Case Study

GEN: Gender Equity Now

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Executive Summary

Working with GEN, a leading organization in equity and inclusion assessment, the goal of our project is to create a data-driven design framework and prototype for a DEI dashboard. This dashboard will provide organizations GEN works with a tool that tracks progress in the GEN certification. Understanding the shortcomings of conventional diversity training techniques as well as the disjointed state of existing inclusion strategies, our project aims to give organizations a complete tool to maximize Diversity, Equity, and Inclusion (DEI) initiatives. We gathered insights from end users who have went through the GEN certification, brainstormed and prioritized features, and prototyped a Process management tool specifically for the GEN certification process.

Project Goals:

- Client-Facing DEI Dashboard: Designing a user-friendly dashboard with features and data visualization strategies in line with client expectations, and adapted to meet a variety of workplace needs.
- Wireframes/Prototypes: Designing interactive prototypes using predefined features and functionalities and iteratively gathering user feedback to ensure alignment with user needs
- Employee-Level Platform for Optimization: Creating a platform that is usable by staff members at all levels and that makes it easier to optimize procedures for inclusivity by including features like progress tracking and user-friendly interfaces.

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Sponsor

**Sara Sanford
(Founder of GEN)**

The GEN Certification is a recognized standard for promoting intersectional equity in U.S. workplace environments.GEN assesses and enhances workplace cultures by addressing biases and promoting systemic equity through a comprehensive framework.

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Information Problem

- This certification process starts with employee experience surveys, process audits, and leadership interviews, resulting in detailed assessments
- The GEN Measurement System provides organizations with measurable benchmarks to foster gender equity, evaluating disparities across various factors such as race, age, socioeconomic status, sexual orientation, neurodiversity, and disability status.

| Employee Surveys | Process Audits | Leadership Interviews | Initial GEN Assessment |

Information Problem

- Our capstone **addresses limitations in the current GEN assessment process** by prototyping a data-driven Diversity, Equity, and Inclusion (DEI) dashboard.
  - This project aims to **streamline and optimize the certification process**, which currently relies heavily on manual, time-consuming tasks such as tracking progress via email, managing documentation manually, and lacking a centralized system for project management and communication.
  - Key challenges include inefficiencies in tracking progress, documenting artifacts, organizing internal meetings, and managing change effectively.

Overview of Approaches

We approached the business problem in a structured way and focused on solving for the right problem through the following approach:

1. Requirements Gathering

2. Research

3. Explore Data

4. Translate Data

5. Brainstorm and Prioritize Features

6. Design / Final Deliverable

1- Requirements Gathering

Objective: Understand the specific needs and challenges faced by clients during the GEN certification process. This process included:

- Collaboration with our sponsor on scope of the project
- Literature review to measure
  - *Awareness, Competitors, Current State*
- Competitor analysis to measure
  - *SWOT analysis of GEN, Direct Competitors, Indirect Competitors, Survey Platforms, Unique Value Proposition*

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1- Requirements Gathering

Key Milestones:
- Collaboration with our sponsor
- Literature review and competitor analysis that measured
- Awareness, Usage, Delivery Method, Suggestions
- Conducting initial stakeholder interviews that measured
- Current State Processes, Needs, Frustrations, Suggestions
- Outlined existing workflow analysis to pinpoint areas for improvement

Tools Used:
- Zoom and Microsoft Teams for interviews
- Excel for competitor analysis
- Excel for User Research theming

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2- Research

## Objective: Investigate how the existing process worked and how a dashboard can bridge gaps in the process

- Conducted User Interviews with the end users of GEN that have gone through the GEN certification process. The goal of these interviews were to:
  - *Outline how the users tracked progress in the certification process*
  - *pinpoint frustrations and setbacks they encountered*
  - *Outline the current State process, User needs, and Suggestions*

User Interviews

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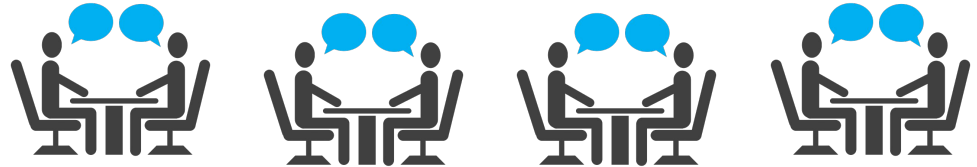
2- Research
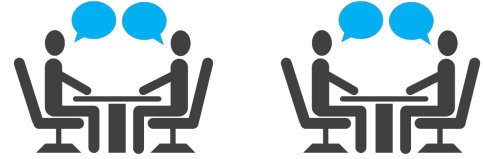
- We developed solutions that address the identified requirements, focusing on enhancing the certification process and client management.

