salesforce
design

SALESFORCE UX OPS

Two Sides of the Design Ops Coin

Team Ops and Product Ops

JOHN CALHOUN & RACHEL POSMAN I DESIGNOPS SUMMIT 2020

What happens when you flip your DesignOps Coin?

Team Ops & Product Ops

Our new operating model for DesignOps

- Our "conscious uncoupling"
- Who, how, and what it looks like
- How we got here
- Recognizing your inflection point
- Recognizing your problems
- Why a new operating model?

Hi!
I'm Rachel

Chaos Quellar & Design Addict.

- Architecture, Startups, Financial Services, Tech
- Agency & In-House
- Service Design, Experience Design, Product Design, UX Research
- DesignOps & UXOps
- Oh, and a professional Ballet Dancer prior to all this

Hi!
I'm John

Reformed Video Game Maker & Design Afficanado.

- Found UX by way of Game Design
- Found Ops by way of Game Production
- Loves Good Design at Global Scale
- Bass Player and Baseball Enthusiast
- Has a Spreadsheet For That

We represent **two sides** of the DesignOps coin at Salesforce.

Team Ops   **Product Ops**

Team Ops

Optimizes for the whole UX org.

Goes wide.

Scale.

300+ UX'ers.

Product Ops

Optimizes for a product UX team.

Goes deep.

Delivery.

40+ Products.

What we do.

