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# DesignOps Handbook

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# Design Ops Handbook

DesignOps is the key to scaling digital product design teams with more efficiency. As companies mature and invest in design, they need to operationalize workflow, hiring, alignment between teams, and more so designers can focus on design work while someone else takes care of the rest. Learn how creating these centralized services and systems helps grow integrated, high-functioning teams at the best companies in the world.

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## Chapter—01

# Introducing DesignOps

Amplify the value of design

By Dave Malouf, DesignOps Summit and IxDA

I've always been on the fringe of people in the design community who love how design works more than they love designing. Throughout my career as a designer, I have leaned more toward **process** over **practice**, and in some circles I was made to feel like a pariah because of my fixation on semantics (resulting in my last name being affectionately turned into a verb by colleagues: "maloufing").

This focus on process took me to Queens, New York, in November of 2017, where I joined nearly 300 people to learn, share, and work on formalizing a new aspect of design practice management, DesignOps. The DesignOps Summit marked a turning point, as design operations had begun to emerge across the design industry. But for me, it was also the culmination of a very long, personal journey through design.

## What makes design valuable

Let's go back to the start. Back in 2005, I took classes in a design school for the first time. They were continuing education courses in industrial design, and through them, I was awakened to what design really is, and what properties make

design practice so uniquely valuable: serendipity by design, a culture of interruption, and deconstructive creativity.

**Serendipity by design** is the cultural core of a design studio.

In a pre-digital studio, everyone's work is externalized, visible, and transparent. This means that ideas are juxtaposed purposefully, passively, accidentally, and serendipitously.

These forced interactions that give light to new ideas are core to how design works.

The **culture of interruption** is vital for design to reach its full potential. These interruptions come in the form of instruction, criticism, and comparison, to name a few.

When designers envision a rough idea of a whole system, only to tear it apart and rebuild it, they engage in **deconstructive creativity**.

These three properties of design practice contribute to a high-functioning design team with quality outputs. Add to that, the advent of user-centered design, and design practitioners also function as chief advocates of **human understanding and empathy** within an organization.

From design school, I moved to an industrial design studio

and then to a design teaching position in the industrial design department at the Savannah College of Art and Design. That experience introduced me to systems design thinking in service design, and design for sustainability.

What I didn't realize was that while on campus, immersed in the properties that make design so valuable and unique, the agile approach to software development was subsuming those very practices. I knew of agile, but I wasn't prepared for its impact on the design world.

## Anti-agile, pro-design

Agile is an iterative software development approach, where cross-functional teams collaborate to set requirements and solutions for a given project. As explained in the [Manifesto for Agile Software Development](#):

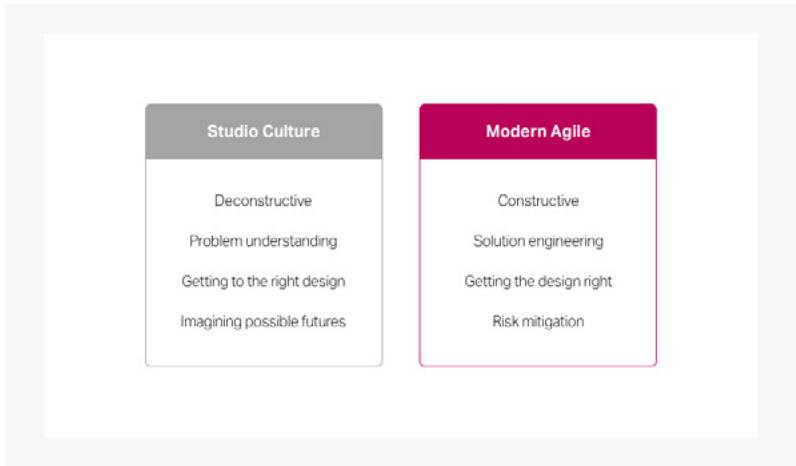
*We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:*



- *Individuals and interactions over processes and tools*
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

In those five short years while I was on campus, agile became the norm in product development, much to the detriment of designers. What I saw was design practice taking big steps backwards—vision, exploration, deconstruction, associative thinking, and interruptions were suppressed in favor of working the way developers work:



This subjugation of design to engineering in agile makes sense for engineers, as agile fit their culture. Further, agile methods have led to great outcomes, making it hard to refute their value. Companies like Amazon, Google, Netflix, and Facebook were poster children for agile method success. Designers were in the uncomfortable position of acculturating into the agile mindset lest their positions become irrelevant.

Here's what I saw in this culture optimized for engineers:

- Designers isolated from other designers, and not working out in the open

- Design as a production role instead of a strategic role, with designers often asked to perform superficial visual cleanup
- Design hiring practices based on engineer hiring practices
- Designer career paths being mapped to engineering career paths
- Design tools misaligned to the tasks at hand, as well as design tools chosen for integrations with developer tools rather than design functionality

In my first job after leaving SCAD, I was in the awkwardly-titled role of head of interaction design at Rackspace. This was my first “design operations” role, where my job was to make design—meaning my designers and our product outcomes—better. I discovered that the metrics of success for our partners in development and product management differed from those of design, leading to the shipment of subpar products. And therein was the problem: **developers and product managers measured success by whether a product shipped on time, and not whether the design satisfied user**

## needs.

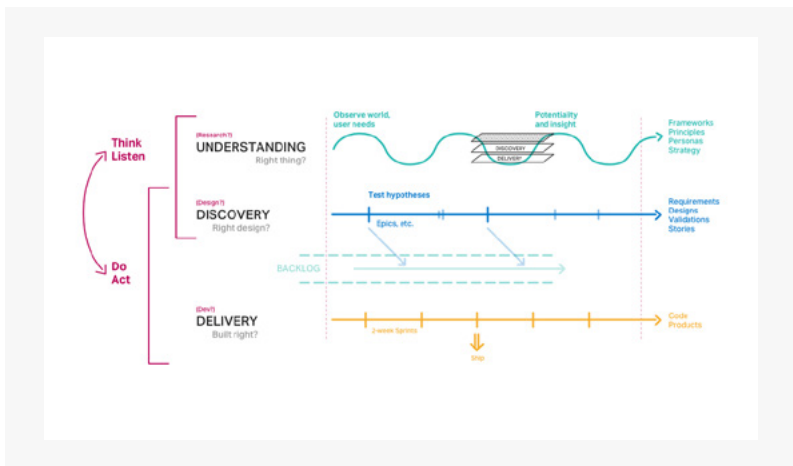
In my role with Rackspace, I learned about DevOps and Lean Startup. DevOps is the practice of aligning software development, system operations, automation, and more to allow for continuous integration and deployment for the purpose of continuous learning. Lean Startup mitigates business risk by focusing on small, tightly-scoped bets, called experiments, that lead to determining whether a product direction is valid or not.

The combination of the DevOps and Lean Startup methodologies made people see agile in a new light, and agile product development cycles started to incorporate learning and quality. Speed was no longer the goal, but rather a byproduct of automation. Learning iteratively and learning quickly were brought together.

Everything changed for me in 2014 when I was first introduced to dual-track agile. This added **discovery** to the agile method; while one track focuses on delivering the value of an idea to users, a separate track is dedicated to actions based on learning. Dual-track presented questions about the role of the designer: how exactly do they work with their peers in this environment, and how could this new framework allow

designers to incorporate their own methods of discovery and exploration?

The answer: add yet another track. I created **tri-track**: parallel to and integrated with discovery and delivery is a third track, **understanding**. On this track, we align on a strategy for building the “right” thing based on user needs and team insights.



Tri-track agile. Drawn with Freehand.

Given my exposure to DevOps and my close working relationship with IT operations, it was a natural next step for me to christen tri-track as a new “thing” called **design operations**. Though it was still a very loosely formed idea when I developed it in 2014, I felt I was onto something.

Since that point in 2014, I've been on a journey from the loose idea of design operations to the legitimate practice of **DesignOps**. Along the way, I discovered peers with whom the idea of DesignOps resonated, and their stories resonated with me as well. This journey culminated with the DesignOps Summit.

## Why DesignOps now?

My mission for the practice of DesignOps is to **amplify the value of design**. Design as a practice requires a singular focus on the operations that maintain the best interests of design and an organization's business.

From my conversations with and observations of a host of organizations around the world, I've come away with four core factors contributing to DesignOps-oriented leadership roles and practices as design teams mature: **scale, people, expectations, and inclusion**.

**Organizations are scaling at every turn:**

- Teams are growing larger
- Companies are opening new offices (and forming distributed teams)
- Design teams are supporting more parts of an organization
- Companies keep spinning up new business units
- Design solutions are growing in complexity
- Organizations are integrating more and different types of design practices
- The tools used for design become more complex in proportion to the systems being designed

**People are a priority:**

- Great designers are a rare commodity, and they know it. This makes recruiting more difficult than days past
- Product organizations are growing more complex, which makes structuring teams difficult
- Design isn't a job you just show up to. Designers need to be developed, advanced, promoted, rewarded, and recognized

## **Expectations are sky high:**

We want our flying cars, meaning we expect that better experiences should have arrived by now. We insist on better design and better design outcomes.

## **Diversity and inclusion take work:**

Diverse teams are great for design, but getting there isn't as easy as saying, "Let's hire more diverse people." People need training and practice to work on diverse and inclusive teams,



and this requires coaching that's new and different than that of previous generations of design organizations.

"Design as a practice requires a singular focus on the operations that maintain the best interests of design and an organization's business."

Dave Malouf — IXDA, DESIGN OPS SUMMIT

## So, what is DesignOps?

"Operations are basically responsible for all of the overhead that makes design happen."

