

A man in a blue cap and brown jacket is operating a large industrial machine. The machine has a long, angled conveyor belt that is covered with numerous small, bright green rectangular items. The background shows a complex industrial environment with various pipes, railings, and structural elements.

**Design at
Scale is
People!**

Peter Merholz

@peterme

<http://petermerholz.com/>

Discussion of “Design at scale” usually starts with design systems...



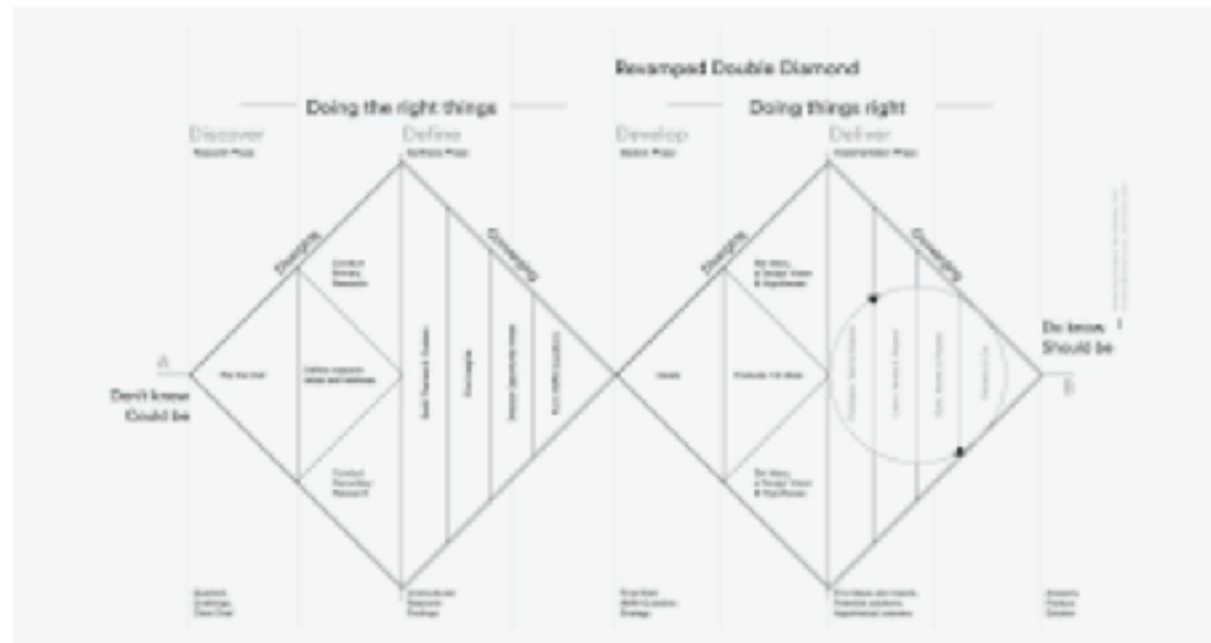
**Designing at scale:
How industry
leaders leverage
design systems**

organizational challenges of scaling digital product design and reveal how design systems can unite teams and provide consistency in the face of growing product demands.

**Building a Design System:
Speed, Scale, Collaboration,
and Innovation**

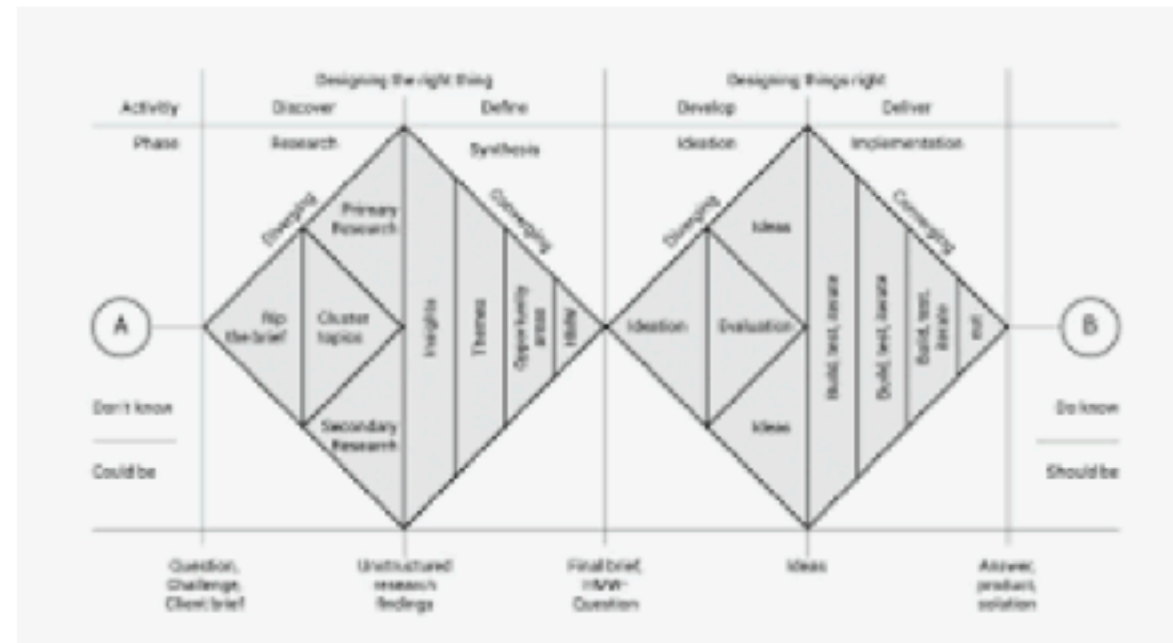
...and processes to align activity across the org...

hackernoon.com



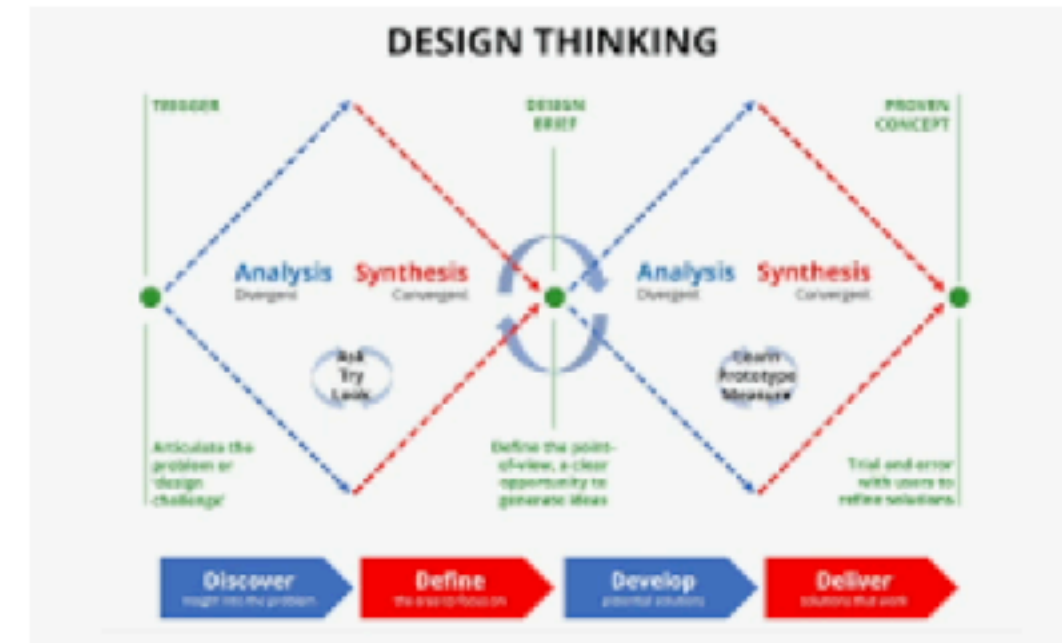
How to apply a design thinking, HCD, UX ...
uxdesign.cc

mgearon.com



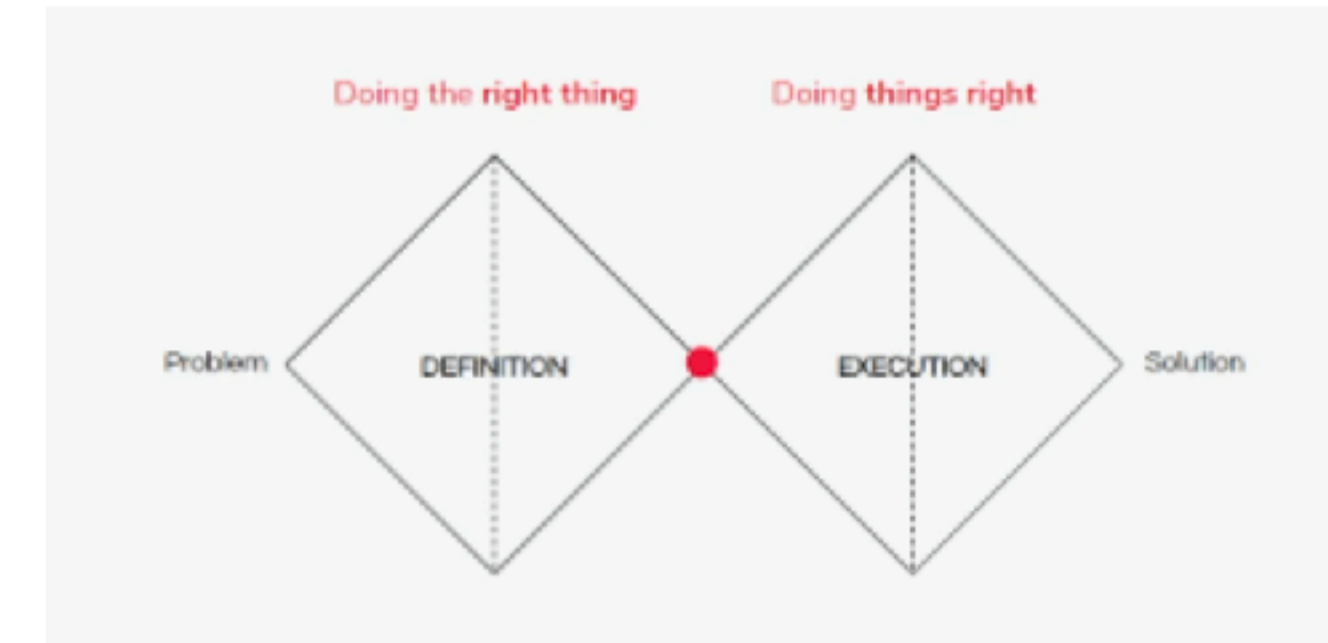
Double Diamond framework (Nessler, 2018 ...
researchgate.net

empathizeit.com



double-diamond design thinking
acumen.sg

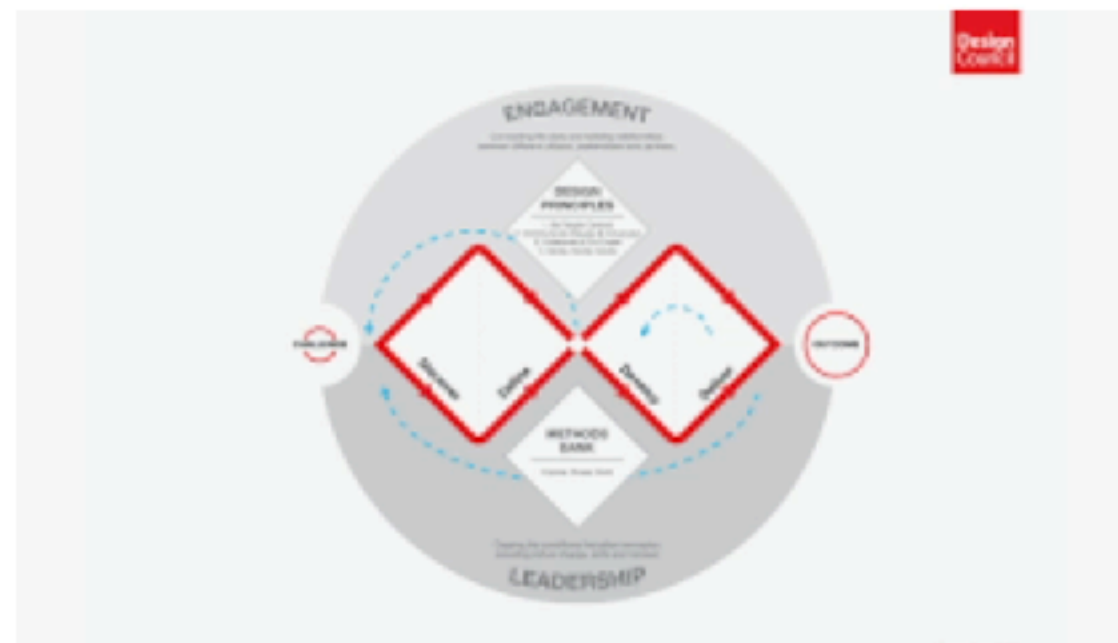
testingtime.com



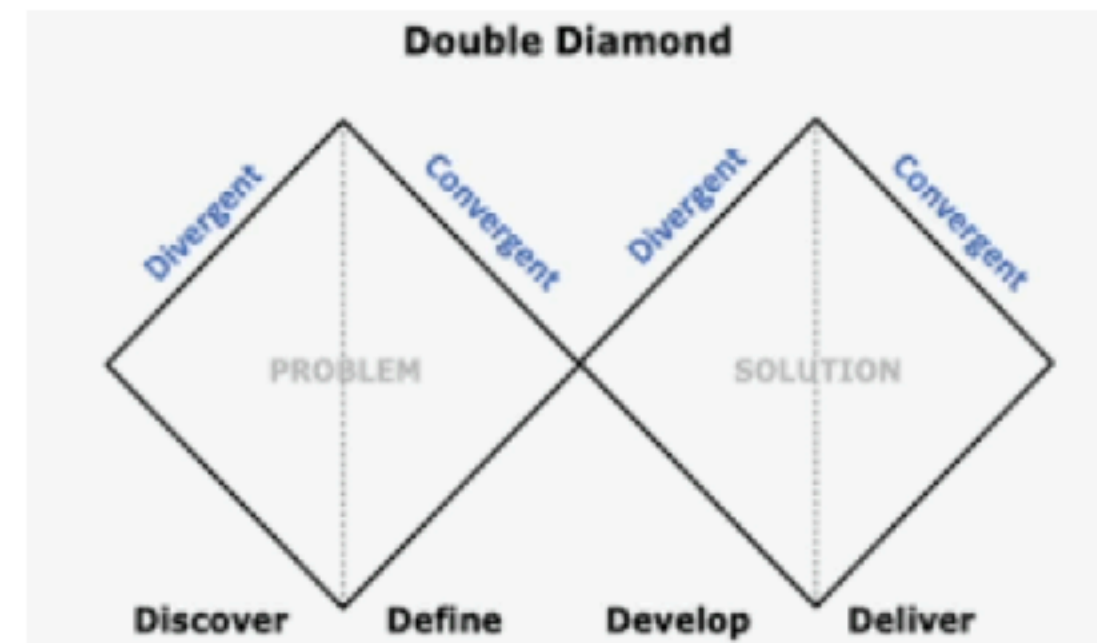
double diamond framework | Hallam
hallaminternet.com



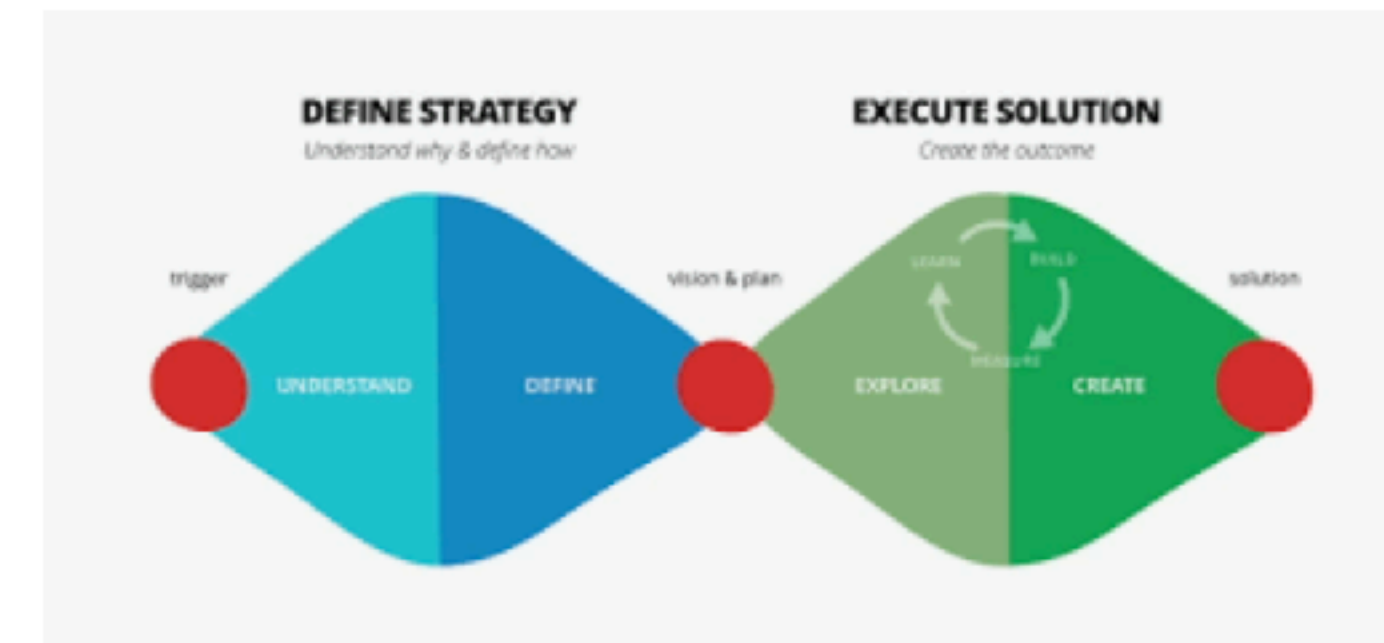
Double Diamond Implementation – Meret ...
meret.design



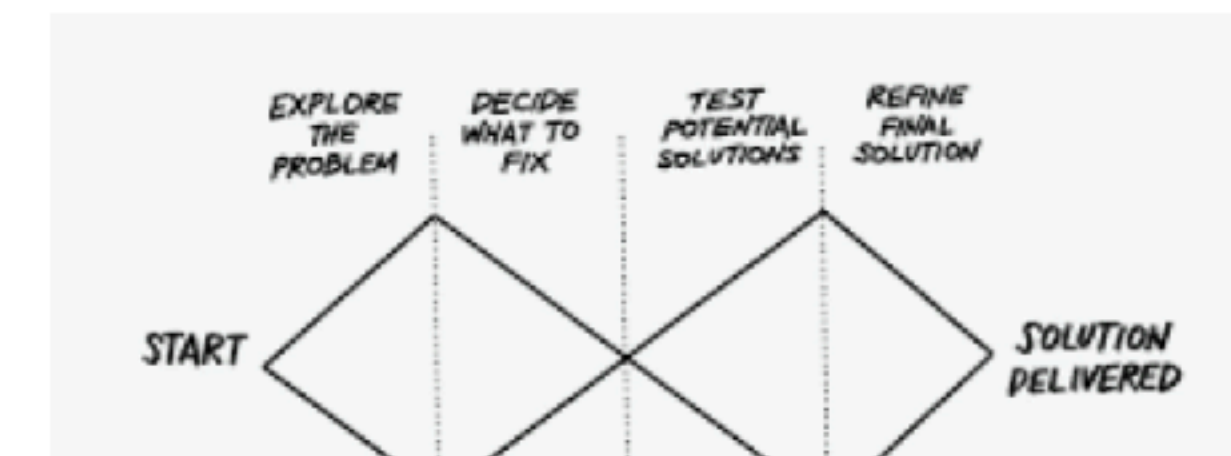
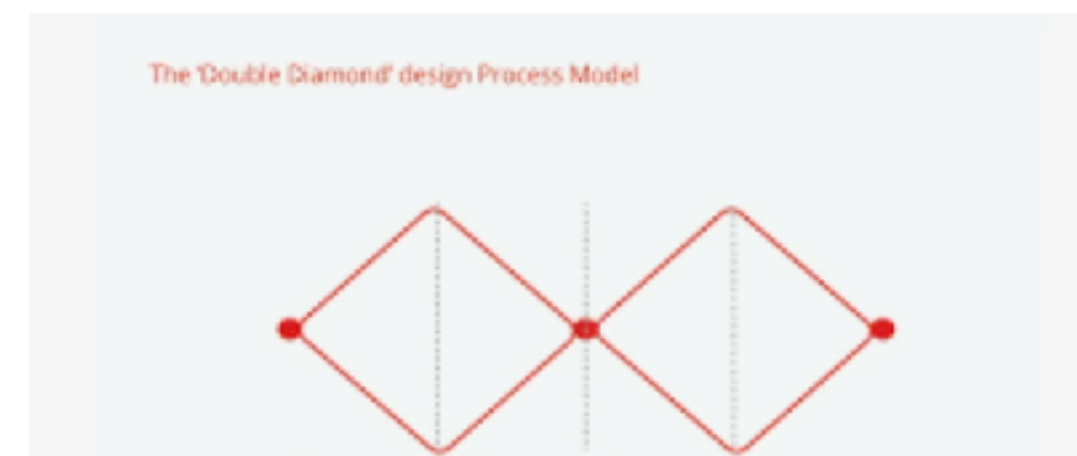
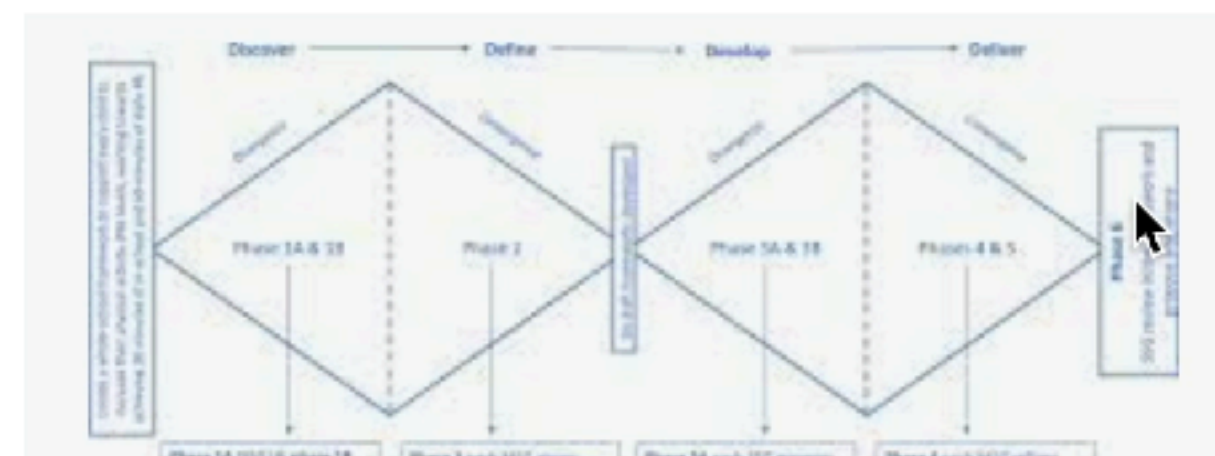
Design Council's evolved Double Diamond ...
designcouncil.org.uk