Optimizes for the Whole UX Org

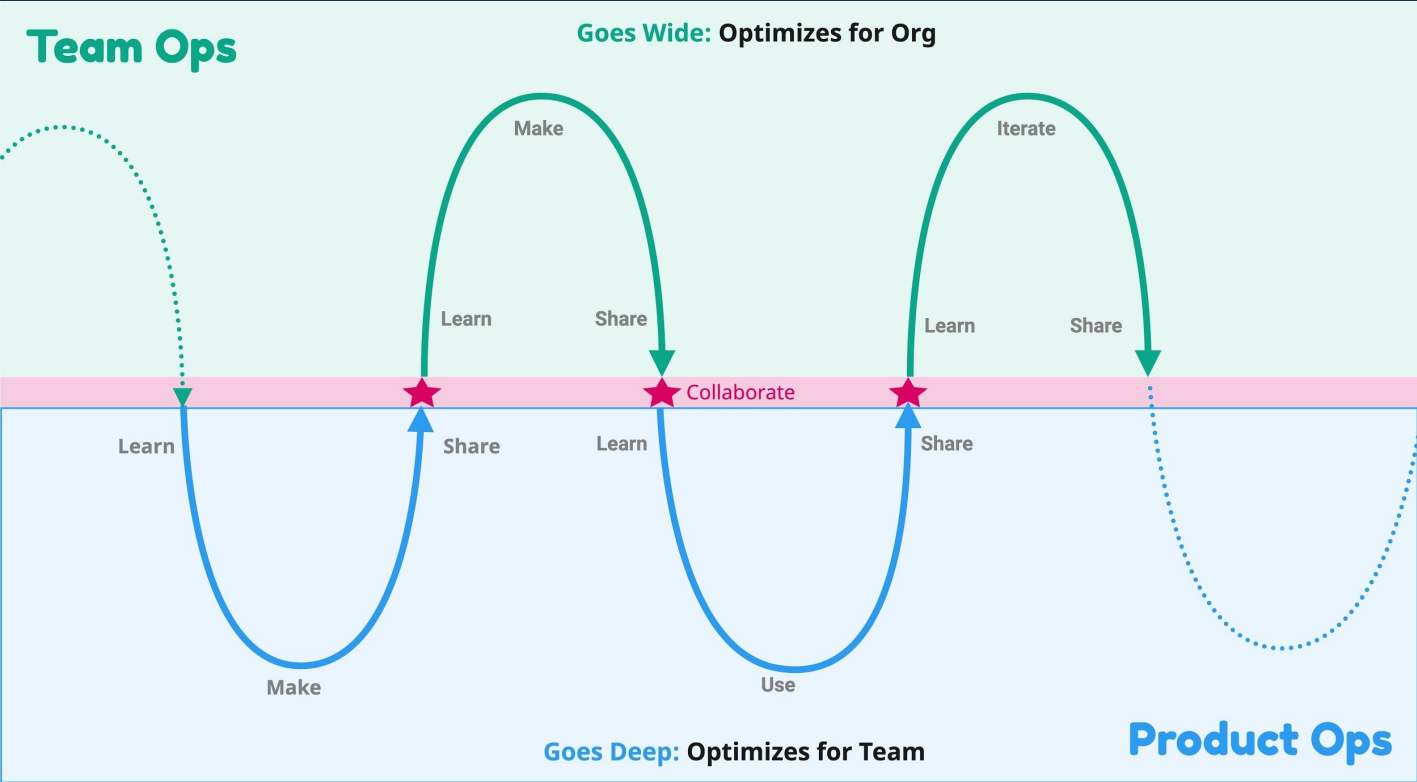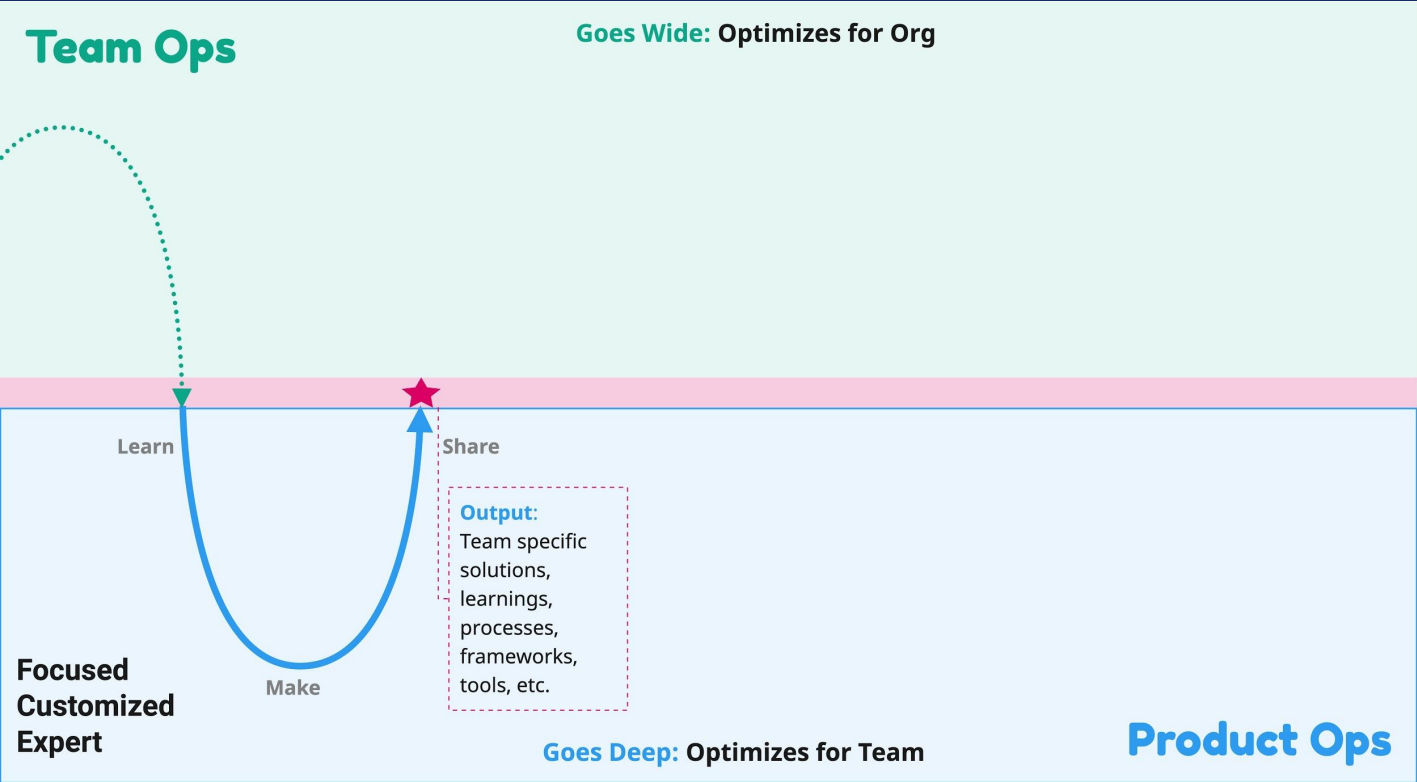| Team Ops		
Community & Culture	**Learning & Growth**	**Systems & Tools**
✓ Industry Events ✓ Internal Events ✓ Team Celebrations ✓ Team Health Programs ✓ Giving Back/VTO ✓ Voice of UX ✓ UX Communications ✓ Operationalizing our Values	✓ Inspiration ✓ Hiring + Onboarding ✓ Recognition ✓ Competencies ✓ Trainings ✓ Talent Review + Promos ✓ Career Paths + Growth ✓ Manager Communities	✓ Agencies, Vendors, Contractors ✓ Facilities ✓ Policies ✓ Tools + Licensing ✓ Org Dashboards ✓ Budget ✓ Playbooks and Toolkits

