



SYSTEMS THINKING

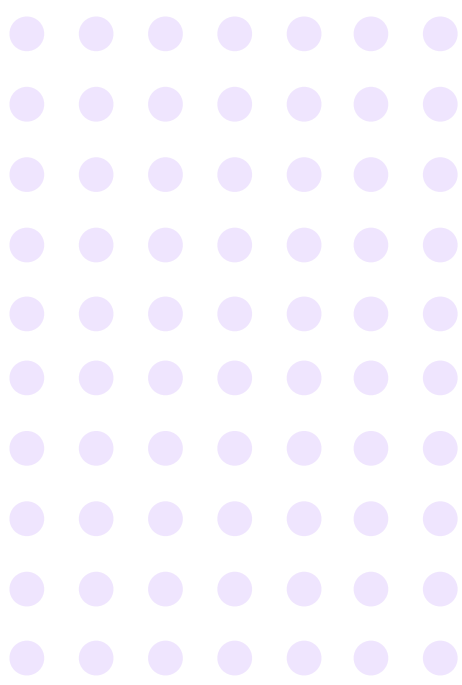
# Spreadsheet the joy.

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 Healthcare Air Canada		Focus on notifications to drive timely learning completion  Organizing and sequencing of best next action first	Kick my team's butt!  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 E.g. courses being discontinued, courses filling up, courses with no/low enrolment, ...	Potential items: cou courses/ enrol
Structured Development (business needs driven)	Push learning Performance: defined job families, paths, JD, goals, skills, skill levels	Restaurants: Yum, ... CPG: Busch, ... Mfg: R. R. Donnelley Higher ed: Harvard Banking: RaboBank Ciena Healthcare Sales enablement	Gena	Timely learning completion (e.g. for onboarding)  Organizing and sequencing of best next action first  Potential for gamification to incent completion  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  Ensure my team's timely completion and progression along paths  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?  How well is my org progressing towards meeting corporate performance goals?	Focus on actions needed E.g. courses being discontinued, courses filling up, courses with no/low enrolment, ...	Potential items: cou courses/ enrol
Career Development	Pull/recommend learning	Saba Daimler, BT Northern Trust	Daimler Northern Trust	What are my goals, where am I at with them, how do they tie into org goals?  What skills do I need to develop to accomplish my goals? How do I do it - learning, mentoring, etc.?  Suggestions and opportunities for learning	How are my team members progressing towards their goals? How can I help them?  What development needs do my team members have?  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?  How well is my org as a whole progressing towards its goals?  Am I giving my org the right tools for development?	Focus on actions needed E.g. courses, giving the managers and business owners the right metrics, providing the right content.	Potential items: cou courses/ enrol
Structured High-impact Development	Push/pull/do learning Moving towards informal learning and feedback, learning by doing, crowdsourced learning, user-created learning, etc.  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.  Admins control group creation.	McDonalds Rose RCMP (SE)	McDonalds	All of rows 3 and 4, plus:  What learning or feedback can I contribute to my group?  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:  Who are the top contributors/informal learners from my team, so I can recognize them?  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?  What's the most popular informal content - maybe we need formal training on that?	Would like to track informal learning/performance metrics	Potential items: cou courses/ enrol
				First experience is often				



# Crits, cricket, and chatbots.

At Saba, I had inherited a team that was not only under-appreciated, but also not very cohesive. With team members in three countries and a tight travel budget that prevented us from meeting in person, I worked to **help the team gel together through a variety of remote collaboration techniques.**

These included regular show and tell sessions to introduce new methods to team members not familiar with them, design critiques, pair design sessions, and even having the India team members video conference the rest of team into the office cricket tournament!

One of the most successful outcomes of this cross-team collaboration was an innovation project where two of my team members (one in Canada, the other in India) worked together to **build a “talent coach” chatbot prototype.** When I presented it to my VP, she was so excited that she used it as an example of Saba’s innovation at our customer conference!