Double diamond: A design process model ...
wiki.doing-projects.org

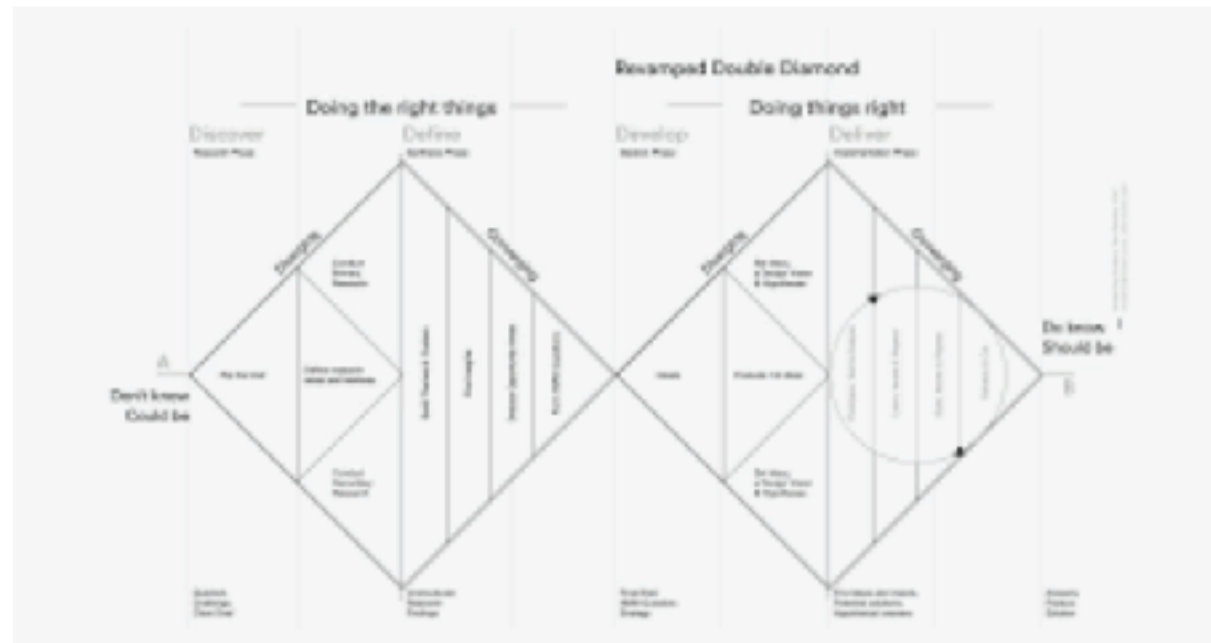


The Double Diamond: Strategy + ...
thoughtworks.com



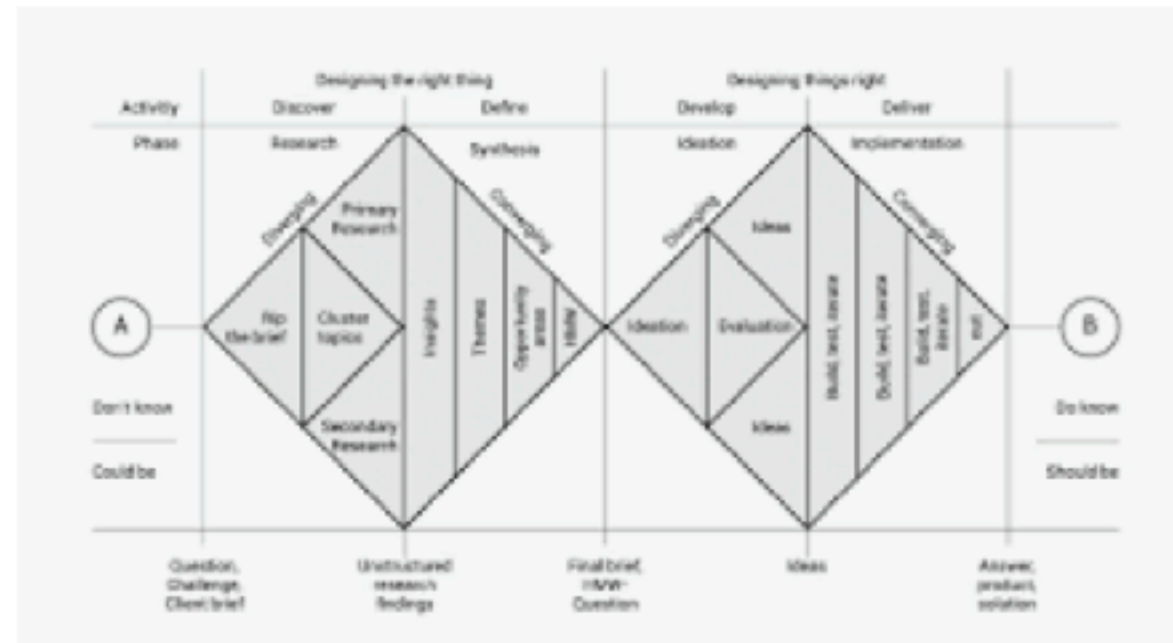
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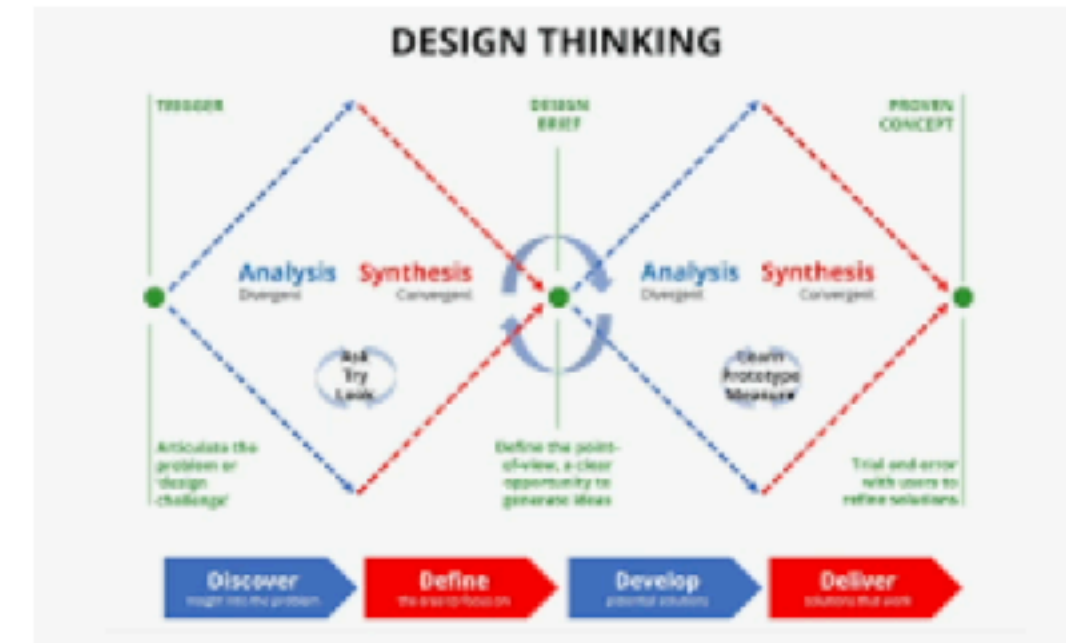
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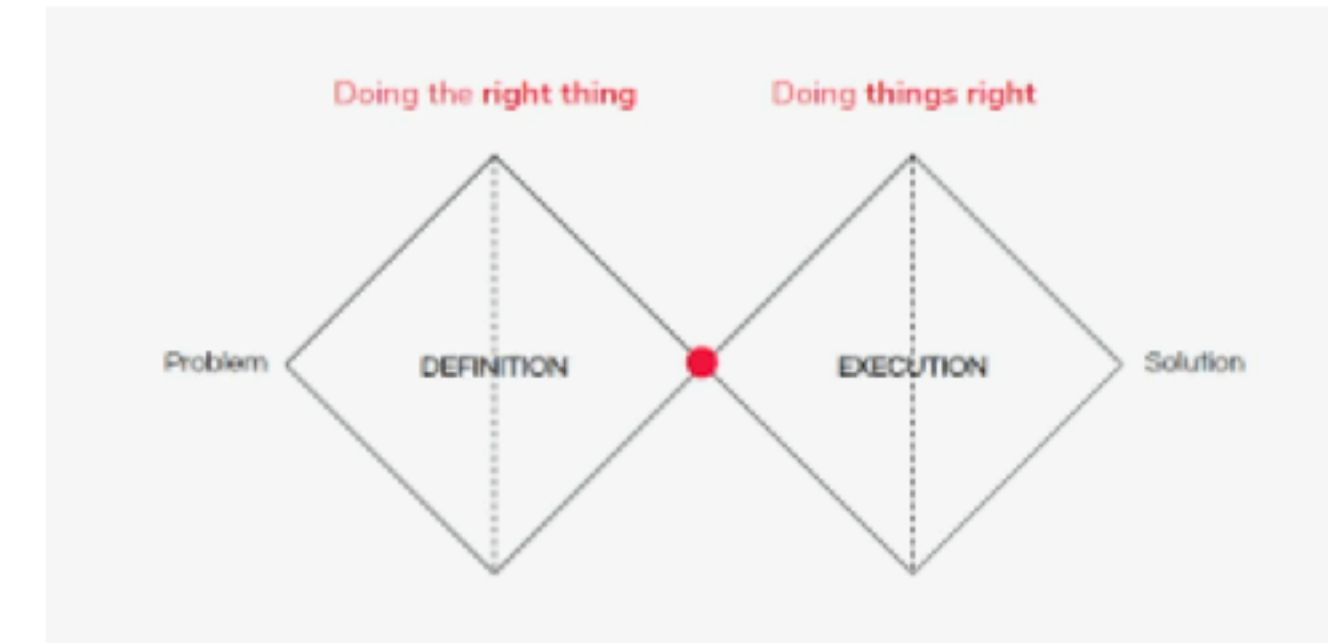
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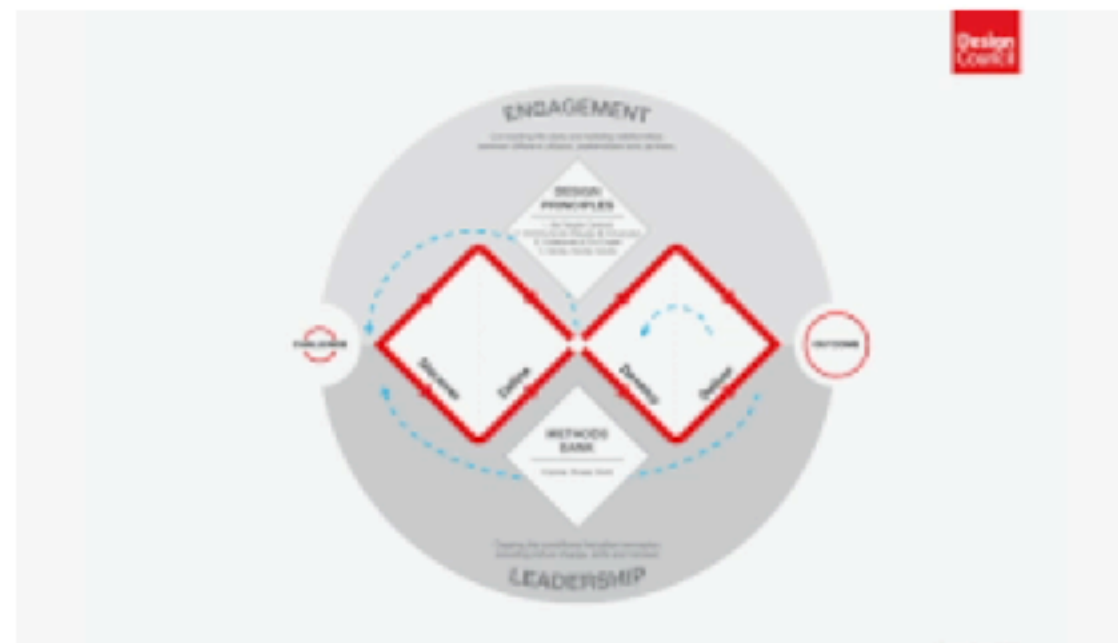
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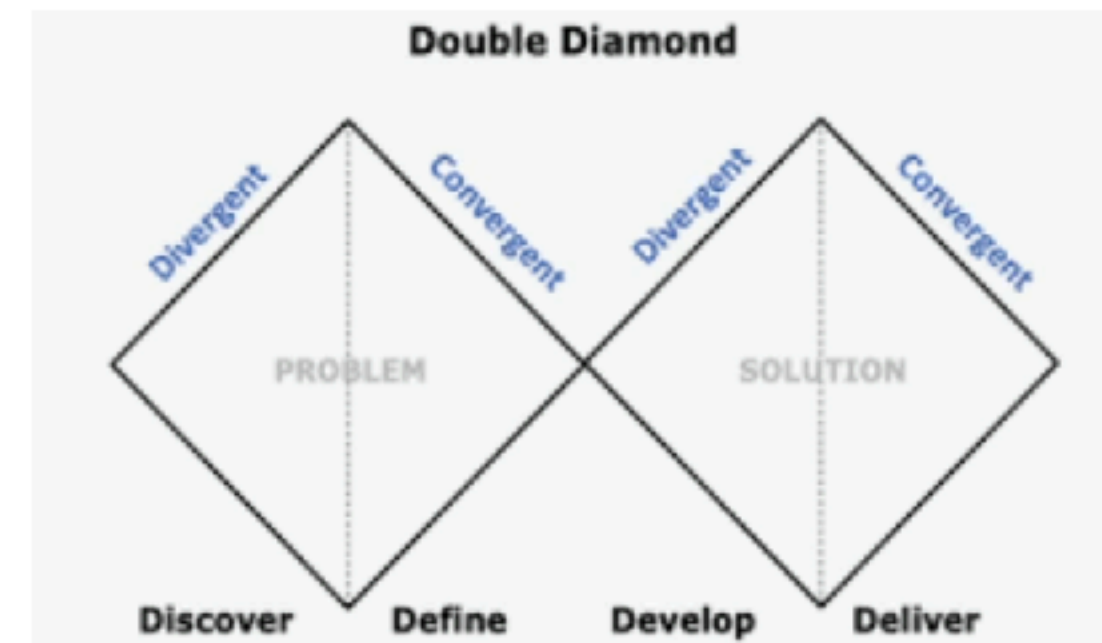
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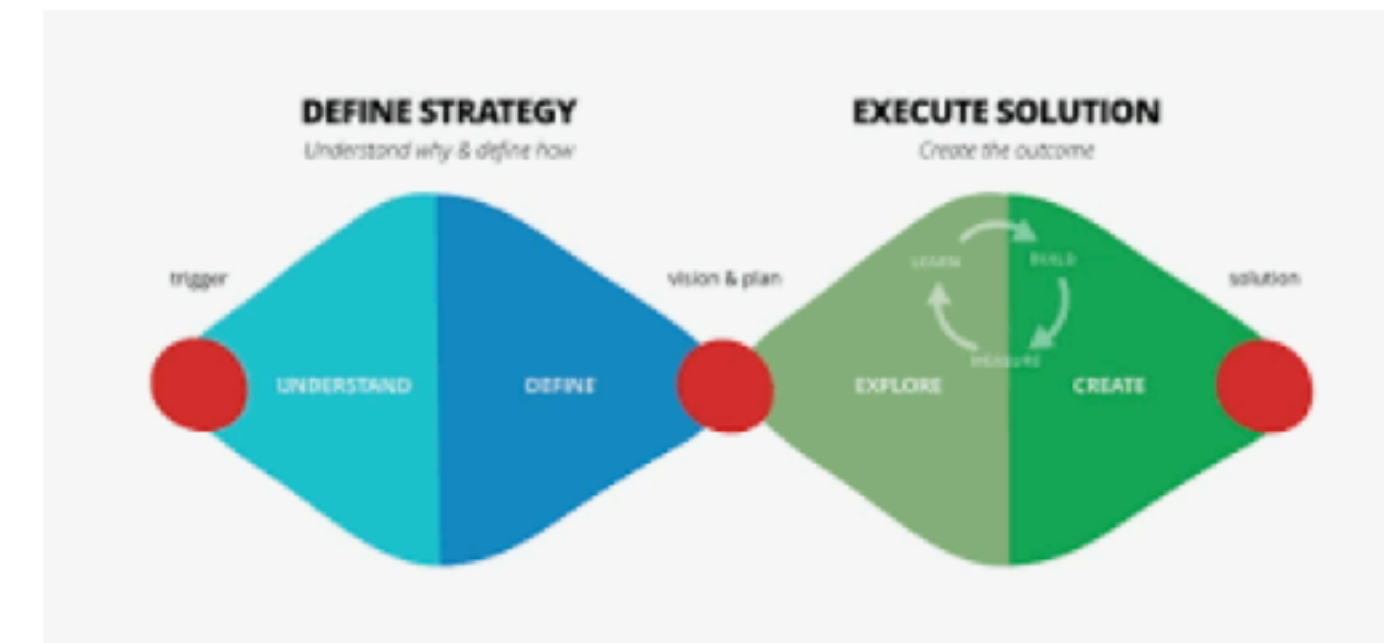
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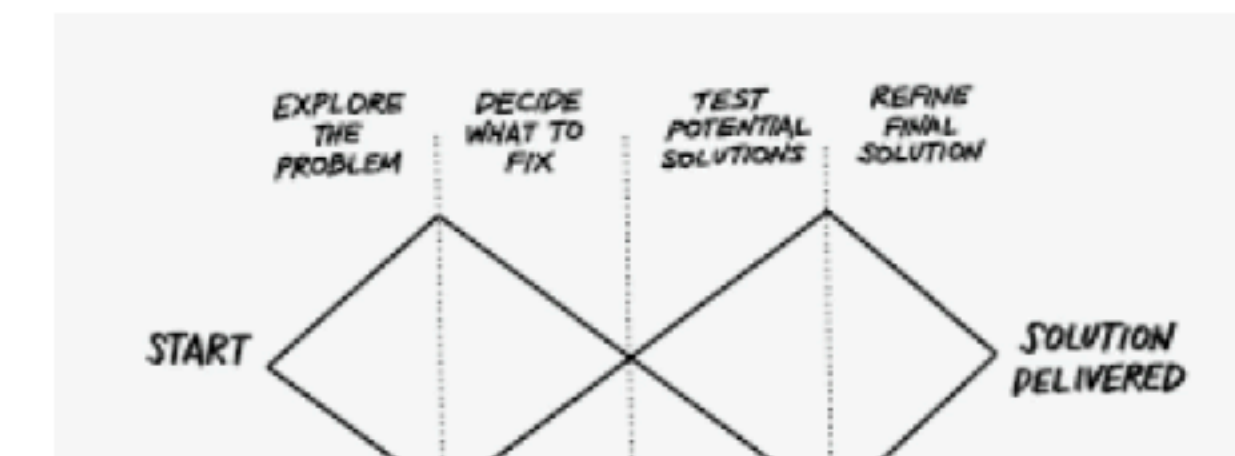
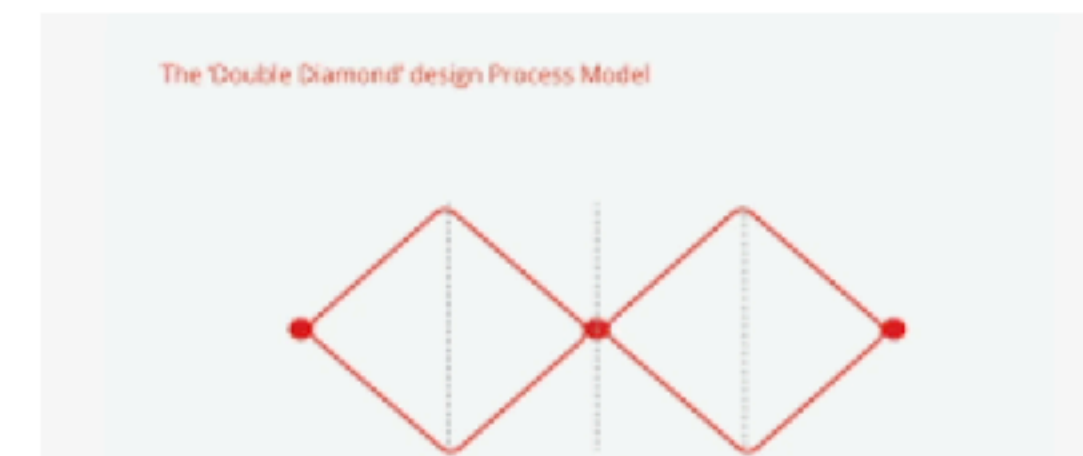
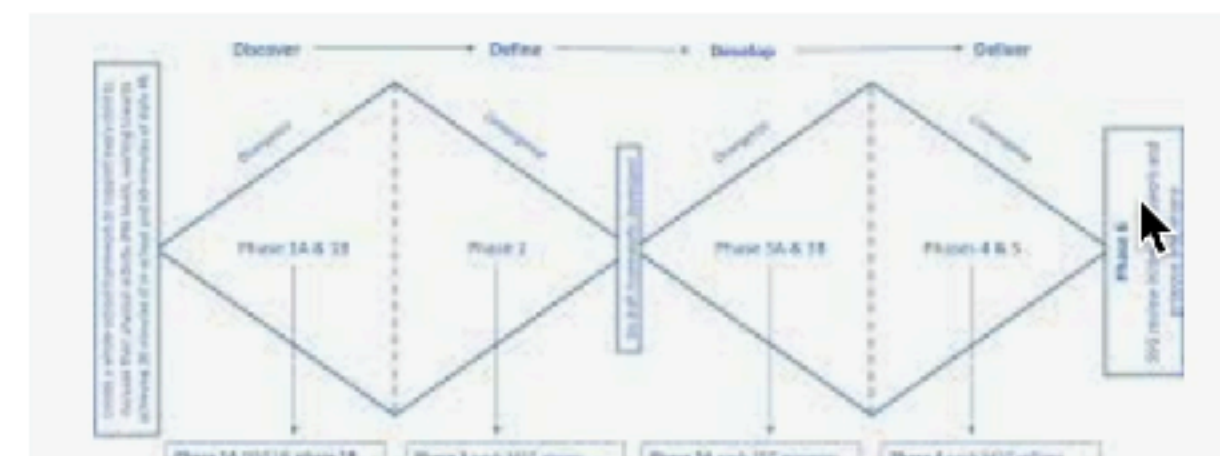
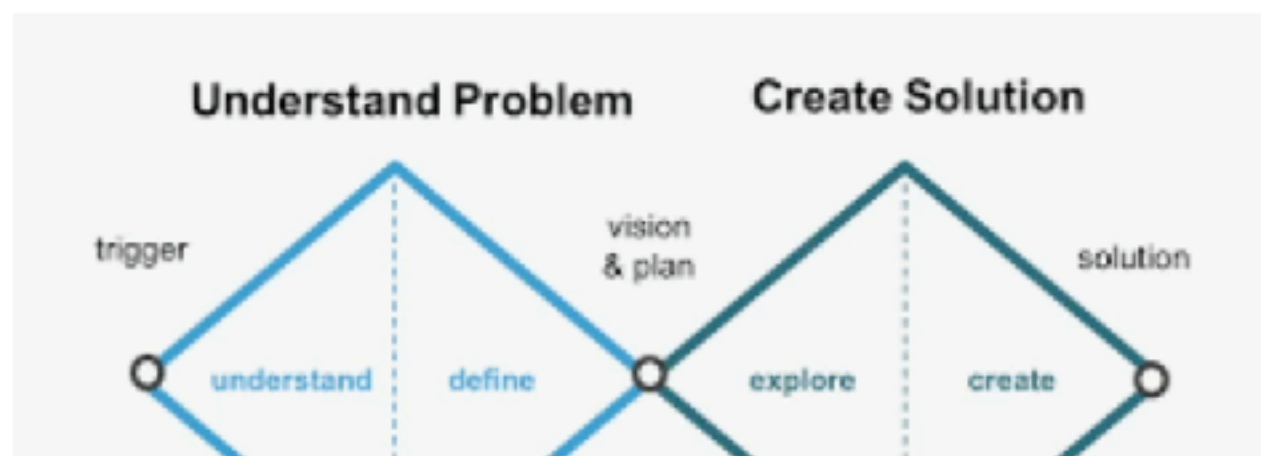
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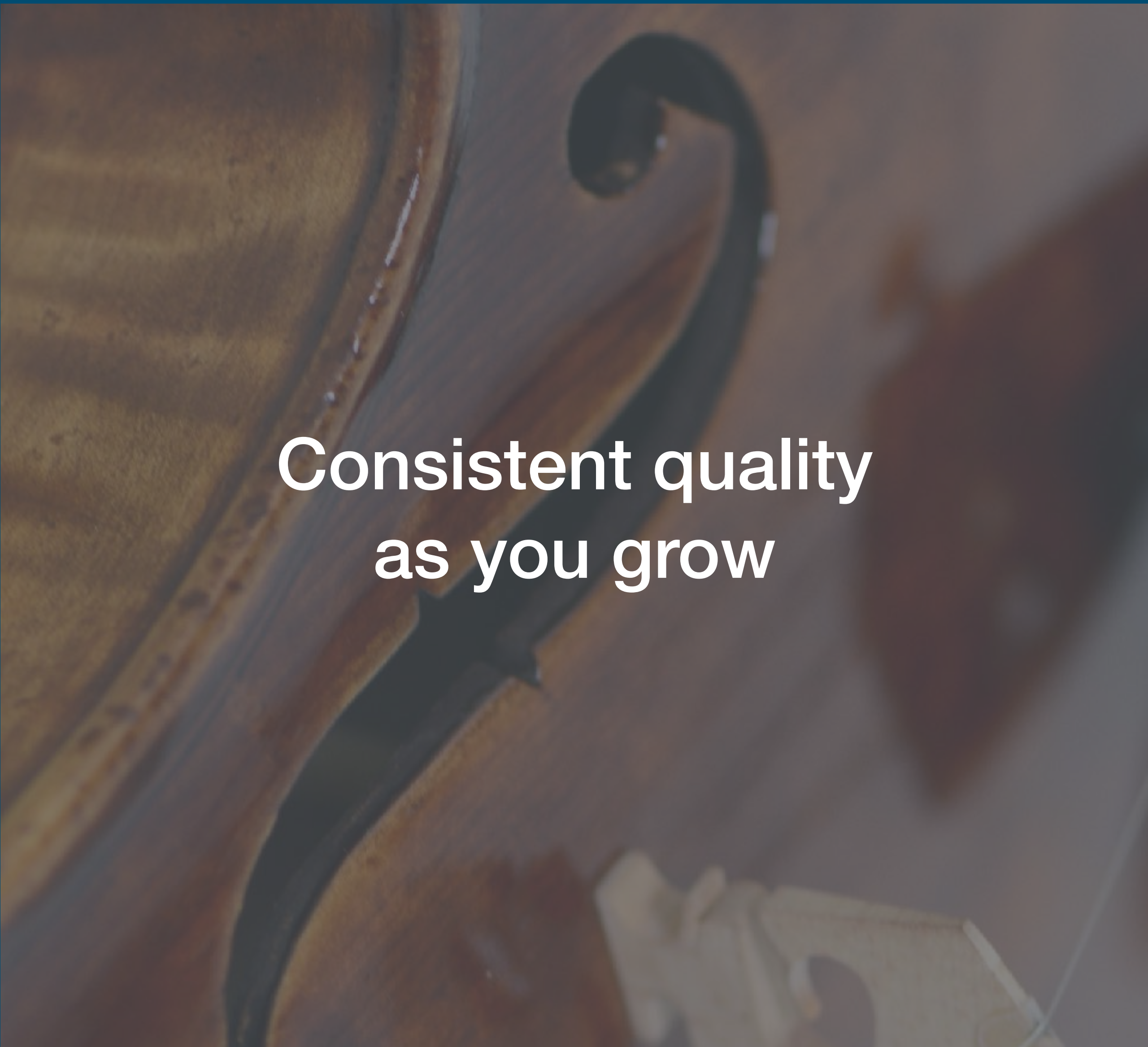


...as there are two driving considerations

...as there are two driving considerations



...as there are two driving considerations




**Consistent quality
as you grow**

...as there are two driving considerations

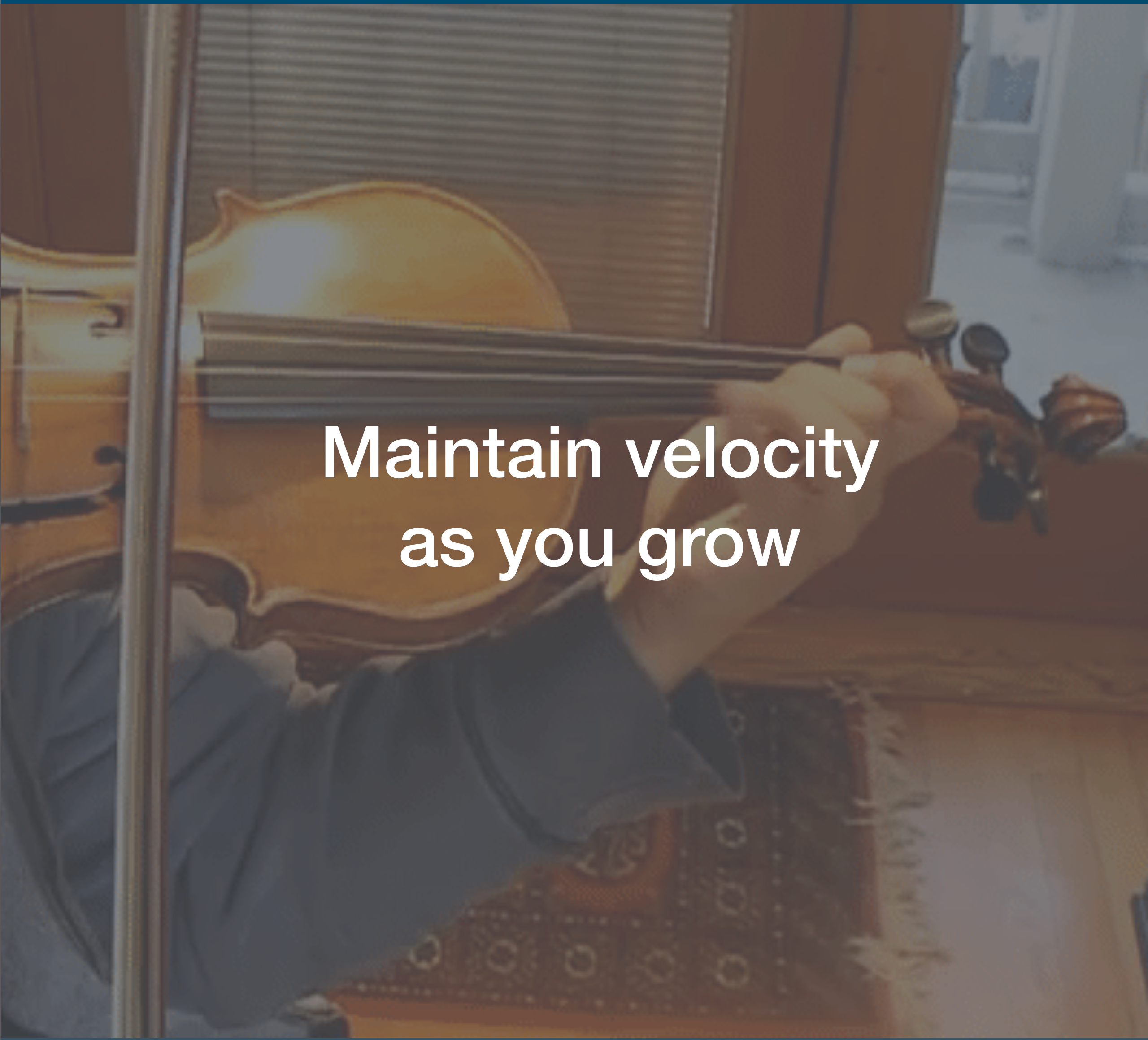
Consistent quality
as you grow



...as there are two driving considerations



**Consistent quality
as you grow**



**Maintain velocity
as you grow**

However, **Design** operates
in a broader context.



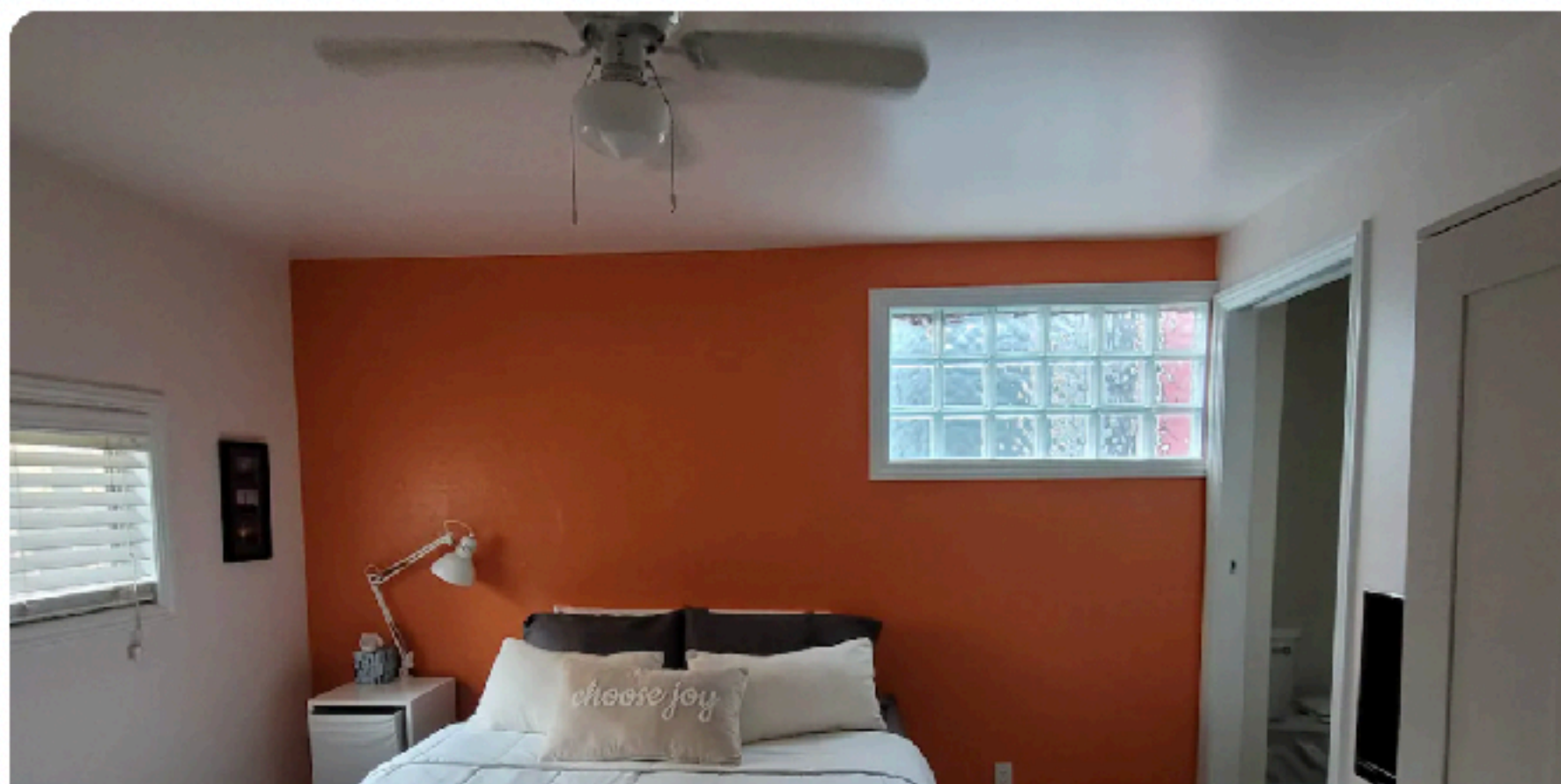
Everything is, or is becoming, a **service**



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Certification Guide

AWS Certified Solutions Architect - Associate

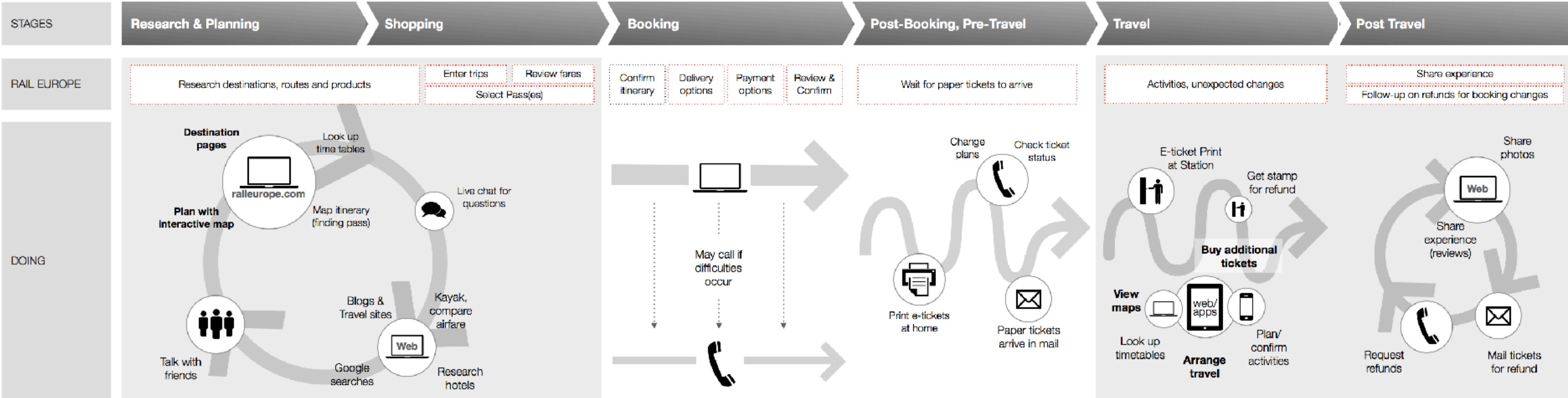
Certification Overview



Welcome to the Certification Guide for the AWS Certified Solutions Architect - Associate Exam. You can learn more about the requirements and exam on the [AWS website](#).

You can access titles in this guide in any order, or start with the [Solutions Architect Associate \(Pearson Practice Test\)](#).