Josh Ulm — ORACLE

Every institution has at least one goal. And there are required activities to achieve that goal. If the goal of my wall company

is to build brick walls, the laying of brick is the primary activity. For my taxi service, my goal of moving passengers from a point of origin to a destination is achieved by driving the taxi.

**Operations** are the elements that facilitate high-quality instances of those activities with minimal friction. Operations includes the tools and infrastructure required to complete the activity. Using the taxi example, a taxi service requires an automobile, fuel, and roads. The meter, map system, and dispatcher all make up the ecosystem of the taxi experience.

Like a taxi service, design practice requires a collection of balanced activities that support the work.

We talk about **craft** in design—sketching, pixel movement, and critique. But more generally, craft is how we create the plans for the forms and shapes we imagine will solve problems and create positive change.

These crafts are usually encapsulated inside of **methods**. Any given method can use different crafts to target the same success.

Finally, methods fit specific **processes**. Processes communicate the shared path to achieve success. The classic

"four Ds of design" are an example of a process: discover, define, design, and deliver.

**DesignOps, then, is everything that supports high quality crafts, methods, and processes.**

To illustrate, let's imagine you're tasked with completing hand-drawn wireframes. What do you need to accomplish this task?

Well, you need **tools**, like a collection of drawing apparatus. Maybe this is a #2 pencil, or perhaps a Staedtler .5mm roller. You might want to incorporate different colors and even different thicknesses. A ruler or a set of stencils might help, too. You'll also want something to write on—a sketch pad, maybe a with a printed grid. You have many options, but you'll need some tools.

You'll need **infrastructure** to support your drawing. A desk and adjustable chair will help. If you draw often, a tilting desk that reduces stress would be nice. Where do you keep your collections of drawings—how are they organized and found later?

"DesignOps is everything that supports high

quality crafts, methods, and processes."

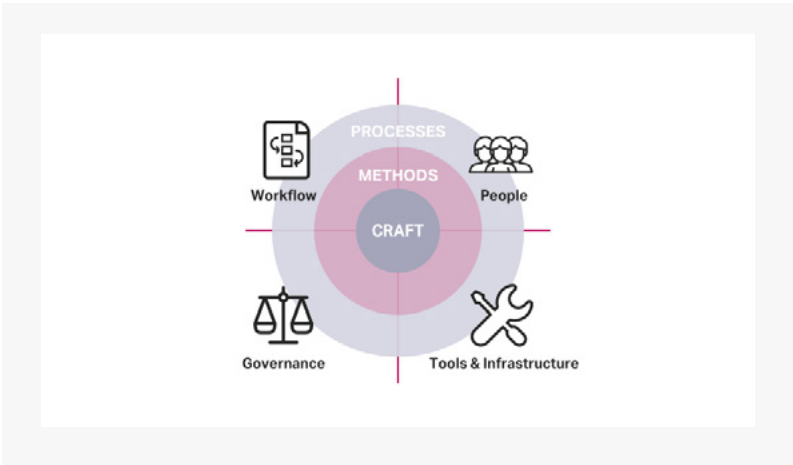
Dave Malouf — IXDA, DESIGN OPS SUMMIT

Let's back up and ask even more questions: how do you even determine what to draw in the first place? Who decides your **workflow**? When you're done, where do you submit your drawings, and who decides if they're good enough? How is "good enough" defined? What if your drawings require corrections: who decides this, and who performs the corrections? These questions could go on and on.

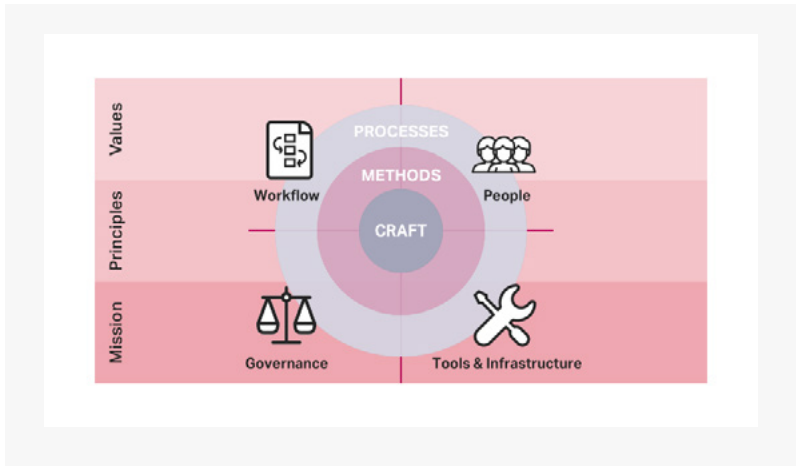
How many **people** really need to work on these drawings, and how are they organized? At what point do you decide to hire more people, and how are the new people brought into the organization?

How do you get paid for your drawings, and when can you take a vacation (and for how long)? What type of **governance** is in place for time tracking, or for engaging with customers, or for grievances between parties when there are disagreements?

Together, tools, infrastructure, workflow, people, and governance is operations.



Finally, how we manage our particular operations is our culture. These are the values, principles, and mission that drive an organization.



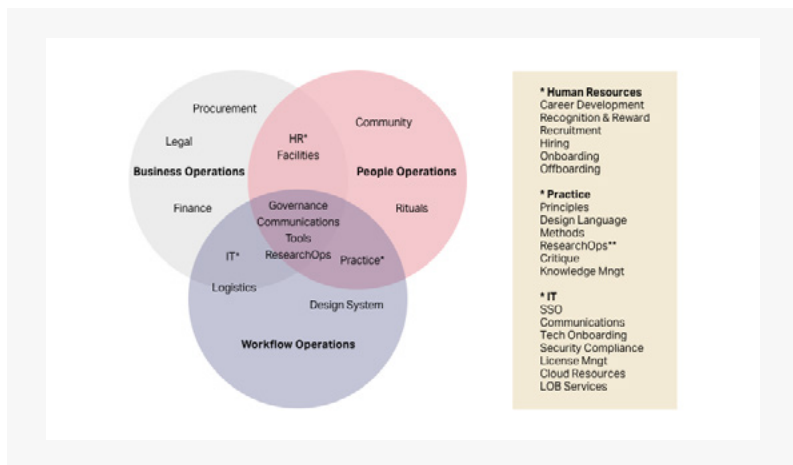
"Tools, infrastructure, workflow, people, and governance is operations."

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## How DesignOps works

A DesignOps practice is made up of three overlapping lenses, or areas of focus. These areas overlap, but the specific

overlaps and practices are often influenced by the leadership at the time the DesignOps practices were put in place.



How DesignOps works.

My introduction to the work of DesignOps was through the lens of Business Operations. My executive leader at Rackspace had a keen eye for how important business operations was to his team's success. I saw him in as many meetings with finance, IT, and procurement as I did with marketing, product, and engineering. He took change management seriously, which manifested in a very strong communications channel for the team.

This business focus advantaged our team over others at my company. We got Macs when no one else could, and tons of

whiteboards. We were able to reserve studio space. We had a special career track with HR, and more. A focus on business operations leads to the budgetary and political capital to facilitate design. In a DesignOps organization, a chief of staff is commonly in charge of business operations.

"A focus on business operations leads to the budgetary and political capital to facilitate design"

Dave Malouf — IXDA, DESIGN OPS SUMMIT

Another area of focus in DesignOps is **People Operations**.

In my career, I saw what a difference having a defined and clearly communicated career path could mean to a design team. Conversely, I saw how an organization's "one size fits all" approach to employee development can deflate team morale. Design teams need the support, rituals, and defined expectations that a dedicated focus on people operations can supply. Community leaders or practice leaders often run the people operations in a DesignOps organization.



"Design teams need the support, rituals, and defined expectations that a dedicated focus on people operations can supply."

Dave Malouf — IXDA, DESIGN OPS SUMMIT

Lastly, **Workflow Operations** is an area of focus that I sometimes call "Product Lifecycle Management Operations." A program manager is typically tasked with this area of focus, which focuses on the flow of production within design and research teams, and on the integration of design practice with the other product lifecycle roles—development and product. Systems that support project intake, assessment criteria, and project management of design, tools, and infrastructure all fall under this lens.

In the next chapter, DesignOps Scenarios & Models, Collin Whitehead shares details about the unique operations models in place at Dropbox, right after he presents some scenarios when DesignOps might make sense for your organization. Later, look for Meredith Black to talk more about the operations that support design at Pinterest in Putting DesignOps into Play.

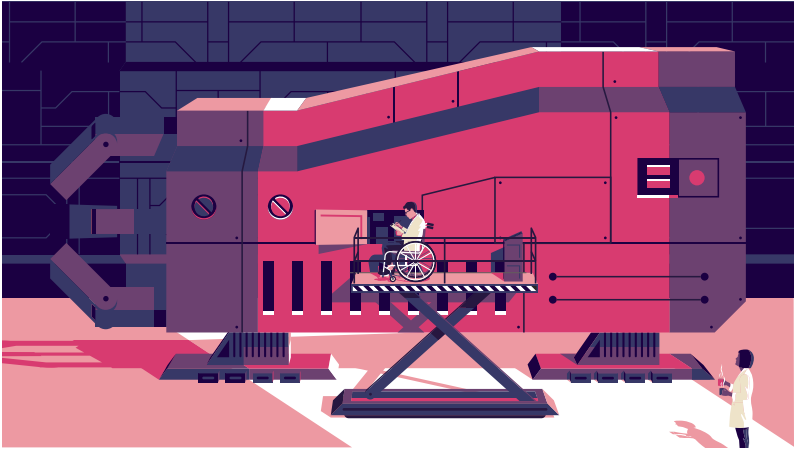
# Dive in

This DesignOps Handbook presents the unique experiences, best practices, and lessons learned from leading DesignOps practitioners at some of the most design-forward companies in the world. DesignOps is both emerging and emergent. We authors don't necessarily have all the answers, but we do have a strong set of principles and perspectives that we hope become valuable to you and your design organization.