Key Milestones:
- Brainstorming sessions to generate ideas for potential features in the DEI Dashboard
- Using RICE framework to prioritize the brainstormed features
- A 1-2 year roadmap outlining the timeline for the product
- Prioritized product backlog with detailed user stories and acceptance criterias
- Dataflow and workflow diagrams

Tools Used:
- Excel for brainstorming
- Pen and Paper for wireframe
- Azure DevOps for product backlog
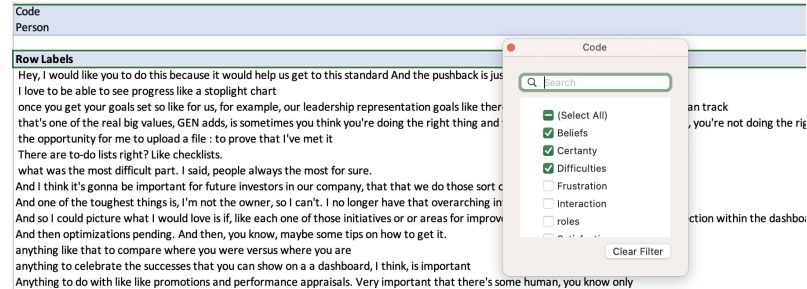- Miro for dataflow and workflow
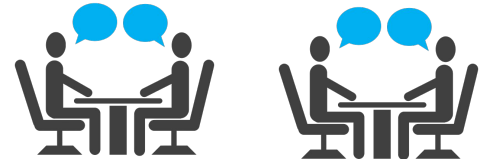
3- Explore Data

Objective: Identify what the user needs

- After conducting user interviews, we created 9 codes that would help us pull insights from the user interviews and allow us to use this qualitative data to work toward creating a data driven dashboard design for the certification process

- There were 255 quotes highlighted from interview transcript that related to one on our 9 codes

Theme	Code	Description
Emotion	Frustration	User having frustration or negative language with anything we mention
Emotion	Satisfaction	User using positive language in general about items we mention
Emotion	Certainty	User expression things they dont want to be changed from the certification process
Emotion	Speculation	User raising points about what they would want the GEN Certification process to be
Person	Difficulties	User having setbacks during the certification process
Person	Beliefs	Thought the user holds about The future Dashboard process
Organization	Roles	User expresses what role people or tech played in the certification process
Organization	Interaction	User mentions how they completed the certification in the past

Interview Theming

Code
Person

Row Labels
Hey, I would like you to do this because it would help us get to this standard And the pushback is jus
I love to be able to see progress like a stoplight chart
once you get your goals set so like for us, for example, our leadership representation goals like ther   an track
that's one of the real big values, GEN adds, is sometimes you think you're doing the right thing and   , you're not doing the rig
the opportunity for me to upload a file : to prove that I've met it
There are to-do lists right? Like checklists.
And I think it's gonna be important for future investors in our company, that that we do those sort c
And one of the toughest things is, I'm not the owner, so I can't. I no longer have that overarching in
And so I could picture what I would love is if, like each one of those initiatives or or areas for improve   ction within the dashbo
And then optimizations pending. And then, you know, maybe some tips on how to get it.
anything like that to compare where you were versus where you are
anything to celebrate the successes that you can show on a a dashboard, I think, is important
Anything to do with like like promotions and performance appraisals. Very important that there's some human, you know only

Code

Q Search

- (Select All)
- ☑ Beliefs
- ☑ Certanty
- ☑ Difficulties
- ☐ Frustration
- ☐ Interaction
- ☐ roles

Clear Filter

4- Translating Data

User Quote	Feature
"How do we see the shift and change?"	**Dynamic Progress Indicator**
"even just like a portal to submit our new policy on domestic violence. Here's our new policy, and then, like, see on the dashboard like check check. You know this is good to go"	**Document Upload**
"You know that scrum method? So maybe something like that would be helpful"	**Easy Task Management**
"I would want to be able to see, like visual representation of all that progress and kind of who was owning what components"	**Task Assignments**
"Seeing that feedback, like real-time, or when we have questions about things. would be huge"	**Internal Chat Integration**
"Seeing where you were vs where you are"	**Look back feature**
"We want to make sure we are going down the right path. And so it probably took us a little bit longer, just because of some of the back-and-forth communication."	**External communication**

5- Brainstorm and Prioritize Features

Objective: Develop a solution to address the identified needs and pain points for the Certification process

- **Brainstorming sessions** to generate ideas for potential features in the DEI Dashboard
- RICE framework to **prioritize the brainstormed** features
- A 1-2 year roadmap outlining the **timeline for the product**
- **Prioritized product backlog** with detailed user stories and acceptance criterias
- Dataflow and workflow diagrams