Customer Journey

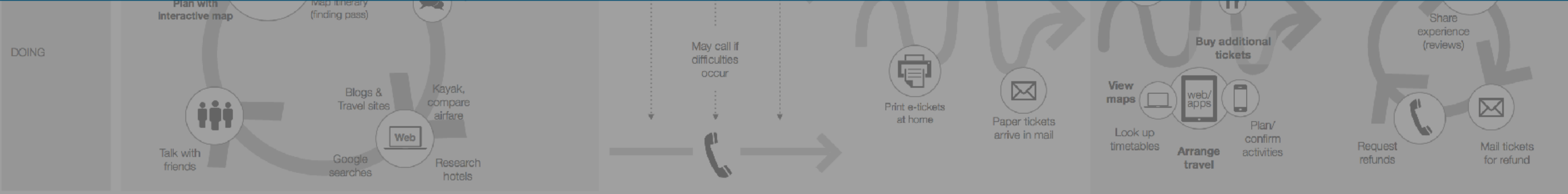
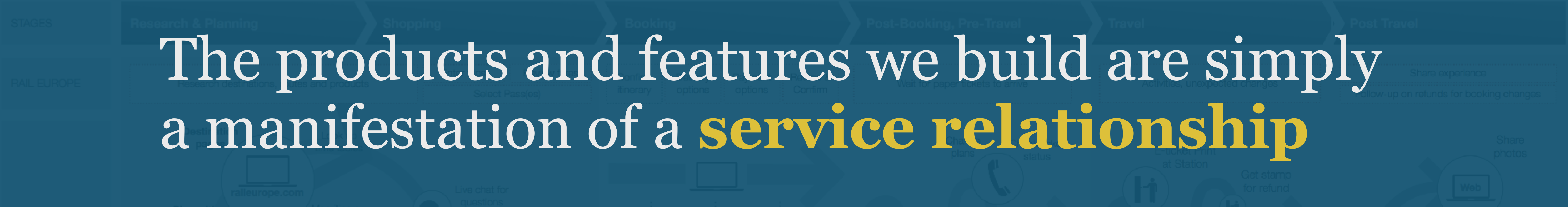


The products and features we build are simply a manifestation of a **service relationship**

EXPERIENCE	STAGE: Initial visit	STAGES: Global	STAGES: Planning, Shopping	STAGES: Shopping, Booking	STAGES: Post-Booking, Travel, Post-Travel	STAGE: Traveling
Helpfulness of Rail Europe						

Opportunities

GLOBAL	PLANNING, SHOPPING, BOOKING	POST-BOOK, TRAVEL, POST-TRAVEL
<p>Communicate a clear value proposition.</p> <p>STAGE: Initial visit</p>	<p>Enable people to plan over time.</p> <p>STAGES: Planning, Shopping</p>	<p>Improve the paper ticket experience.</p> <p>STAGES: Post-Booking, Travel, Post-Travel</p>
<p>Help people get the help they need.</p> <p>STAGES: Global</p>	<p>Visualize the trip for planning and booking.</p> <p>STAGES: Planning, Shopping</p>	<p>Accommodate planning and booking in Europe too.</p> <p>STAGE: Traveling</p>
<p>Support people in creating their own solutions.</p> <p>STAGES: Global</p>	<p>Connect planning, shopping and booking on the web.</p> <p>STAGES: Planning, Shopping, Booking</p>	<p>Proactively help people deal with change.</p> <p>STAGES: Post-Booking, Traveling</p>
<p>Make your customers into better, more savvy travelers.</p> <p>STAGES: Global</p>	<p>Aggregate shipping with a reasonable timeline.</p> <p>STAGE: Booking</p>	<p>Communicate status clearly at all times.</p> <p>STAGES: Post-Booking, Post-Travel</p>
<p>Engage in social media with explicit purposes.</p> <p>STAGES: Global</p>		



	Research & Planning	Shopping	Booking	Post-Booking, Pre-Travel	Travel	Post-Travel
DOING	Plan with interactive map, Talk with friends, Map itinerary (finding pass), Blogs & Travel sites, Google searches, Kayak, compare airfare, Research hotels, Live chat for questions	May call if difficulties occur	Print e-tickets at home, Paper tickets arrive in mail	Buy additional tickets, View maps, Arrange travel, Plan/confirm activities	Request refunds, Mail tickets for refund	Share experience (reviews)
THINKING	<ul style="list-style-type: none"> What is the easiest way to get around Europe? Where do I want to go? How much time should I/we spend in each place for site seeing and activities? 	<ul style="list-style-type: none"> I want to get the best price, but I'm willing to pay a little more for first class. How much will my whole trip cost me? What are my trade-offs? Are there other activities I can add to my plan? 	<ul style="list-style-type: none"> Do I have all the tickets, passes and reservations I need in this booking so I don't pay more shipping? Rail Europe is not answering the phone. How else can I get my question answered? 	<ul style="list-style-type: none"> Do I have everything I need? Rail Europe website was easy and friendly, but when an issue came up, I couldn't get help. What will I do if my tickets don't arrive in time? 	<ul style="list-style-type: none"> I just figured we could grab a train but there are not more trains. What can we do now? Am I on the right train? If not, what next? I want to make more travel plans. How do I do that? 	<ul style="list-style-type: none"> Trying to return ticket I was not able to use. Not sure if I'll get a refund or not. People are going to love these photos! Next time, we will explore routes and availability more carefully.
FEELING	<ul style="list-style-type: none"> I'm excited to go to Europe! Will I be able to see everything I can? What if I can't afford this? I don't want to make the wrong choice. 	<ul style="list-style-type: none"> It's hard to trust Trip Advisor. Everyone is so negative. Keeping track of all the different products is confusing. Am I sure this is the trip I want to take? 	<ul style="list-style-type: none"> Website experience is easy and friendly! Frustrated to not know sooner about which tickets are eTickets and which are paper tickets. Not sure my tickets will arrive in time. 	<ul style="list-style-type: none"> Stressed that I'm about to leave the country and Rail Europe won't answer the phone. Frustrated that Rail Europe won't ship tickets to Europe. Happy to receive my tickets in the mail! 	<ul style="list-style-type: none"> I am feeling vulnerable to be in an unknown place in the middle of the night. Stressed that the train won't arrive on time for my connection. Meeting people who want to show us around is fun, serendipitous, and special. 	<ul style="list-style-type: none"> Excited to share my vacation story with my friends. A bit annoyed to be dealing with ticket refund issues when I just got home.
EXPERIENCE	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>	<p>Enjoyability</p> <p>Relevance of Rail Europe</p> <p>Helpfulness of Rail Europe</p>

Opportunities

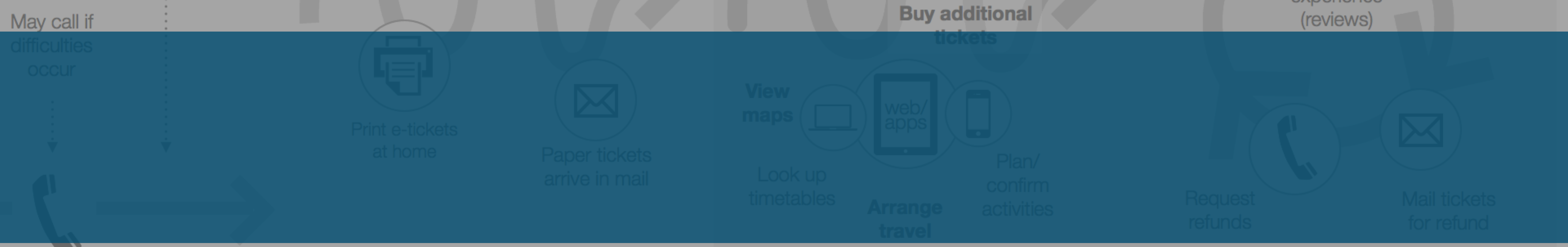
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Customer Journey



Opportunities

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...e tickets, passes and reservations
...looking so I don't pay more

...not answering the phone. How
...my question answered?

- Do I have everything I need?
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- What will I do if my tickets don't arrive in time?

- I just figured we could grab a train but there are not more trains. What can we do now?
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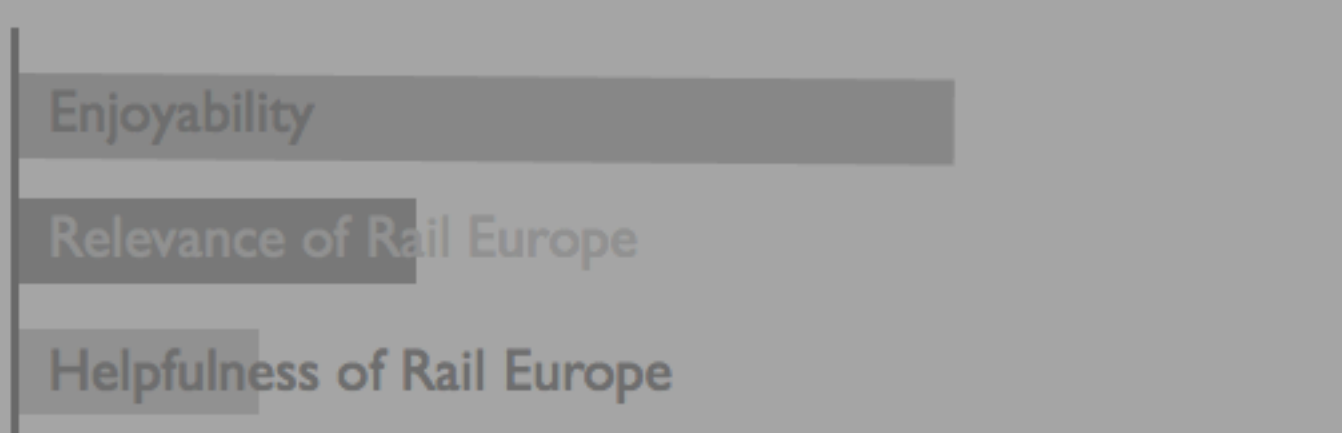
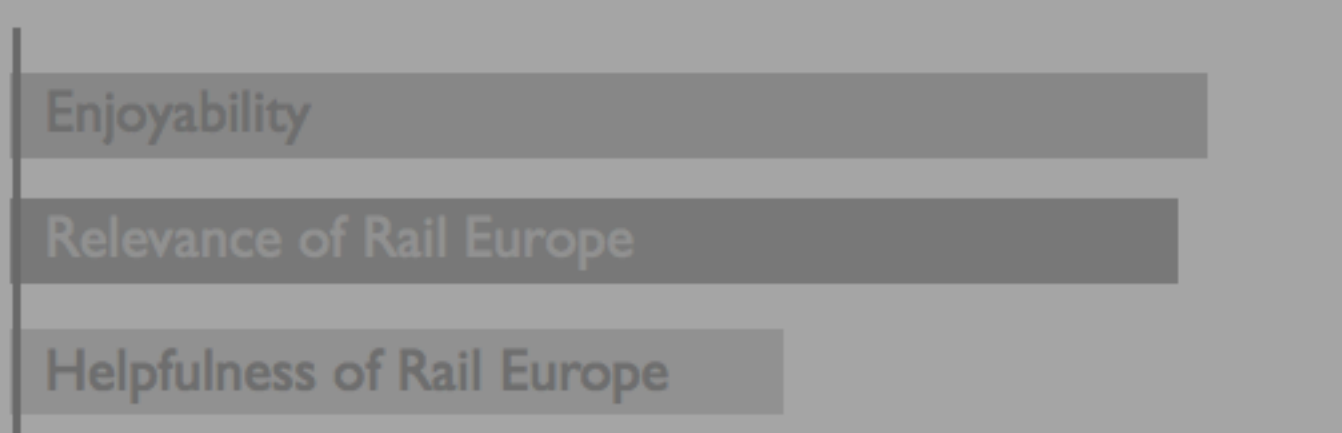
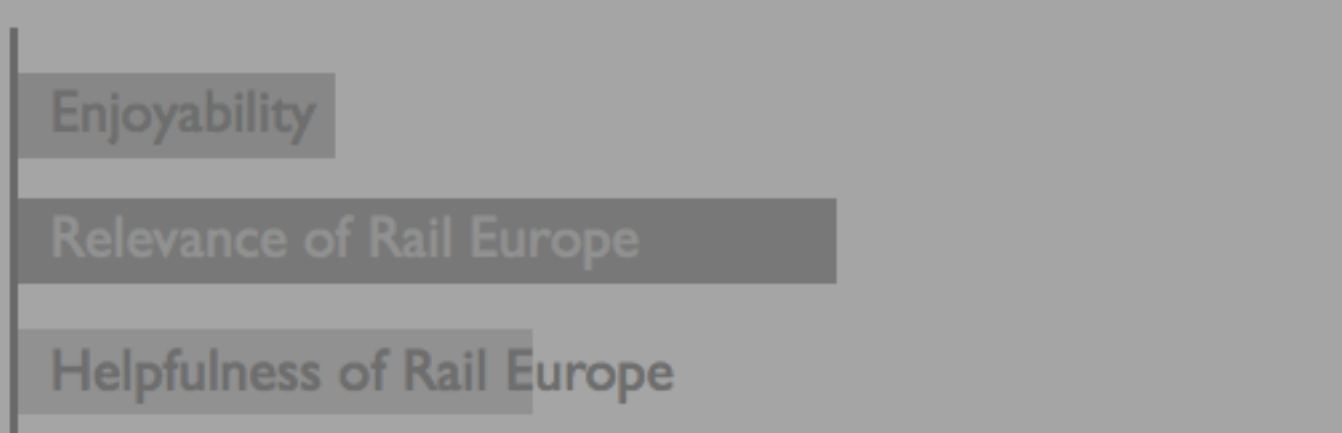
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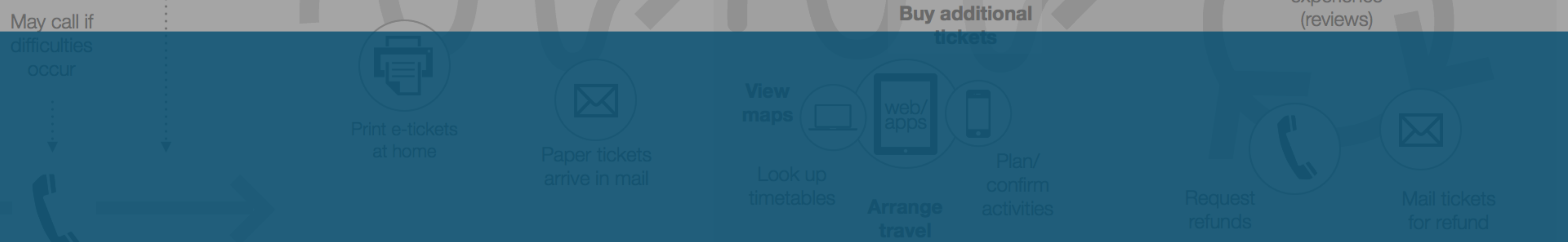
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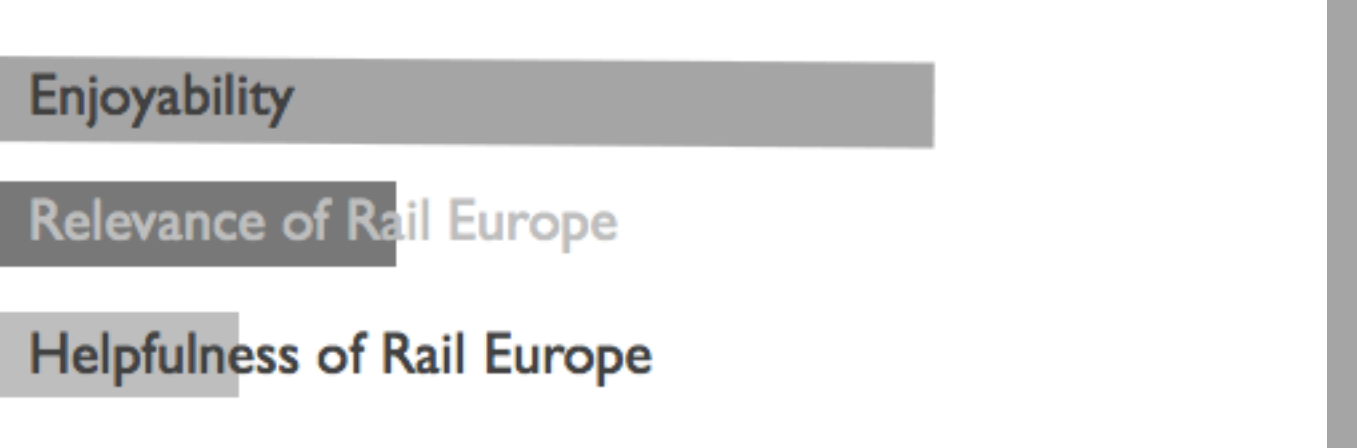
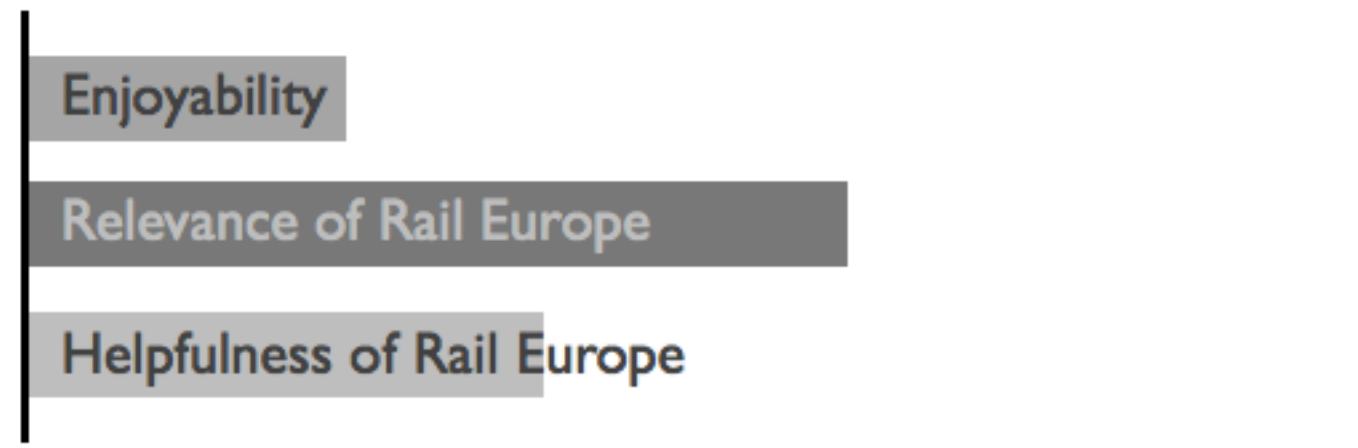
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...Europe
...il Europe



And with a service, what customers primarily have to consider is their **experience**

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Enjoyability

Relevance of Rail Europe

Helpfulness of Rail Europe

Enjoyability

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Enjoyability

Relevance of Rail Europe

Helpfulness of Rail Europe

And with a service, what customers primarily have to consider is their **experience**

THINKING

- 🤔 Do I have everything I need?
- 😡 Rail Europe website was easy and friendly, but when an issue came up, I couldn't get help.
- 😓 What will I do if my tickets don't arrive in time?

- 😟 I just figured we could grab a train but there are not more trains. What can we do now?
- 🤔 Am I on the right train? If not, what next?
- 🤔 I want to make more travel plans. How do I do that?

- 😞 Trying to return ticket I was not able to use. Not sure if I'll get a refund or not.
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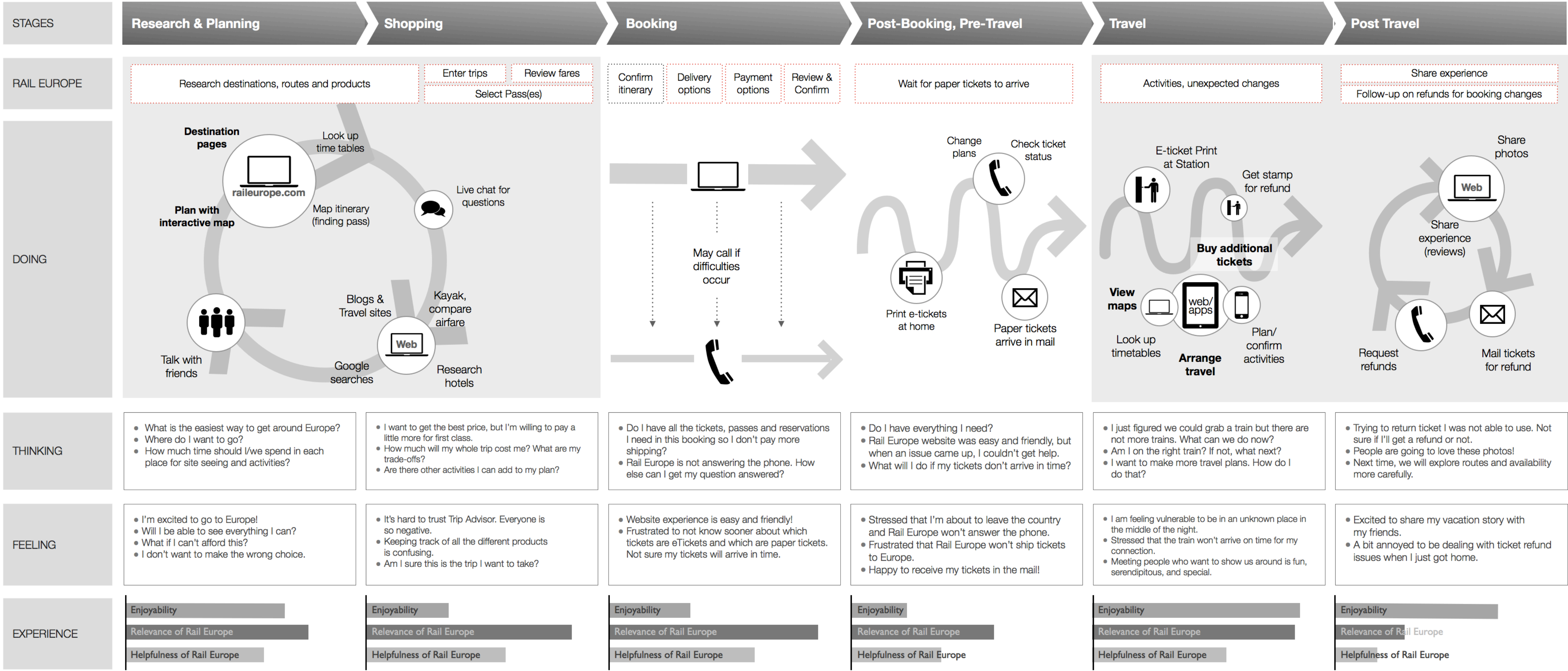
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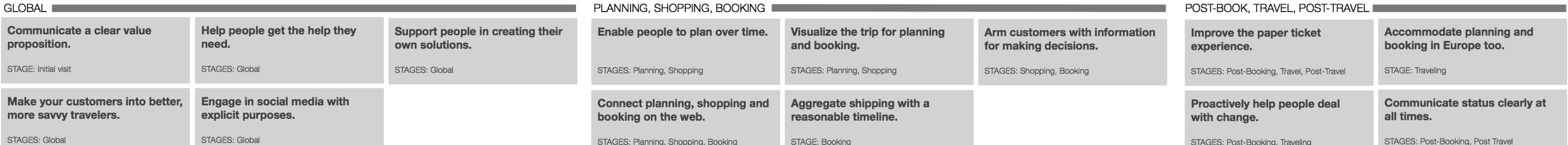
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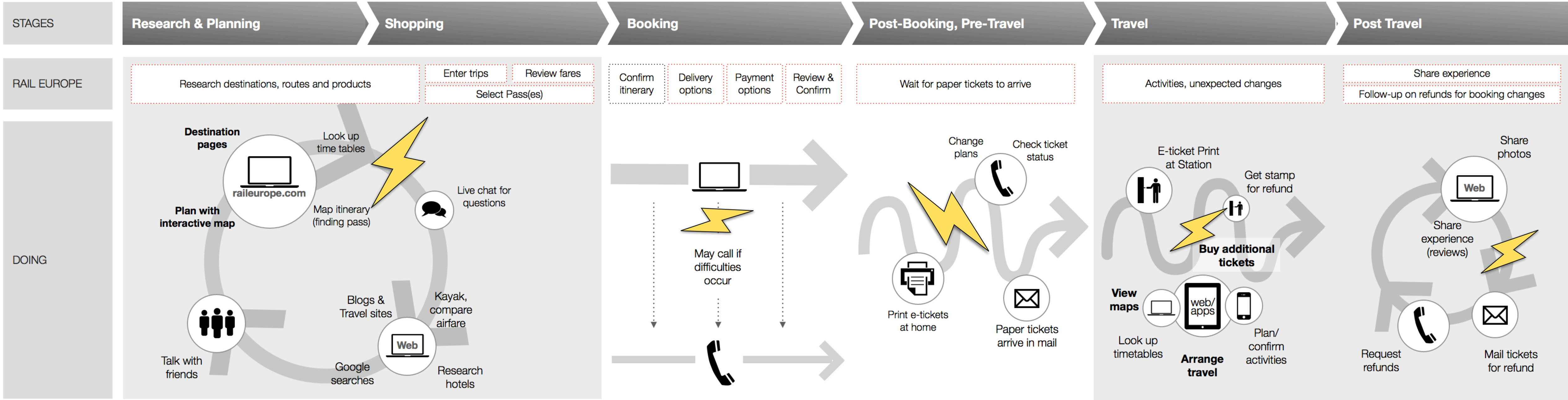
Customer Journey



Opportunities



Customer Journey




As the service grows, so do the chances of fissures in that end-to-end experience

EXPERIENCE	Research & Planning	Shopping	Booking	Post-Booking, Pre-Travel	Travel	Post Travel
Enjoyability	Low	Medium	Medium	Medium	Medium	Medium
Relevance of Rail Europe	High	High	High	High	High	High
Helpfulness of Rail Europe	Medium	Medium	Medium	Medium	Medium	Medium


Opportunities

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<p>Communicate a clear value proposition.</p> <p>STAGE: Initial visit</p>	<p>Enable people to plan over time.</p> <p>STAGES: Planning, Shopping</p>	<p>Improve the paper ticket experience.</p> <p>STAGES: Post-Booking, Travel, Post-Travel</p>
<p>Help people get the help they need.</p> <p>STAGES: Global</p>	<p>Visualize the trip for planning and booking.</p> <p>STAGES: Planning, Shopping</p>	<p>Accommodate planning and booking in Europe too.</p> <p>STAGE: Traveling</p>
<p>Support people in creating their own solutions.</p> <p>STAGES: Global</p>	<p>Arm customers with information for making decisions.</p> <p>STAGES: Shopping, Booking</p>	<p>Proactively help people deal with change.</p> <p>STAGES: Post-Booking, Traveling</p>
<p>Make your customers into better, more savvy travelers.</p> <p>STAGES: Global</p>	<p>Connect planning, shopping and booking on the web.</p> <p>STAGES: Planning, Shopping, Booking</p>	<p>Communicate status clearly at all times.</p> <p>STAGES: Post-Booking, Post Travel</p>
<p>Engage in social media with explicit purposes.</p> <p>STAGES: Global</p>	<p>Aggregate shipping with a reasonable timeline.</p> <p>STAGE: Booking</p>	

So **Design at Scale** needs a third objective:

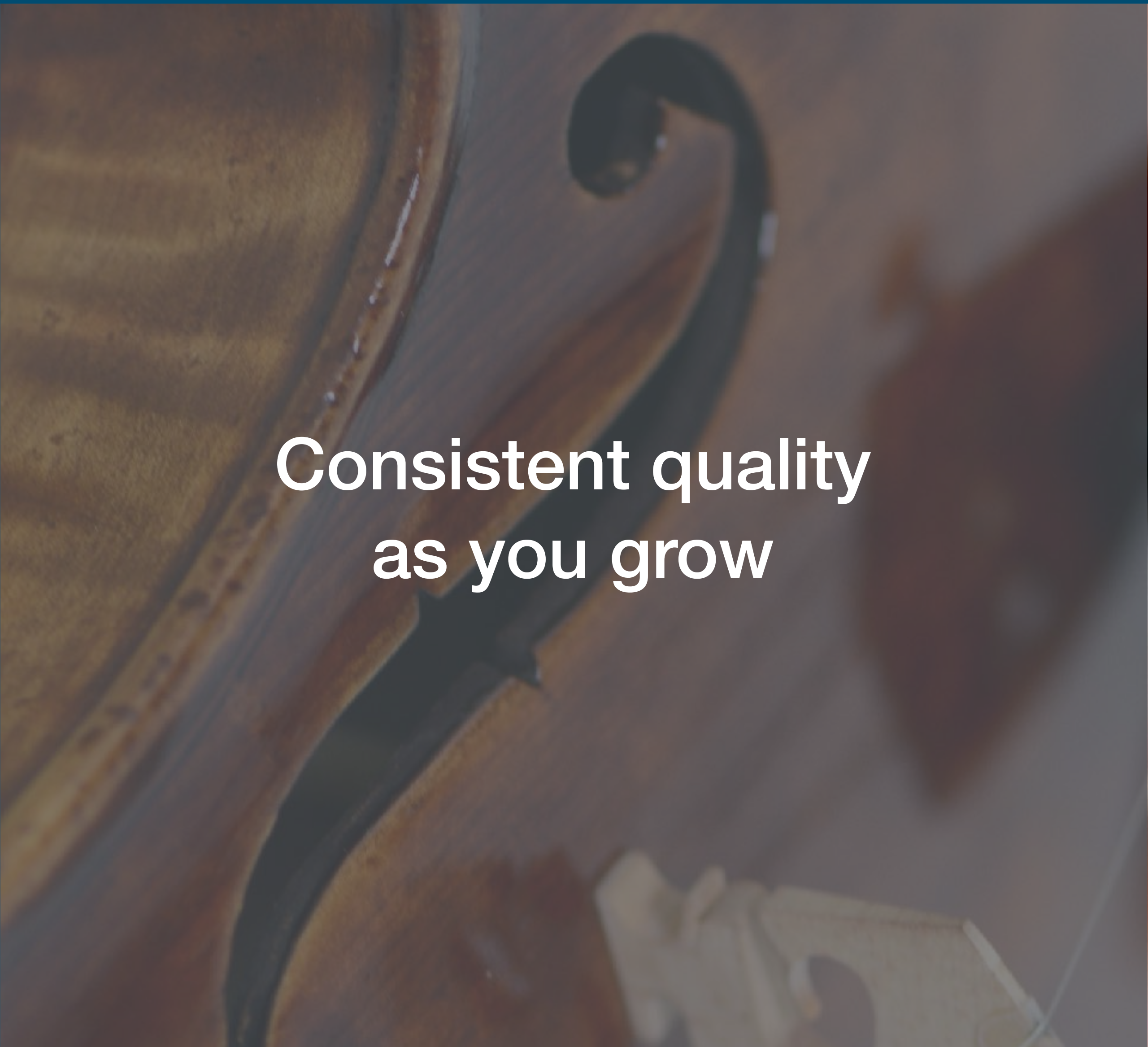


**Consistent quality
as you grow**

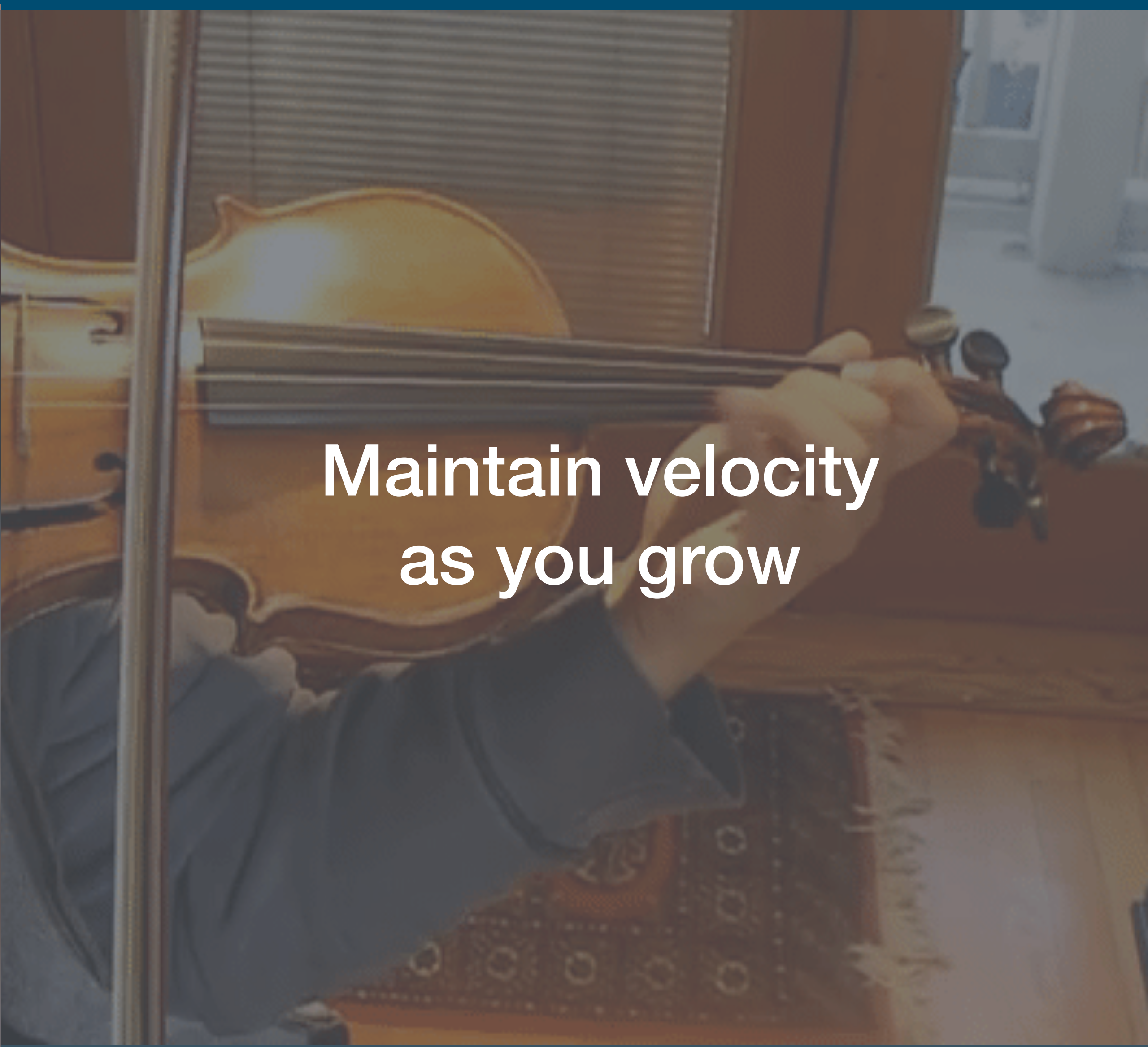


**Maintain velocity
as you grow**

So **Design at Scale** needs a third objective:




**Consistent quality
as you grow**




**Maintain velocity
as you grow**

So **Design at Scale** needs a third objective:




**Consistent quality
as you grow**




**Maintain velocity
as you grow**

So **Design at Scale** needs a third objective:

A close-up, slightly blurred photograph of a violin's body, showing the intricate scrollwork and the warm, polished wood grain. The lighting is soft, highlighting the curves of the instrument.