## Chapter—02

# DesignOps scenarios and models

## Model structure

by Collin Whitehead, Dropbox

# Going Hollywood

Sometimes I wish I had a simple answer to the question, “What do you do for work?” Instead of being able to say “I’m a tax lawyer” and move on with the conversation, I answer “I’m a design producer.” This usually leads to a response of, “So... like a movie producer?,” which is not far from the truth.

The craft of being a producer in the creative world is similar to that of a movie producer. Filmmaking is one of the most logistically complicated creative workflows in the world.

Naturally, this discipline helped to introduce roles that maintain the creative integrity of a director’s vision while working to coordinate large teams against tight timelines and budgets.

As film industry talent spilled over into commercial advertising, broadcast producers followed. Then as advertising and design agencies grew, more and more types of producers were brought on, each with their own craft discipline. Broadcast, print, interactive, experiential, design, and even integrated producers who spanned multiple mediums began to support creative teams.

“Companies are beginning to understand the value of design, and are investing in the role of DesignOps to maximize design’s value and impact.”

Collin Whitehead — DROPBOX

Nowadays, the role of DesignOps is becoming more commonplace. DesignOps teams help to forecast work, manage resourcing, drive the day-to-day project flows, oversee budgets, support team health, and basically facilitate anything that allows creative teams to focus on what they do best. Companies are beginning to understand the value of design, and are investing in the role of DesignOps to maximize design’s value and impact.

I began my career as an interactive producer at Goodby Silverstein and Partners. The timelines were insane, the clients were demanding, and my production teams were trained to “yes, and” every creative idea that landed on our laps.

An ad agency was (and still is) a great proving ground for a producer; I was often tasked with scheduling and budgeting unrealistic and impossible ideas from teams of art directors and writers, with the expectation to never say it couldn’t be



done.

I came away from the ad agency with some incredible experiences and came to realize that what mattered most in my role was not to fight just for the creative team but to build a process that would protect the integrity of the creative team's work.

As I transitioned from an agency to a startup consultancy to in-house DesignOps at Dropbox, many aspects of my work have remained the same. However, unlike my time at the agency, where I sometimes felt I was producing creative work for its own sake or for awards, I now clearly see when and how DesignOps can serve and impact both design teams and the businesses they serve.



Maria Giudice (Hot Studio)

Listen Online: [Producer roles at facebook](#)

# When is it time for DesignOps?

The craft of a DesignOps team boils down to process. When you have a team responsible for process, it lets every other team focus on their respective crafts. It can be hard to gauge when to ramp up a DesignOps function, but I've seen three scenarios where it might be time: Nowadays, the role of DesignOps is becoming more commonplace. DesignOps teams help to forecast work, manage resourcing, drive the day-to-day project flows, oversee budgets, support team health, and basically facilitate anything that allows creative teams to focus on what they do best. Companies are beginning to understand the value of design, and are investing in the role of DesignOps to maximize design's value and impact.

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**01. Craft specialization:** it's no longer feasible for roles to blur

**02. Operating a design team at scale:** it's no longer possible to keep everyone in sync

**03. Safe harbor:** designers need protection from the grind and thrash of creative development

## Craft specialization

In the early stages of a design team, designers and other team members wear many hats. The roles and responsibilities are blurred in a persistent “all hands on deck” approach to every problem. For small teams, this is often the fastest way to work together—the workflows, stakeholders, coordination, and communication are all easy enough to keep in check, and everyone is in sync.

At this limited scale, designers manage their own project intakes and timelines, as well as other tasks outside their own design crafts. At this stage, while teams are small, DesignOps functions don’t make a lot of sense; it would likely take more work just to keep a DesignOps person up to speed on projects that are moving quickly.

As organizations mature and grow, specialization becomes increasingly important. As a business scales, the processes

that were once effective might no longer fit the changing org. Design teams may find that as they scale, they require specialist roles beyond the UX designer—like design researchers, UX writers, brand designers, illustrators, and motion designers. This is when a DesignOps role can help to make sure that the right people give the right feedback at the right time, with each specialist aligned to the same overall objective. It's a tough job that seems more of an art than a science.

The job of the DesignOps team is to protect the time and headspace of everyone within the design organization—the designers, writers, researchers, and so on—which allows everyone to focus on their respective craft. That focus benefits managers, who are able to pull themselves above the fray of the day-to-day to set a longer-term vision, as well as individual contributors who gain more time to hone and develop their skills. Specialization also introduces a financial upside to an organization by ensuring that people are doing the work they were hired to do, rather than taking on work outside of their core competency.

“The job of the DesignOps team is to protect

the time and headspace of everyone within the design organization, which allows everyone to focus on their respective craft.”

Collin Whitehead — DROPBOX

## Operating a design team at scale

Organizational growth means more teams and individuals—from product management, customer support, marketing, sales, etc.—lean on the design team. Keeping these teams and their requests in sync often becomes a responsibility unto itself beyond the actual work of design.

Beyond organizational headcount, companies tend to expand their product lines and functionality, which creates an acute need for design standardization and optimization. This is when it becomes critical to better manage communications and coordination across all teams and projects.

When I joined the Dropbox brand studio team in 2015, we were growing fast and spread too thin across a wide variety of projects. I was hired as the team's first executive producer to help our creative team to collaborate better in general, as well as with cross-functional teams, our marketing team, and external creative partners. We were experiencing growing pains on two fronts.

First, other teams were growing faster than our team. Dropbox was establishing marketing teams in multiple cities around the world. As teams like communications, sales, and product design relied on us for more and more projects, suddenly everything was considered "high priority."



Dropbox brand team

Second, we were expanding our product offerings. The launch of the Dropbox Paper beta was my first project, and we faced a number of internal challenges to get it out the door.

For many years Dropbox had a smaller portfolio of products and features, and we had not established an operational cadence for new product launches at scale. The Paper beta required lots of hunting around to identify the project stakeholders (not to mention determining how they wanted to be involved), as well as the financial and legal management of new vendors.

As organizations build out these processes they become the “fine motor skills” that ensure consistent quality at scale. DesignOps is uniquely adept at defining, socializing, and maintaining these type of workflows.

## **Safe harboring design teams from burnout**

Creative teams are uniquely vulnerable to the subjective nature of their work. On any given project, they might receive



bad feedback, late feedback, conflicting feedback, and even feedback from unknown parties with no apparent involvement in a project. After jumping through the burning hoops of a long creative approval process, a team will see their good ideas arbitrarily go down in flames. This creates a stressful environment with few safe places to explore and ideate, and little to no empathy or support for the creative process.

What's more, scale, pace, and complexity can add up to an environment where creative teams feel like they are always reacting, and never exploring and refining ideas. When this happens, it's understandable that a designer might just throw up their hands and say, "Just tell me what to do." This happens all too often at companies that invest in amazing design talent, only to relegate them to software operators rather than thinking of them as partners in solving business problems. It also means that these great creatives are going to look elsewhere for a creative outlet—hopefully on a side project, but likely at another company.

DesignOps is not a panacea for every issue, but it can mitigate the workflow problems that impact a teams' health—beginning with planning. If a team knows when to expect feedback from specific people—whether from the CEO or other stakeholders—they can tailor the presentation of their

work to reflect how it addresses things like revenue goals (this design will increase conversions), product goals (this redesign will make features more discoverable), etc. What's more, a design producer can set expectations and explain to stakeholders what type of feedback is needed at each particular stage in the design process.

“DesignOps is not a panacea for every issue, but it can mitigate the workflow problems that impact a teams’ health.”

Collin Whitehead — DROPBOX

At Dropbox, producers create what we call “blue boxes” at the top of each document we present for creative reviews. These are check boxes that clearly state—before any work gets presented—what feedback we are looking for and from whom. We also call out what types of feedback won't be helpful. This approach is a great reminder at each review of roles and responsibilities; while we want everyone to be heard, we also want to clarify who is the ultimate decision maker for different aspects of the creative output.

To use a video production as an example: in the final edit review, our design producer will kick off the meeting with specifics on what feedback we need, but will also note that we have a locked cut—signaling that we are not accepting feedback on the voiceover or other unchangeable elements.

Beyond managing stakeholder feedback, DesignOps can prepare the team for upcoming projects and even expose the creative team to the decision-making process early, elevating them more to project partners than executors. This advanced forecasting allows creative teams to get involved with those requesting projects—like product or marketing—and work collaboratively to define the problem.