RICE score →

Brainstormed Features	Reach(1-5)	Impact(1-5)	Confidence(1-5)	Effort(1-5)	Score	Final Score
Dynamic Progress Indicators	5	5	4	4	25	25
Easy Task Management	5	5	5	3	41.66666667	42
Task Assignments	5	5	5	2	62.5	63
Internal Chat Integration	3	4	4	3	16	16
Instant Alerts	4	5	5	2	50	50
Look back feature	5	5	5	4	31.25	31
Benchmark data	3	5	4	4	15	15
Role-Based Access Control	4	4	3	5	9.6	10
External communication Feature	4	5	5	2	50	50
Gamify	2	3	1	5	1.2	1
Interactive Training Module	3	3	3	2	13.5	14
Accessibility	2	3	3	5	3.6	4
Customizable	4	5	4	4	20	20
Data Export	3	3	4	2	18	18

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5- Design

Objective: Sketching was used to capture how the features would be integrated into the dashboard design. Drawing allows for quick ideation, collaboration, and real time changes. The drawing were used to inspire the final prototype
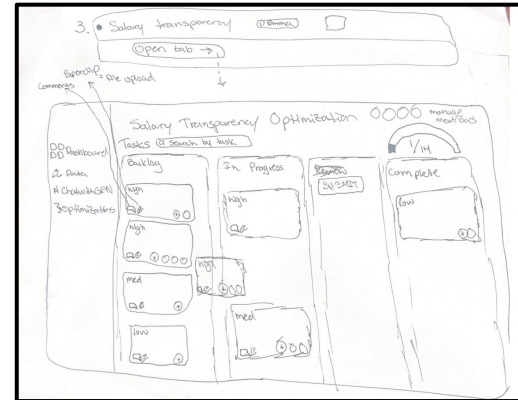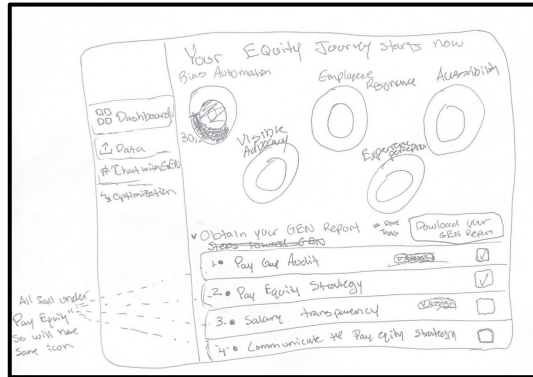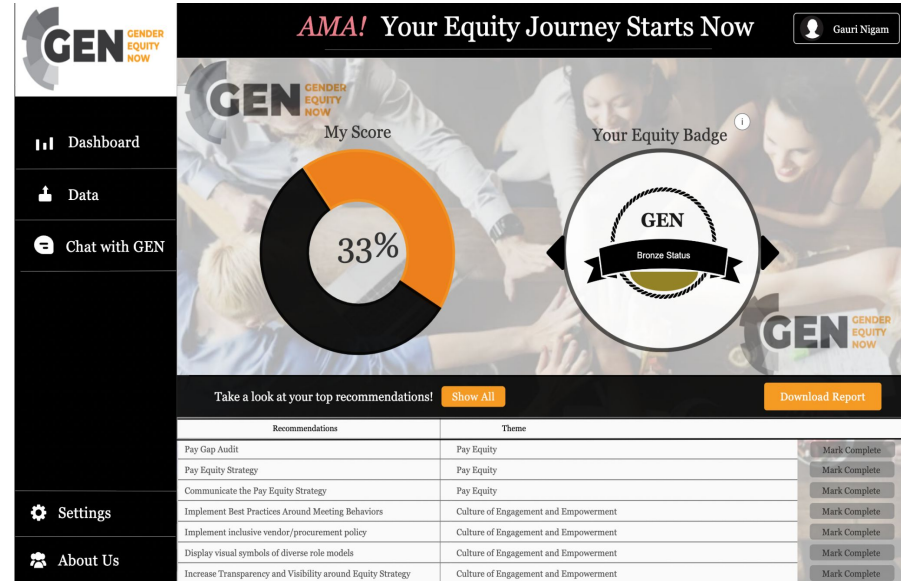
6- Final Deliverable

We delivered a fully functional and user-friendly dashboard prototype that enhances the certification process and supports dynamic tracking and management.