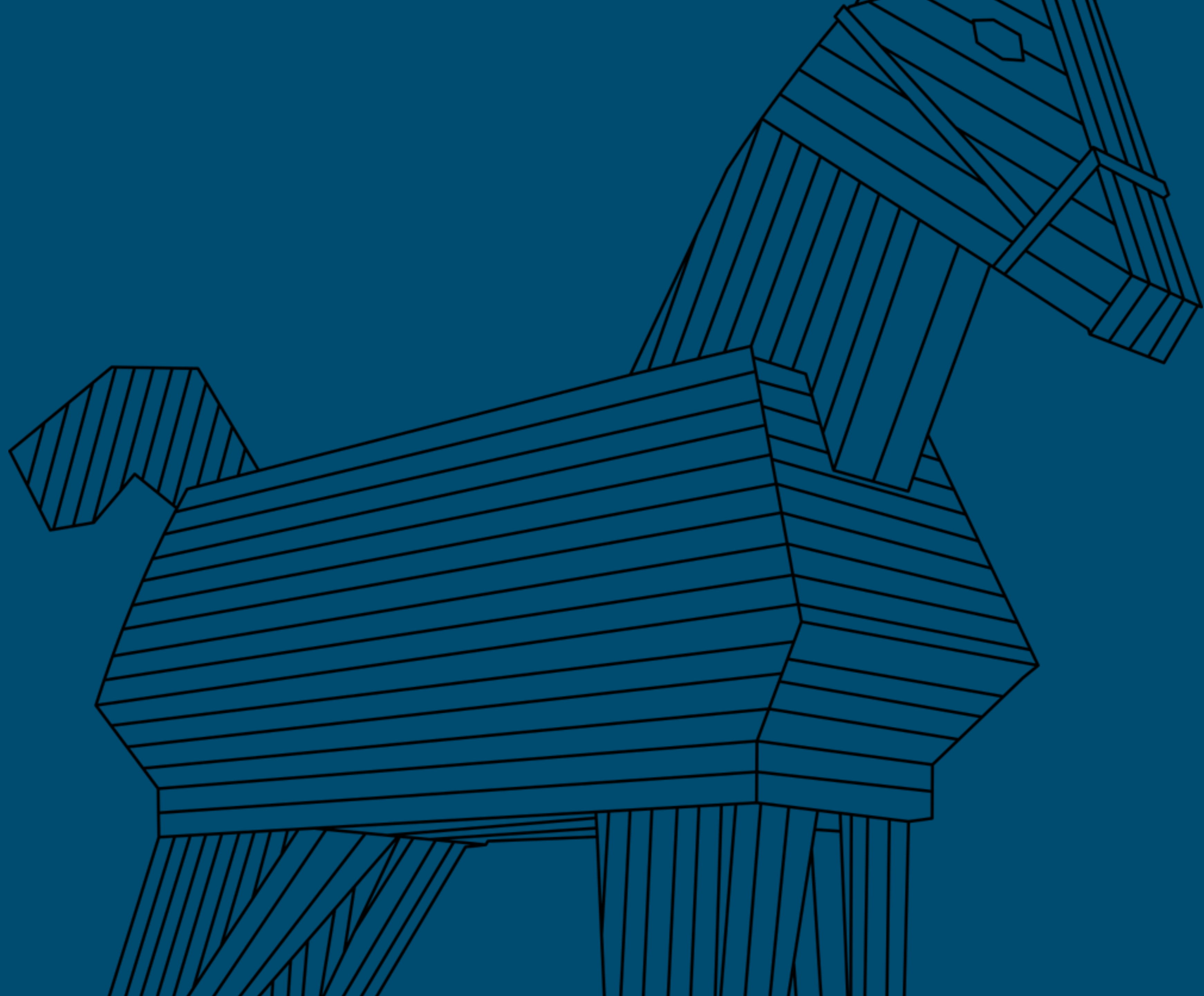
**Consistent quality
as you grow**

A photograph of a violinist in a dark suit playing a violin. The focus is on the instrument and the musician's hands, with a blurred background of a concert hall.

**Maintain velocity
as you grow**

A wide-angle photograph of an orchestra performing in a concert hall. The musicians are seated in rows, playing various instruments like violins, cellos, and woodwinds. The conductor is visible in the foreground, facing the orchestra.

**Ensure coherence
as you grow**



Mechanistic modes of product/service delivery have tapped out. It's hard to realize greater efficiency.





Mechanistic modes of product/service delivery have tapped out. It's hard to realize greater efficiency.

Design is valuable because it reintroduces **humanism** into a corporate, business, and technological context that had forgotten people.



← 800
TECHNOLOGY

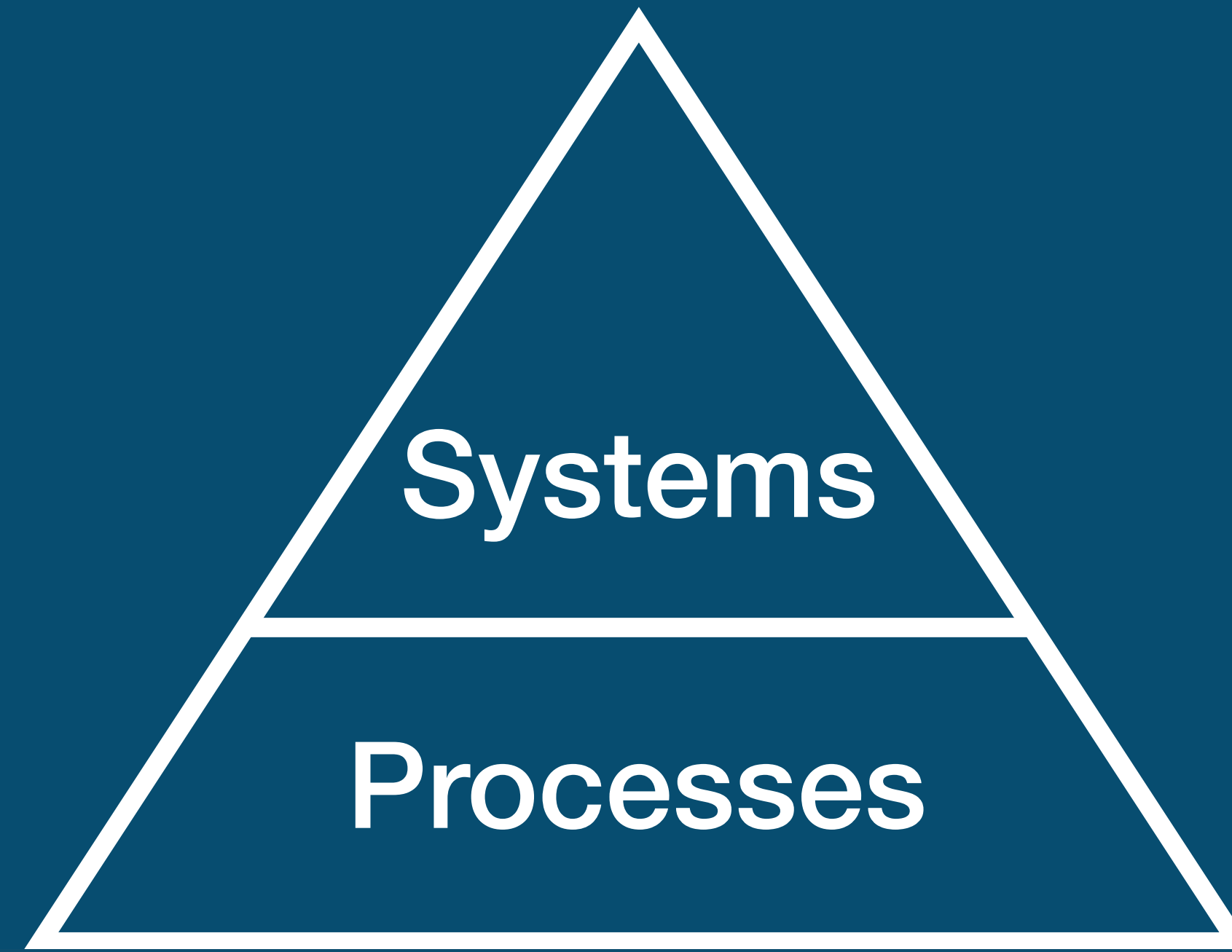
← 1500

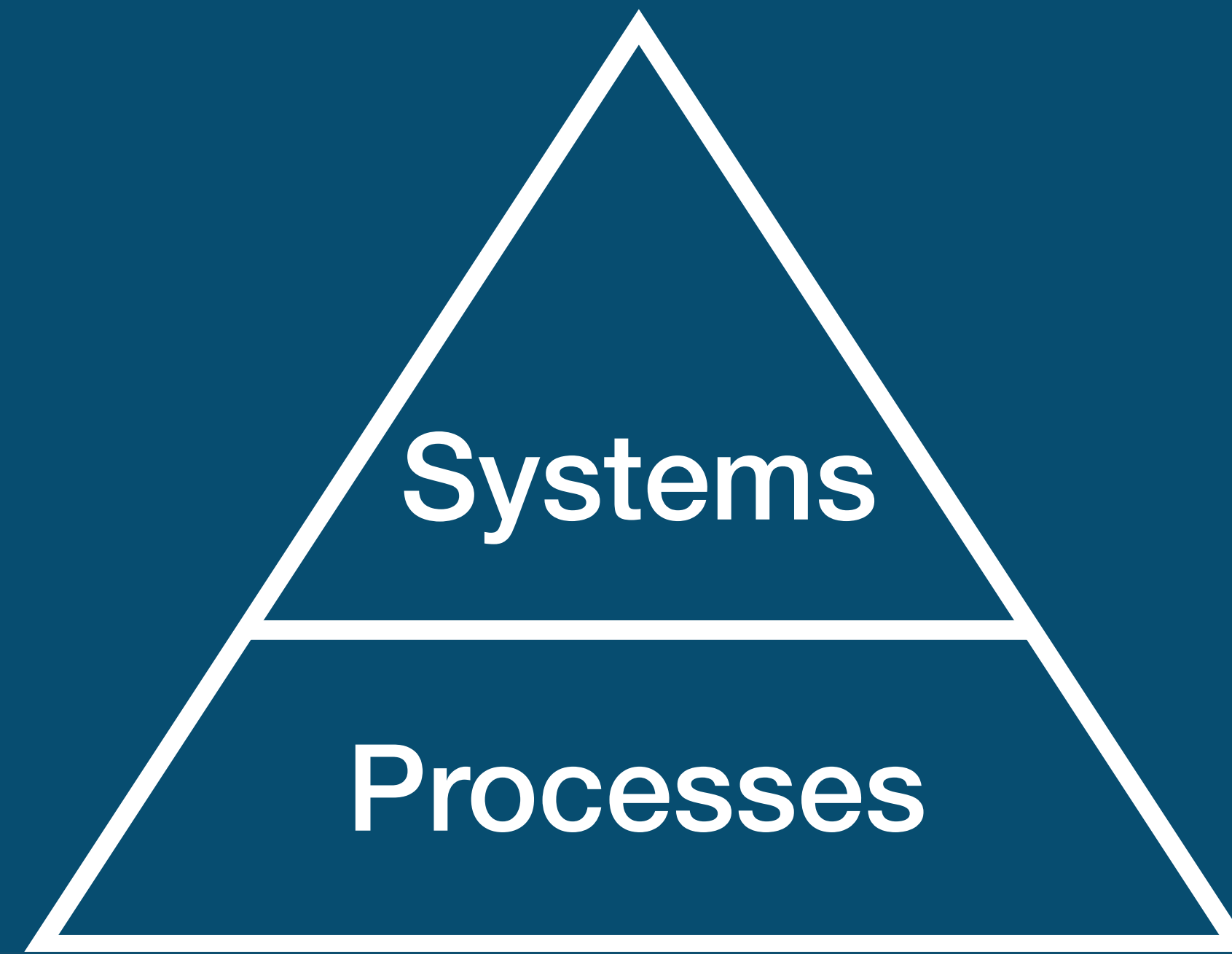
LIBERAL ARTS



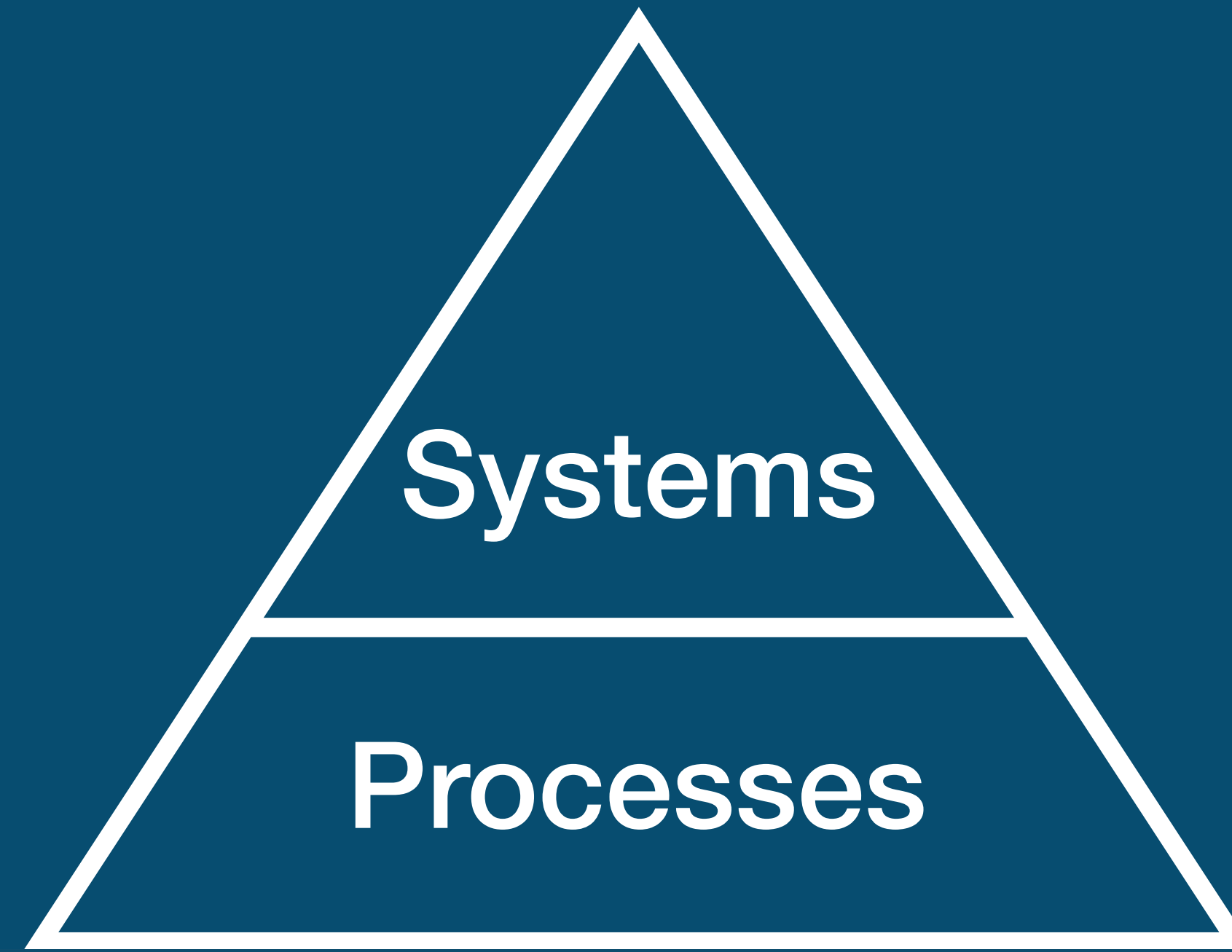
“Design is the fundamental soul of a man-made creation that ends up expressing itself in successive outer layers of the product or service.”

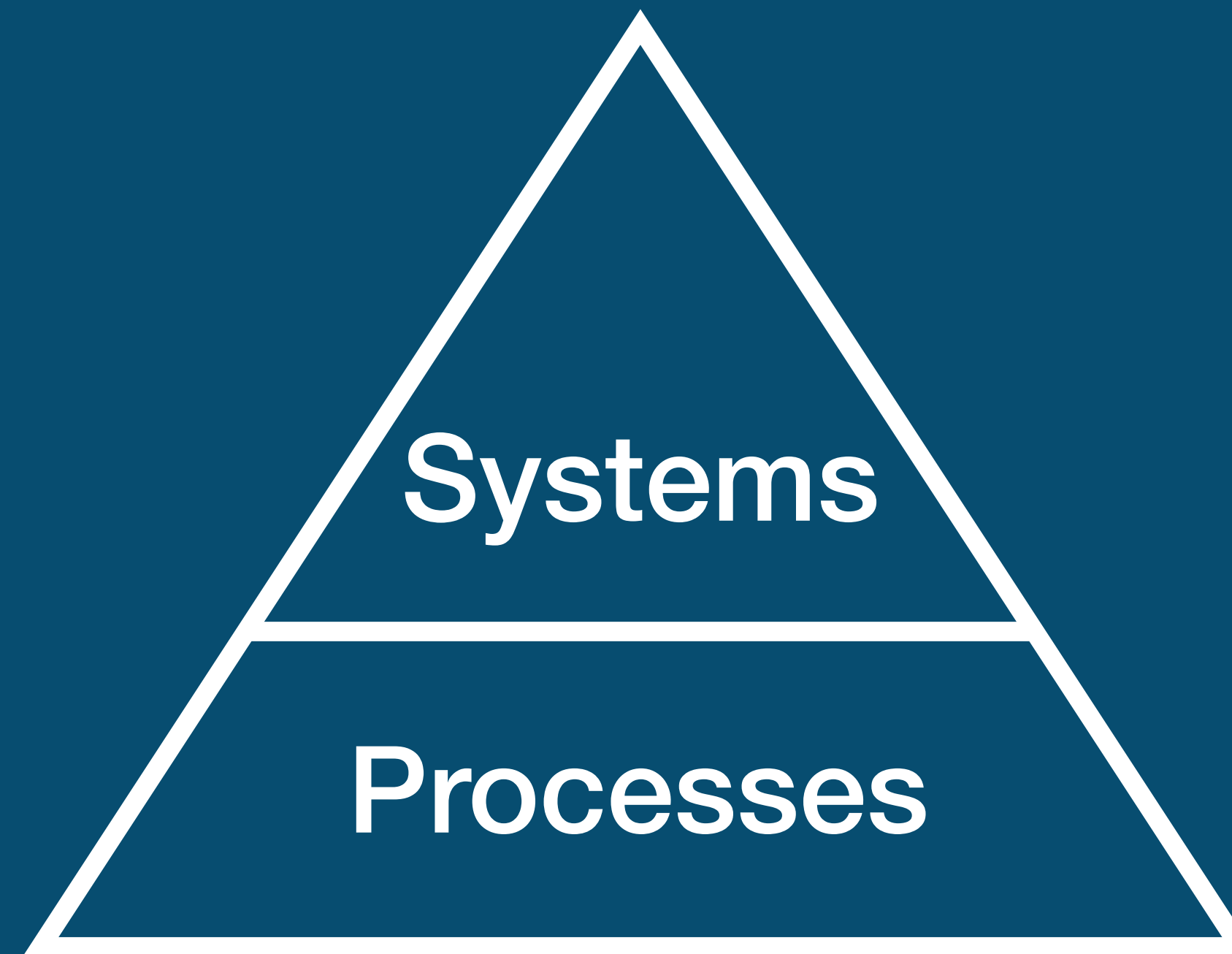
How do you scale **soul**?





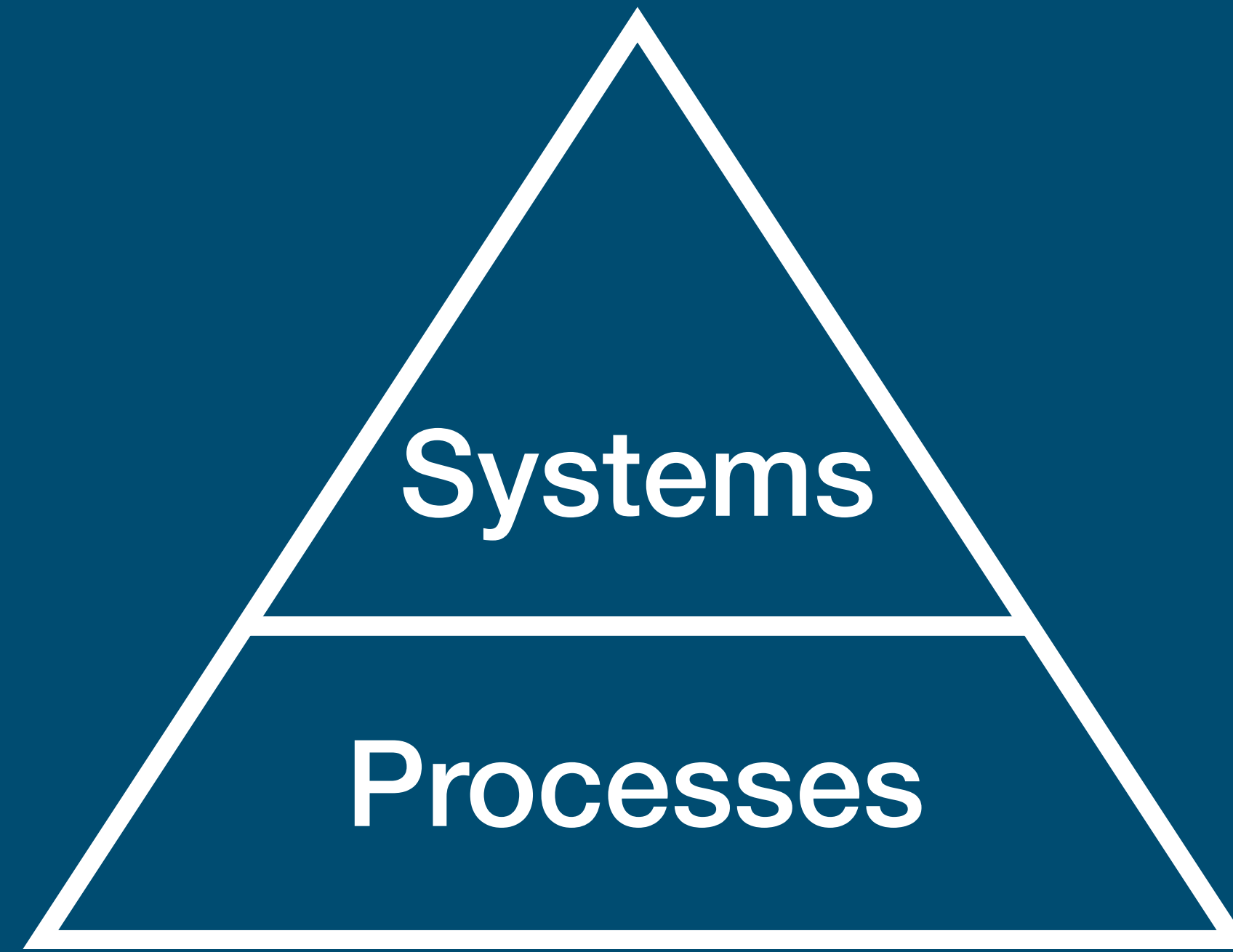
These may “raise the floor” for quality and speed, but on their own they have no soul, and risk becoming a focus in and of themselves, inhibiting innovation.

