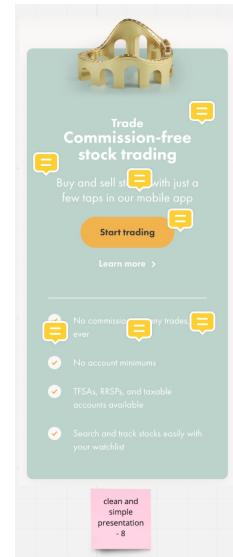
Life's brighter under the sun

Select desired solution

- This is the area where the team was struggling before design sprints were introduced as part of design process.
- We went back and reviewed the goals and assumptions again, then proceeded with voting for a solution that satisfies the requirements.
- The voting should be unbiased, hence everyone was asked to add their designs to the board without their name, no explanation of design was asked, everyone voted silently.

Key exercises

- ✓ Heat maps – All sketched solutions are placed on the board and team is asked to vote silently on features they like (0.5 hr)
- ✓ Speed critique – discuss solutions that received more votes, 3 minutes per feature. Categorize features as must have vs nice-to-have as you go. (0.5 hr)
- ✓ Straw poll – Ask each participant to vote on one desired layout. If there are discrepancies, the decider makes the final call (15 minutes).

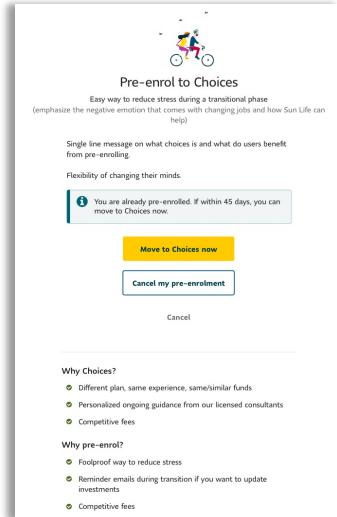


Must have:

- No form fields
- One click sign up
- Simple and clean presentation of benefits

Nice to have:

- Lighter tone of language
- Present GRS as trial for Choices
- Additional entry points during MAX review



Practicing design sprint - 4

Build and test



Life's brighter under the sun

Build and test

- This exercise can be done individually or with a smaller group (UX architect, UX writer)
- We built the prototype based on the discussions, reviewed the designs with product owner, business consultants and development lead before testing it with end users.
- Testing is scheduled in usertesting.com to gather insights and validate assumptions made earlier in the process.(In progress)

Key exercises

- ✓ User test – One solution will be tested with 5 users in usertesting.com (0.5 hr/participant)
- ✓ Analysis – Feedback will be collected and analyzed for emerging patterns and gap in requirements. (2.5 hrs)
- ✓ Reporting– Feedback will be documented along with few recordings to show the expectations vs results. Further adjustments will be proposed and worked on. (2 hrs).

Learnings

Key takeaways from design sprint:

- Everyone in the team enjoyed going through the process.
- Stakeholders are open to the required time commitment as long as same exercises done as part of refinement sessions are not repeated.
- Team felt included and felt their opinions on designs were heard.
- Team felt the experiment was thought provoking and made them see the problem and solution from the lens of a user.
- There were times when team members went deep into the underlying systems and their constraints. This sometimes diverted the focus from what we were trying to solve at the moment.
- It was hard for team members to not talk about and justify their solutions/ideas. Facilitator had to do the job of steering the conversation back to the topic.



Adapting design sprints to your project

- There is no one-size fits all, but design sprints can be an effective, guided way to gather design requirements from business and getting the team involved in design process.
- Design sprint can be run for a new application/epic or for a single feature.
- Depending on the complexity and priority of an epic, some exercises might not be necessary.
 - For single features like Internal portal dashboard (Medium t-shirt size, 1 screen, 3 user personas), we completed design sprint within 2 weeks (4 1-hr sessions) while the pre-enrolment feature (Large t-shirt sizing, 2-5 screens, 3 user personas) took about 2 months (8 1-hr sessions) to gather all requirements and sketch high-level concept.

Main takeaways are:

- Have a **shared board** where every participant logs their ideas, questions, constraints, etc.
- **Periodically going back to the goals** helps keep the team aligned on the problem we are trying to solve and compare the designs against the goal.
- **Actively take notes** that's clear to all participants so we can refer back. Make sure there is a separate note taker other than one leading the sessions.

For more information, please refer to <https://www.thesprintbook.com/the-design-sprint>