Optimizes for Product UX Teams

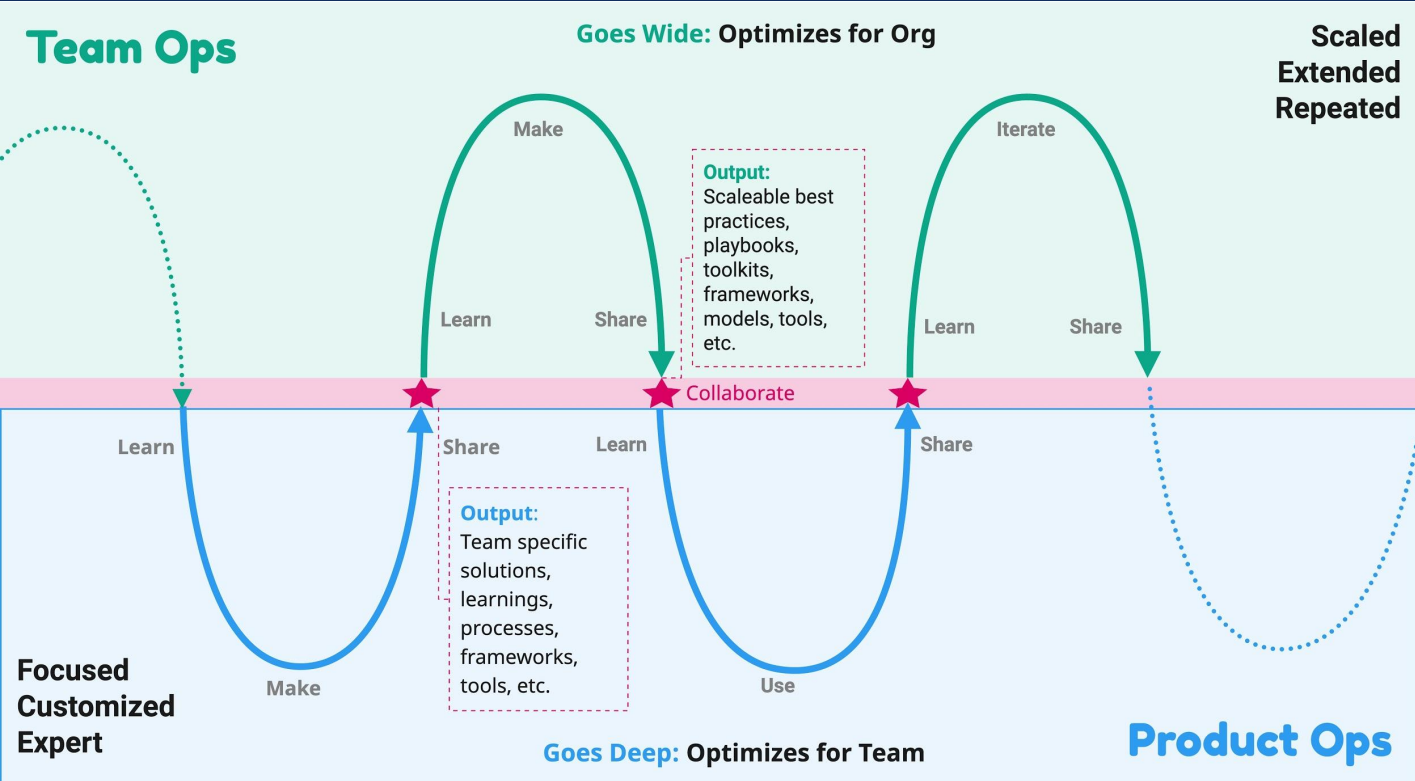| Product Ops		
Productivity & Delivery	**Project & Program Management**	**Partners in Leadership**
✓ Tracking UX Work Across Teams ✓ Dependency Intake and Triage ✓ Reporting UX Status to Stakeholders ✓ Curating Artifacts for Hand-off to Dev ✓ Release Coordination ✓ UX Kick-offs, Crits, and Design Reviews	✓ Vision Workshops ✓ Requirements Gathering & JTBD ✓ Cross-product Pattern Collaboration ✓ Long Range Plan (LRP) Coordination ✓ Idea Jams / Ideation Sprints ✓ Managing UX Presence inside our Tech & Product Org	✓ Resourcing & Allocation ✓ Headcount Planning ✓ V2MOM Accountability ✓ Managing TPM, PM, & Eng Relationships ✓ Product Team Health ✓ Communications ✓ Offsites

How we work together. Flipping the coin.

Team Ops

Goes Wide: Optimizes for Org

Make

Iterate

Learn Share Learn Share

Collaborate

Learn Share Learn Share

Make

Use

Goes Deep: Optimizes for Team

Product Ops

How we work together.

Team Ops

Goes Wide: Optimizes for Org

Learn

Share

Goes Deep: Optimizes for Team

Product Ops

Focused Customized Expert

Make

Output:
Team specific solutions, learnings, processes, frameworks, tools, etc.

How we work together.

Team Ops

Goes Wide: Optimizes for Org

Scaled Extended Repeated

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Share

Output:
Scaleable best practices, playbooks, toolkits, frameworks, models, tools, etc.

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Product Ops

Rachel Posman & John Calhoun, Salesforce UX Ops

What it looks like all together.

UX Playbooks
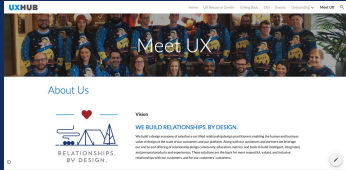
UX Org Team Site
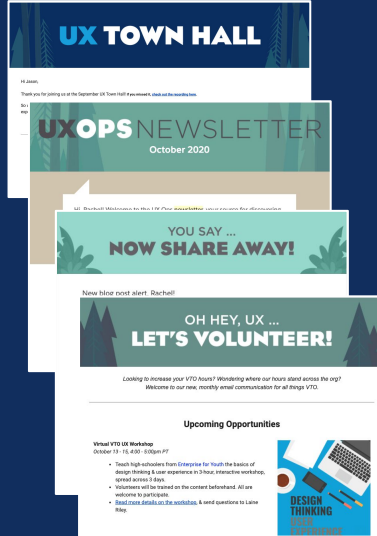
Org Communications

Work Tracking Enablement

Product UX @ Events
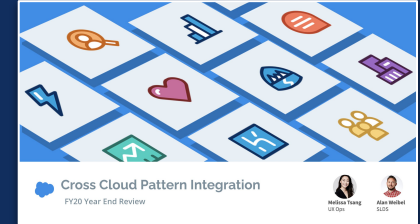
Cross Product Patterns
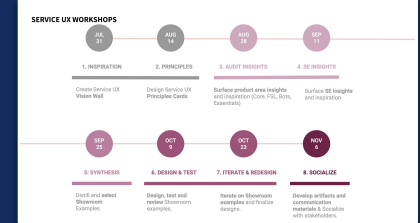
Product Workshops

Team Ops ────────────── **Product Ops**

That's what we look like today. But... How did we get here?

