

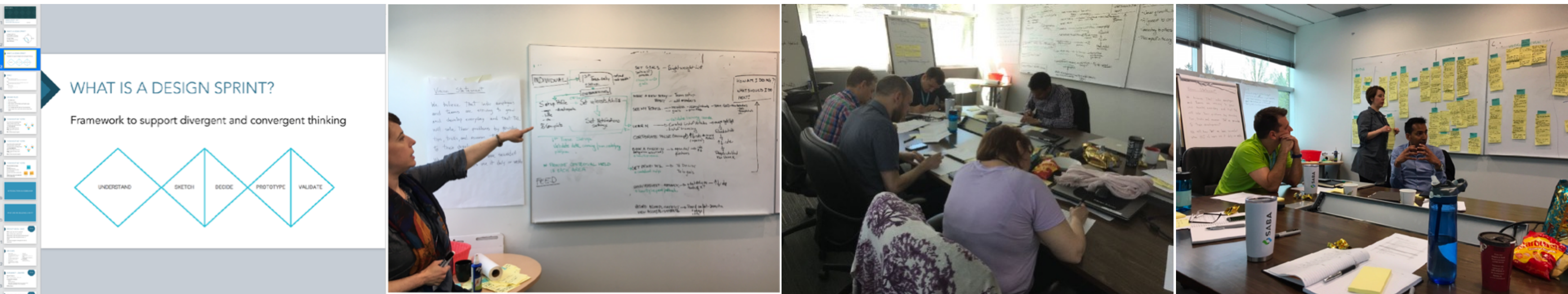
## COLLABORATION

# Sprint to alignment.

The team's contribution to saving the Daimler account helped me make the case with my leadership for **introducing design thinking methods** to Saba.

The need to deliver on the product vision shared with Daimler provided a perfect opportunity for this. I invited a cross-functional team of product managers and engineering leads to spend a week in Ottawa kicking off this project with a Google Ventures-style design sprint. We brought in a professional sprint facilitator, with whom I worked closely to adapt the GV sprint format to the project context.

The design sprint experience was an eye-opener for the attendees, who quickly **appreciated the alignment and collaborative spirit it created amongst the team**. "This was awesome" and "We need to run a sprint at the beginning of every project" were the most common pieces of feedback.



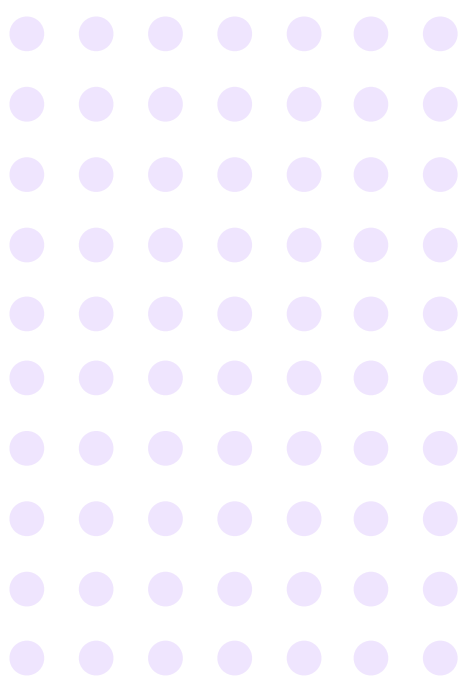




SYSTEMS THINKING

# Spreadsheet the joy.

When I joined Saba, the UX team already had a design system and code component library. What was missing, though, was **a systematic approach for thinking about customer and user personas.**



A home page redesign project my team was working on embodied this issue. The project team included three product managers, all experts on different parts of the product, and its direction shifted constantly depending on the personas being discussed.

In a workshop with the Product team, I **took on a facilitator role** to help the product managers share their understanding of customer and user personas and **build a conceptual framework around this knowledge.**

By the end of the workshop, we had a spreadsheet with **a taxonomy of customer and user personas and the usage scenarios relevant to each**, and the thrilled PM team was aligned on the priorities for each persona.

| Customer type/Persona  | Customer characteristics   | Example customers  | Potential customers for design partnership program | End User   | Manager/Org Mgr   | Business Owner   | Admin  | Ins                             |
|--|--|--|--|--|---|--|--|---------------------------------|
| Compliance Development (external forces driven, e.g. HIPAA, OSHA, GDPR, ...) | Push learning  | Harvard<br>Healthcare<br>Air Canada  |  | Focus on notifications to drive timely learning completion<br><br>Organizing and sequencing of best next action first  | Kick my team's butt!<br><br>Ensure my team's timely compliance (reminders, scheduling, ...)   | Need a dashboard to see my org's compliance rate so I know that my business is compliant   | Focus on actions needed<br>E.g. courses being discontinued, courses filling up, courses with no/low enrolment, ...               | Potential items: courses, enrol |
| Structured Development (business needs driven)                               | Push learning<br>Performance: defined job families, paths, JD, goals, skills, skill levels   | Restaurants: Yum, ...<br>CPS: Busch, ...<br>Mfg: R. R. Donnelley<br>Higher ed: Harvard<br>Banking: RoboBank<br>Ciena<br>Healthcare<br>Sales enablement | Gena   | Timely learning completion (e.g. for onboarding)<br><br>Organizing and sequencing of best next action first<br><br>Potential for gamification to incent completion<br><br>This user could have more than one position which would require them to monitor learning and goals for this position | Assign paths and individual learning<br><br>Ensure my team's timely completion and progression along paths<br><br>This manager could have people who belong to more than one organization which would require them to monitor learning and goals for a person | How fast users in my org are progressing along paths?<br><br>How well is my org progressing towards meeting corporate performance goals?   | Focus on actions needed<br>E.g. courses being discontinued, courses filling up, courses with no/low enrolment, ...               | Potential items: courses, enrol |
| Career Development   | Pull/recommend learning  | Saba<br>Daimler, BT<br>Northern Trust  | Daimler<br>Northern Trust                          | What are my goals, where am I at with them, how do they tie into org goals?<br><br>What skills do I need to develop to accomplish my goals? How do I do it - learning, mentoring, etc.?<br><br>Suggestions and opportunities for learning  | How are my team members progressing towards their goals? How can I help them?<br><br>What development needs do my team members have?<br><br>Warning signs/risks: Lack of engagement, lack of progress towards goals, gaps in skills - how do I                | Who are my most successful leaders/dev managers? Who are the ones that aren't doing well?<br><br>How well is my org as a whole progressing towards its goals?<br><br>Am I giving my org the right tools for development? | Focus on actions needed<br>E.g. courses, giving the managers and business owners the right metrics, providing the right content. | Potential items: courses, enrol |
| Structured High-impact Development   | Push/pull/do learning<br>Moving towards informal learning and feedback, learning by doing, crowdsourced learning, user-created learning, etc.<br><br>Often will give their users a smaller group space (which may be aligned with their job or location) where they can create and share learning content.<br><br>Admins control group creation. | McDonalds<br>Rose<br>RCMP (SE)   | McDonalds  | All of rows 3 and 4, plus:<br><br>What learning or feedback can I contribute to my group?<br><br>What can I learn from my group, and how can this help me develop and achieve my goals?  | All of rows 3 and 4, plus:<br><br>Who are the top contributors/informal learners from my team, so I can recognize them?<br><br>Are some of my team members developing into mentors/influencers?   | Who are the top contributors/informal learners from my org, so I can recognize them?<br><br>What's the most popular informal content - maybe we need formal training on that?  | Would like to track informal learning/performance metrics  | Potential items: courses, enrol |
|  |  |  |  | First experience is often  |   |  |  |                                 |