## DesignOps models

The specific flavor of DesignOps you put in place can vary. In general, I've seen two DesignOps strategies surface, each of which overlaps with the other:

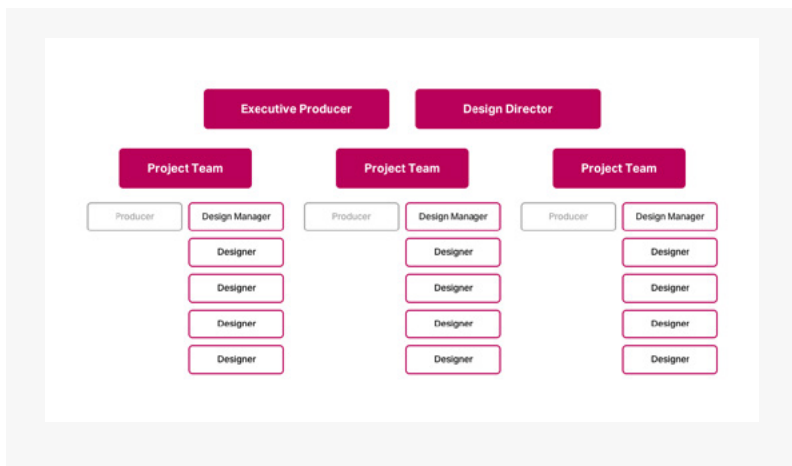
- **Operations support:** the DesignOps role sets standards

and refines processes for the entire design team.

- **Project support:** the DesignOps role embeds into each specific project workflow to drive and improve the creative process in partnership with design leadership.

## The operations support model

In a DesignOps support model, the ops function builds systems that impact the work at a high-level. Here the ops function tends to be smaller—sometimes just one person—with a broad focus that allows for spotting areas in need of triage. These areas include design tooling and systems, communications, recruiting, team development, and budgeting.



### Operations support model

The DesignOps team can standardize the tooling and systems used to scope, resource, track, and archive projects. While some of these systems can drive high-level strategy, others—like file nomenclature and folder structure—can be just as vital to a team’s success and sanity.

The ops role might dictate meeting cadence, thinking strategically about when 1:1 meetings, team meetings, and leadership meetings should fit in any given week. More, the DesignOps role can implement and enforce good meeting hygiene by requiring and documenting clear agendas and action items.

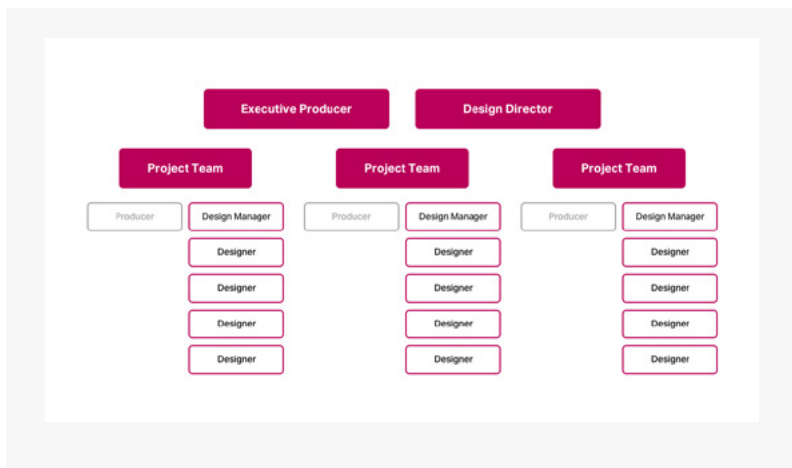
More broadly, a DesignOps support function might set recruiting standards, plan new hire onboarding, and set a curriculum for the ongoing education and development of the team. The support model also extends beyond the logistics of project work and facilitates teammate recognition, the “pulse” of the team, special projects (like a “hack week”), and other projects where there is no natural project owner.

Finally, the DesignOps role can support the team by managing the budget. Forecasting and tracking both external and internal spending trips benefit even the most adept design leads. This is especially true when your team relies on freelance talent, vendors, and agencies.

The work of managing contracts—setting the scope of work, negotiating rates and terms, coordinating with the finance team—is absolutely crucial for team success. A DesignOps function can manage this responsibility, giving both the design team and external resources an informed and helpful point of contact.

## The project support model

In the project support model, a design producer or program manager attends not just to the high-level systems but to individual projects, driving the day-to-day creative workflow.



Project support model

As each project kicks off, DesignOps can establish clear roles and responsibilities for the working team as well as for stakeholders. Within Dropbox we don't have one set way of doing this across each of our teams; one group may be using a R.A.C.I. model, others a D.A.C.I. model, and still others some (likely made-up) acronym that means the same thing.

DesignOps can help pair the different work styles into a unified project flow. And while this obviously keeps everyone

accountable for their respective contributions to a project, these clear responsibilities also delineate what folks should not work on, like tasks that can best be handled by someone else or that are out of scope.

While a product or project manager might own the overall schedule, in this model the DesignOps team owns the creative schedule and milestones and ensures that creative teams have what they need to develop their best work on time. This project support might include documenting tasks and follow-up items, wrangling project specifications, and handling asset management.

"The most effective DesignOps teams are servant leaders to their organizations and respected peers to design leaders and teams."

Collin Whitehead — DROPBOX

## Moving the practice forward



You might find the trigger for your org's adoption of DesignOps doesn't fit the scenarios listed here or in other chapters—or perhaps the trigger is a combination of a few scenarios. You might also settle on a hybrid DesignOps model that provides both operations and project support. There is a lot of overlap and variability in DesignOps practices worldwide, and that's fine.

Whatever the reason behind and shape of your team's adoption of DesignOps, just remember the most effective DesignOps teams are servant leaders to their organizations and respected peers to design leaders as to how better work processes can impact the entire culture of collaboration.



## Chapter—03

# Putting DesignOps into play

Rubber meets the road

by Meredith Black, Pinterest

# My path to DesignOps, from consultancies to in- house

I knew design was being taken seriously when the firm where I worked, Hot Studio, was acquired by Facebook, joining a wave of design acquihires. Around the same time, Accenture acquired Fjord, Capital One acquired Adaptive Path, and Nurun acquired Odopod. Large organizations realized that one way to quickly scale teams was by acquiring design firms.

One thing all of these design firms had in common was a staff who knew how to work with creatives and clients, and who could manage projects efficiently. Through these acquisitions, the role of DesignOps was introduced into larger organizations, which demonstrated just how valuable design operations can be when strengthening product teams.

Margaret Stewart, VP of product design at Facebook, embraced this opportunity by ensuring there were several DesignOps members on her team—including me, during the Hot Studio acquisition and transition.

Today, there's a growing DesignOps team of more than 40 design program managers at Facebook.

Jasmine Friedl, formerly a product designer at Facebook, is now the director of design at Udacity. Here's how she recalls the integration of the role of DesignOps at Facebook:

"While our leaders saw the value of design, many parts of the largely-driven-by-engineering company had a learning curve to understand how we were more than just pixel-pushers. The role of design program managers was crucial in that: to set expectations, get the right people with the right skills on the right projects, scope phases, and manage those expectations to delivery. We saw this first become a pertinent part of the ads organization, and later the design organization as a whole, where design program managers facilitated, organized, prioritized, and wrangled people, events, and initiatives on everything from product to culture."

Jasmine Friedl — UDACITY

After some time at Facebook, Pinterest called me. Bob Baxley

was head of design, and he wanted someone to help steer the design ship and run operations for a small team. While it was very much a to-be-defined position, we both knew the DesignOps role could make the design team operate more efficiently, and allow the designers to focus solely on design. After four years in this role, I'm excited to share what I've learned about what DesignOps can look like in an organization.

## Getting buy-in for DesignOps

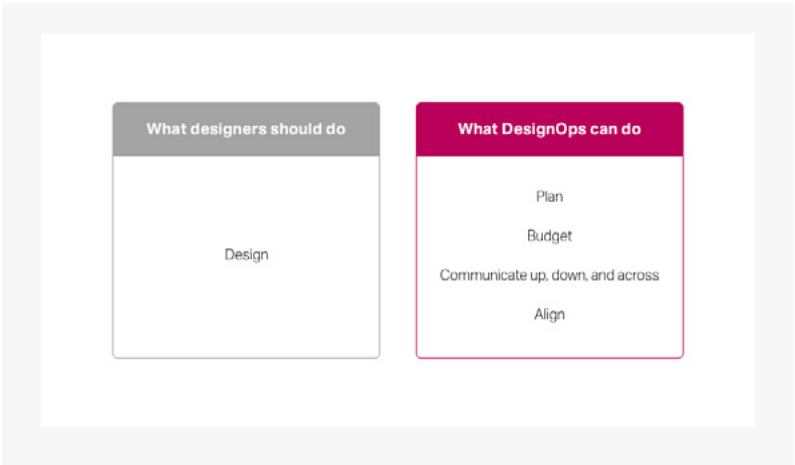
"What we've learned over time is that when our [designers] are spending more than 50% of their time doing operational work, that's a problem."

Adrienne Allnutt — LINKEDIN

Adrienne Allnutt and Kalee Dankner discuss how LinkedIn approaches Design Ops, from sharing work out to other teams to building cross-functional relationships.

Because not everyone is familiar with the role of DesignOps, introducing it into your organization can be a challenge. You'll want to prepare an explanation of the role and how it benefits your organization.

DesignOps makes teams run more effectively by letting designers focus on design while leaving everything else to the operations team. Many organizations expect their designers to wear many hats—project manager, cross-functional partner, creative leader, and logistical coordinator. However, these additional roles reduce the time your designer can devote to your product and users.



While it may take some convincing to hire for this role, the ROI

will appear quickly. Teams will be better organized, leadership will gain a better understanding of what makes their teams tick, and cross-functional teams will have more visibility into—and a better understanding of—the design process. This creates better organizational awareness of design, and mitigates misconceptions that “designers design in a black hole” or that design projects take too long.

“Many organizations expect their designers to wear many hats—project manager, cross-functional partner, creative leader, and logistical coordinator. However, these additional roles reduce the time your designer can devote to your product and users.”