Our Ops team originally looked like a bunch of "Unicorn DPMs."

- Multi-skill Generalists

- Jacks-of-all-Trades

- UX Support Team

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We wore many hats.

UX Project Management

Offsite Planning

Software Admin

On-boarding

Budget & Spending

Release Planning

UX Town Halls

Process Management

Certifications

Industry Events

UX Career Ladders

Comms, comms, comms

But not in ways that always made sense.

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Comms, comms, comms

As our UX team grew, **this is what we heard** from our DPMs:

DPM Feedback

Things are becoming _way_ harder than they need to be…

I feel like I keep dropping the ball for my design team.

This isn't what I was hired to do. I have no experience running this kind of program!

Everything is "Ops!" What _don't_ I do?

What does your day-to-day look like?

Wow, that's way different than mine!

I think someone has done this before, but where is it and who has done it?

I'm being asked to do so much, I have no idea what my real priorities are.

When am I actually supposed to get some real work done?

How can I grow in a role that has me doing so many different things?

Of course, our design partners had some pain points, too:

Partner Pain Points:

Which one of these rosters is the one I should be using?

Seems like we could've done this more efficiently, huh?

I just went ahead and purchased the software, I'm sure it'll be fine...

Why can't I see what all my designers are working on?

I thought you were hired to work on our team, not theirs...

So it seems like we should be using Figma and Sketch?

It seems like you're really busy, I didn't want to bother you...

I get that it's a priority for you, but it's not a priority for me...

You're so awesome! But we need more of you.

Why were we hearing this?

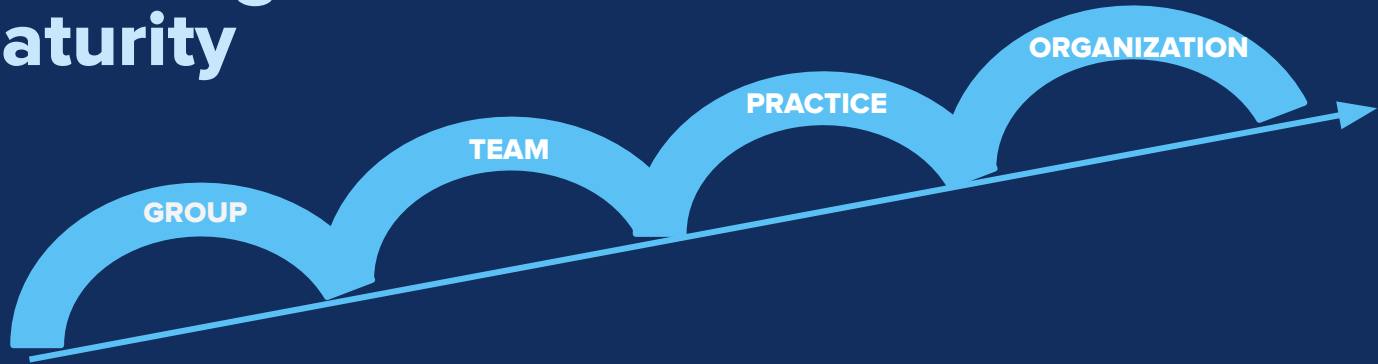# Because our DesignOps team had reached an **inflection point.**

The trajectory of our DesignOps **team** was out of sync with our Design **org...**

How might you recognize this in your own organization?