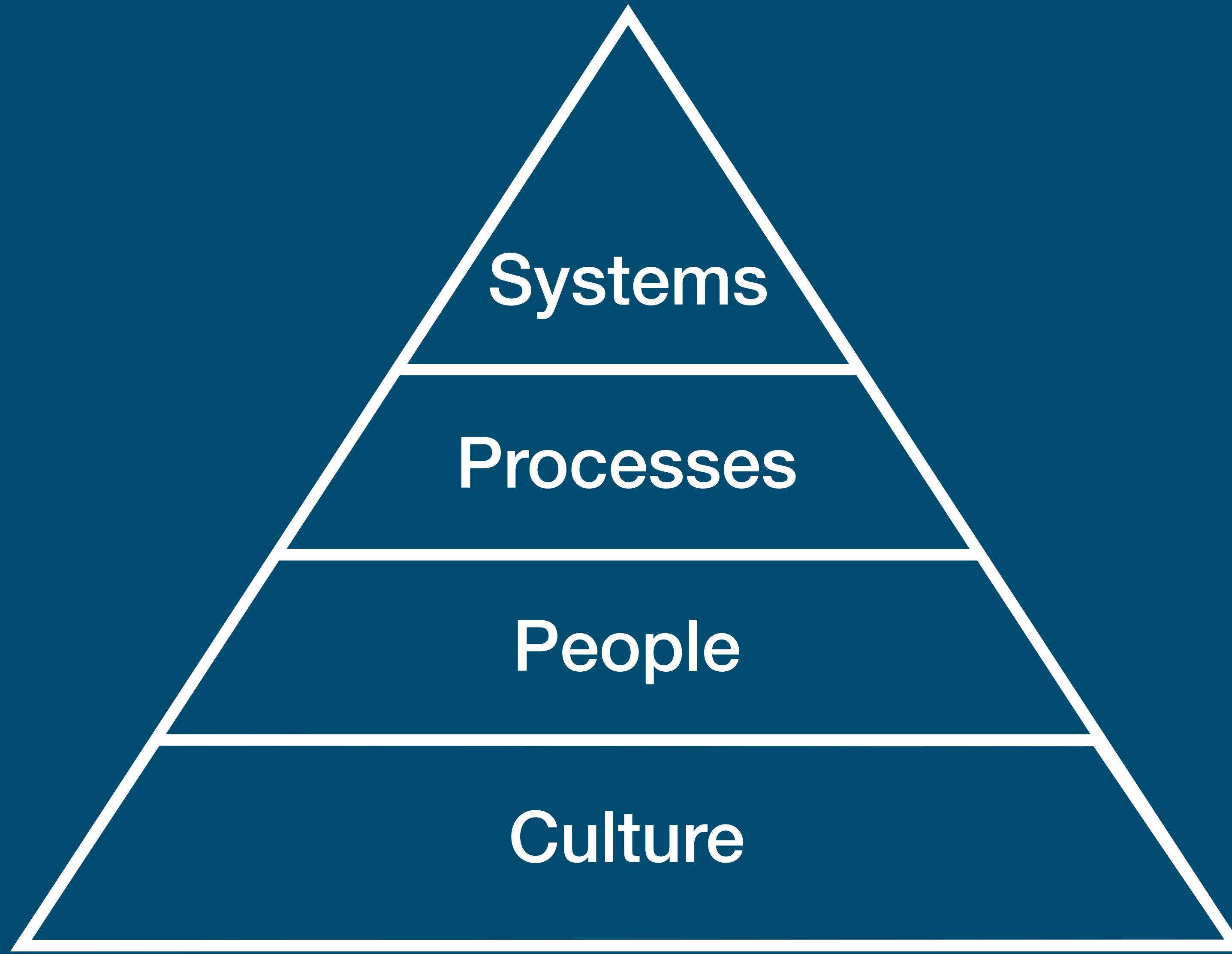




Jeremy Keith, Web designer and developer:

*“[D]esign systems take their place in a long history of **dehumanising approaches** to manufacturing like Taylorism. The priorities of ‘scientific management’ are the same as those of design systems —**increasing efficiency and enforcing consistency.**”*







To maintain its soul, **Design at Scale** must rest on a foundation of **culture** and **people**

People

Culture



Culture

In the Design team



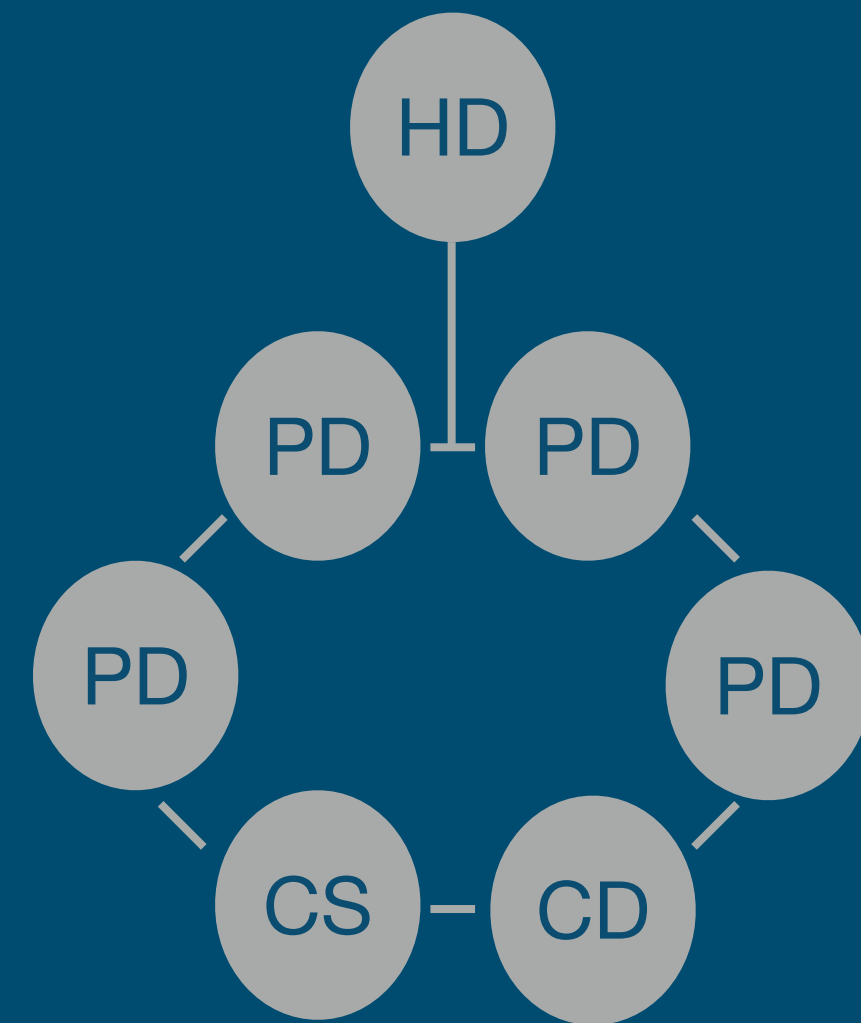
Culture

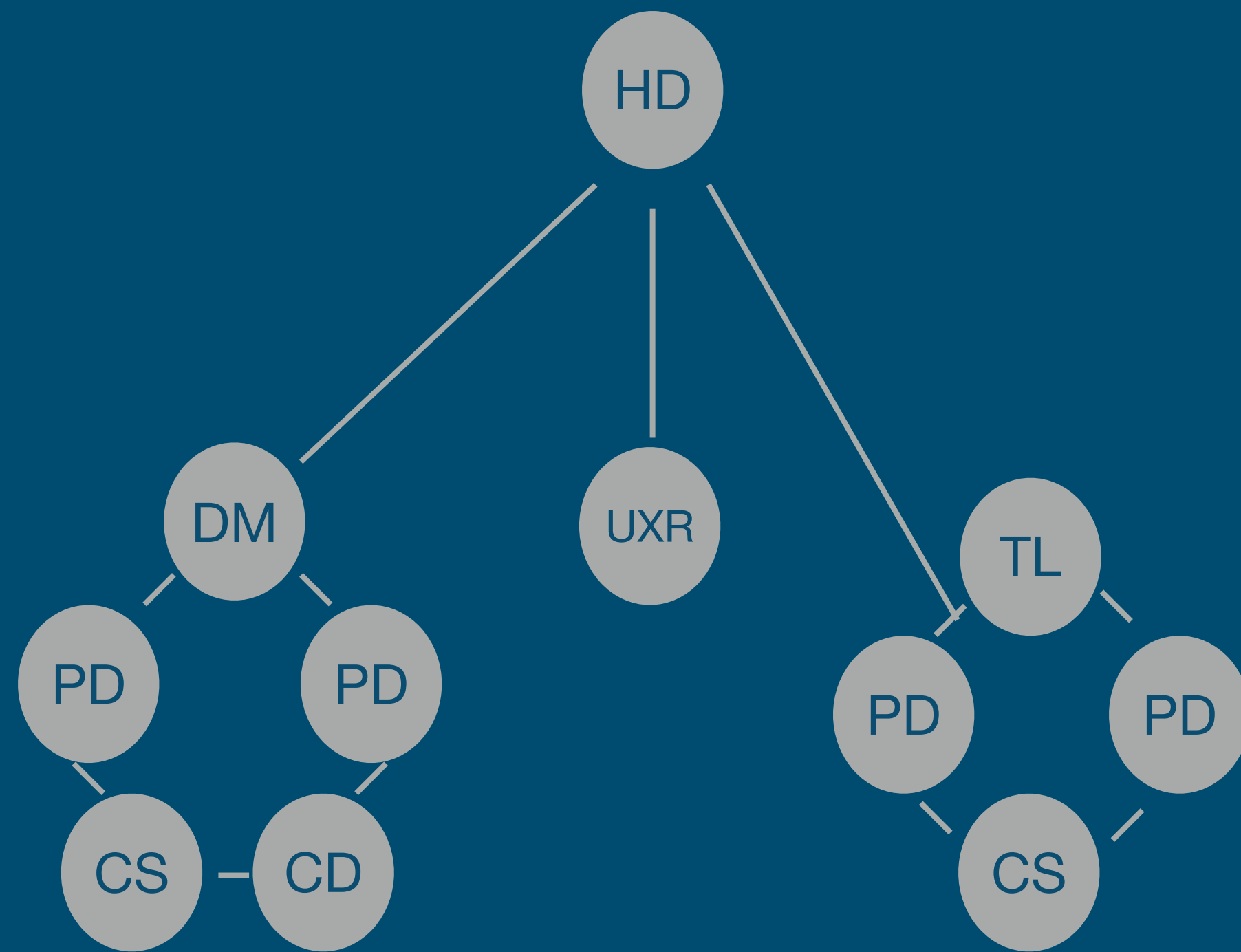
In the Design team

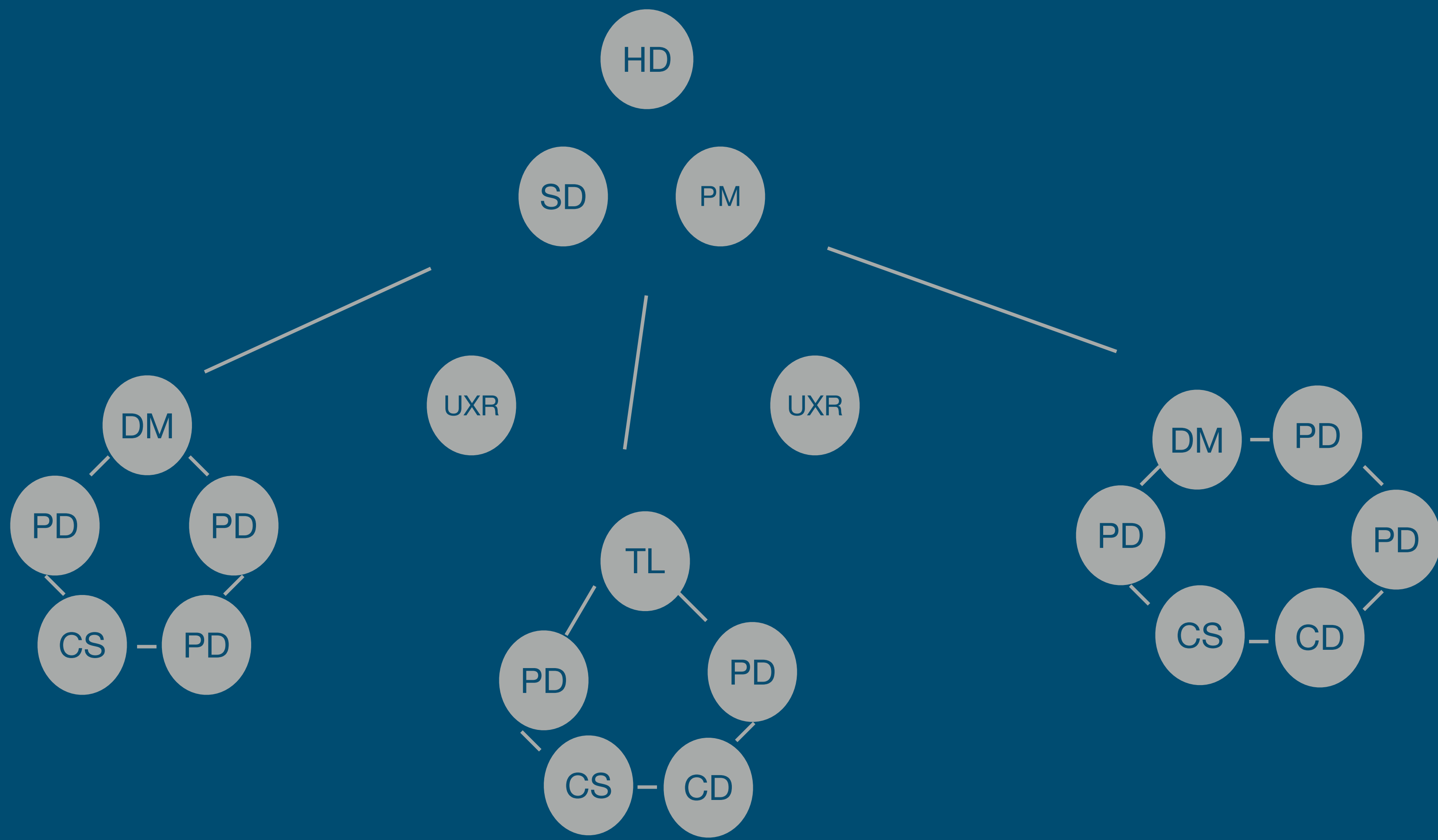
In the company

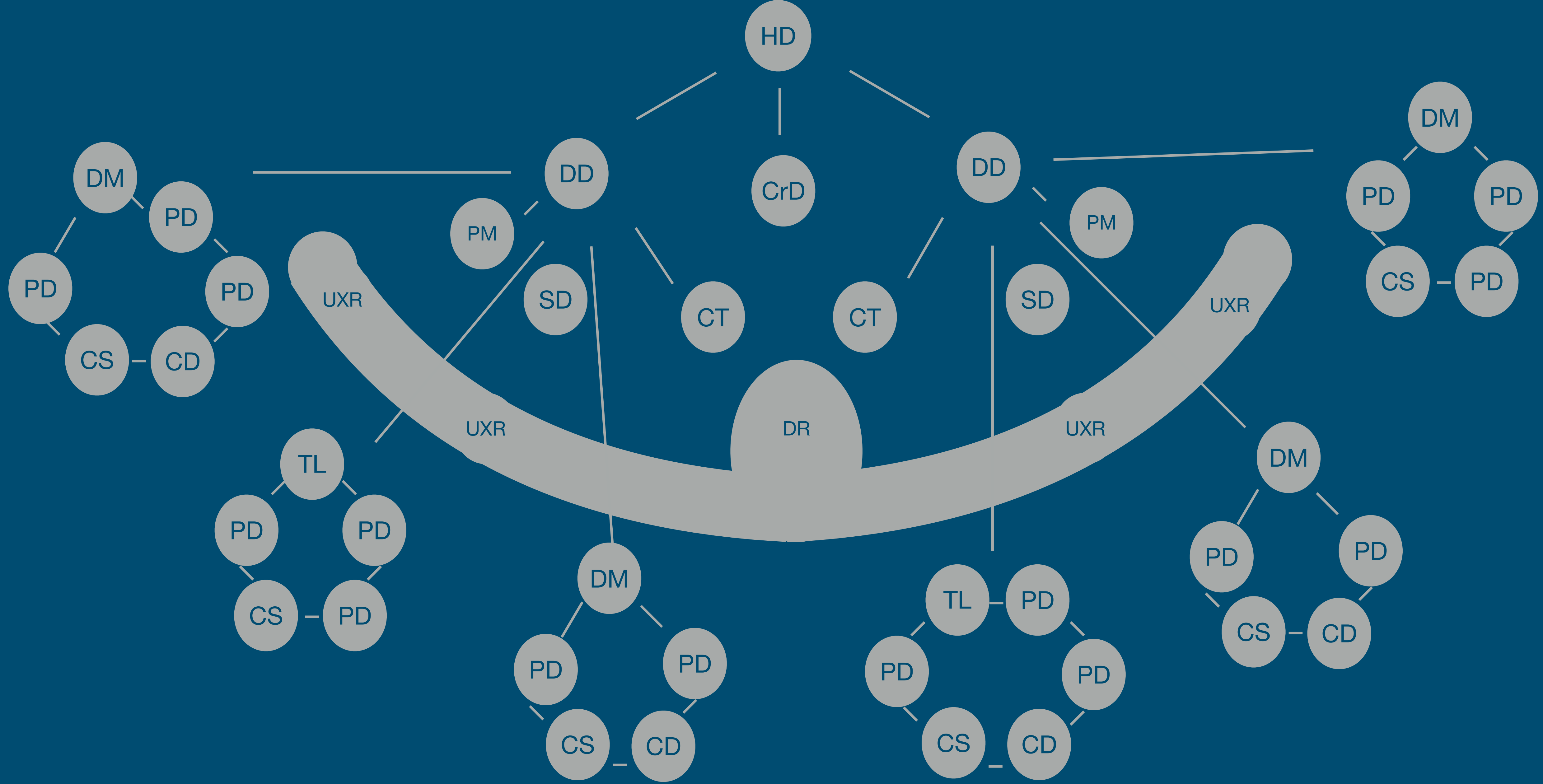


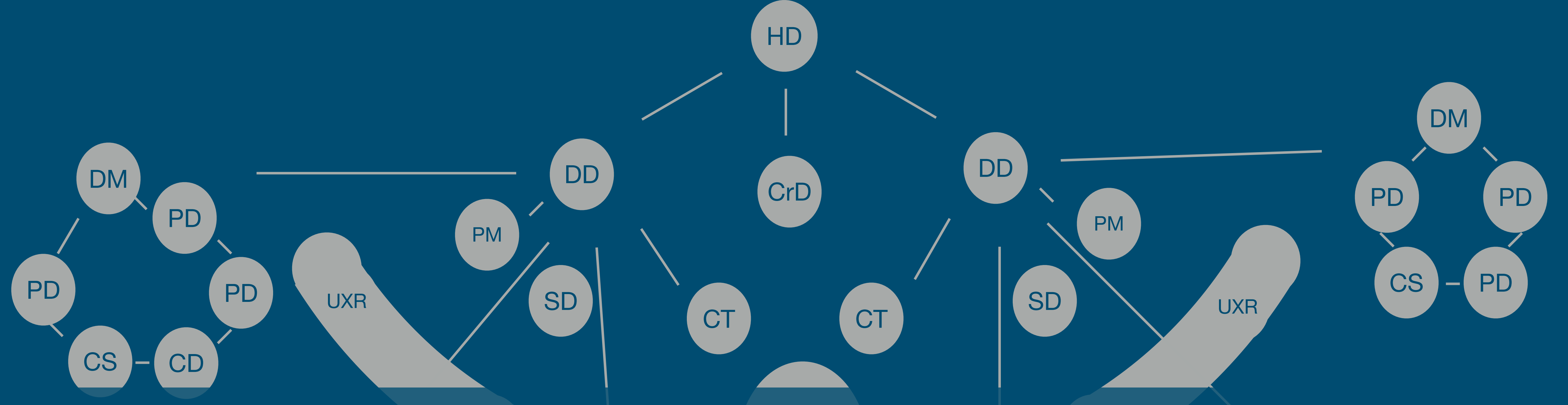




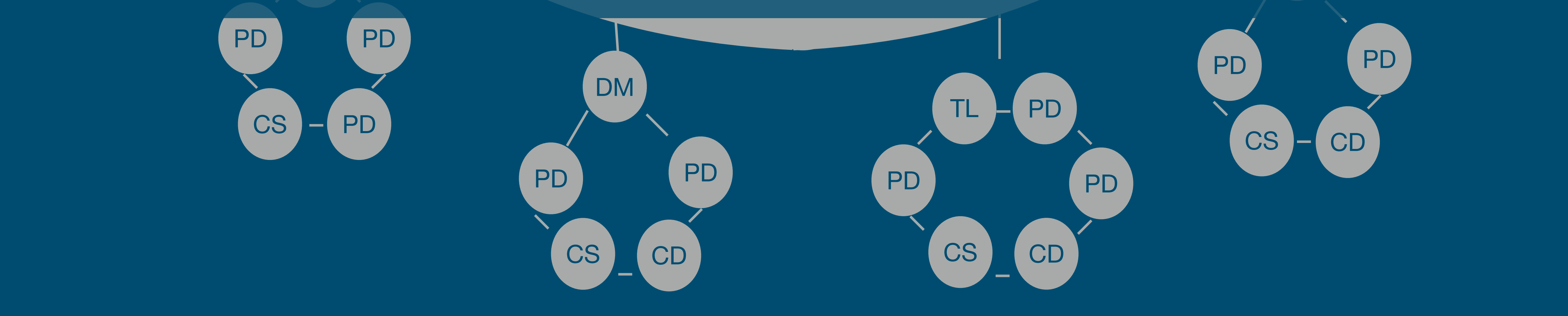








As the team grows, you cannot manage culture informally



Make culture explicit within Design

Shared sense of purpose

Make culture explicit within Design

Shared sense of **purpose**

Purpose statements I helped craft

Make culture explicit within Design

Shared sense of **purpose**

Purpose statements I helped craft

For a publication's team:

The Product Design Team champions all readers through crafting engaging, enriching, and enduring experiences.

Make culture explicit within Design

Shared sense of **purpose**

Purpose statements I helped craft

For a publication's team:

The Product Design Team champions all readers through crafting engaging, enriching, and enduring experiences.

For a technical enterprise team:

The Product Design Team champions human values throughout strategy and development, and empowers users by taming technical complexity in designing reliable, safe, and approachable experiences.

Make culture explicit within Design

Shared sense of **purpose**

Establish **values**

Make culture explicit within Design

Shared sense of purpose

Establish values

Snagajob Design Team Values

Humility

Quality

Evidence

Context

Fearlessness

Make culture explicit within Design

Shared sense of **purpose**

Establish **values**

Demonstrate values through **norms**

Make culture explicit within Design

Shared sense of **purpose**

Establish **values**

Demonstrate values through **norms**

How we pledge to work with one another

Practice with empathy, kindness, even love...

but also candor, and get to resolution in the moment.

Be honest, direct, and respectful in critique...

and recognize it's not about you, it's about the work.

Subsume personal pride for what's best for the team...

but be vocal about what you need to succeed.

Follow through on your commitments...

but don't fear asking for help to get out of the weeds.

Keep people in the loop with frequent communication...

but respect one another's time and attention.