Meredith Black — PINTEREST

## **Some tips for DesignOps buy-in:**

## Do the research

Talk to your heads of design, product, and engineering (and any senior leadership within your org you have access to) to assess opportunities available in the current product teams.

Here are some possible conversation starters:

- Do you have visibility into what the design team is working on?
- Do you know if the team is working well cross-functionally with product and engineering colleagues?
- Does the team have clear and actionable goals they are driving toward, and are they meeting them?
- Are there regular design critiques or feedback sessions?
- Are the product manager, engineer, and designer aligned with what's shipping?



- Is the team meeting deadlines?

## **Propose a plan**

Propose a set of essential tasks that DesignOps could help contribute to.

For example, DesignOps can help a product manager operationalize a roadmap, make sure that the team has proper kick-offs on projects, and ensure a design QA is scheduled prior to a major product launch.

## **Recommend the role**

Recommend to your leadership team that you would like to hire someone into this DesignOps role to tackle the opportunities surfaced in your research—someone who will develop a long-term plan to scale operations on the team.

## **Keep leadership involved**

Invite your stakeholders to interviews, and keep them involved throughout the interview process.

## **Spread the good news**

Update your stakeholders on successes and the impact this hire is making in this role. You want to make sure leadership sees the positive outcomes this role creates.

# **Staffing for DesignOps**

Staffing for DesignOps will depend on both the makeup of the design team and the culture within your organization. Some design teams might appreciate tenacious and driven people running projects, while other organizations might require a lighter touch.

Regardless of the situation, there are some universal qualities and skills to look for in a DesignOps candidate:

**01. You want someone who can build cross- functional**

relationships while representing design, and who understands the design process. These relationships will necessitate understanding the product development process and product engineering principles.

02. The role calls for excellent project, time, budget, and resource management, and an understanding of different project management ideologies (like waterfall and agile, among others)
03. Finally, this role calls for calm in ambiguous and changing environments

One size doesn't fit all. It's okay to take the qualities above and get creative, which is something I did when I hired two candidates from an organization outside the typical design path—the United States Navy. Both had experience navigating a large organization with different types of people and multiple missions and goals. In my case, the qualities and experiences perfectly aligned with our team's needs.

# How do you screen for these qualities?

Most hiring processes begin with a recruiter or hiring manager initiating a phone screen with the candidate. I usually ask that the phone screen include a few ops-specific questions, like “What are your strengths when it comes to operations?”

Another way I determine organizational fit is to ask the candidate to describe whether they enjoy variety and change, or a more regimented day with clearly defined daily tasks. If the phone screen goes well, set the candidate up to speak to future collaborators—designers, of course, but also consider representatives from engineering, research, writing, and product management.

Each interviewer should take careful notes, as you’ll all want to debrief after the last chat.

Compare notes and determine if the candidate aligns with your team, your project management needs, and demonstrates the skills to work both cross-functionally and closely with the design group. And be sure the entire team is excited about working with this potential colleague!

# A yearlong plan for integrating DesignOps

## Day one

Now that you've hired this person, you want to set them up for success. On day one, welcome your new hire onto the team, perhaps with a special event. At Pinterest, we used a weekly Wednesday coffee event called "Fika," where a colleague would bring in a treat they discovered from Pinterest, to create a calm and welcoming environment.

## Week one

With day one out of the way, the rest of the week should allow your new DesignOps hire to build relationships within and beyond the design team. Set up 1:1 meetings with the right people for your new hire, and encourage them to learn how design works in your org, what designers need help with, and what opportunities there are for this new hire to help.

## Month one

Now that your hire has made it through week one intact, for the next couple weeks, they can start exploring how to make the design team operationally efficient.

## Year one

What follows are a few initiatives for your new hire to focus on based on the needs of your organization. Covering all of the recommended areas will take at least 6–12 months to implement, and will most likely take the work of more than one person.

Throughout this first year, make sure you're tracking the performance of this role and communicating it—this will allow colleagues across your organization to see the value of the role, and will allow you to build a case for even more DesignOps hires.

“DesignOps doesn't just help the design team—it benefits all parts of the product

organization.”

Meredith Black — PINTEREST

## A menu of DesignOps initiatives

### Resourcing

Align your headcount to your roadmap by thinking about resourcing: who should be doing what and when?

- **Develop a template or guide** to help identify the strengths of each designer on your team and how they can best contribute to different types of projects
- **Audit whether the design team is set up for success—**are designers on projects that suit their skills and strengths?

- **Meet with design leadership each week** to ensure that company priorities are being suitably staffed

## Program management

Begin to shape the design process by instituting communication and collaboration protocols.

- **Create a short (30 minutes should be enough), weekly visual status review with your design leadership team.** This will allow everyone to quickly go through each design, spot any overlaps on projects, ensure the product design is up to design spec, and ultimately solicit approval before launch.
- **Carve out weekly dedicated studio time for designers to catch up with other designers.** For designers embedded on cross-functional teams, this is an opportunity to talk about projects, share designs with someone outside their usual cohort, and contribute to developing a strong design culture.



- **Schedule weekly design critiques for each design team.**

These critiques are an opportunity for peers and design leadership to review work, provide feedback, and maintain high design standards. As the DesignOps program manager, your responsibility doesn't end with scheduling the crit, but includes set-up, ensuring designers are ready to present, and following up with clear and actionable next steps for each designer.

- **Deliver weekly status updates to and beyond your team.**

At Pinterest, we send out a visual status document every Monday morning that lists what everyone is working on and shows design comps from each team. This keeps our design org of 60 people up to date on what other designers are working on, and also serves as a guide for our cross-functional teams to understand what everyone is working on.

- **Establish credibility and become the source of truth for your team.** Once in place, the preceding items will lead to this happening. Courtney Kaplan, head of design program management at Facebook, describes herself as “the human Yelp. People come to me when they need answers.”

## Team onboarding

If you're putting DesignOps in play, you're likely increasing headcount. Demystify the onboarding process for everyone by creating documentation and protocols.

- **Develop an onboarding doc for new designers and design team members.** Make this a team effort—this doc should include everything you and your colleagues wish you knew when you first started. Think about things like file saving and naming protocols, master calendars, email aliases—even where to grab a bite to eat.
- **Pair up new designers** for training and meeting other members of the organization, when you have two or more new design team members starting at the same time. This shared experience can be the foundation for building tight bonds and a strong culture on your team.
- **For a larger organization, consider scheduling design-specific onboarding** in addition to company onboarding. Work with your hiring team to build a curriculum that sets your new hire up for team and org success.

## Team morale and education

A design team requires inspiration, collaboration, and continuing education. Establish how you can facilitate both individual and group growth.

- **Plan team offsites** to get your designers together at least once per quarter as a team. This doesn't have to be anything more than ordering (a lot of) pizza, stocking up on LaCroix water, and procuring a soccer ball. The important part is that everyone gets together and teammates have a chance to bond.
- **Provide educational opportunities** for the team by hosting experts who can level up everyone's skills. This could be a class on how to use a complicated bit of software more effectively or a presentation of a case study by a respected peer outside the organization. If possible, extend an invitation to the local design community by hosting events like Creative Mornings or AIGA Design Week.
- **Schedule regular design speakers** for lunch brown bags

or coffee hours.

- **Make time to take your designers on inspirational field trips.** If your team is distributed, signal that this is an acceptable use of company time and encourage your designers to find nearby inspiration.
- **Hold a monthly all-hands meeting for the design team.** Curate this to include a mix of education, presentations of work in progress from designers, any updates you might have for the team, and some time for folks to get to know each other.

### **PRO TIP** — Strengthen team bonds

Pinterest's head of brand, Sadia Latifi, came up with a variation of "Inside the Actors Studio" where she does background research and asks interesting questions about a designer. It's been so well received that I started doing my own version at our product design all- hands meeting.

Here's how it works:

01. I choose one member from the team and ask them to introduce me to their mother, a significant other, or a friend.
02. I email that person a series of questions, and we review the answers with the designers in front of the whole team.
03. Sometimes this even includes baby pictures and prom photos. It's the best part of the all-hands for everyone.

## Budgeting for design

To advocate for the design organization, you'll want to understand how design fits into your organization's larger financial picture.

- **Meet with your finance team** to understand how the company operates. You'll want to know about accounting systems, the fiscal calendar, team budgets, and how headcount is allocated.
- **Share this information with your design leadership team**—everyone should understand the financial

constraints and opportunities.

- **Track all design team expenses**, and establish approval processes for expense requests. For a large team, you might even provide each designer with a discretionary budget for the tools they need to perform their work.

## Supercharging your DesignOps program

Let's jump forward in time. The team is running smoothly, and you have a good sense of everyone's needs. Now it's time to think beyond design critiques and budgeting.

Though a heavy lift, a **product design system** is a worthwhile investment of time and resources. A design system enforces standards and gives everyone a common language and starting point.

Shifting from digital to physical, a workshop program offers designers a dedicated space to perform special activities. At Pinterest, we have one design program manager dedicated solely to running our workshop—a room that teams can book to run design sprints, kick off projects, or work through a tricky

problem.

The workshop provides an opportunity for designers to move into a new environment and run an IDEO-style workshop to generate new ideas, work through problems, and return to their project teams with clear and actionable next steps.

## Final thoughts

Establishing DesignOps is just the start of this work. You're going to need to make sure this role remains top of mind within your organization by keeping the lines of communication open within and outside the design org.

It takes work, but share team and individual wins with stakeholders, and gather the stories that demonstrate the value of DesignOps. If a project would have fallen through the cracks, or a product launch went off without a hitch, or the team has gotten better at communicating design feedback, it's on you to share this high and low.