Key Milestones:
- Business Requirements Document (BRD)
- outlines the details of the project, research, and outline for future development
- Finalized our Prototyping tool
- Axure RP
- Initial prototype of the DEI Dashboard
- Iterative feedback loop real-time adjustments
- Final proposal of the Smart DEI Dashboard to GEN
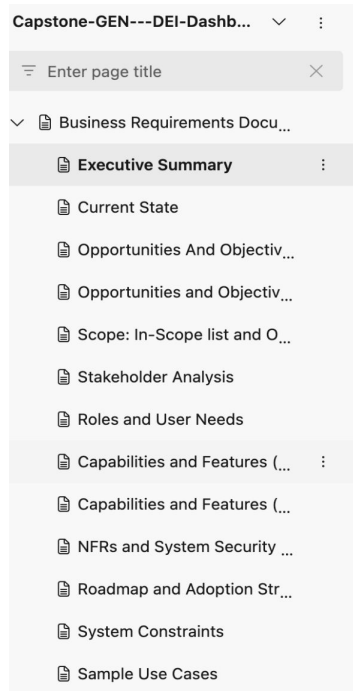
Tools Used: Azure DevOps, Axure RP, Figma

Link to DEI Dashboard Prototype

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Business Requirement Document

The Business Requirements Document **(BRD)** outlines the details of the project, research, and outline for future development.

Azure DevOps

Capstone-GEN---DEI-Dashb...

Enter page title

- Business Requirements Docu...
  - Executive Summary
  - Current State
  - Opportunities And Objectiv...
  - Opportunities and Objectiv...
  - Scope: In-Scope list and O...
  - Stakeholder Analysis
  - Roles and User Needs
  - Capabilities and Features (...
  - Capabilities and Features (...
  - NFRs and System Security ...
  - Roadmap and Adoption Str...
  - System Constraints
  - Sample Use Cases

Executive Summary

Follow 1 | Edit

VS Vanshika Srivastava · Mar 7

The goal of our collaborative DataSmart DEI Dashboard project is to transform workplace inclusion by utilizi cutting-edge data-driven design frameworks and technological solutions. Understanding the shortcomings conventional diversity training techniques as well as the disjointed state of existing inclusion strategies, our project aims to give organizations a complete tool to maximize Diversity, Equity, and Inclusion (DEI) initiative

Key Goals and Objectives:

Working with GEN, a leading organization in equity and inclusion assessment, we aim to create a groundbreaking data-driven design framework and prototype for a DEI dashboard. This dashboard will provide companies with practical insights and guidance to help them foster a more inclusive and equitable work environment.

Project Overview:

The DataSmart DEI Dashboard consists of the following important parts:

- Client-Facing DEI Dashboard: Designing a user-friendly dashboard with features and data visualization strategies in line with client expectations, and adapted to meet a variety of workplace needs.
- Wireframes/Prototypes: Designing interactive prototypes using predefined features and functionalities and iteratively gathering user feedback to ensure alignment with user needs
- Employee-Level Platform for Optimization: Creating a platform that is usable by staff members at all levels and that makes it easier to optimize procedures for inclusivity by including features like progress tracking and user-friendly interfaces.

We hope to combine insights from audits, surveys, and interviews with active participation from clients, GEN local tech companies, and end users to create an eye-catching dashboard. This dashboard will show organizational performance visually, emphasizing areas of success and providing doable suggestions for development.

Benefits and Impact

All in one platform	Empowers People	Decrease certification time	Interactive insight
One single platform that helps access all certification data and progress	Visibility on the certification process creates team buy in to the process	Platform allows for quicker response time from GEN and decreases time spent on certification tasks	Users can communicate to find answers and move within the dashboard to see progress

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Next Steps

- The Product Roadmap has a timeline that includes the features our team was able to incorporate in the initial prototype and features that we see being included in the final product, but were unable to include in the prototype
- The BRD includes the details of how we see these features being included in the next version of the prototype. Additionally the BRD acts as a document for the next team to look at and know what to do next for final development

Lessons Learned

User-Centered Design
- Direct feedback from end users is invaluable. Conducting thorough interviews and analyzing user pain points helped us tailor the dashboard to meet specific needs.
- Regularly updating prototypes based on user feedback ensured the final design was both user-friendly and functional.

Effective Collaboration and Communication
- Consistent collaboration with our sponsor and stakeholders helped in clearly defining project scope and goals.
- Leveraging tools like Zoom, Microsoft Teams, and Miro facilitated smooth communication and collaboration among team members and stakeholders.

Data-Driven Decision Making
- Comprehensive research, including literature reviews and competitor analysis, provided a solid foundation for understanding the landscape and identifying unique value propositions.
- Systematically coding interview transcripts helped in extracting actionable insights, guiding feature prioritization.

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Conclusion

We have successfully created a data driven design framework for a dashboard for the GEN certification process. The analysis and insights provided by the user interviews provided by the researched informed the decision process for creating a dashboard prototype. The results of creating the dashboard will allow for a faster certification process for GEN's clients, reduced manual effort, increased team buy in, and a more efficient certification process.