Learning & Development Portal

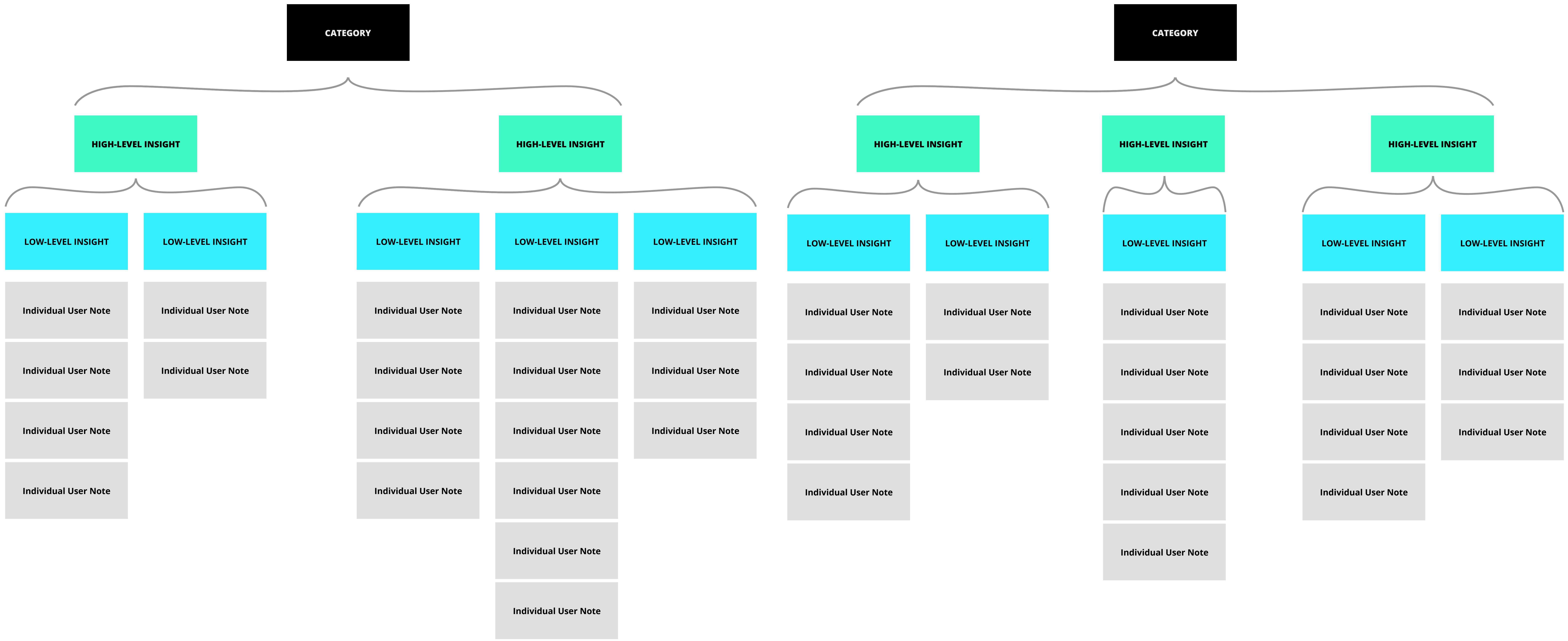
Affinity Diagram Insights & Outcomes | July 10th, 2018

Introduction

Affinity Diagramming Overview

Affinity diagramming is a qualitative analysis method for user experience research synthesis.1 Following 19 interviews with the Defense-State Liaison Office representatives, state policymakers and staffers, the team constructed affinity diagrams from data and anecdotes gathered in order to identify key insights, patterns, and concerns.

This method consists of two key components: story language, meaning the use of statements written from the perspective of the user, and meaningful structure derived through bottom-up grouping of interview notes and insights. The affinity diagram consists of four tiers: a bottom-level tier of user quotes, two tiers of insights,



1 Holtzblatt, K., & Beyer, H. (2015). *Contextual Design: Evolved*. San Rafael, CA: Morgan & Claypool.

Applying Affinity Diagramming to the L&D Portal

Interviews

Through speaking to nine requesters, five approvers, three administrators, one Talent representative, and the developer of the original site, the team gathered information on various topics ranging from information and data needs to familiarity and use of L&D Portal.