Champion this role. DesignOps doesn't just help the design

team—it benefits all parts of the product organization. Be deliberate and thoughtful as you put DesignOps into play, and keep in mind that there is no right or wrong way to do this—it's all about what's best for your design org.







## Chapter—04

# Team coordination

DesignOps is a team sport

by Kate Battles, Fitbit

Design operations teams form for many reasons, and grow and morph in many ways to fit the needs of an organization. I joined Fitbit to help build out the DesignOps team within the larger industrial design (ID) organization, transitioning from my former design program management role.

My design program management role was defined by discrete programs with a clear project brief, defined milestones, and desired outcomes, but my DesignOps role focuses on building an effective design team through established processes, partnerships, and initiatives.

Our initial tasks as a DesignOps team at Fitbit were to help the industrial design teams get up and running as quickly and effectively as possible, and to integrate the ID team processes with those of the greater product development team.

We achieved both of these tasks by:

- Identifying the critical gaps and weaknesses where design could provide the most value
- Establishing and fostering strong cross-functional partnerships

- Socializing our process proposals to other teams and make our case for change

As with most young companies, things change quickly—and so too did what was being asked of us. Within a year of being at Fitbit, my role—and my team's role—expanded to include supporting the entire design organization: ID, user experience, and user experience research.

With the expanded territory and responsibility came new teams, new people, and new challenges. Taking a similar approach to where we started with the ID organization, we now needed to solve for the different types of challenges across each design group; we needed to figure out how to work together collectively to elevate design process and culture within the company; and we needed to bring everyone together under a unified design organization. This was no small task, but in partnership with strong design leaders, this became one of my most exciting career opportunities.

Jonah Becker is the VP of Design at Fitbit. Here's how he recalls the opportunities and challenges we faced with the transition to a unified design organization, and how he foresaw the DesignOps team helping:

When unifying the design disciplines at Fitbit into a single organization, we faced challenges spanning from the tactical to the cultural. The design operations team was central to this transition, establishing processes for communication and project management both within design and with other functions; leading space planning to foster sharing and a stronger sense of team; and creating a culture team to coordinate events, learning opportunities, and workshops to define organizational values. The work of the design operations team has contributed to a team that is central to the development of the Fitbit's strategy; ranks at the top in company engagement metrics; and is creative, open, and fun.

To describe how this unified design organization got started, I'll start by discussing the day-to-day aspects of design operations management that run and coordinate the Fitbit design organization.

## **Listen to all levels**

Once you understand the high-level ask from your manager and have the nuts and bolts of your DesignOps team in place

(team structure, resources, roles and responsibilities, tools, etc.), what steps should you take to help effectively run a design organization? **Start by listening to all levels.**

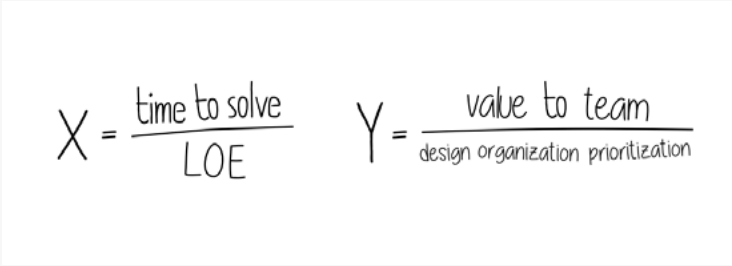
The most effective tool for solving any problem starts with listening. Give yourself and your team an ample amount of time to meet the people who help get the work done. It's critical that you don't stop with the people directly within your particular organization—talk to everyone who contributes to the successful delivery of great design work.

This includes design leaders and individual designers; cross-functional partners like engineering, product management, marketing, legal, purchasing, and customer service; and anyone else with a hand in the process. By talking to an extended group of stakeholders, you should be able to gauge where the organization stands and determine the strengths, weaknesses, biggest problems, and biggest opportunities.

### **Practice effective listening — [VIEW EXERCISE](#)**

I recommend using Post-it notes for these exercises, with one idea per Post-it—this way you can easily move things around. These two groupings should help you get the lay of the land,

help you better understand the spectrum of work needed, and identify the most urgent and/or valuable problems that you and your team can start to tackle.



The image shows two handwritten formulas, X and Y, enclosed in a light gray rectangular border. Formula X is on the left and Formula Y is on the right. Both are written in a casual, handwritten style.

$$X = \frac{\text{time to solve}}{\text{LOE}} \quad Y = \frac{\text{value to team}}{\text{design organization prioritization}}$$

Once you have a clearer picture of what's in front of you, set up some time with design leadership to discuss where you and your team should focus. My general rule of thumb is to mix quick wins against long-term strategic efforts with meaty problems to solve over time. This provides a balance of short and long-term progress for the team.

"The most effective tool to solving any problem starts with listening. Give yourself and your team an ample amount of time to meet the people who help get the work done."

Kate Battles — FITBIT

## Communicate often



Maria Giudice (Hot Studio)

Listen Online: [Design Ops and leadership](#)

Once you have your priorities and approach in place, it's very important to communicate progress often. These internal initiatives should be as revered as any other product program. If you have a weekly status meeting with design leadership, be sure to speak to progress, blockers, etc., to make sure your team has what it needs to be successful.

It's often time that's required to solve process problems, so communicating what is needed and expected of your design leadership team is crucial. In addition, make sure to have



ongoing dialogue at the cross-functional leadership level (if necessary). Not only does this elevate the DesignOps team within the design org and the company at large, it helps to create awareness of the value of DesignOps, and presents you and your team with the opportunity to present your work to a broad group of stakeholders.

Finally, depending on the frequency at which your design organization meets, consider regular team meetings to proactively communicate what everyone is working on. It's likely that a lot of the ongoing initiatives you discuss in these meetings will be those that were inspired and informed by the designers themselves. Not only will this make the designers feel heard, it will make them feel like they had a hand in making things better.

"Communicating what is needed and expected of your design leadership team is crucial."

Kate Battles — FITBIT

# Don't forget to ask for feedback

Communication is often half the battle when trying to effect change within an organization. The second—and often forgotten—half is taking the time to gather feedback. Getting feedback on a project or initiative you're leading can feel scary and personal, which can give feedback a negative connotation.

However, feedback helps us understand what went well (positives!) and where things can improve (opportunities!). Nothing is ever going to be perfect the first time (or often even the second or third times), so it's important to continually ask for feedback to help improve the final outcome of your project.

Depending on the scope of the work and the number of people involved, there are many ways to gather feedback: one-on-one discussions, surveys, and retrospectives are some of my go-to methods. Regardless of how you gather the feedback, doing so early and often does two important things. First, it allows people to be heard and feel valued. Second, it helps inform you and your team about how to make things better going forward.

Make sure to also communicate that you're open to feedback at all times. If something doesn't feel right or isn't going in the

right direction, it's best to know as soon as possible versus down the road when you have missed your opportunity to effect change.

## **Managing through chaos is your super power; flexibility is your most valuable asset**

Change is inevitable and happens on all levels at all scales. When working in DesignOps, your team is on the frontlines, helping everyone do outstanding work amid the chaos and rapid change. DesignOps keeps design teams focused on the work, not the processes. As everything is subject to change—from the company level down to the individual pixel—it's important for DesignOps to remain calm and collected.

I often refer to this chaos-to-calm relationship when I describe my day-to-day to those who want to better understand what I do or my role as a design operations manager. I say, "It's like I'm a duck on water during a storm, trying to get from point A to point B. Above the water, it might look like I'm gliding along with

little effort, but below the surface, I'm paddling like crazy to get out of the darn rain."

I also try to be very transparent with my team about things outside of our control, and how it's important to adopt a "wait and see" approach.

DesignOps must keep moving despite what the universe throws at us, and our flexibility in all conditions makes us such a valuable resource for design teams. We don't give up, and we get everyone to the finish line—even when the finish line has moved more than a few times. How to keep the team happy and leadership sane

You can't keep everyone happy all the time. I recommend you say that a few times, and maybe write it down. It's one of the hardest lessons to learn when managing stakeholders, clients, teams, and individuals.

That said, there are some steps you can take toward building a solid foundation, which will enable you and your design organization to grow, evolve, and manage through good times and bad—and hopefully be happy and healthy most of the time.

## 01. Align and articulate team mission or vision

02. Align on roles and responsibilities

03. Define success for your team and your individuals

04. Define your culture and prioritize it

## 1. Align and articulate team mission, vision, and values

Well-written mission, vision, and value statements can unify and inspire design teams. Think of these as the glue that brings and holds teams together. As all companies are different, so too are their statements. Here's how I think about them:

- **Vision statement:** An ambitious framing of the future that you want to achieve—a North Star toward which your teams should be working
- **Mission statement:** A breakdown of how you're going to achieve your vision

- **Values statement:** A guide for the day-to-day decisions about how you conduct yourself

These statements are great resources to be used within the design organization during onboarding and recruiting, and during those times when designers need guidance to tackle a tricky problem or scenario. These statements should also be shared with cross-functional teams as a reference to better understand how the design organization aspires to operate, solve problems, and define success.

Make these statements visible—print them out, or place them where your designers often go (wiki, design home page, etc.). Keep in mind that these statements aren't just for departments—you can write them at the team level too.