A Look at Design Team Maturity

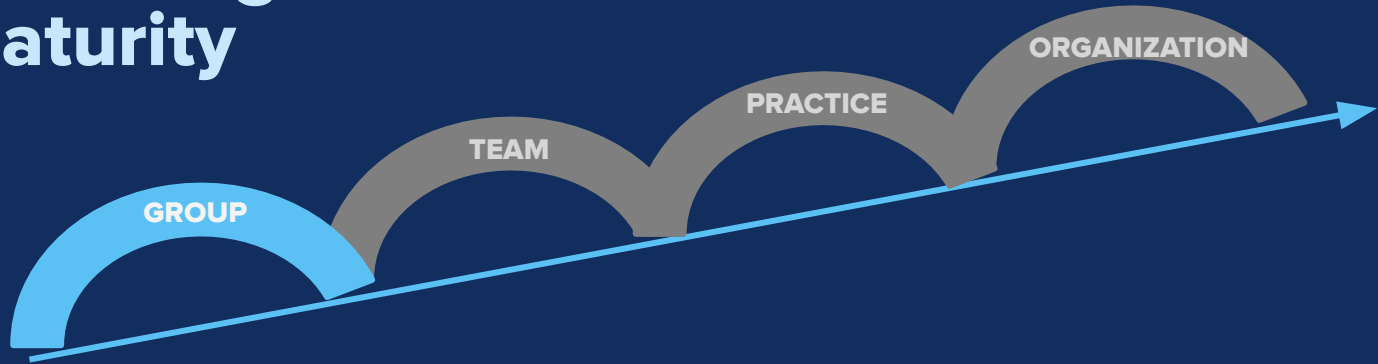| Size of Design Team	1-30	31-50	51-200	201-600+
Design Team:	• Strong family feeling • Easy communications • Quick decisions (often by gut feelings) • Mostly clear priorities • Folks are wearing many hats.	• More people means more process and better communication are needed. • The team is mostly still made up of generalists.	• Weakening of strong family feeling • More org shifts • Harder to find answers and make decisions • More meetings and more formal process.	• The product is mature • More specialists & new capabilities • Team and leadership turnover • Organizational complexities • Hard to remain connected.
DesignOps Team:	**.5-1** • Likely a DesOps team of one or it's done by Designers. • Focused on ensuring designers are set up to do their work.	**2-4** • A small team • Focused on putting processes into place and establishing best practices across the team.	**5-20** • Dedicated DPMs are aligned to product areas • Focused on solving team specific challenges.	**21+** • A larger DesOps org is scaling in new ways • Focused on creating stability, cultural support and optimizing across and down to stay connected

A Look at Design Team Maturity

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PRACTICE

ORGANIZATION

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Rachel Posman & John Calhoun,

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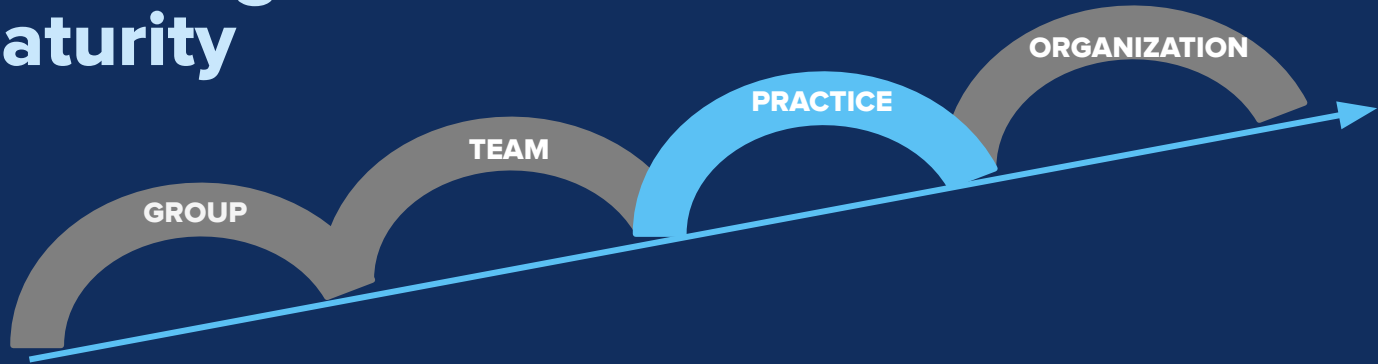| Size of Design Team	1-30	31-50	51-200	201-600+
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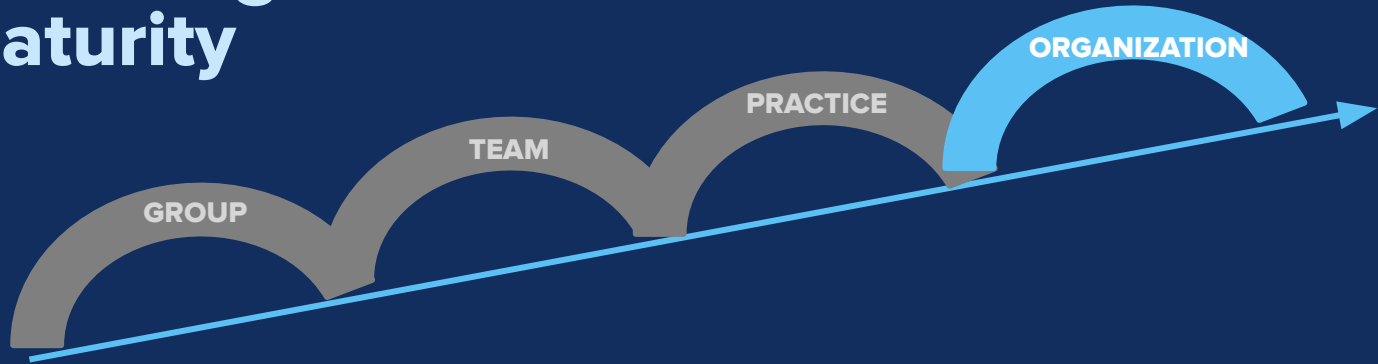| Size of Design Team	1-30	31-50	51-200	201-600+
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Rachel Posman & John Calhoun,

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Our Mismatch

GROUP · TEAM · PRACTICE · ORGANIZATION

Our design team was here.