Make culture explicit within Design

Shared sense of **purpose**

Establish **values**

Demonstrate values through **norms**

Make it **tangible**

Make culture explicit within Design

Shared sense of **purpose**

Establish **values**

Demonstrate values through **norms**

Make it **tangible**



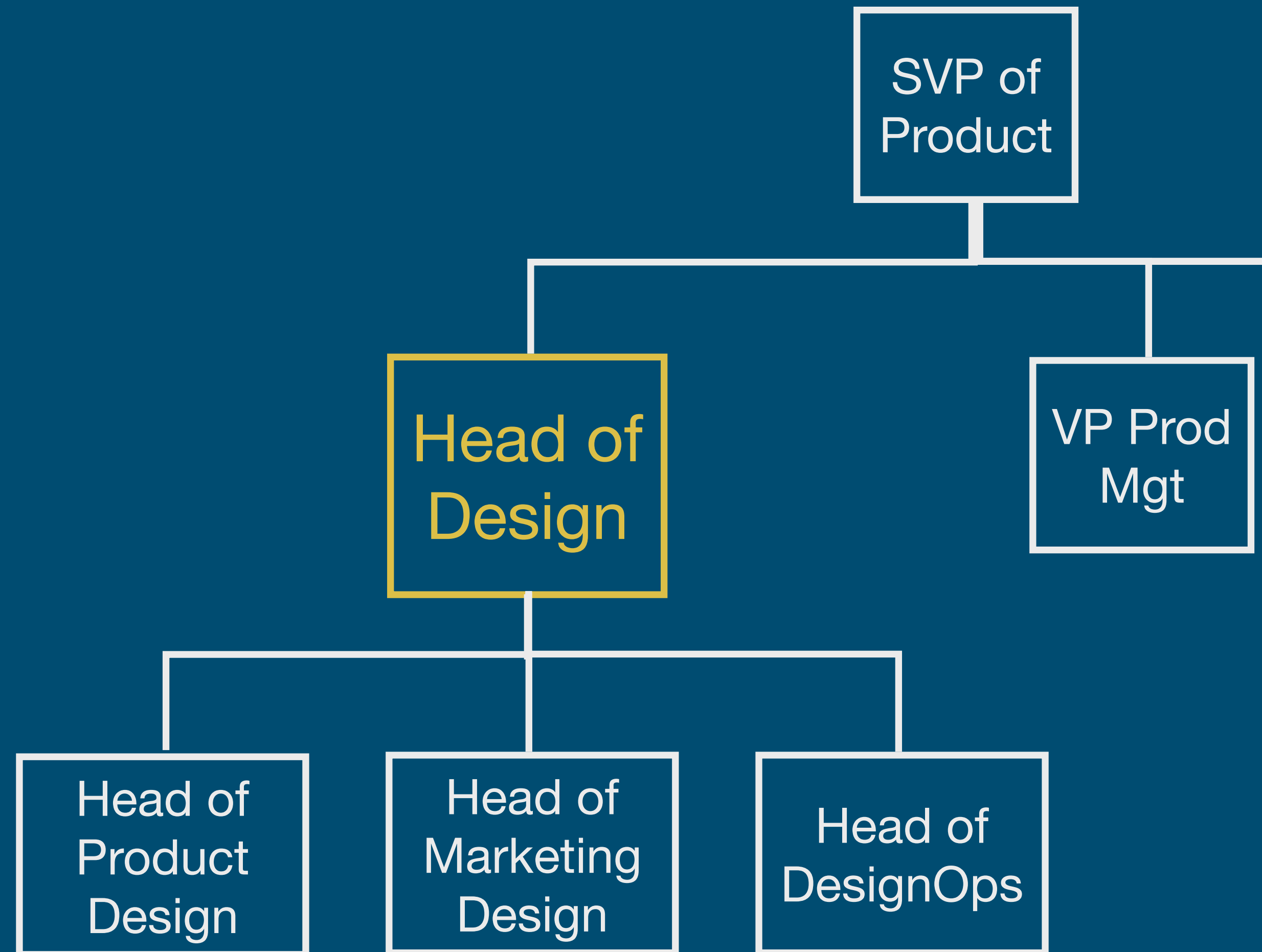
Scaling design culture company-wide

Scaling design culture company-wide

Singular design leadership

Scaling design culture company-wide

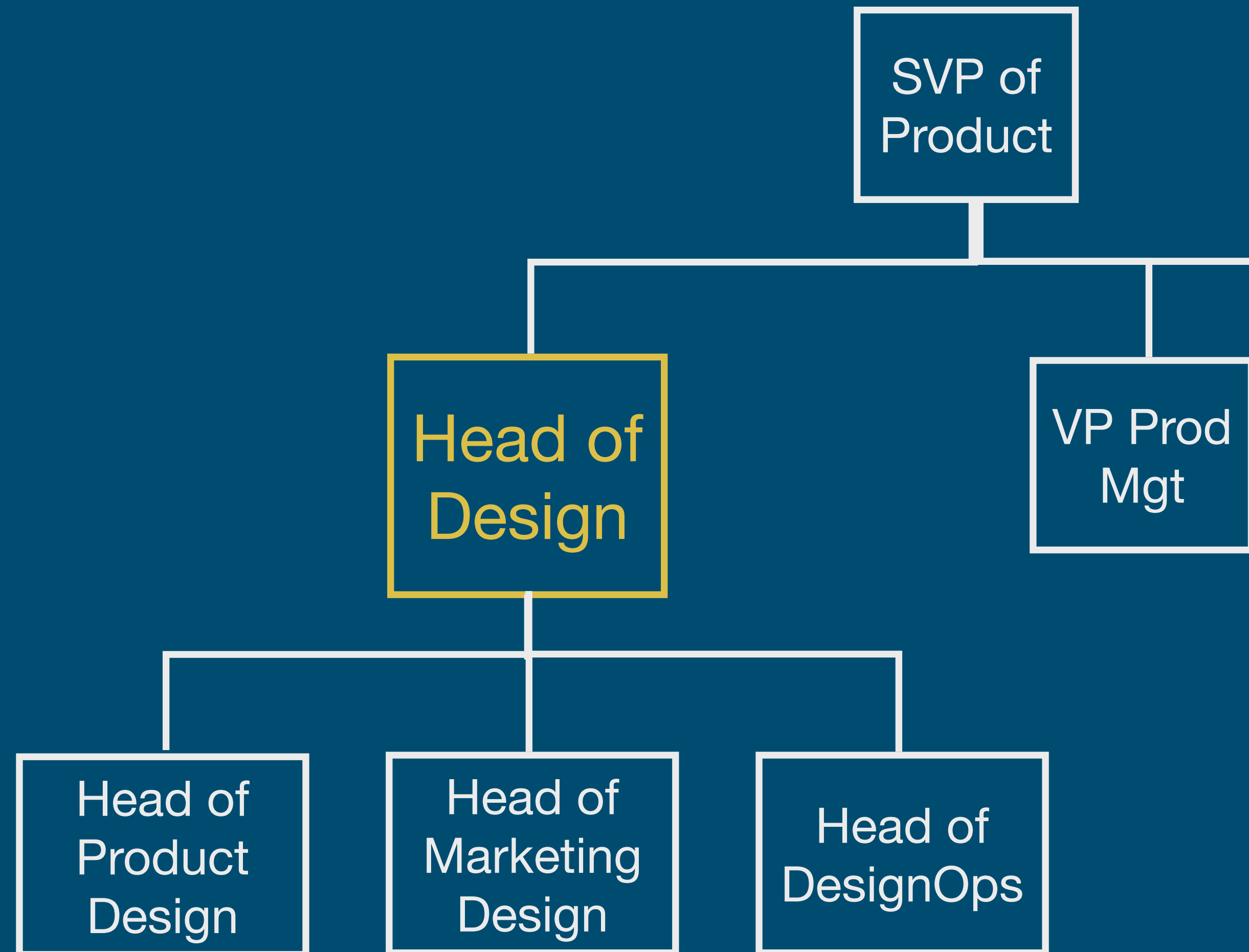
Singular design leadership



Scaling design culture company-wide

Singular design leadership

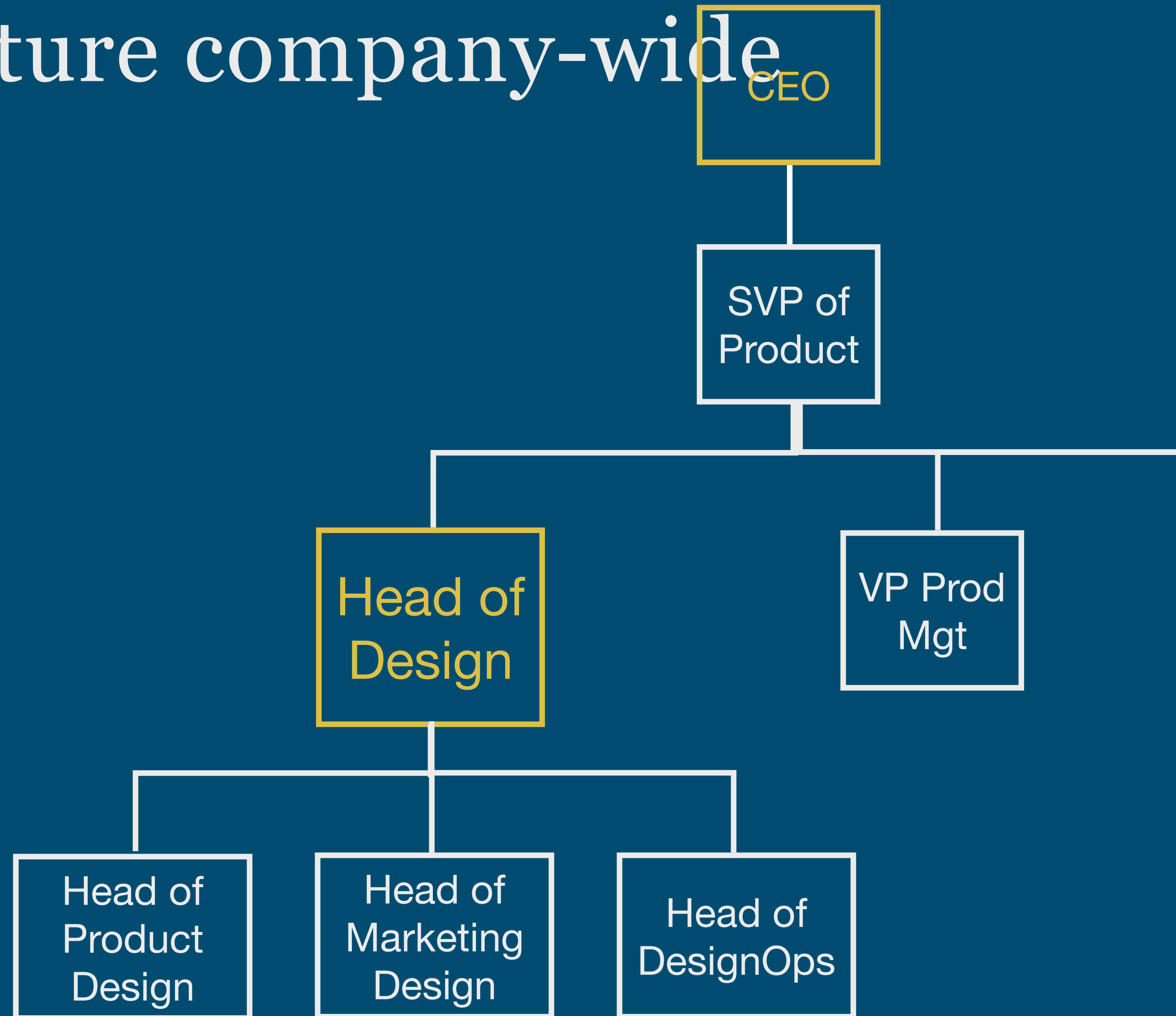
≅ Two levels from the CEO



Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO



Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO

Executive commitment and investment

Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO

Executive commitment and investment



Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO

Executive commitment and investment

Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO

Executive commitment and investment

HCD 101 / Design Thinking

Scaling design culture company-wide

Singular design leadership

≅ Two levels from the CEO

Executive commitment and investment

HCD 101 / Design Thinking

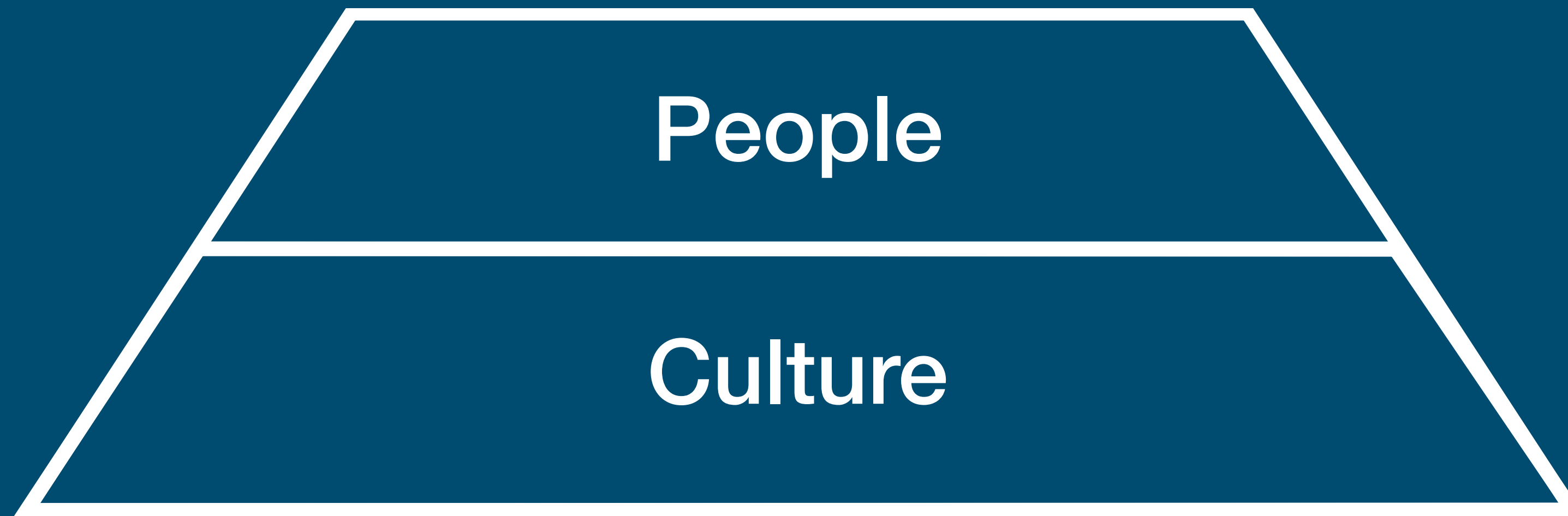




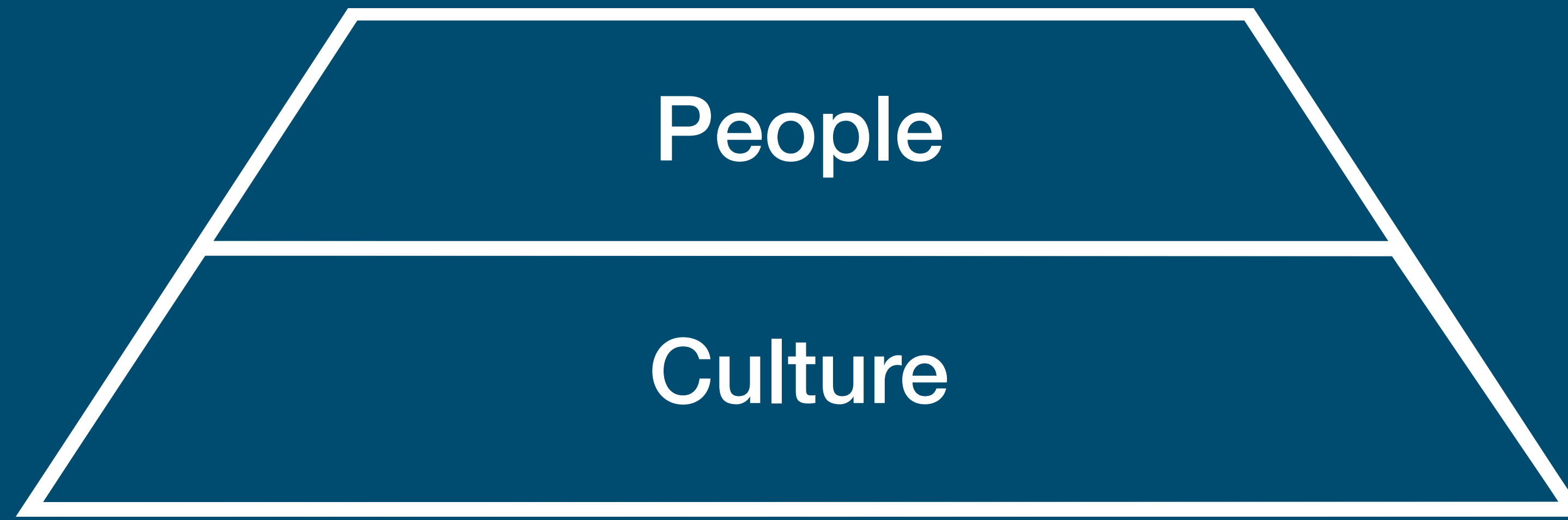
Culture

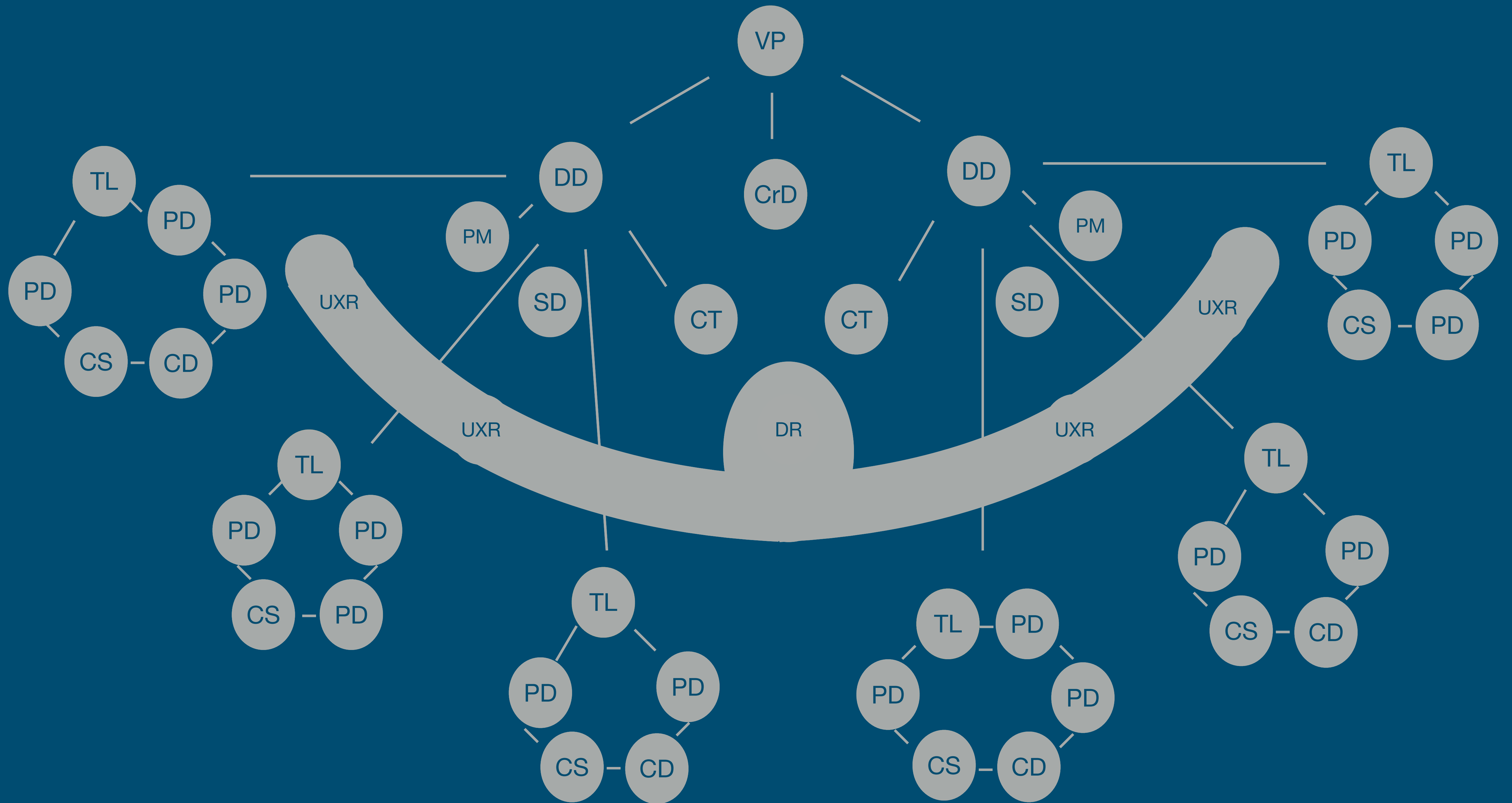


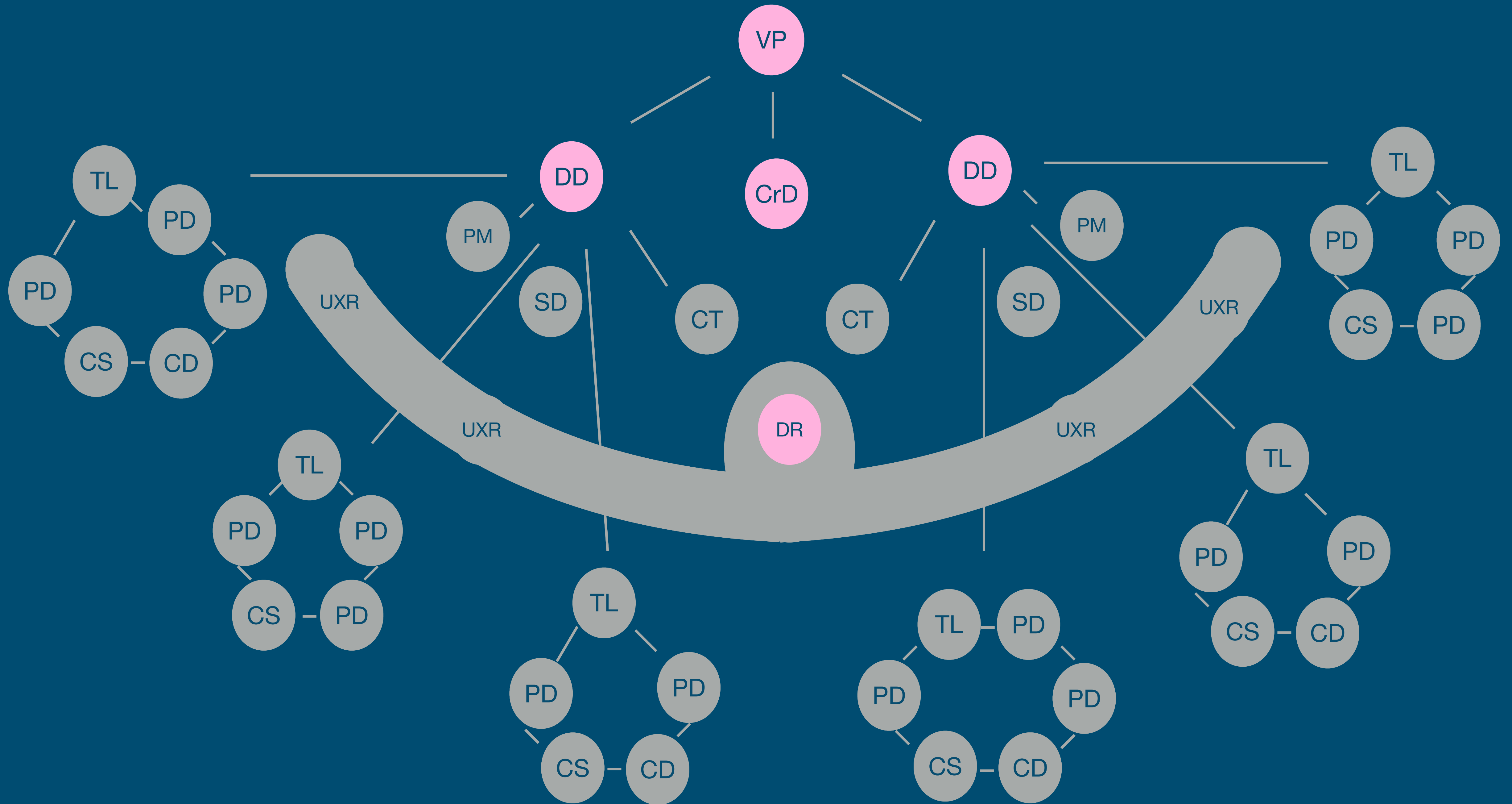
Roles that enable scale



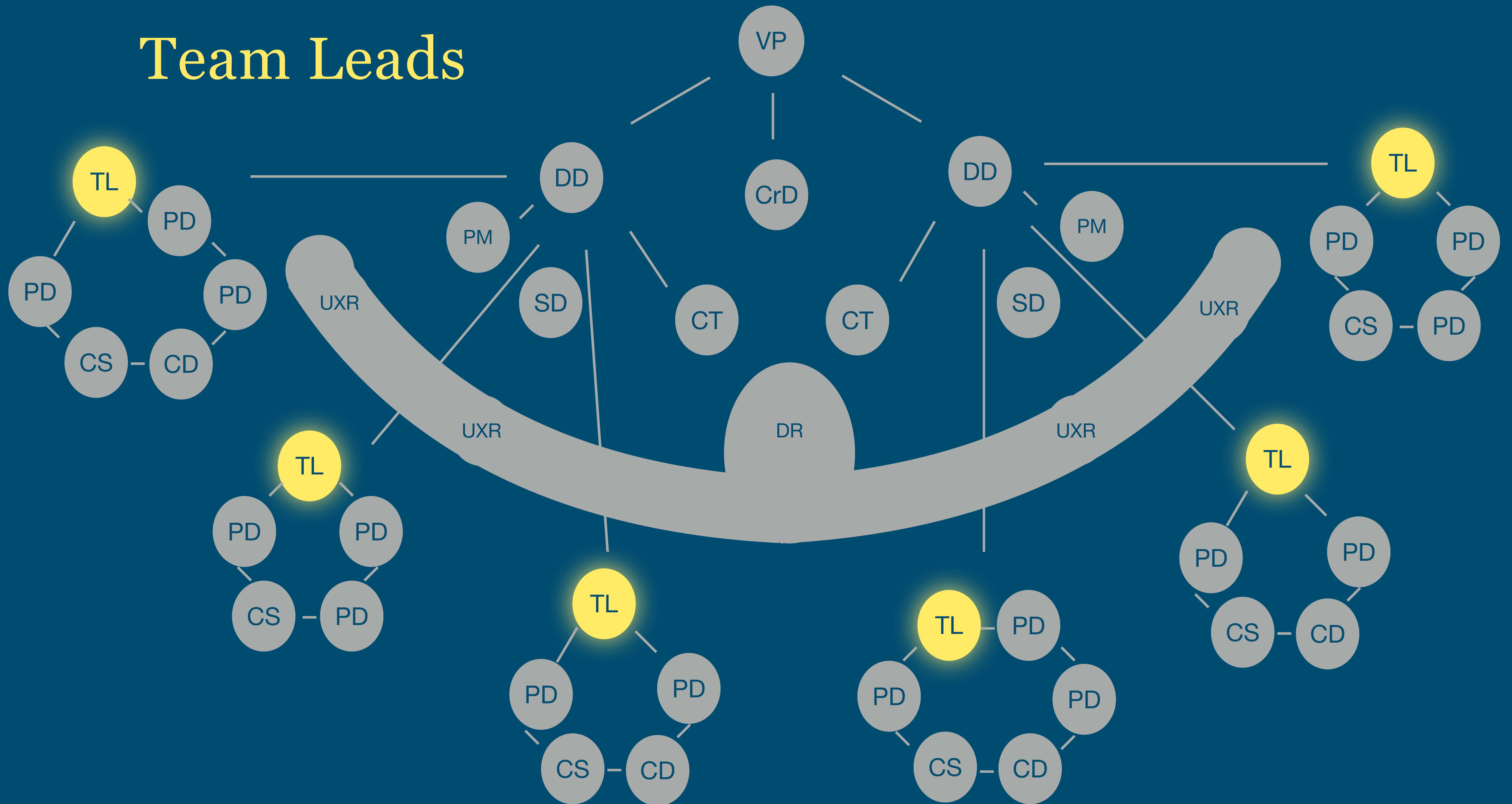
Roles that enable scale







Team Leads



Team Leads—Relationships

Team Leads—Relationships



Team Leads—Relationships



manage down

COACH

Team Leads—Relationships



manage down

COACH

Create a context to get the most out of their team

Provide a vision for success

Treat the team as people, not resources

Uphold standards of quality

Team Leads—Relationships



manage down

COACH

Team Leads—Relationships

Diplomat

manage across



manage down

COACH

Team Leads—Relationships

Diplomat

manage across



manage down

COACH



Team Leads—Relationships

Diplomat

manage across



manage down

COACH

**We're in this
together**



Team Leads—Relationships

Diplomat

manage across

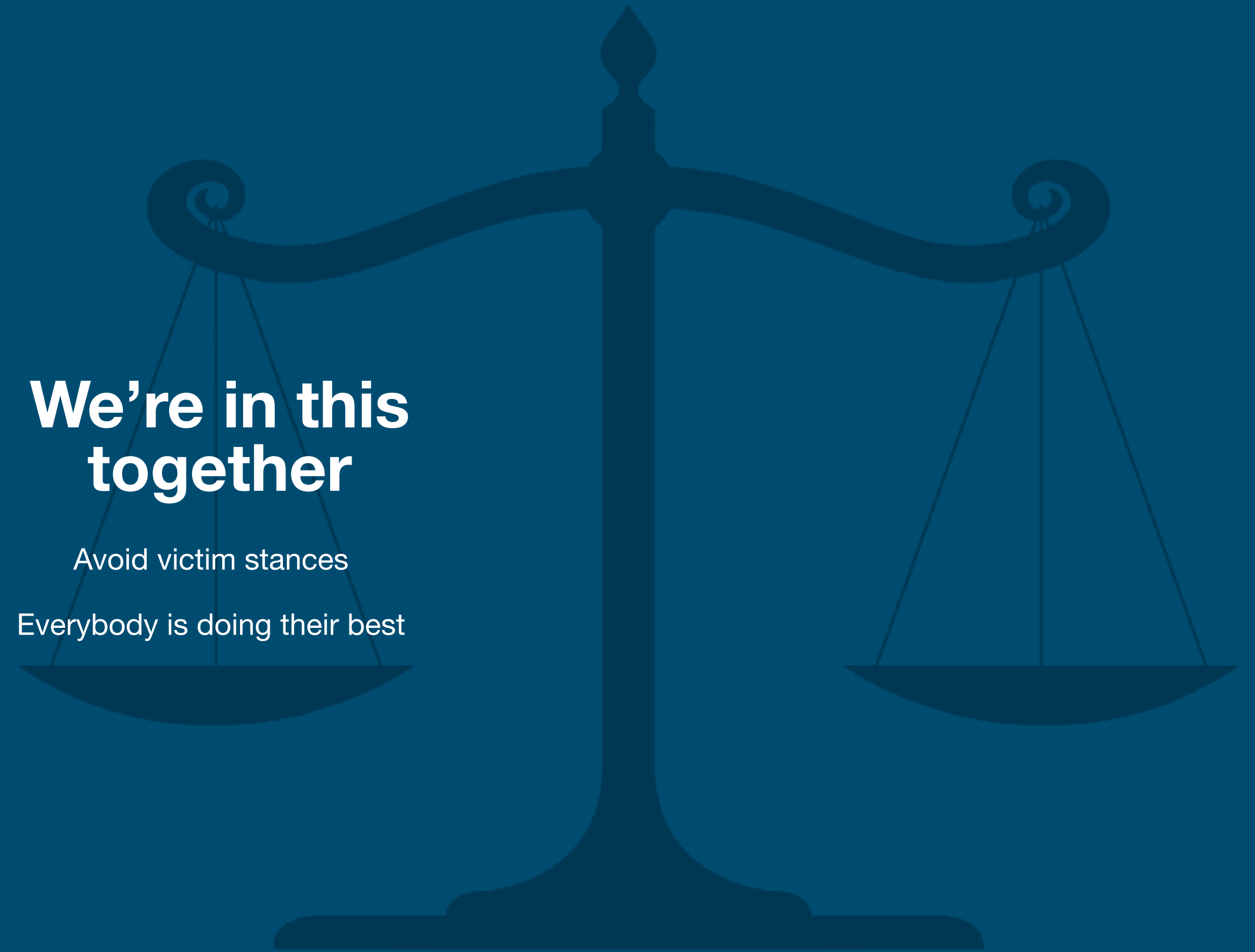


manage down

COACH

We're in this together

Avoid victim stances
Everybody is doing their best



Team Leads—Relationships

Diplomat

manage across



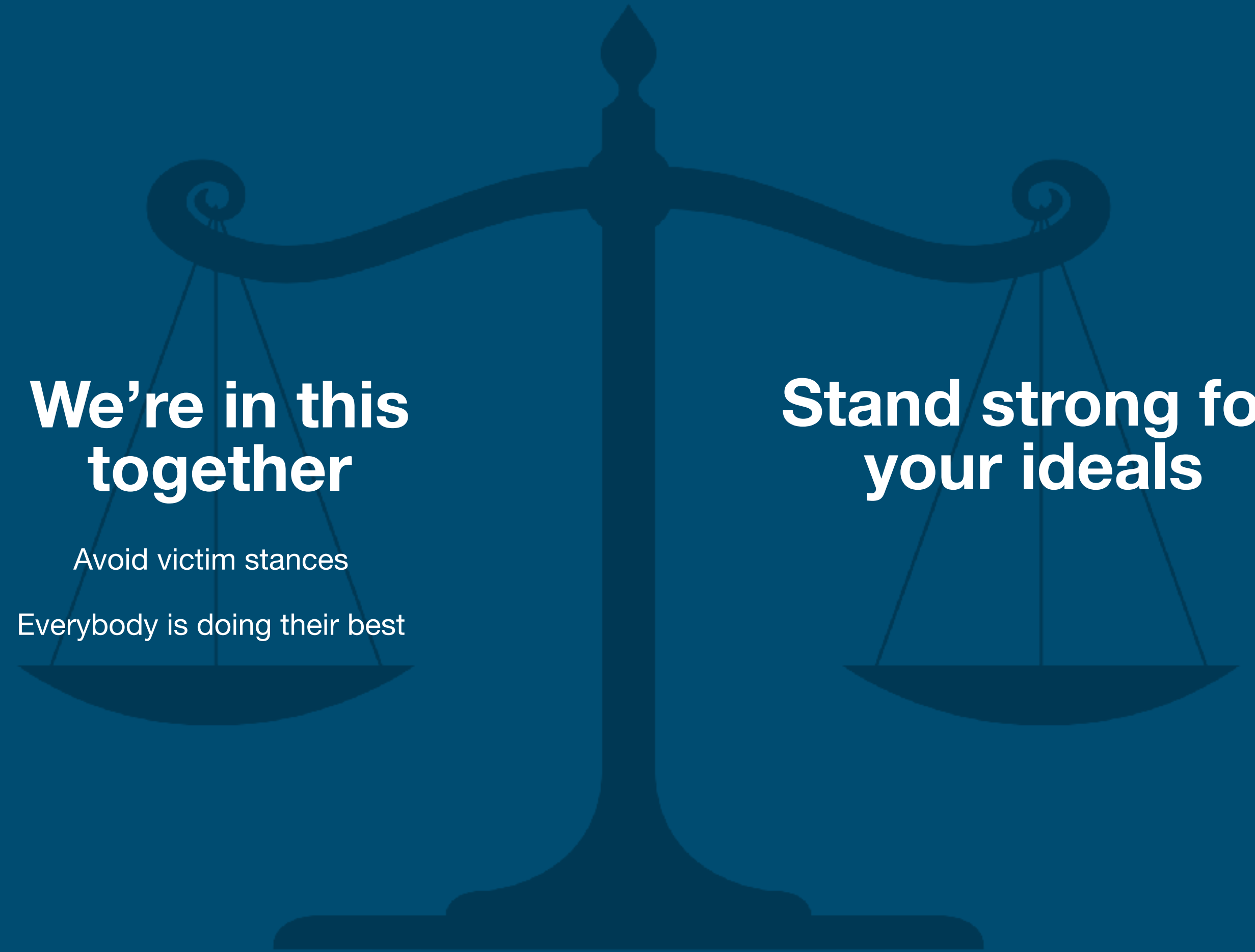
manage down

COACH

We're in this together

Avoid victim stances
Everybody is doing their best

Stand strong for your ideals



Team Leads—Relationships

Diplomat

manage across



manage down

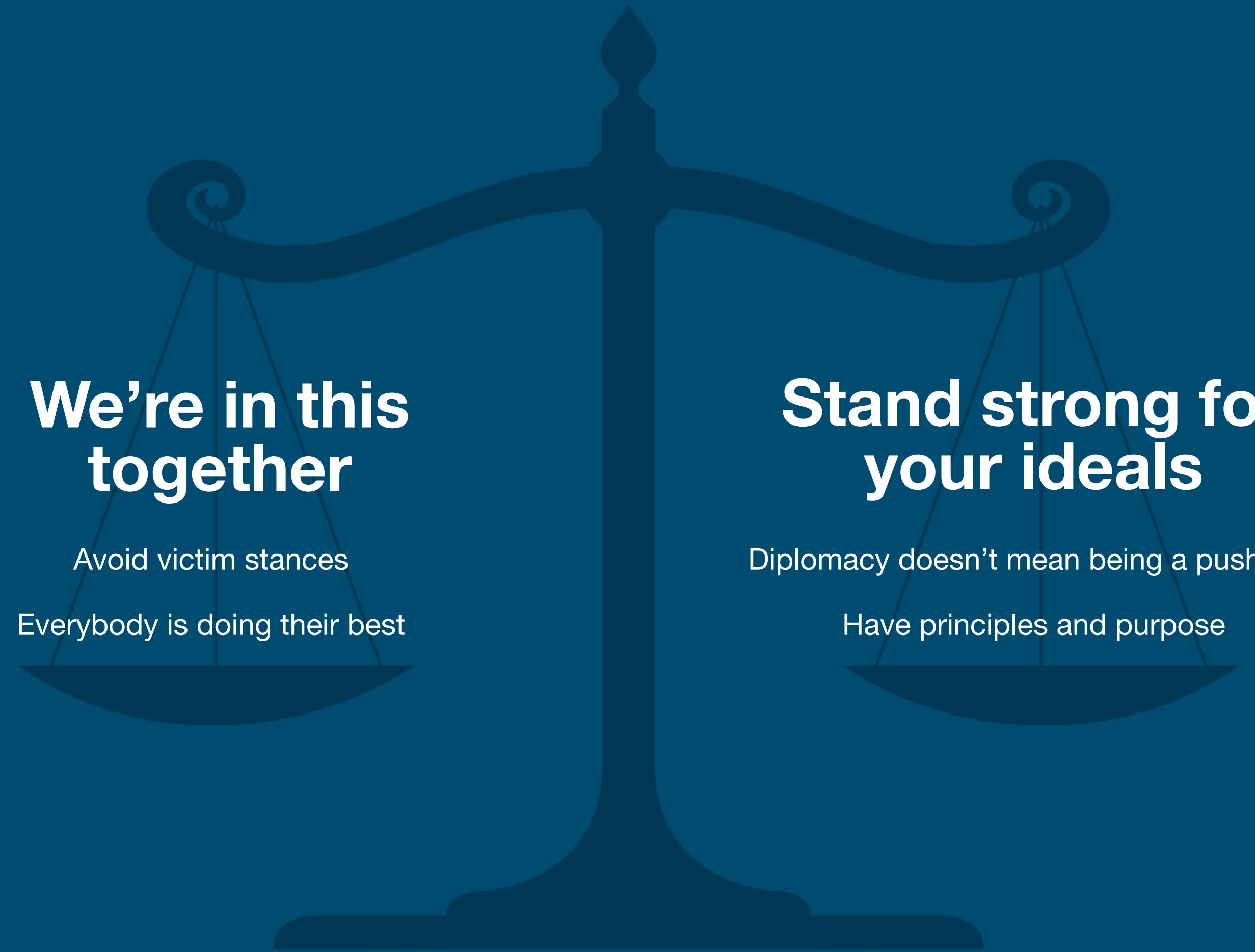
COACH

We're in this together

Avoid victim stances
Everybody is doing their best

Stand strong for your ideals

Diplomacy doesn't mean being a pushover
Have principles and purpose



Team Leads—Relationships

Diplomat

manage across



manage down

COACH

Team Leads—Relationships

Champion

manage up

Diplomat

manage across



manage down

COACH

Team Leads—Relationships

Champion

manage up

Diplomat

manage across



manage down

COACH



Team Leads—Relationships

Champion

manage up

Diplomat

manage across



manage down

COACH

Team Leads—Relationships

Champion

manage up

Because of what pivots around them, the **Team Lead** is the most important role on the team.