Not sure where to start when writing your design organization's statements? Here's a simple template for starting a mission statement:

- Who we are
- How we work

- The outcomes we aim for

For reference, this is the Fitbit design operations mission statement:

We are agents who facilitate change, strengthen connections, and drive better process within the design organization and across the company. We partner with design leadership, design teams, and cross-functional partners to build and grow best in class teams, processes, and culture. Our initiatives and collaboration help launch amazing products and experiences.

## **2. Align on roles and responsibilities**

Once you have a North Star toward which your teams are working, it's also ideal to have clearly articulated roles and responsibilities within the organization. This way, individuals know where they stand and how they can progress in their careers. Roles and responsibilities are likely in place if you're working at a mature company, but for the new company or newly formed design org, these will have to be defined.

Work closely with your human resources business partner, if

available, to ensure roles and responsibilities match (or are within industry standards), and that they're equally leveled across the company if similar roles exist within separate organizations.

### **3. Define success for your teams and your individuals**

As most companies have long-term (looking several years out) strategic and annual planning, so too should design organizations. DesignOps can facilitate conversations at the design leadership level to ensure success is being defined based on the company's goals. At Fitbit, we meet quarterly as a design organization to reflect on the previous three to six months, talk through any urgent priorities, and set goals for the coming months.

With your team goals established, take time to get feedback. Goals that are shared and agreed upon are goals that can be met. Write your team goals down and place them where the team can easily access them.

Many companies have tools that help teams and individuals document their goals. Make sure to agree on these tools—and



set the expectation that everyone should use them to ensure you're working toward the same outcome.

#### **4. Define your design culture and prioritize it**

Culture is often the unsung hero that keeps design teams happy and healthy, yet too often it's not prioritized. Similar to how it's important to frequently elevate and discuss design operations initiatives, culture is also something that must be addressed.

Building a design culture can be done in many ways and at different scales. Find out what works for you and your organization by having stakeholder conversations with design leadership. Ask them to describe their ideal design culture, and to define what is most important to them. From there, approach it like you would any other design problem: set up desired outcomes and deliverables, set milestones, and create teams to get things done.

"Goals that are shared and agreed upon are goals that can be met."

Kate Battles — FITBIT

# **Design cannot be successful in a silo: building cross-functional relationships for optimal design outcomes**

Relationships are so crucial to successful outcomes for both design and DesignOps. When tackling any design challenge, whether it's designing a new product experience or designing a new process, identify key cross-functional partnerships and stakeholders who can spot the opportunities for design to provide the most value.

By establishing and fostering strong cross-functional partnerships, you're also ensuring that all possible solutions are surfaced by balancing the user experience with business needs and company goals.

Identify your cross-functional partners and stakeholders early to make sure they clearly understand the problem and

are aligned on the desired outcome. From there, establish a meeting cadence that will keep everyone looped in. If you're solving for stronger collaboration in general, consider a bi-weekly meeting cadence to ensure close and frequent communication.

Some of the meeting topics I recommend include, but aren't limited to:

- **Aligning on priorities across teams**
- **Problem solving key/hot issues across programs**
- **Sharing work that's in progress**
- **Process problem-solving**

No one likes a lot of meetings, so revisit the meeting cadence often to ensure it's a good use of everyone's time. In addition, promote collaboration at every level—but start at the top. Having leadership aligned will make things less chaotic for everyone.

Finally, don't be afraid to solve for areas of friction. Often, I hear collaboration with cross-functional groups described as a major frustration among our teams. Address this head on to deliver better outcomes sooner!

## Final thoughts

As companies grow and build design organizations, the need for and value of DesignOps will continue to rise. Whether your implementation of DesignOps is a single contributor or a small army, team coordination—whether within the design organization or across the entire company—is paramount. Coordination is job number one, as it's required to get DesignOps off the ground in the first place.

Throughout this handbook, you've learned how DesignOps came to be, when and why it should be implemented, and how it can be put in play. You'll also learn how DesignOps overlaps with research operations. The common thread across these chapters is the need for clear and constant communication and coordination—listen, share, ask for help, and keep your team aligned.

DesignOps is a complicated discipline, but sometimes getting started is as simple as coordinating.



## Chapter—05

# ResearchOps

But first we research

by Dave Malouf (DesignOps Summit, IxDA); Conclusion by Meredith Black (Pinterest)

At this point, you know a ton about DesignOps. And the fundamentals of DesignOps are transferable to thinking about research operations (ResearchOps). ResearchOps gets its own chapter here for two reasons. First, it's tightly related to design. Second, research calls for very specific approaches to people, workflow, and business operations.

## The mission of research

Research helps gather data from inside and outside the organization to derive actionable insights that drive both strategic and tactical decision making.

The data that feeds research comes from a variety of sources:

- User research
- Ethnography
- Interviews

- Remote and in-person moderated and unmoderated testing
- Journaling
- Participatory design
- User activities (purchases, usage, site, and app analytics)
- Market research
- Analyst reports
- Support and sales logs
- Customer interviews

Organizing research activities to discover insights—and then making those insights actionable—requires attention to many operational concerns. This is especially true as you scale your research organization and your org as a whole.



In this chapter, we'll discuss the considerations and special needs unique to user research, as well as how it intersects with design and other parts of the organization.

"Research helps to gather data from inside and outside the organization to derive actionable insights that drive both strategic and tactical decision making."

Dave Malouf — IXDA, DESIGN OPS SUMMIT

## People operations

The difference between the people and community operations for DesignOps and ResearchOps is organizational structure. Though there are many ways to organize research in an organization, the context and makeup of your team will determine the right path.

Some questions that might help you shape your research structure include:

01. Is research a practice unto itself, or is it practiced by people tied to other functional roles (like design, product management, or development)?
02. Who leads which types of research activities?
03. Do researchers plan and execute all the research for the benefit of others?
04. Do designers and product managers lead their own research initiatives?
05. Who do researchers report to?
06. What other types of research does the organization conduct—market research, data science, and analytics?
07. If market researchers or data scientists are conducting research, who do they report to?
08. Does research function as a service agency to the entire org, or are individual researchers assigned to specific teams?

The different answers to these questions changes both the people operations (PeopleOps) and ResearchOps contexts. To illustrate, let's imagine a scenario that will allow us to create a scaling team structure:

*You're the head of design for a growing and maturing design team. When you joined, the design team was eight-people strong, and the team lacked a dedicated researcher—all the designers did their own research.*

*Now the team is up to 10 folks, and you're ready to start adding dedicated research practitioners. You need them to:*

- *Scale design research, especially in areas that are horizontal to all products*
- *Operationalize research so designers can more efficiently and effectively do the research they were already doing*
- *Evangelize and coach research, analysis, and synthesis methods to make results more accurate and actionable*

*This first person you hire is a lead researcher. This is a senior*

*role that will convert to a manager in a short period of time. This hire might be at the management level now, but wants the challenge of building a research organization from the ground up and is willing to be an individual contributor for a short while until more headcount arrives.*

*The lead researcher's first hire will most likely be a junior, focusing on partnering with designers for their larger vertical research efforts, and for managing discrete aspects of the ResearchOps process.*

A research team might start out as part of the design organization, since the designers already practice research in their work and likely come from a traditional UX background with a healthy respect for qualitative research. Alternatively, research might work as part of a data science group, or parallel to design, or as part of a product management team.

Once the team is large enough, the design research team might even run **parallel** to both design and product management. At scale, this team might run parallel to the **entire product organization** as a new "Insights" department that includes data science and market research.

*For the purposes of this chapter, we'll assume research is*

*part of the design organization as we discuss operationalizing research.*

*With a structure in place, the next consideration is the ratio of researchers to the rest of the organization. Let's jump ahead three years:*

*There are now 25 designers across 15 product teams, each with its own product manager. Each product team may have at least one scrum-based agile team of eight people. To serve this product organization, you spin up a new design research team made up of the following people:*

- *A manager of design research*
- *Four senior design researchers, two of whom handle qualitative methods (interviews, ethnography) while the other two tackle usability issues*
- *Two junior or associate design research generalists—likely recent graduates*

*This team is about one-third the size of your design*

*organization, but you will need to adjust this based on capacity planning, how extensive your research initiatives are, and how much non-user research your design research team needs to be doing (quantitative studies, analytics, market research, and analyst reports).*

## Physical and virtual space

Research and design share a lot of the same space parameters. Both want workshop spaces with whiteboards and room for Post-its. Both want a flexible space that can be reconfigured to meet their needs with minimal effort. And both require space that can be reserved for the length of a project and possibly beyond. Physically, it should be easy enough to "get a room," so to speak. Virtually, there are plenty of tools and systems that can facilitate research when team members are not in the same room.

### Physical

One space unique to research is the usability lab. A lab calls for equipment that needs to be selected (measuring, recording, and communication devices), a space architected into a proper test environment (proper lighting and sound set-up), and ongoing maintenance to keep everything humming.

Eventually this might call for a lab manager who keeps the space in tip-top shape and administers all the equipment. A lab also serves as a storeroom for equipment like cameras and microphones that are used both in the lab and the field.

Along those lines, you might require a mobile device lab stocked with different devices and configurations of software and hardware. This is especially true if you maintain legacy platforms.

Lab time is coveted by researchers, so you'll need a system for managing access. While first come, first served on a shared calendar can work, you'll likely need to implement some evaluation criteria based on project priorities.

When you bring folks into a lab, you need everything to run smoothly. Your lab manager or tech support might need to be on standby in case of any unanticipated glitches. And don't forget to be hospitable—where will visitors wait for their

interviews or tests? Will you provide drinks, snacks, or lunch?

The user experience extends to the lab.