We were here

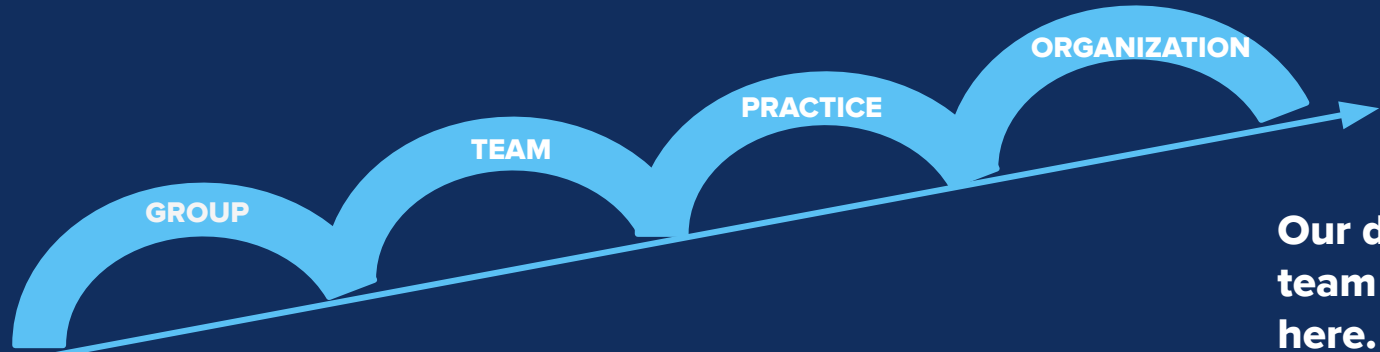| Size of Design Team	1-30	31-50	51-200	201-600+
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Rachel Posman & John Calhoun,

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We were out of sync, solving the needs of a **Design Practice**.

We needed to be solving the needs of a **Design Organization**.

Recognizing we were at an inflection point helped us see our Design Ops problems **clearly.**

1

The Pendulum Problem

Design Ops is swinging wildly between priorities.

The do-it-all DPM has priorities that swing wildly, from helping the entire org, to helping a single project.

But each takes 100% of their time.

dreamforce®

How it is now.

- Same amount of work as before, but wholly owned by two separate teams.

- Clearer RACI model for Ops; all are welcome to contribute, but not all are responsible.

- Sharing a product team's best practices now owned by Team Ops, who have the skills and tools to scale effectively.

We can now tackle the big org things, and the specific product things, **without swinging wildly**.

Our partners no longer worry about **losing DPM support** to giant events, nor do we have to pause org-wide projects for product release milestones.

2

The Mind the Gap Problem

Quality gaps emerge when we're stretched too thin.

Blinds spots caused by the need to simultaneously look across while also looking down.

Quality suffers and balls get dropped when we split priorities across multiple levels of zoom.

We had a gap in supporting new hires and managers with onboarding.
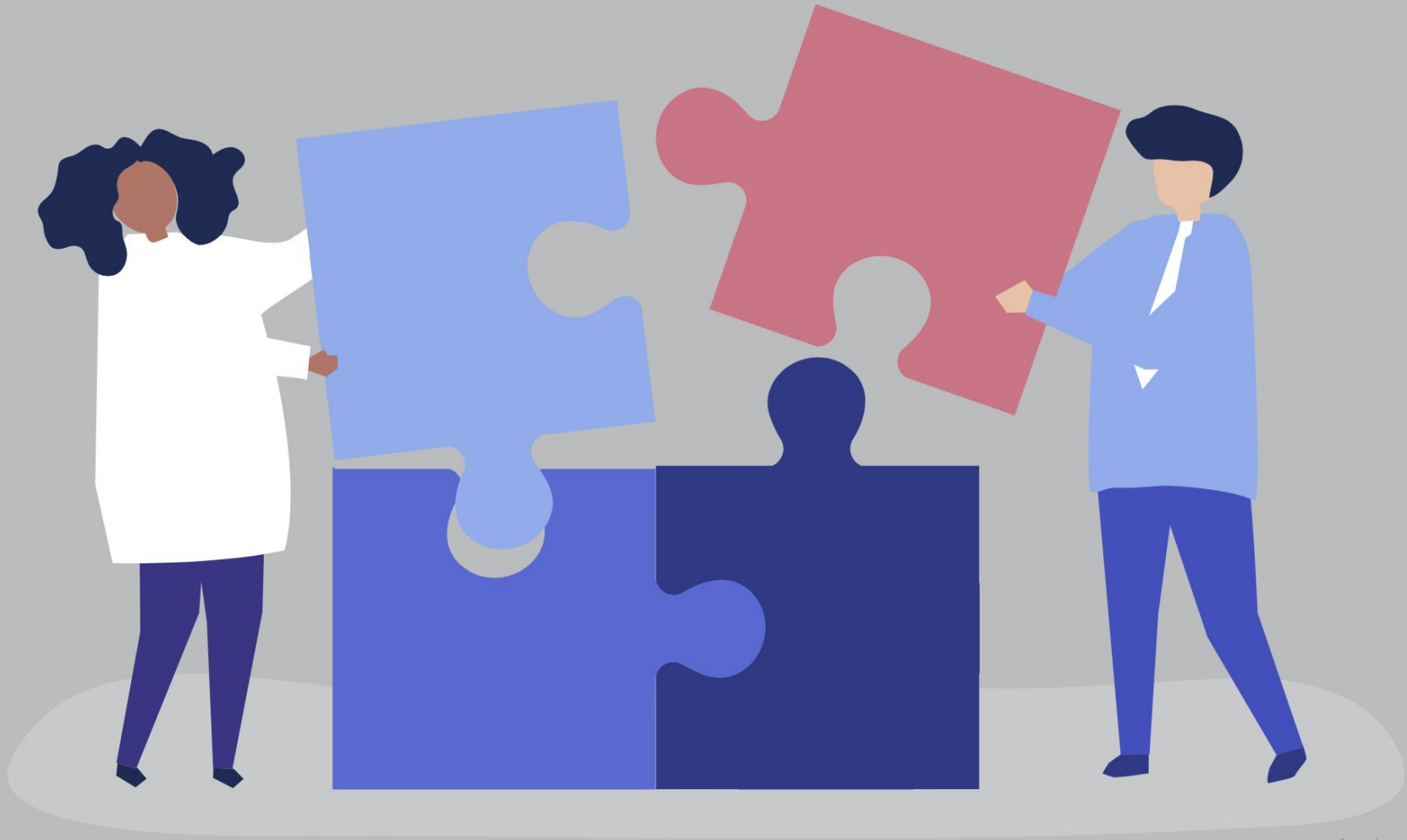
What we did.

