Success Metrics Workshop Outline

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Day 1 - Establishing HEART Categories and Goals (1.5 hour)

Time	Activity	Facilitator Description	Additional Notes
20 min	Opening	Give an overview of ground rules and agenda. Conduct a warm-up to get the participants familiar with the Mural tool and do a round of introductions.	
15 min	Discuss the HEART Framework	Give the the group an overview ensure everyone has the same understanding of the HEART framework.	The facilitator may want to put together a deck to aid in this overview.
	Goals (55 min)		
5 min	Dot Vote on which HEART categories to focus on	Happiness, Engagement, Adoption, Retention, Task Success; What ux categories matter to this process?	
10 min	Discuss & finalize decisions	If there is indecision in the group on what categories to move forward with, at your discretion you can carry categories forward as goal setting might reveal whether or not this category is truly needed.	
5 min	Generate Goals for the chosen HEART categories	Post-it brainstorming exercise.	Can extend time if necessary
5 min	Combine similar goals	Instruct participants to take **5 min to cluster and combine similar goals** that have been generated. **Apply a label** that summarizes that cluster.	
15 min	Review and Discuss	Tell participants about the designated **thoughts and question** post-its. These should have a specific color code so that they stand out from the other information. Thoughts and questions post-its let participants engage in active listening by documenting their thoughts, which is especially helpful in a remote workshop	

		where discussions are more difficult due to audio constraints of video conferencing. These post-its are **helpful for later documentation** of workshop output, but also **clues the facilitator into a point that the group should discuss** while in the workshop. If this is a remote workshop, when people are sharing what they wrote use a **visual icon** as the visual guide. Explain that when someone is talking they should take the icon and move it to the post-it they are talking about.	
10 min	Prioritize Goals with Dot Voting	Use Dot Voting to Limit the amount of goals to a reasonable number. *"Forcing you to decide what is most important to accomplish for [workshop subject]."* **2 min -** to vote **8 min-** to discuss and decide what to move forward with	Have color coded dots for each participant ready to use.

Day 2 - Signals (60 minutes)

Time	Activity	Facilitator Description	Additional Notes
10 min	Recap from previous day	You can walk participants through the goals that were decided on or just have them individually review. Ask participants if there's anything to add or change about the previous day's work. This time can be used to ensure alignment on goals. This is also an opportunity for the facilitator to ask participants any follow up questions or clarifications about the work.	
10 min	Freelist Signals	Instruct Participants: *Ask yourself, "How might success or failure in the goals actually manifest itself in user behavior or attitudes?"*	From Kerry Rodden: For example, an engagement signal for YouTube might be the number of videos users watch on the site — but an even better one might

			be the amount of time they spend watching videos. A failure signal in the "Task Success" category for YouTube Search might be entering a query but not clicking on any of the results.
20-30 min	Discuss Signals	Ask participants to use the **color coded thoughts and questions post-its** to document thoughts as the discussion progresses. As thoughts and questions appear during the discussion, address those as talking points for the group.	Some questions for them to consider: *What is easy or hard to track?* *What would be automatically tracked vs. manually tracked?* *What is sensitive to changes in the design?* *Which signals could be influenced by other factors?* *What are lagging vs. leading indicators?*
~10 min	Evaluate Signals	What are strong signals that the group wants to move forward with? Should any be eliminated? This is an optional piece of the workshop as you might want to simply move forward with all of the the signals that the group created.	Ideas to help the group narrow signals to move forward with: - Moving some signals into a parking lot - Dot voting - General discussion

Day 3 - Metrics (60 minutes)

There are two variations of this session.
- A. You can brainstorm and evaluate together as one group
- B. If you have a high number of signals on which to brainstorm metrics, you can break into two groups to cover more ground and discuss more thoroughly.

Time	Activity	Facilitator Description	Additional Notes
10min	Freelist Metrics		

40 min	Analyze & Evaluate Metrics	Go through and discuss the metrics. Facilitator can prompt the group by reading a metric and pausing to ask if the group has thoughts. Additionally, if someone has added a thought or question post-it, the facilitator can react to that.	**Thoughts and questions for the group to consider:** Will you actually use these numbers to help you make a decision? Do you really need to track them over time, or is a current snapshot sufficient? Stay focused on the metrics that are closely related to your goals to avoid unnecessary implementation effort and dashboard clutter.
	Feedback on Workshop (10 min)		
10 min	Gather feedback from participants on the effectiveness of the workshop	Use the format of "I liked, I learned, I wonder"	At the end of your session include a feedback activity on the workshop. I liked, I learned, I wonder, or rose bud thorn are some suggestions. Use an activity that will give you the angle of feedback you need to uplevel your experiences for next time.