Analysis

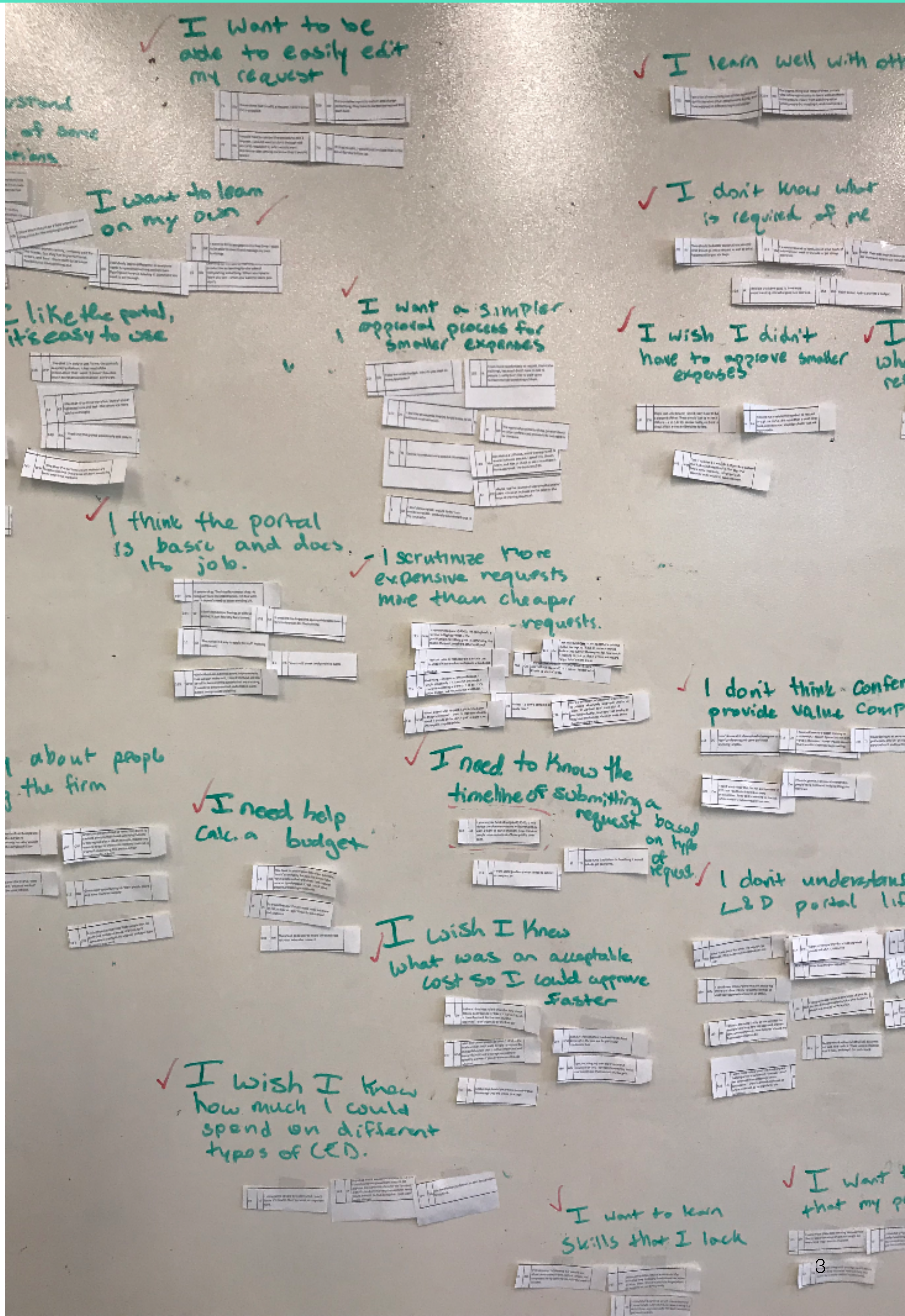
In order to identify the underlying needs and perspectives among these diverse experiences, the team extracted salient points from the interviews into over 380 individual user notes. Each individual note constitutes a single belief, experience, opinion, concern or need. These user notes, physically printed and sorted, comprise our final affinity diagram.