- Assigned an owner whose role it is to look across and optimize for the org.

- Created staged materials and feedback loops for both the Manager & New Hire

- Created stronger relationships with HR and Recruiting

- Created an Onboarding Playbook to scale the process and support as part of a broader learning journey

It is a highly valuable skill for a DPM to be able to look across multiple levels of zoom at the same time.

However, at the practice and organization levels, doing so **causes much bigger gaps leading to morale and quality issues** than it does at a team or practice level.

3

The Lone Wolf Problem

DPMs are siloed from their Design Ops family.

DPMs who are chasing different priorities don't feel aligned to each other, or to their Design Ops team.

The Ops family erodes, resulting in siloed, inefficient DPMs.

"

The DPM team was lonely - they felt like lone wolves. **They're the only person of their type within their team**, and that's a lonely place to be.

Courtney Kaplan, DesignOps Leader
DesignOps Summit 2018

The Lone Wolf Problem

On-boarding

Team Dependencies

UX Career Ladders

UX Project Management

Comms, comms, comms

Industry Events

Certifications

Process Management

Offsite Planning

UX Town Halls

Release Planning

Budget & Spending
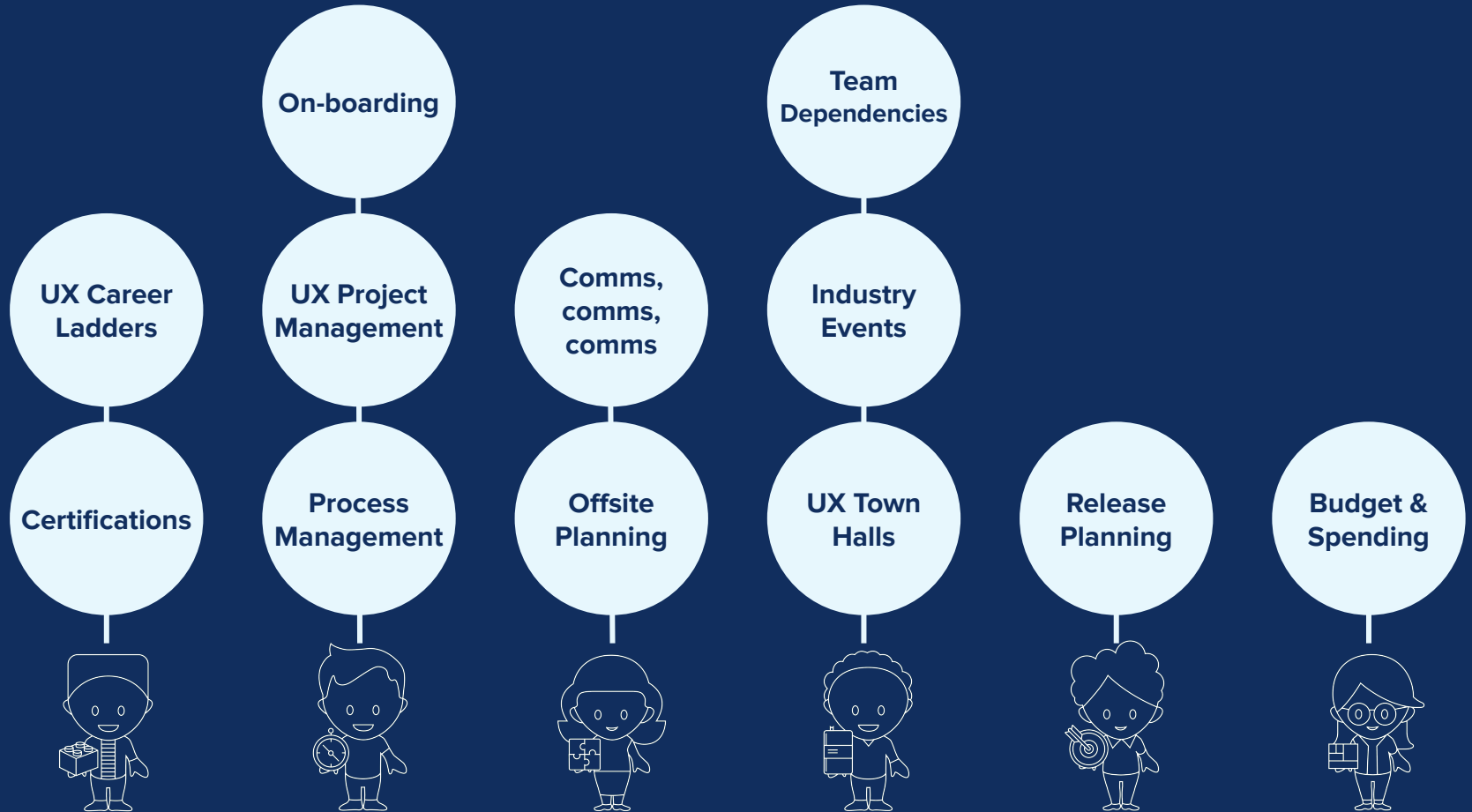
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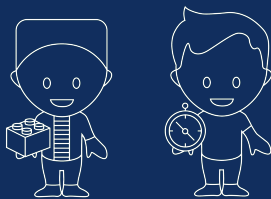
Team Ops