## Virtual

For research that doesn't take place in a lab or dedicated space, you might use services like Optimal Workshop, UserTesting, UserZoom, or Validately, among others. These are paid platforms that allow you to run a mix of moderated and unmoderated tests of interfaces, scenarios, and content. You may also use data capture software like Mural, Optimal Workshop, AirTable, Smartsheets, or others.

Note that you'll want someone to keep track of which platforms you're licensed to use, and when those licenses expire.

Similarly, you'll want to track which platforms you no longer use to avoid recurring charges that eat into your research budget.

Some usability testing teams simply rely on video conferencing services. However, you might want to juggle more than one conferencing service—many enterprise organizations don't allow individuals to install their own apps on their work computers. Keep this in mind if your research will require you to speak to members of an enterprise organization,



and have conferencing options in mind.

## **Workflow process and tools**

The biggest parts of operationalizing research revolve around workflow and tools.

### **Project intake**

You'll need to give your team a transparent intake process for the evaluation and prioritization of projects. This ensures that everyone—stakeholders especially—can see the right projects are prioritized based on sound business reasoning.

The people who request research don't always know exactly what they need, so your intake process might require a discovery process. Discovery is often run against a template that frames the criteria required for moving a project to a planning stage.

## Research planning worksheet — [VIEW EXERCISE](#)

### Recruitment

Participant recruitment, scheduling, and incentive management are probably the hardest things about user research. How do we get people to invite us into their homes or offices or workspaces, where we can observe them performing the activities we want to design for?

### Participant database

Around your fifth or sixth usability test, you start to see the need to manage your subjects in a database. Any spreadsheet works; I prefer Airtable because it's incredibly easy for creating relational tables that mesh lots of different data and metadata.

Why a participant database?

- A pool of customers who have opted in to research projects makes it quick and easy to recruit participants and provides you with a better response rate than contacting

people you have no information about

- A database helps track schedules and incentives
- In a system like Airtable, I can track participant information across multiple projects to build a richer analysis of each person
- Finally, tracking participants ensures that we don't go back to the same customer too often

## Engagement tracking

An engagement is a single session (a usability test, interview, etc.) that a team has with a user or customer during a project. Engagement management is similar to project management, on which we add a layer of engagement data to track.

These are the engagement data points I recommend tracking:

### 1. Project information

The project information is analogous to what you'd find in typical project management—project name, project description, current project status or phase, research type (exploration, generative, evaluative), research methods, expected project duration, budget, and team.

## 2. Engagement information

All of the above could be managed in a project management tool like Trello, but this system doesn't readily extend to the additional engagement data points we want to add or link to.

For each engagement, we'll want to state (or link to) the project name and participant (who is ideally in our **participant database!**). If we could get the participant data out of a company Salesforce account, even better, as this would likely include contextual information like the participant's company, role, and tenure at their organization.

As for the actual engagement, we'll log the date, location, and duration of the engagement, as well as who was there and what their role is. Be sure to note where the engagement took place (lab, field, somewhere else), and which of your products or services this engagement related to (if any). If you took photos

or collected artifacts, be sure to link to those assets, as well as your own notes.

Speaking of assets—consider how these are stored and shared. Every engagement offers an opportunity to add visual and audio documentation, which should be connected in some way to your engagement tracking system.

## **Data curation and consolidation**

"A repository of research data prevents you from the Groundhog Day scenario of repeating the same queries and answering the same question."

Dave Malouf — IXDA, DESIGN OPS SUMMIT

One of the biggest issues a scaling research team faces is that the data is everywhere. In *Seeing the Elephant: Defragmenting User Research*, Louis Rosenfeld recounted the fable of the blind men and the elephant. In this story, a group of blind people are near different parts of an elephant, trying to guess

what animal it is based on what they can feel. Individually, they can't understand that it's an elephant and fail to identify it. (Personally, I always thought the smell would give it away...but that's just me.)

The fable illustrates that when trying to understand an enterprise organization, the data comes from many equally relevant sources: marketing, sales, support, product management, usability tests, analytics, data science, and, of course, user research. Each source comes in different formats, from different lenses and points of view, and via different data collection methods.

## Repositories

To ensure your research synthesis has considered the entirety of the problem space, it's important to aggregate all of these data sources. Not only does this provide you with the complete picture and minimize that your insights are offbase, but it prepares you to answer critiques of your findings from those versed in those various data points.

A repository of research data also prevents you from the Groundhog Day scenario of repeating the same queries and

answering the same question. When you store data, and make it easy to access (with help from solid metadata), you make it easy to find and reuse existing information.

## Insights

Researcher and author Tomer Sharon believes that the most valuable deliverable from a research organization is not the data, but the insights that are generated from that data. To him, the ability to create and share credible insights across an organization is how a research team generates the most value.

Many teams have tried to create insight repositories that are widely accessible to their respective organization. Some examples include Mosaig by Nasdaq and Polaris by WeWork. Additionally, products like Aurelius, Reframer, Nomnom, and Dovetail seek to fill this niche. Other organizations seek to solve for this by repurposing wikis, blogs, or visual spreadsheets like Airtable.

## Synthesis

It isn't design (or research) until there are Post-it notes, only now those post-its might just as easily appear on a screen as they do on a wall. Remote and distributed teams are becoming more common, as are digital tools to create common research artifacts like canvases, affinity diagrams, and other synthesis methods for teams separated by time and location.

If you're thinking of operationalizing research, think about the processes that lend themselves to documentation, decision paths, and archiving. While IRL whiteboards, notes, and giant rolls of paper are great for collaborative research, digital whiteboard spaces offer advantages like commenting, history, and photo insertion... not to mention templating, version control, and easy access to older files.

"If you're thinking of operationalizing research, think about the processes that lend themselves to documentation, decision paths, and archiving."



# Business operations

As you can imagine, for each topic mentioned in this chapter there are a host of decisions that require expertise outside the domain of the average researcher. The legal team needs to draft participant releases and non-disclosure agreements, while procurement can help secure your equipment. You'll want to make the security team a partner if folks will be entering your building to visit your lab, and IT will be a valuable collaborator in connecting systems (and keeping them connected!).

The research team will need a liaison to work with these other parts of the organization to create and amend processes, rules, and tools that allow the research team to meet their unique goals.

## Legal

Legal considerations abound throughout the research process. Your legal team can help with NDAs, participant release forms (which allow you to record participant pictures, videos, and audio), and vendor contracts. These contracts

might be with recruitment services, facilities, and software vendors.

To that last point, you'll want to collaborate with procurement and your IT team about software licenses and agreements.

Legal can also determine if any of your proposed processes break any company rules (or laws, or tax restrictions) around incentives and gifts.

## **Procurement**

When it comes to research, there are many expenses: hardware, software, furniture, vendor services, and participant payments, to name a few. You'll want to find a way to work with your procurement team that allows research to remain lean and agile in a high-velocity working environment.

This usually means collaborating on ways to remove rules and gain permissions for people to make their own purchasing decisions. For example, it's much easier for a researcher to simply buy a gift card as participant compensation, rather than go through a procurement process that was designed to buy gift cards in bulk via purchase order.

## IT and security

The IT department supports the installation and maintenance of software and hardware for the entire organization. You'll want to discuss all your technology plans with both your IT and security teams to make sure that what you have in mind won't conflict with other part of the technology stack, and that anything you propose can be secured.

You might also need IT resources to set up the services that facilitate research, like cloud resources for storing assets or server software that sits behind the company's firewall. For testing and interviews, work with security to make the user experience of entering the building easier for participants. By establishing a plan and partnering with other parts of your org in advance of what you need, you can remove impediments and lay the groundwork for future proposals.

## Final thoughts

This chapter is not meant to be a comprehensive description of everything that goes into ResearchOps. After all, the

practice is evolving every day. But the information here is tightly connected to DesignOps, and can help kickstart discussions around how to work with ResearchOps.

The interconnection between design and research—as well as with other parts of the organization like business operations (BusinessOps) and people operations (PeopleOps)—increases efficiency, communication, and output, and allows everyone to work as a unified front in collaboration with stakeholders.

## Closing remarks from Pinterest's Meredith Black

“For us, Design Ops enables the product and design teams to learn faster, build better things, and focus on their craft.”

Alastair Simpson — ATLASSIAN

While the four authors of this book have played some part in

pioneering the role of DesignOps within our industry, it's now up to you to pioneer the role within your own organization. It's time to take all of the information you just learned and put it into play. It's time to build your team. It's time to show your organization how DesignOps can make an impact.

"Your mission for DesignOps is to amplify the value of design. Bringing in the right people at the right time, and providing clear responsibilities and workflows, liberates your designers to focus exclusively on the user experience."

Meredith Black — PINTEREST

Have you ever heard of an athlete being asked to coach herself, play in the game or competition, and then follow up with the athletic organization about how many tickets were sold and how much money was made from concessions? That doesn't happen. Let's take a note from the wide world of sports and acknowledge that one person shouldn't do it all—it takes a well-rounded team of different talents to succeed and thrive.

**My advice as you put DesignOps into play is to hire smartly,**

**integrate slowly, and plan meticulously.** As your organization grows and scales, so will your team. Think of your DesignOps team as the chameleon in the company, always changing to support the growth and changes of the business.

There is no one way to make the perfect DesignOps team. Just like with design mockups and early stage concepts, the role of DesignOps will need to be nurtured and taken care of. There will be feedback, there will be iterations, and—most importantly—there will be small and large wins that will motivate you to keep going.

The most exciting part about DesignOps is that **you can be involved in creating a practice that didn't exist five years ago.** You are at the inception of a new role that you get to help shape.