Diplomat

manage across



Team Leads are the in-the-trenches stewards of the design **culture**.

manage down

COACH

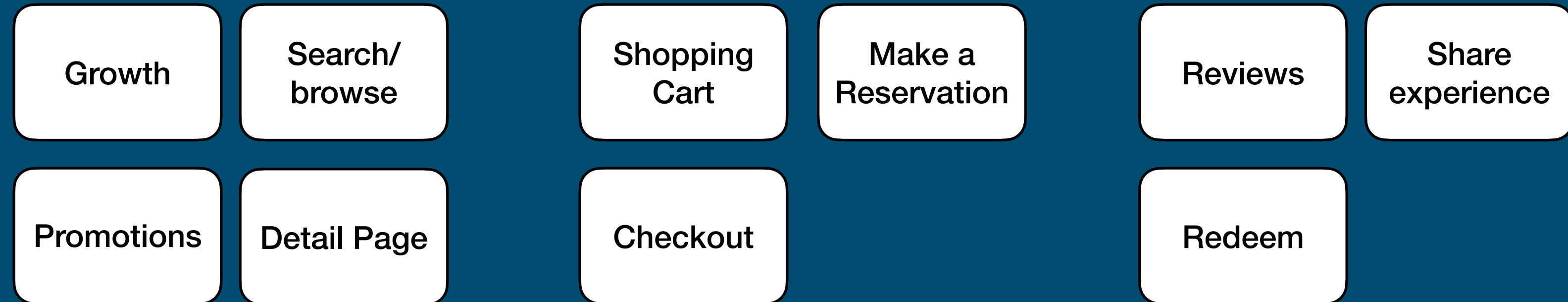
Team Leads—Coherence



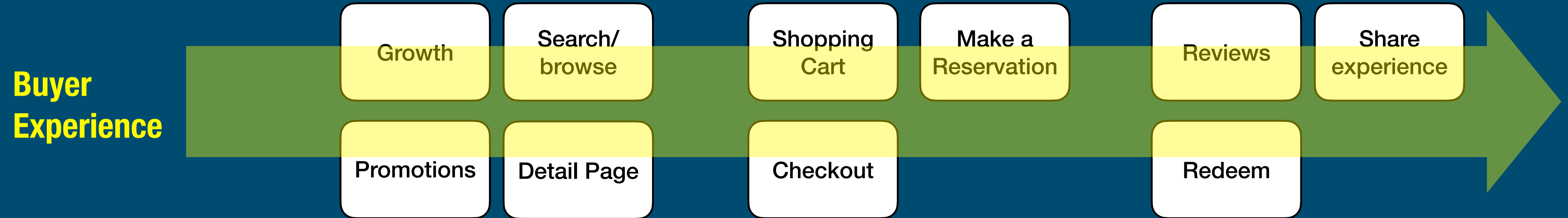
Team Leads—Coherence



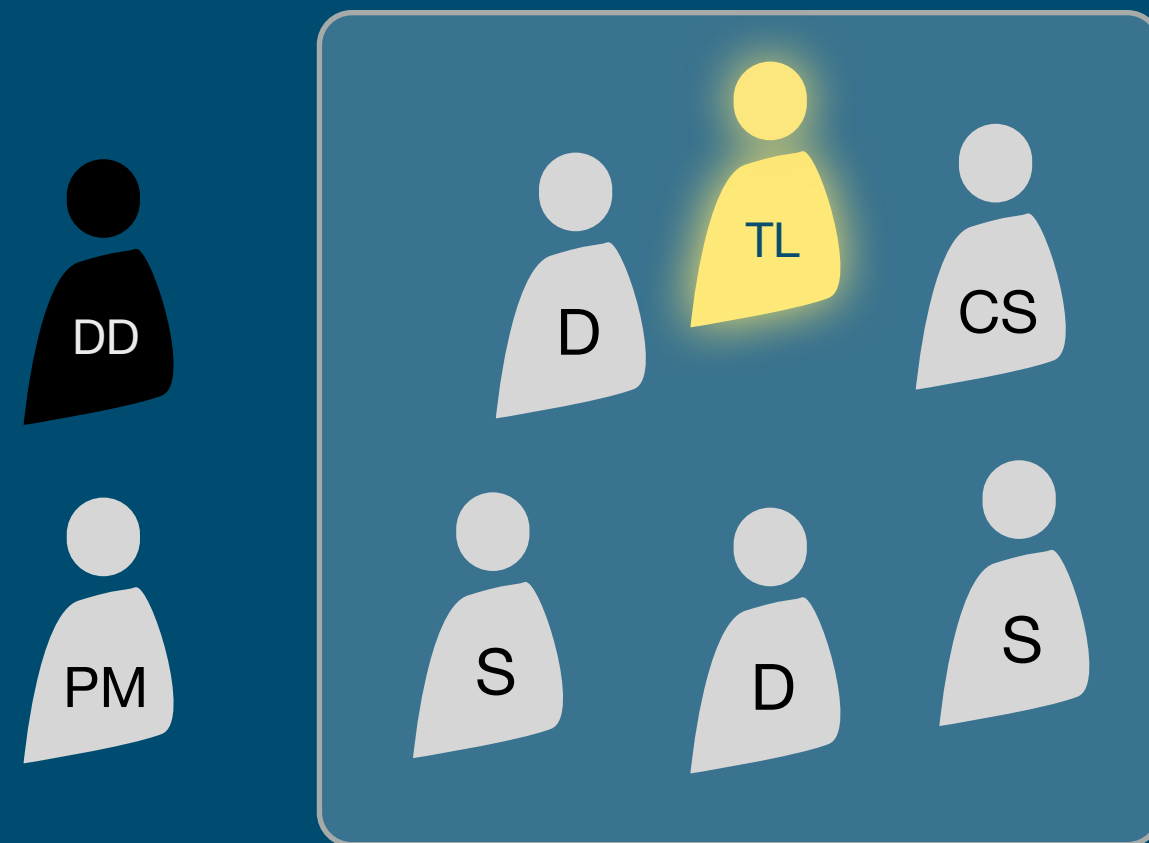
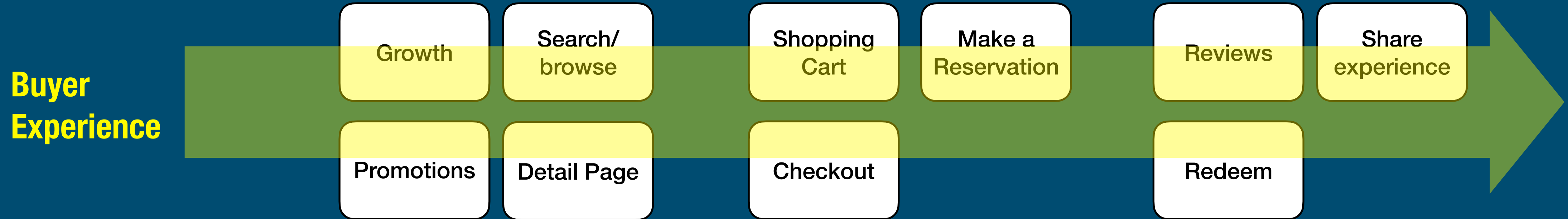
Team Leads—Coherence



Team Leads—Coherence

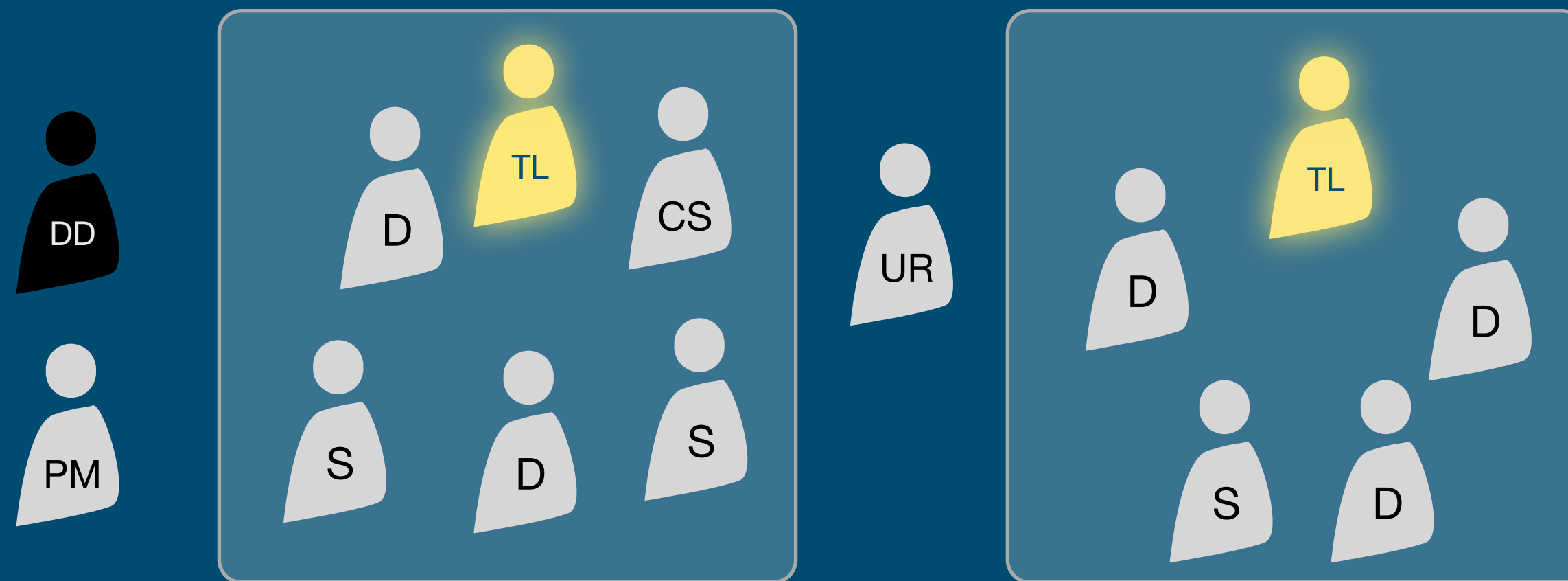
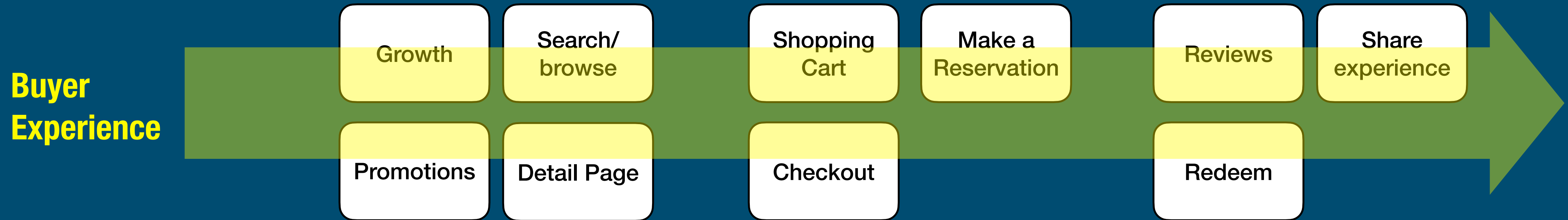


Team Leads—Coherence



Discovery
Design Team

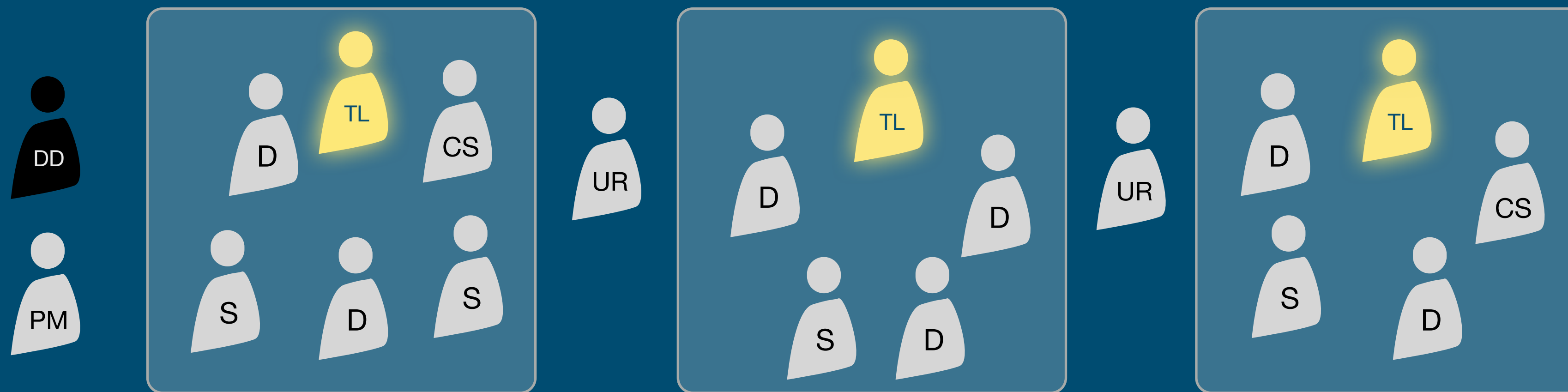
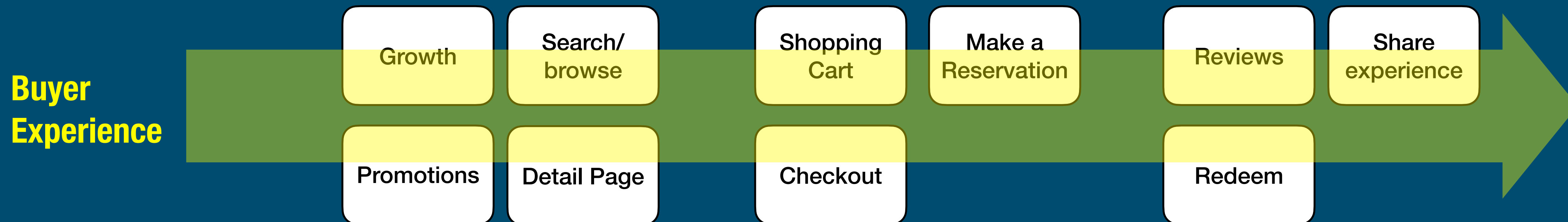
Team Leads—Coherence



Discovery Design Team

Purchase Design Team

Team Leads—Coherence

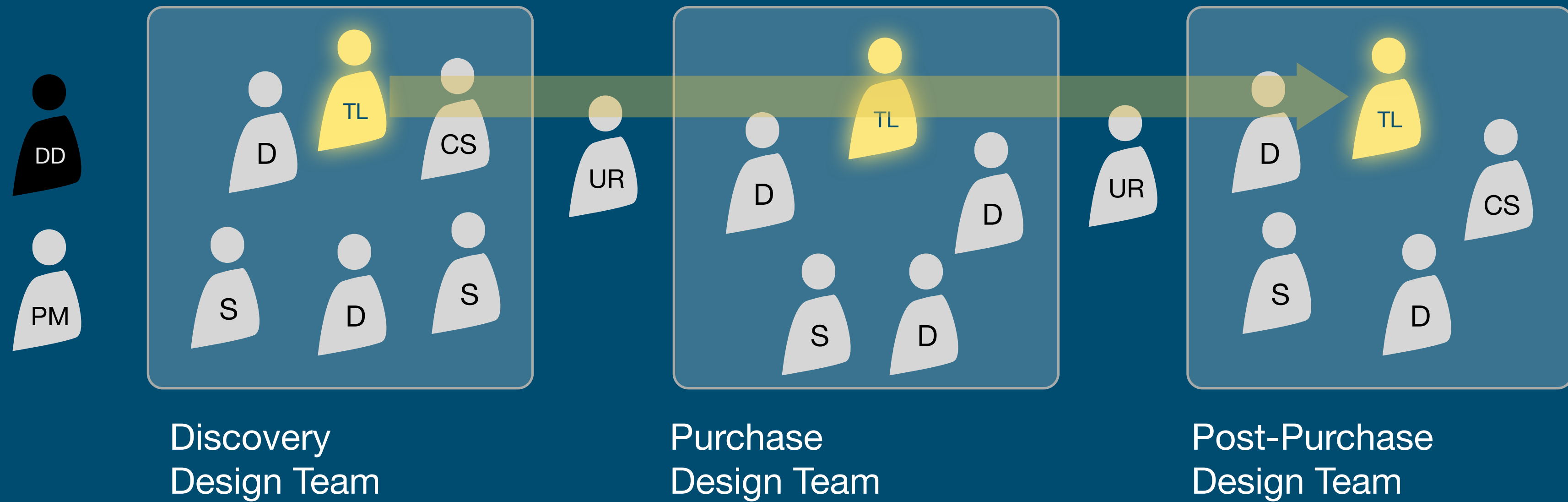
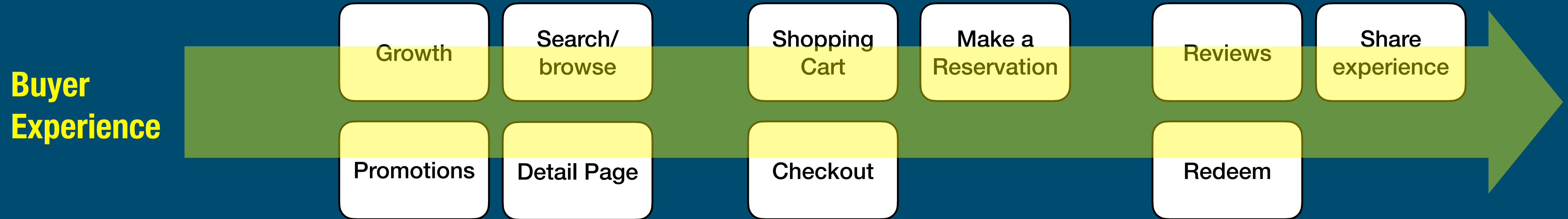


Discovery Design Team

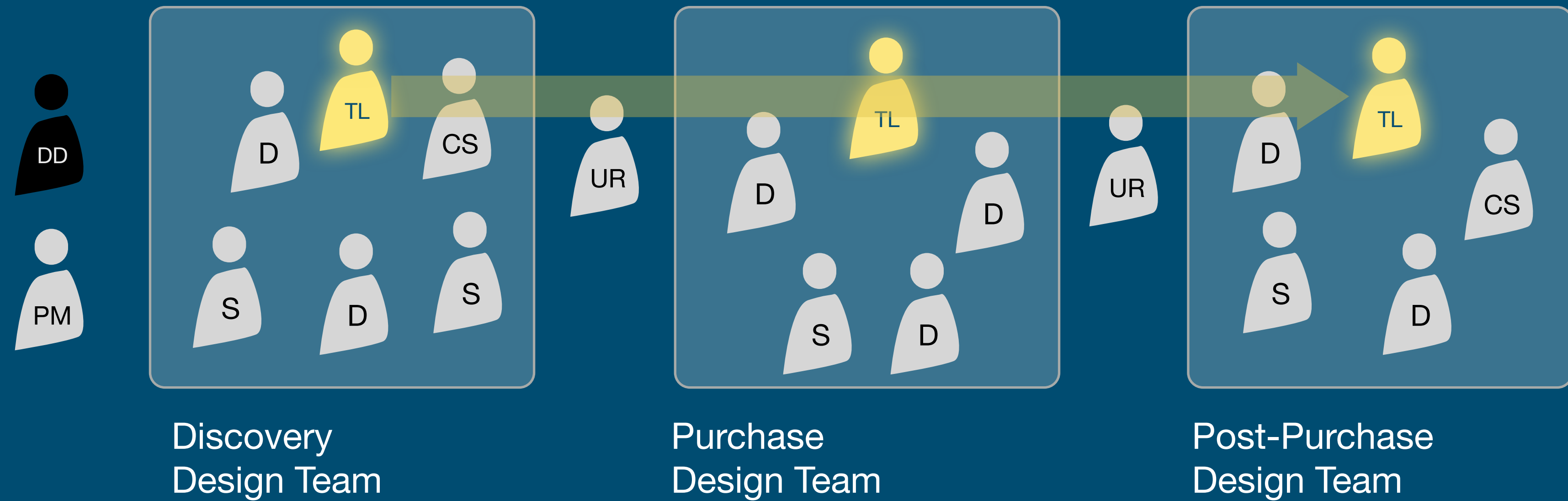
Purchase Design Team

Post-Purchase Design Team

Team Leads—Coherence

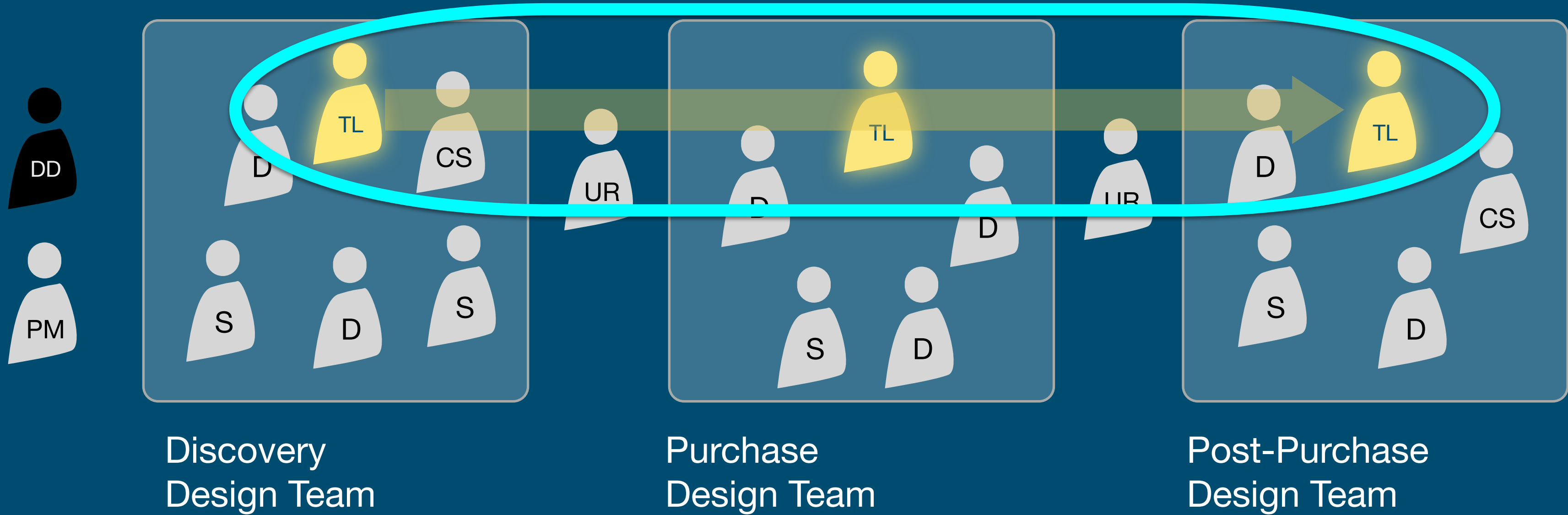


Team Leads—Coherence



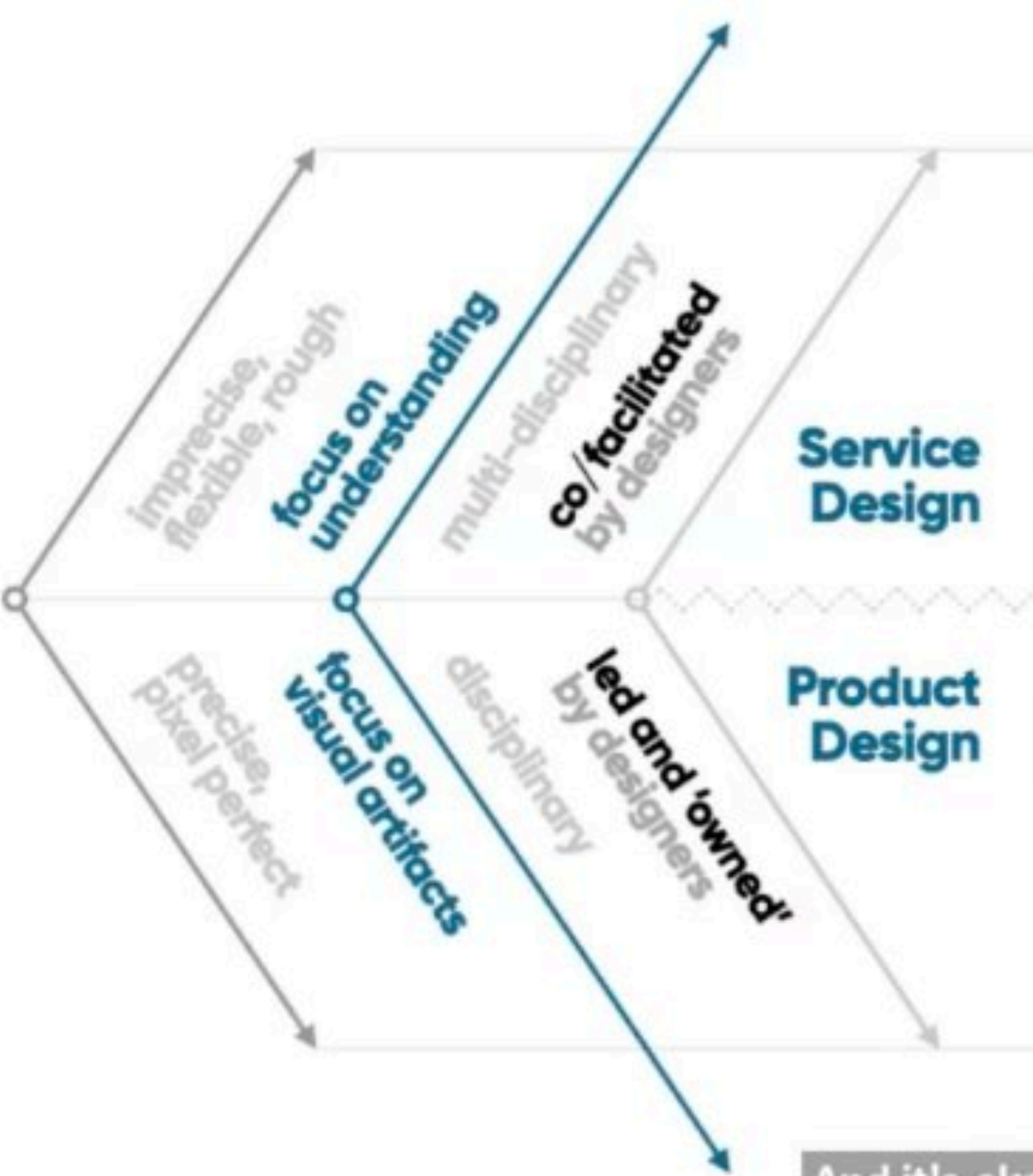
Team Leads—Coherence

These **People**, not systems, are the soul of Design at Scale





Design Scale



SCALE	(DESIGN) METHODS / DELIVERABLES
Global	??? Quantum Superposition? Design Fiction?
Eco/System	Ecosystem Maps, Journey Map Atlases, Wardle Gigamaps, CLDs, S&F Diagrams, Systemic Desi
Service	Journey Maps, Service Blueprints, Service Safa 16x, Experience Maps, Business Origami, etc.
Product	Card Sorting, User Flows, Sitemaps, CS Activiti Apply Ergonomics/HF Principles, Advanced IA
Feature	Task Analysis, Sketching, Paper Prototyping, Wireframing, Hi-Fi Prototyping, etc.
Artifact/Ixd	Create: Iconography, Widgets, Logos, Posters, Packaging, Sound, Micro/Interaction, Video, et
Foundational	Colour Palette, Typography, Design Principles, Cognitive Psychology Concepts, Mental Model

And it's okay to be in precise, flexible, or even a



SCALE

SCOPE

Global

Eco/System

Service

Product

Feature

Artifact/Ixd

Foundational

SCALE

RESCALE

Global

Eco/System

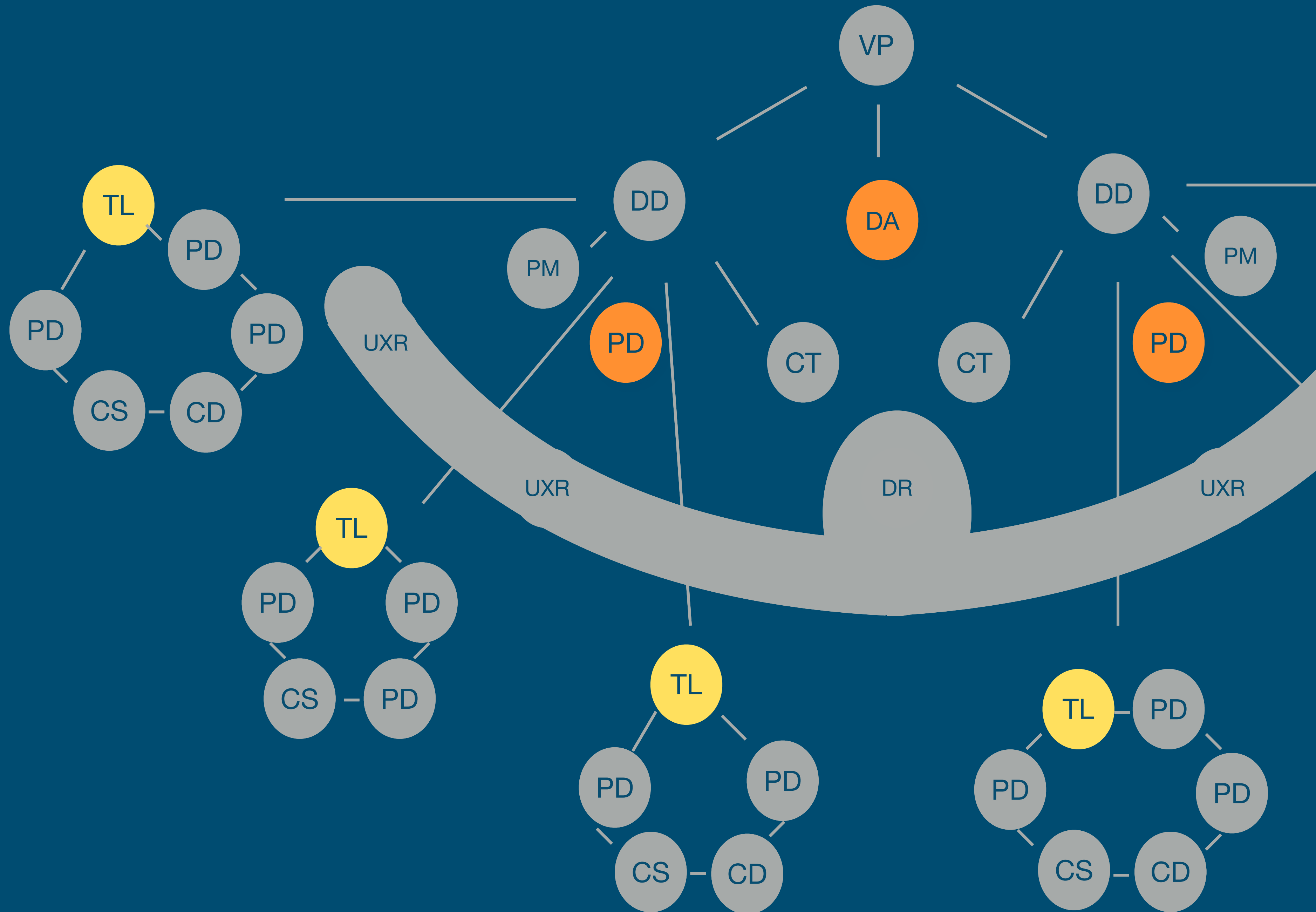
Service

Product

Feature

Artifact/IXD

Foundational



SCALE

RETAIL

Global

Eco/System

Service

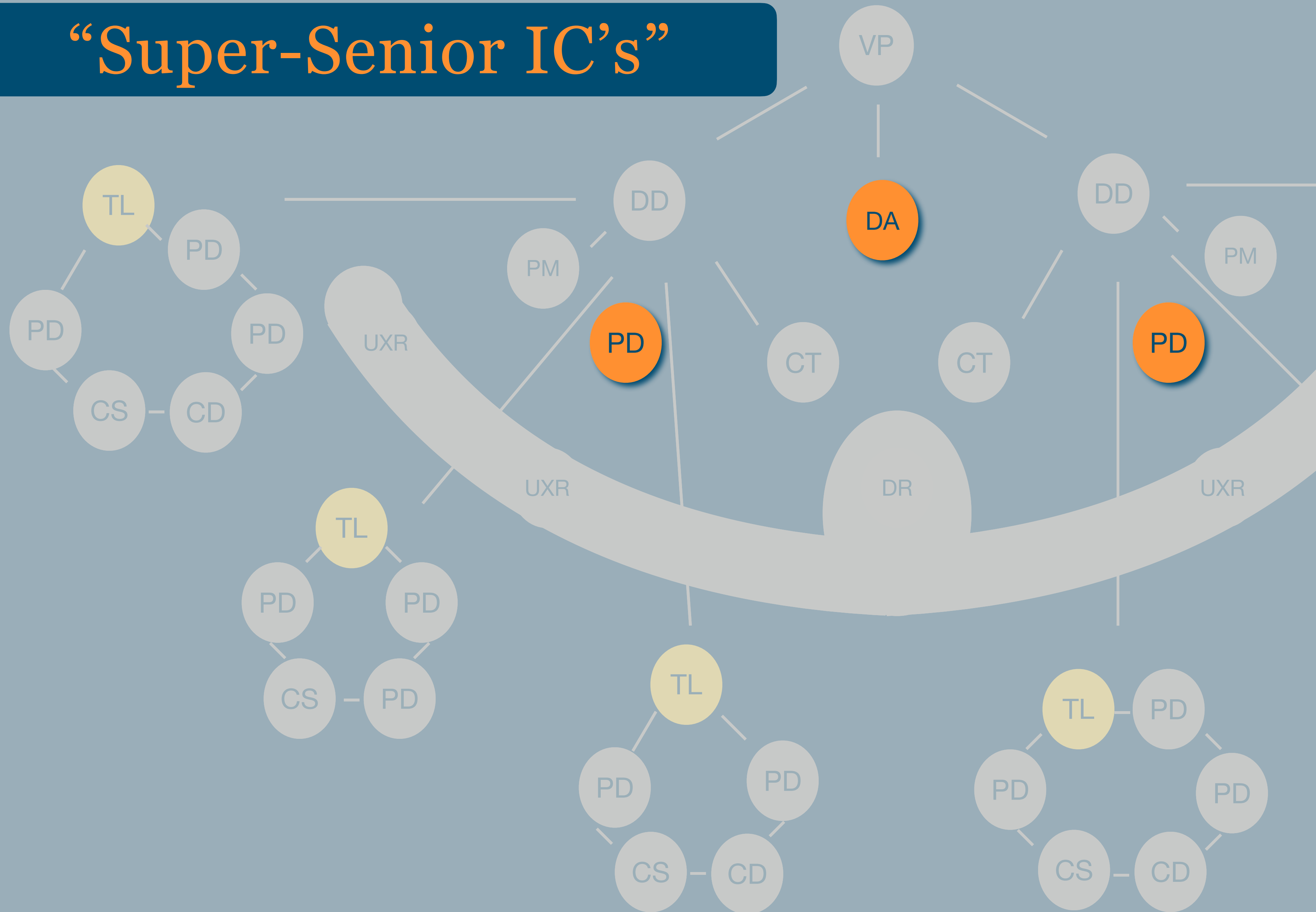
Product

Feature

Artifact/Ixd

Foundational

“Super-Senior IC’s”