- UX Career Ladders
- UX Town Halls
- Industry Events
- Comms, comms, comms
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- On-boarding

Product Ops

- UX Project Management
- Release Planning
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- Certifications
- Team Dependencies
- Offsite Planning
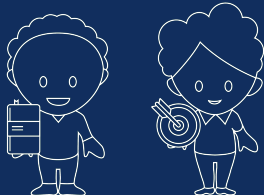
Our operating model encourages connection between like-minded DPMs.

Our Design Ops family has purpose to come together, as we seek to scale best practices from small teams to the org, and implement org programs back into our teams.

4

The Career Step Stool Problem

Design Ops career ladder is poorly defined.

The Design Ops career ladder looks more like a step stool. DPMs get high enough to look around, but there's no next step to take.

How do you grow if your greatest skill is being a problem solver?

"

One of the drivers of turnover is easy to overlook: **allowing workers to stagnate in their current role**.

Workers who don't see a clear progression ... ultimately turn to opportunities elsewhere.

And that suggests an easy solution: **providing clear paths for employees**.

Andrew Chamberlain, HBR

"Why Do Employees Stay? A Clear Career Path and Good Pay, for Starters"

Problem Solvers!
Step right up.

Problem Solvers
with specialized skills!
How high can you climb?

Problem Solvers!
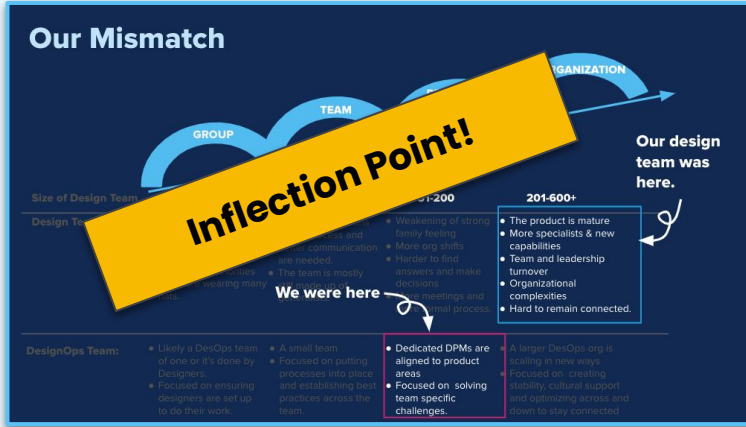**Step right up.**

How it is now.

- Team Ops for scale

- Product Ops for delivery

- Roles in both tracks are refined and simplified

- Our career ladder reaches higher

Ultimately, the specificity of role lets us clarify what's expected at higher levels of the career ladder.

And it gives us runway to grow, as our operating model may continue to evolve into more tracks in the future.

Our Journey Today

Our Mismatch

Inflection Point!

GROUP · TEAM · ORGANIZATION

Our design team was here.

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New Operation Model

Team Ops

Product Ops

1	The Pendulum Problem
2	The Mind the Gap Problem
3	The Lone Wolf Problem
4	The Career Step Stool Problem

What came of all of this?

Impact & Value

- Focus and clarity for ourselves and partners

- Partners are more confident to work with and fund Ops

- Upleveling of quality

- Improved morale and family feeling

- Recruit and retain for Ops growth and Org needs

Lessons learned on our journey

- Take your time

- Be intentional

- Be human first

- The end is not in sight

- Know your maturity

- It takes a team

At an inflection point?

Go ahead.
It's OK to flip your DesignOps Coin.

thank you!

Stay in Touch!

Rachel Posman

Director, UX Ops at Salesforce

in /rachelposman

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John Calhoun

Director, UX Ops at Salesforce

in /johncalhoun

🐦 @JCalhoun2K

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