6
top-level categories

16
high-level insights

64
low-level insights

381
user notes



Overview of Categories from the Affinity Diagram

In total, we identified 24 top-level categories of user data from the affinity diagram. The categories highlight user needs and perspectives in a way that informs product development.

These categories and their underlying insights are examined in depth later in this document.

1. **Balancing the amount of transparency surrounding the site, approval process, and budget**
2. **Learning on an individual basis and for Deloitte Digital as a group.**
3. **Support for practitioners as they go through the request process.**
4. **A tailored experience for each request.**
5. **Analytics provide insight into the budget.**
6. **Accessibility is vital for a growing user base.**

Walking the Wall

Process

Following the completion of the affinity diagram, walking the wall offers an opportunity to reflect upon the data and the insights gathered. This activity consists of individually adding annotations to the physical affinity diagram, covering key concepts or insights, further questions and initial design ideas.

After annotations have been added, the final picture that emerges is an interplay of sorted data with reactions and analysis of that data.

Affinity Diagram Top-Level Categories

Balance

I want less transparency.

- I'm worried people will take advantage of CED.
- I worry about people leaving the firm.

I want more transparency.

- I don't understand the L&D Portal lifecycle.
- I want to know my status in the process.
- I want to be notified when someone approves or rejects my request.
- I want to know who has already seen a request and who will see it next.
- I want to know why or why not a request was approved.

Balance: Takeaways

Key Ideas

- All users lack transparency into the approval process, and this causes inefficiencies.
- Transparency will help make the system stronger and allow a wider group of people to go to conferences.
- More people want more transparency over less.

Questions

- When people go to far away locations for trainings, does it directly tie to their role?

Design Ideas

- Describe the process before a user begins.
- Display contact information for support.
- Indicate where a user is in the process and who is currently reviewing their request.
- Send email notifications when someones approves or rejects a request.
- The notification should include feedback and next steps.
- Clarify expectations in terms of cost and location on the form.

Learning

I learn for me.

- I want to learn more specialized skills.
- I want to learn skills that I lack.
- I want to learn on my own time.
- I learn well with others.

I learn for the studio.

- I want to learn skills that my project/the studio lacks.
- I want the firm to invest in professional development for practitioners.
- I want practitioners to stay ahead of the market.
- I help the studio by sharing what I learned.

Learning: Takeaways

Key Ideas

- Everyone learns differently and for different reasons.
- Learning helps everyone in some way.

Questions

- What’s the best way to bring back what people have learned?

Design Ideas

- Explain or provide examples of the different types of learning opportunities available.
- Provide examples of new technology frameworks, languages, methods, etc. that practitioners might want to learn.
- Document the post-conference/training expectations.
- Set up studio wide or competency trainings for common requests.

Support

I need guidance.

- I am expected to do/not do certain CED programs based on my level.
- I don't understand how the Operating Model shift affects the portal
- I need strategic direction from leadership when it comes to learning.

I need help filling out the form.

- I don't know how to answer the questions because there was not adequate instructions.
- I didn't know what was required of me before I filled out the form.
- I don't understand the purpose of some of the questions.
- I need help calculating my propose expenses.

I need to talk to mentor(s) before filling out the form.

- I talk to my counselor as a first step when I want to participate in CED.
- I view the portal as providing a formal process.
- I have to convince approvers that my CED is worthwhile.
- I get verbal approval before using the portal.

Support: Takeaways

Key Ideas

- The existing form has some poorly worded and potentially unnecessary questions.
- People will always talk to others before submitting an official request.

Questions

- Do all practitioners have a conference/ learning budget?
- What is the L&D budget for FY19?

Design Ideas

- Provide instructions for potentially complicated sections of the form.
- Only include essential questions that apply to every request.
- Make answering questions flexible.
- Include an expense predictor / calculator.
- Alert users of what information they may need to gather before starting the form.
- Show total costs of different conferences over time to compare.
- Provide a table of standard metrics to help users understand what is acceptable for cost.