SCALE

Global

Eco/System

Service

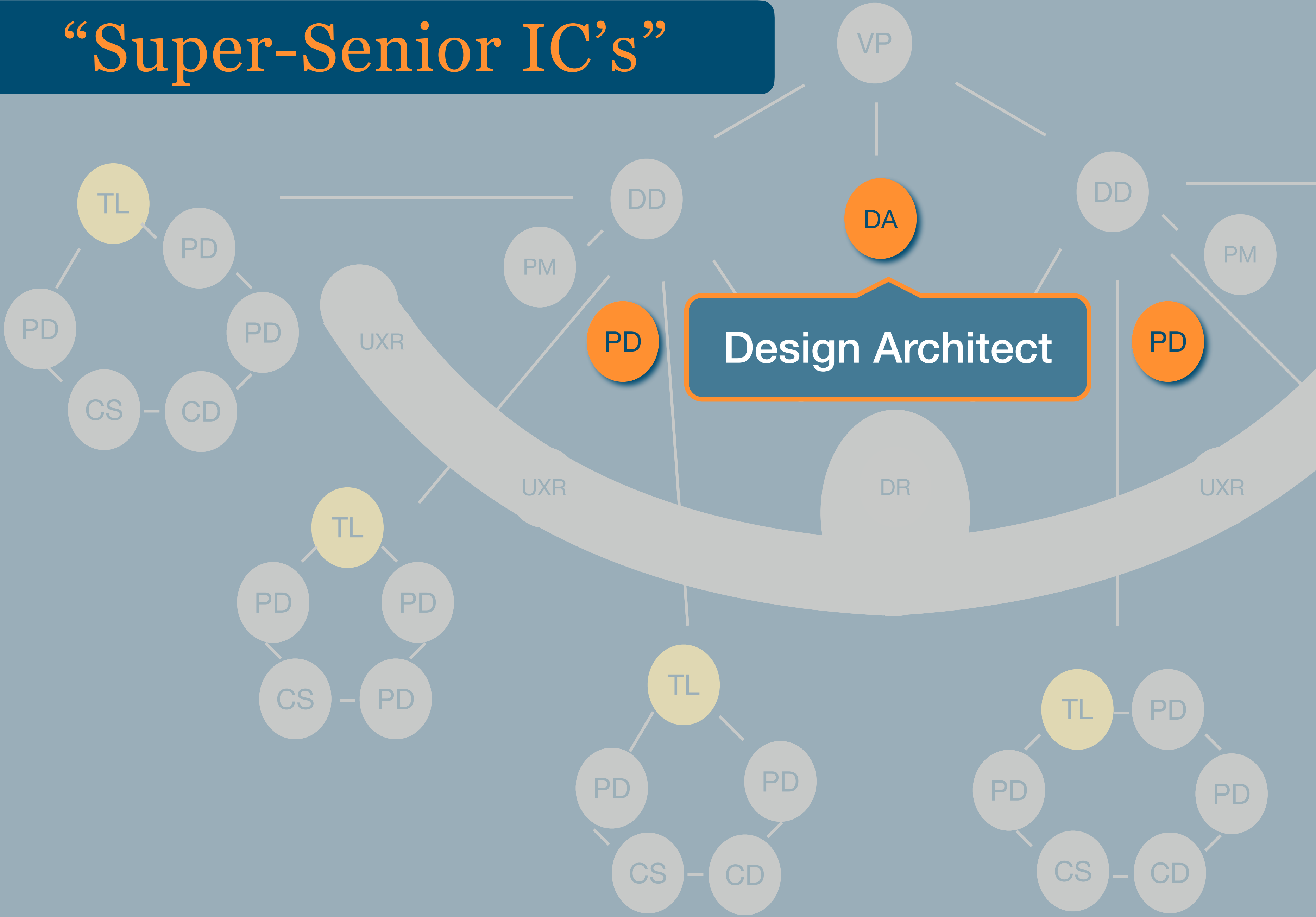
Product

Feature

Artifact/txd

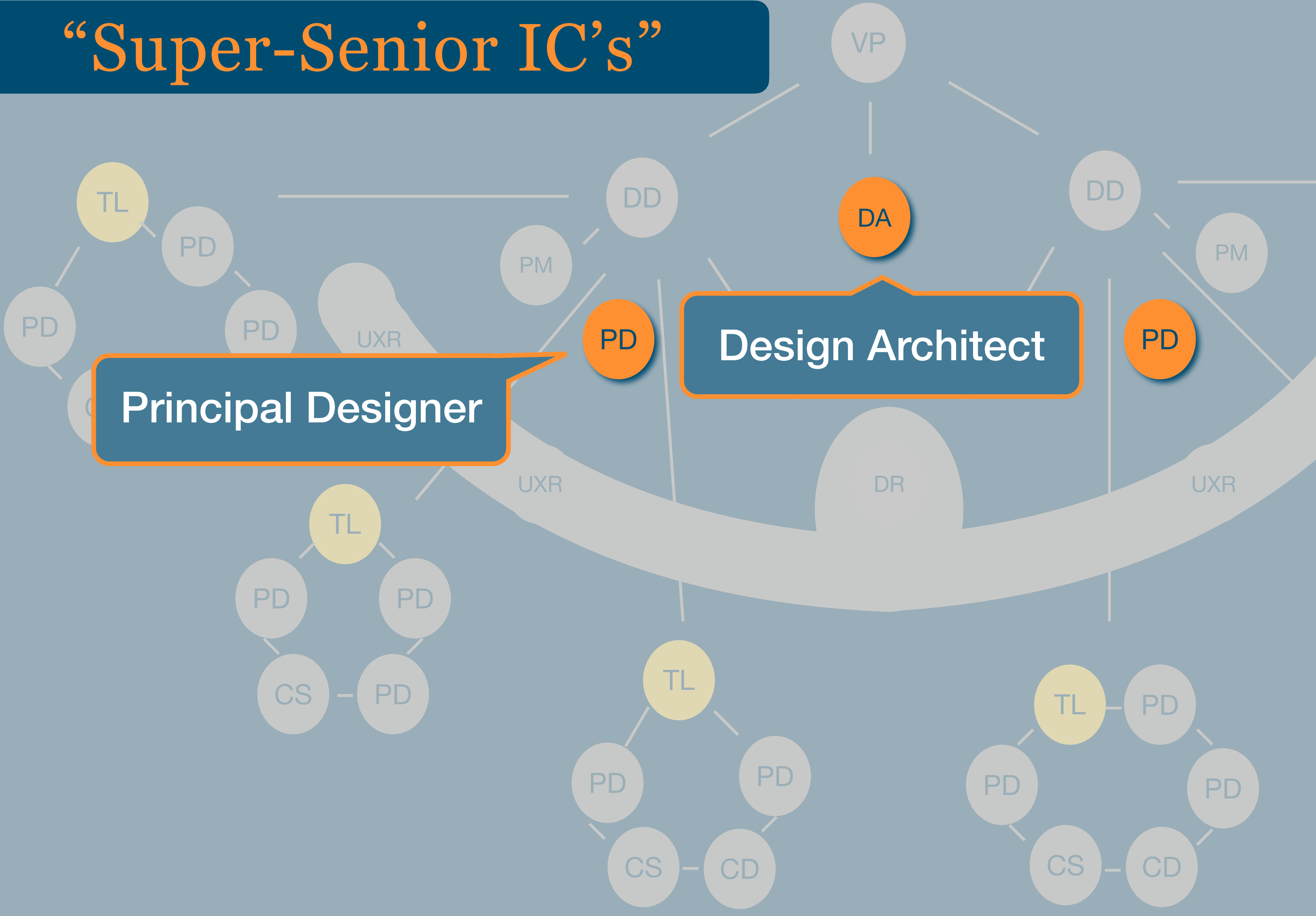
Foundational

“Super-Senior IC’s”



SCALE	REALITY
Global	
Eco/System	
Service	
Product	
Feature	
Artifact/Ixd	
Foundational	

“Super-Senior IC’s”

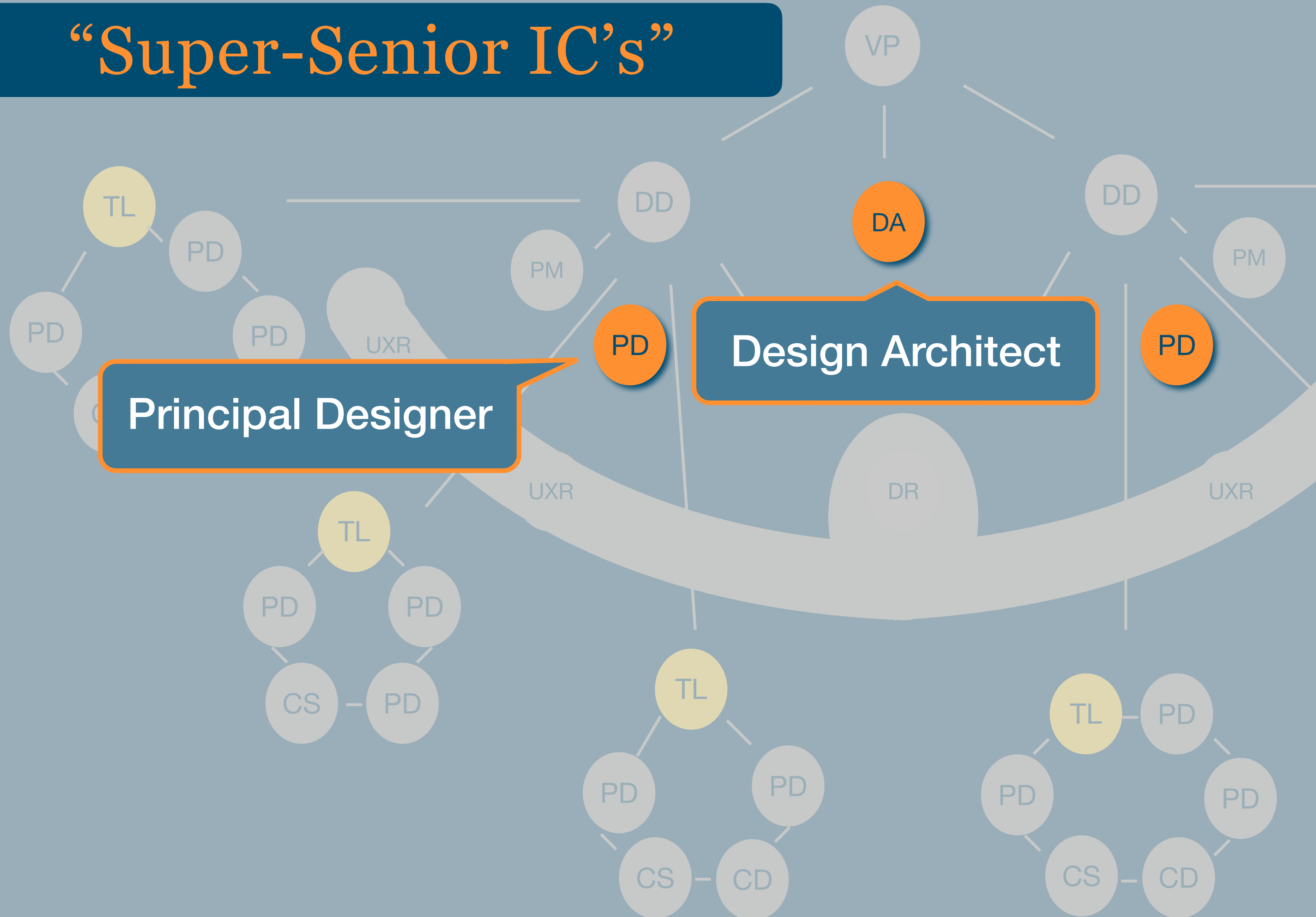


Principal Designer

Design Architect

SCALE	RELEVANT
Global	
Eco/System	
Service	
Product	
Feature	
Artifact/Ixd	
Foundational	

“Super-Senior IC’s”



SCALE

Global

Eco/System

Service

Product

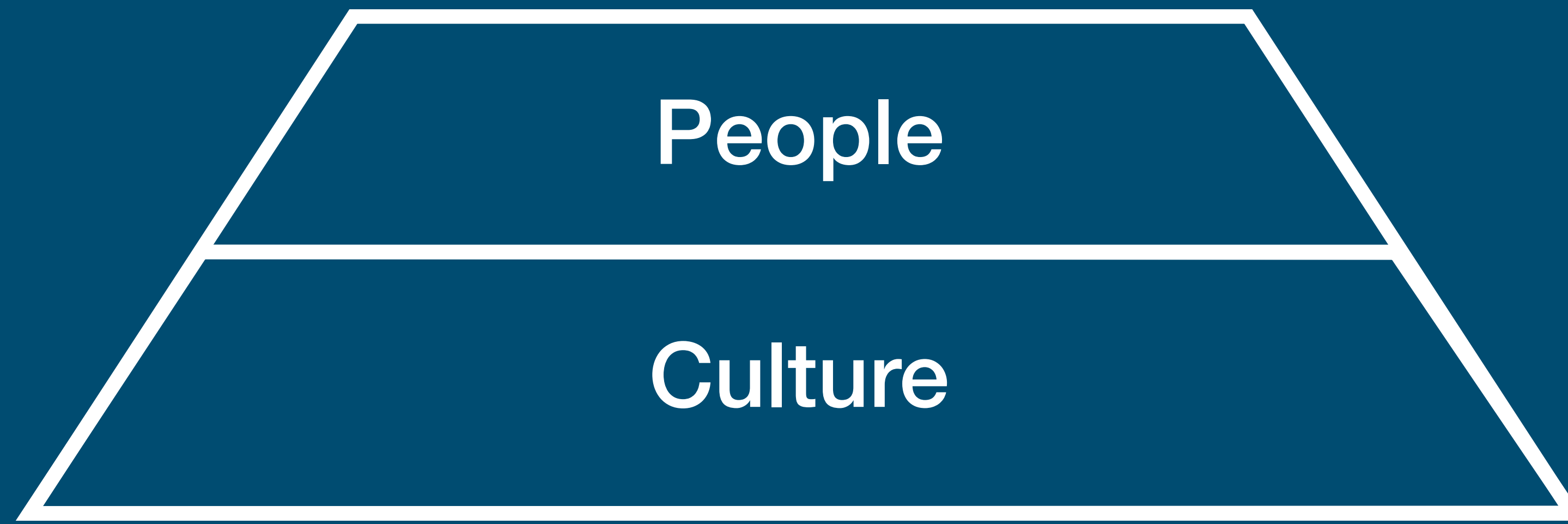
Feature

Artifact/Ixd

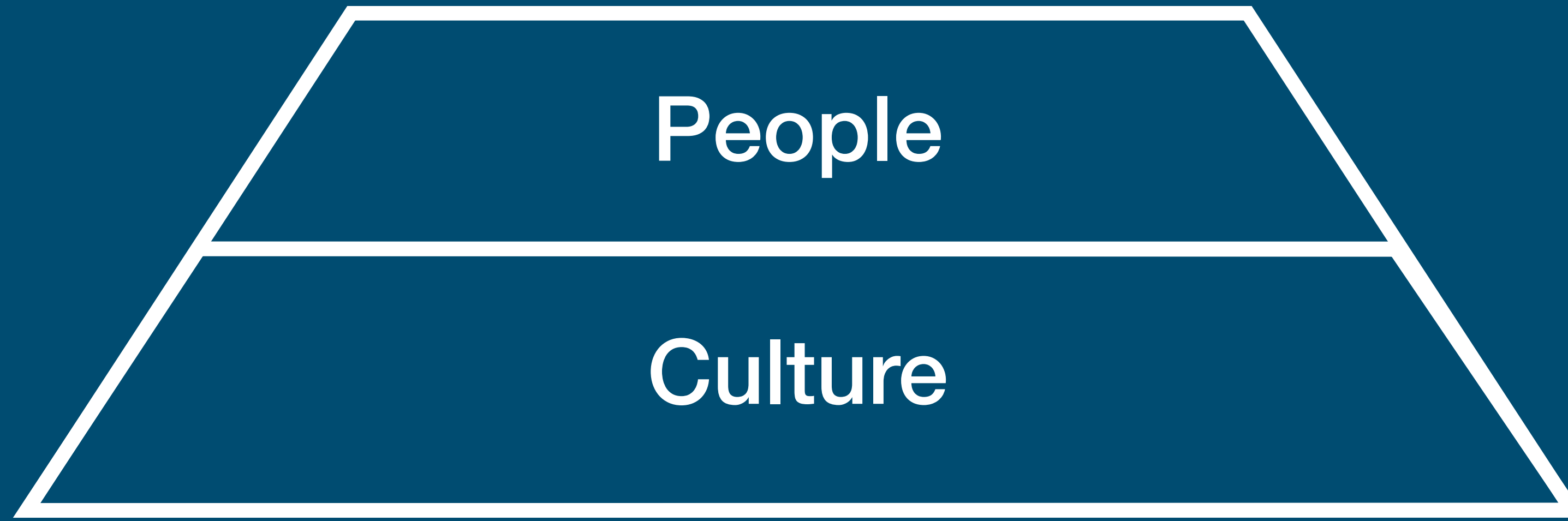
Foundational



This humanist foundation provides the soul.



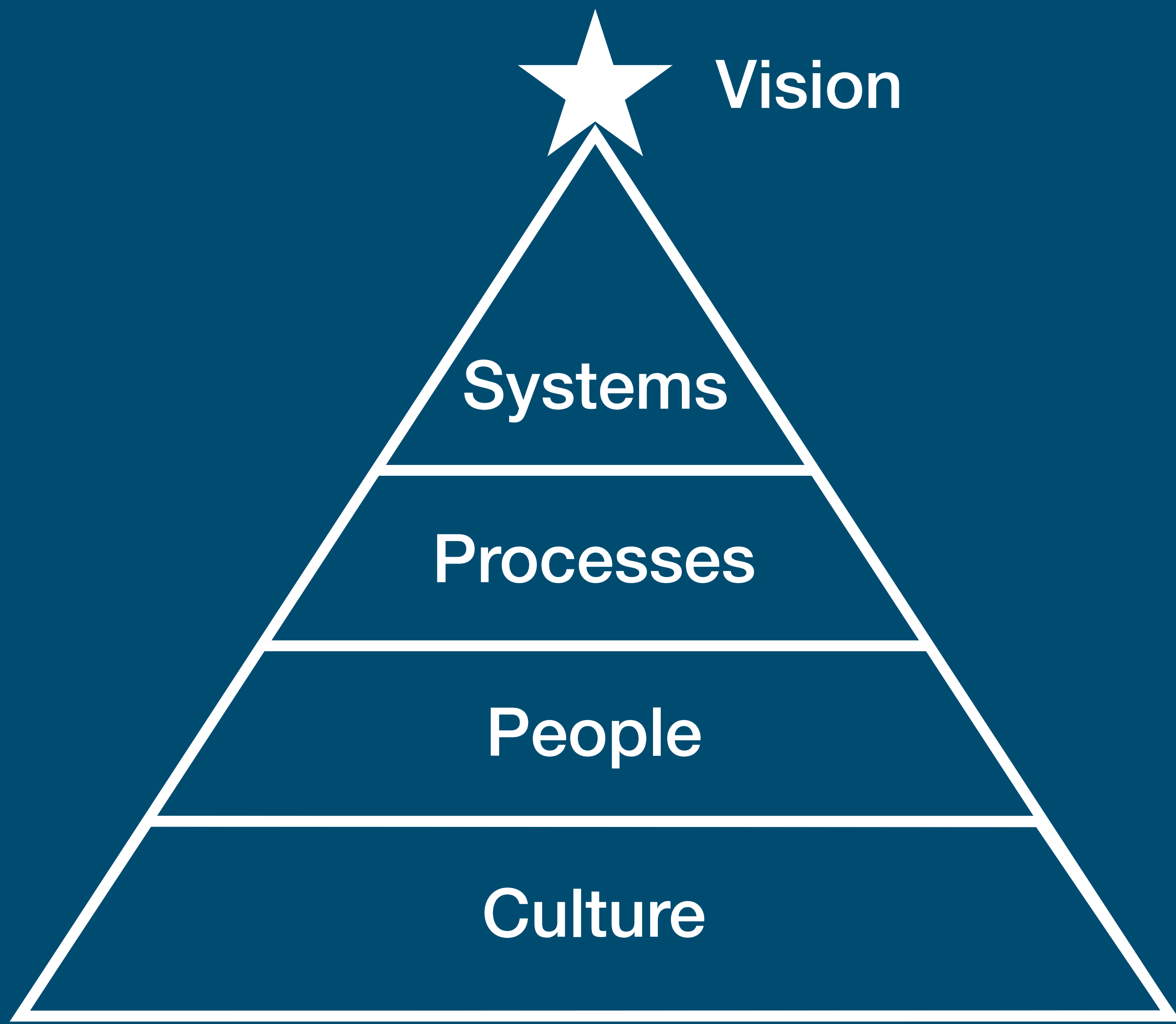






A **vision** aligns distributed effort.
(and is a subject for a different talk)





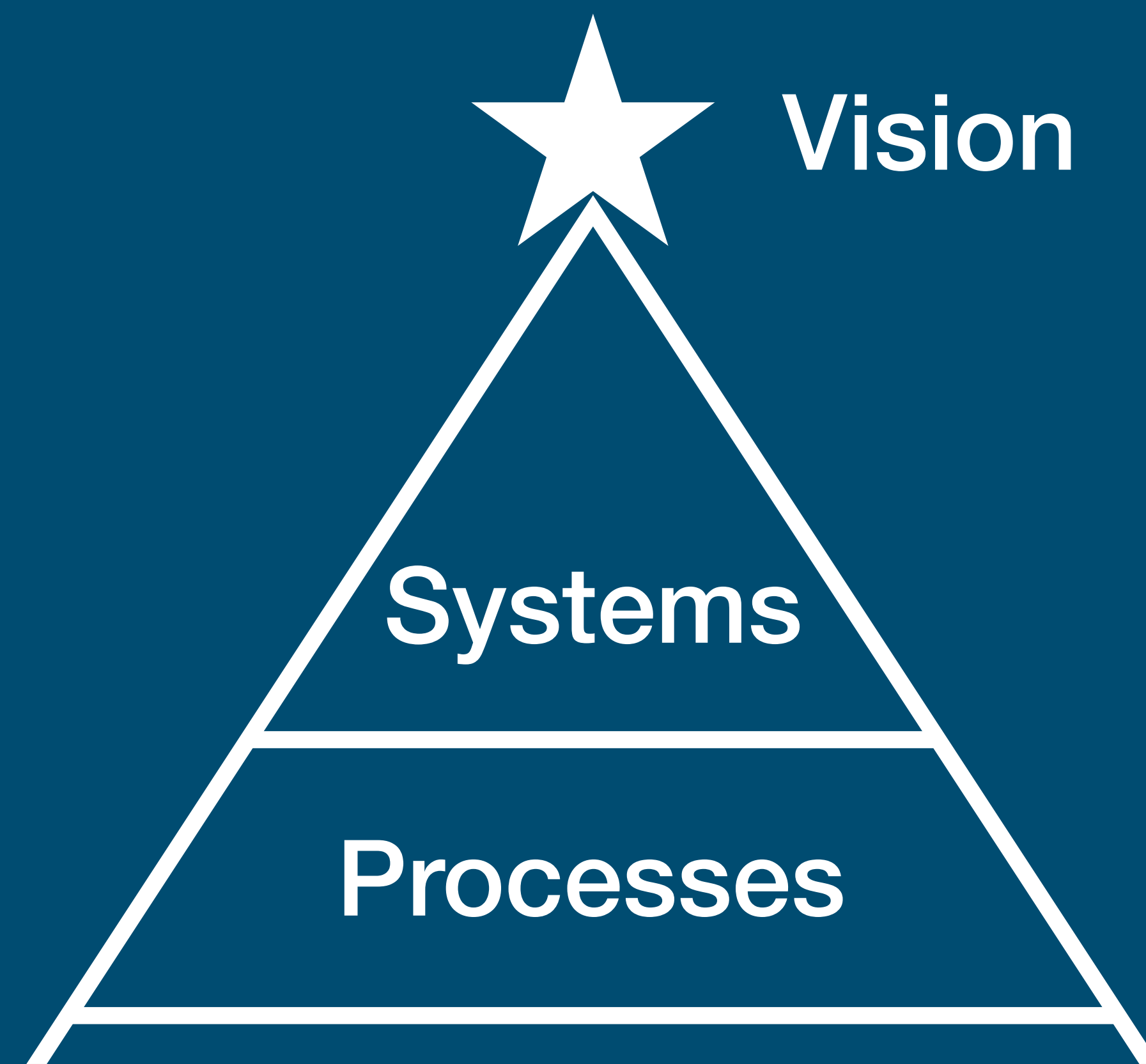
Vision

Systems

Processes

People

Culture



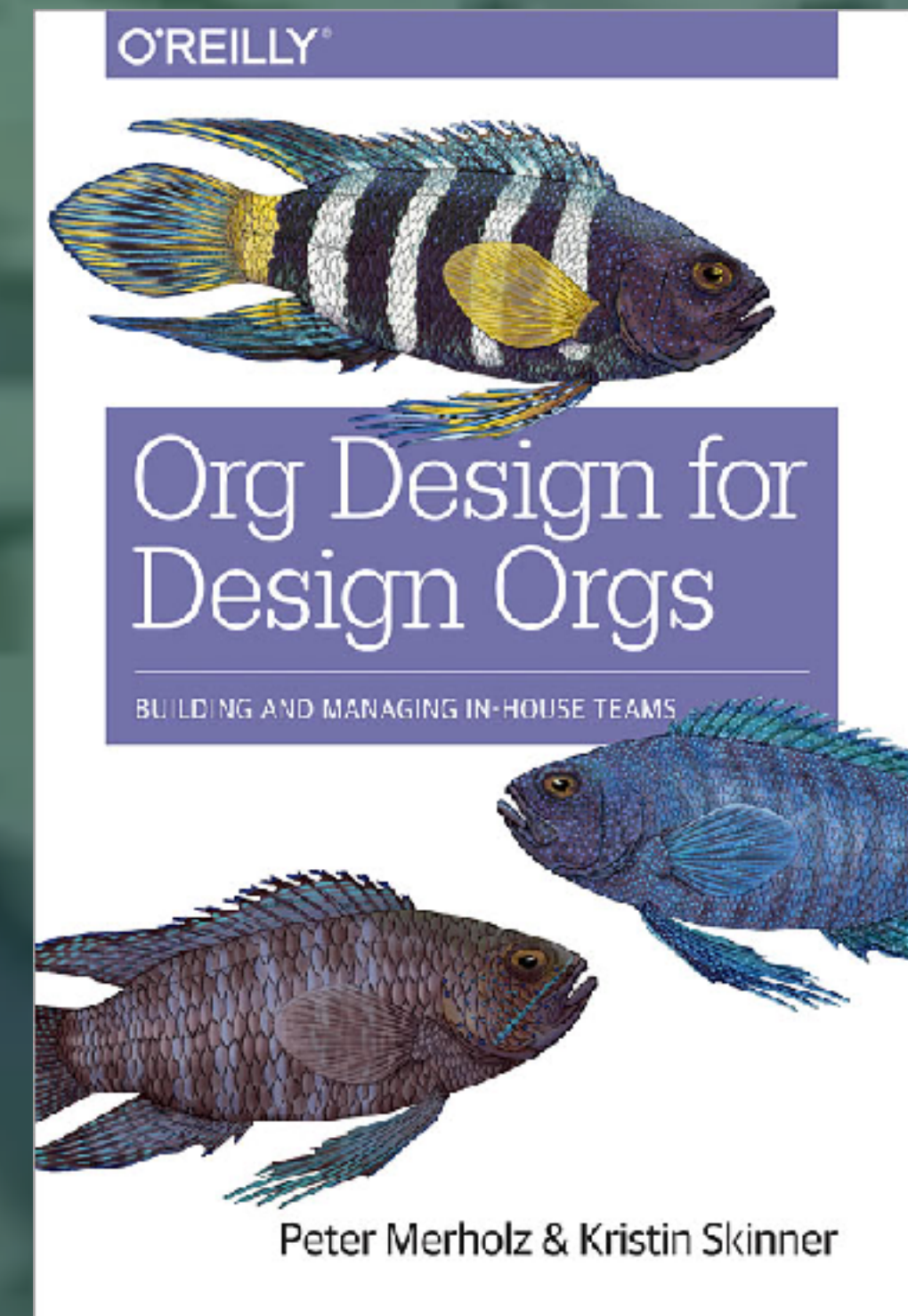
...which helps ensure the systems are serving people, not themselves.

Thank you!

Peter Merholz

@peterme

<http://petermerholz.com/>



Thank you!

Peter Merholz

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