Tailored

I want the approval process to fit the request.

- I want simpler approval processes for smaller request.
- I want the approval process to fit the request.
- I wish I didn't have to approve smaller expenses.

I want to know what CED option is the most valuable.

- I don't think conferences/ trainings provide as much value as other CED opportunities.
- I don't know who to talk to about CED opportunities.
- I want to know how effective CED options are.
- I want to know what all my CED options are.

I don't understand my role in CED.

- I want a defined user group.
- I don't use the portal if I'm in a senior position.
- I shouldn't be the one approving or denying a request.
- I don't know what my limits are.
- I don't know who approves my request if I am not in a competency.
- I don't know what competency restrictions are.

Tailored: Takeaways

Key Ideas

- The portal shouldn't stop a practitioner from owning their career and actively seeking out opportunities.
- Everyone wants CED to be a valuable learning experience.

Questions

- What should the approval process look like for expensive vs. inexpensive requests?

Design Ideas

- Simplify the approval process for any request that costs below a set amount.
- Provide a filterable directory of CED opportunities to choose from.
- Show user reviews on programs.
- Provide recommendations based on the user's role and level.
- Only show programs that the user can participate in (based on competency restriction or price) and communicate any restrictions.
- Display the names and contact information of key people (approvers, L&D leads, etc.)
- Only provide certain information to certain approvers (e.g. maybe counselors and competency leads shouldn't see the price at all)
- Auto-approve items under $100 up to a set threshold per year.

Accessibility

I value timeliness.

- I need to know the timeline of submitting a request based on the type of request.
- I want to get requests approved in a timely manner.
- I wish there was a way to communicate urgency.

I want an intuitive experience.

- I think the portal is easy to use.
- I think the portal is basic and does its job.
- I don’t want to experience technical issues.
- I want to be able to easily edit my request.

I want to be able to access the portal whenever I need to.

- I don’t know that the portal exists.
- I know that the portal exists, but I don’t know how to access it.
- I want the portal to be scalable to all of Deloitte.
- I wish the portal was easier to find.
- I wish I got more information about Deloitte Digital specific resources during on-boarding.

Accessibility: Takeaways

Key Ideas

- The general portal doesn’t need to be anything fancy, but it should be easy to find.

Questions

- Where will people always be able to find the portal?
- What is the best way to advertise it?

Design Ideas

- Show a recommended timeline for different types of CED.
- If a user may need to expedite a request, suggest it.
- Provide a flag / button for users who need to expedite a request.
- Let approvers know how long a request has been awaiting their approval.
- Provide an obvious editing mechanism.
- Make the portal part of the DD on-boarding process.
- Create a memorable link for the portal.
- Send out the portal link in regular emails or announcements.
- Make the portal be a part of the new DD Studio App.

Analytics

I want to use data to make budget predictions.

- I want to estimate the CED investment for next year.
- I want to compare budget and conference data.
- I want to know the impact to the budget before deciding on a request.

I need standardized information to make informed decisions.

- I scrutinize expensive requests more than cheaper ones.
- I wish I knew what an acceptable price was so I could approve faster.
- I need more in-depth responses.
- I approve or reject a request based on extraneous factors.

I don’t understand how my CED expenses factor in to the budget.

- I wish I knew how much I could spend on different types of CED.
- I wish I had transparency into the budget.
- I don’t know how to expense CED.
- I don’t understand the budget.

Analytics: Takeaways

Key Ideas

- Approvers should be able to point to objective reasoning when they make a decision.
- The portal plays a key role in predicting the future budget.

Questions

- What should an individual's budget be?
- How much over that budget is too much?
- Can we access all the CED charges for an individual practitioner?

Design Ideas

- Show how much money is left in the budget.
- Show how much money would be left if a request was approved.
- Show how much and what proportion of the budget an individual has spent on average.
- Show how much each individual gets from the budget.
- Give each person a set amount that they can spend on small items without approval.
- List an expected word count for short-answer questions.
- Ask more specific / in-depth questions on the form.
- Tailor the questions to the request type.
- Provide a CED expenses guide that is emailed out to a person a week before their conference/training.
- Provide indicators for important details.