



When Design Ops Comes in H.O.T. 🌶️

A Tale of a Transformed Design Org



Who is this talk for?

Anyone who is looking for structure in the middle of the madness.

What is coming in H.O.T. 🍷

Honest. Orchestrated. Timely.



Honest

Encourage transparent and real conversations to receive the feedback you need.



Orchestrated

Connect the right instruments
together at the right time.



Timely

Execute on your recommendations quickly and strategically.




In our first 30 days, we conducted an audit.

People

Practice

Portfolio

	Status	Sizing	Quarter 4 - 2020	Quarter 1 - 2021	Quarter 2 - 2021	Quarter 3 - 2021	Quarter 4 - 2021
Meetings and Rituals (People)							
UX Weekly		L	Discovery	Implementation	Redesign	Discovery	Launched and staffed

UX Weekly

Started like this...

Meet the Producers!



Briana Thomas
Sr. Product Design Producer

She/Her/Hers
African American
Historically Black University Alumni
Afro-futurist



Christina Rodriguez
Sr. Product Design Producer

She/Her/Hers
🇵🇷 Puerto Rican | WOC
Design Strategist
Curl Expert

Our fearless leader



Dianne Que





UX Weekly, what is it?

A place where design leadership and peers inform each other of the current state of affairs.

80

Product Designers
Researchers
Content Designers
(across all regions)

1

Hour
Weekly
Meeting

64

Slides about
project related
work



Briana Thomas

Product Design Producer

Highlight(s) from last week:

- Product Design H1 Kick-off
- Recording Luma Method for Critique with
- Aligning with Product Program Management
- Support Monthly Prod Dev Review
- Meet & Greet w/ Localization

Top priority/priorities for the week:

- Jira/sizing intro with Agent Exp team
- Jira board pilot
- Design Crit confluence and templates updates
- Design Tools audit kick-off
- Figma Figma Figma

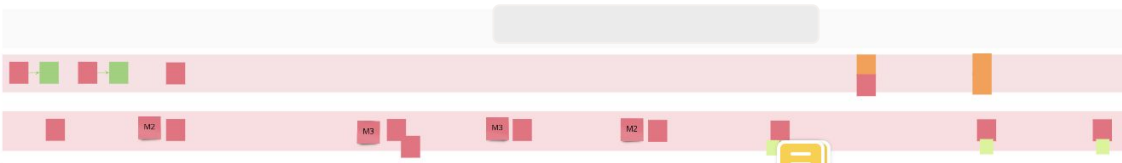
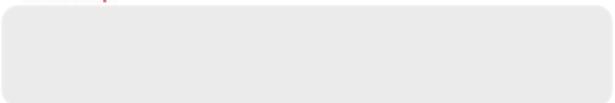
Happy Black History Month!

[Stacey Abrams](#) has just been nominated for a Nobel Peace Prize

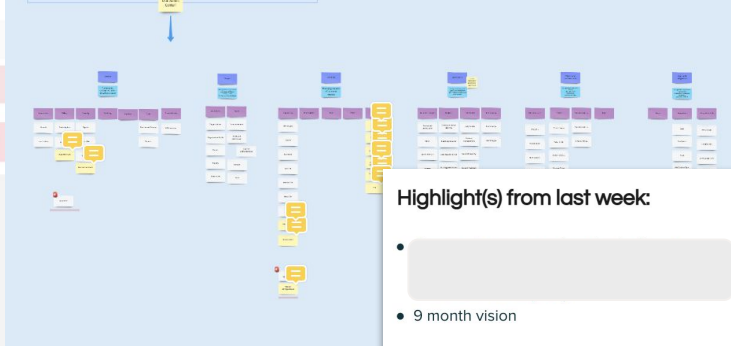




Sales Rep



Exploring a solution to the comparison direction dilemma - which one is old and which one is new? What if they aren't versions of the same thing? 🤔



Highlight(s) from last week:

-
- 9 month vision

Top priorities for the week:

- Truffle making
- Truffle eating

Single View of the Customer (C360)

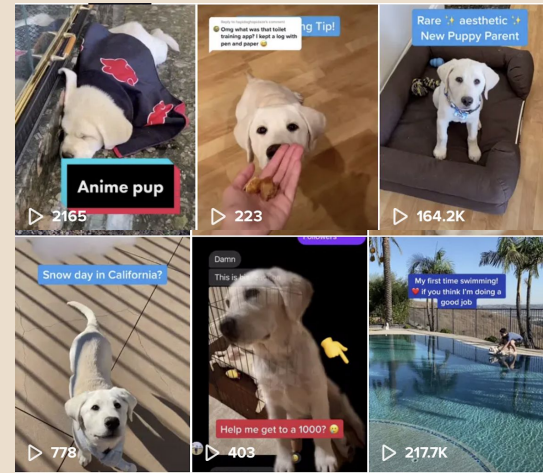
UX Vision



Jian Wei Liao

Feb 17, 2021

Thanks for invite and great explorations!





Say Goodbye to UX Weekly as you knew it!



How we came in H.O.T. 🍷





Honest

Encourage transparent and real conversations to receive the feedback you need.

Encourage honest
conversations through an
Ops Discussion Guide.

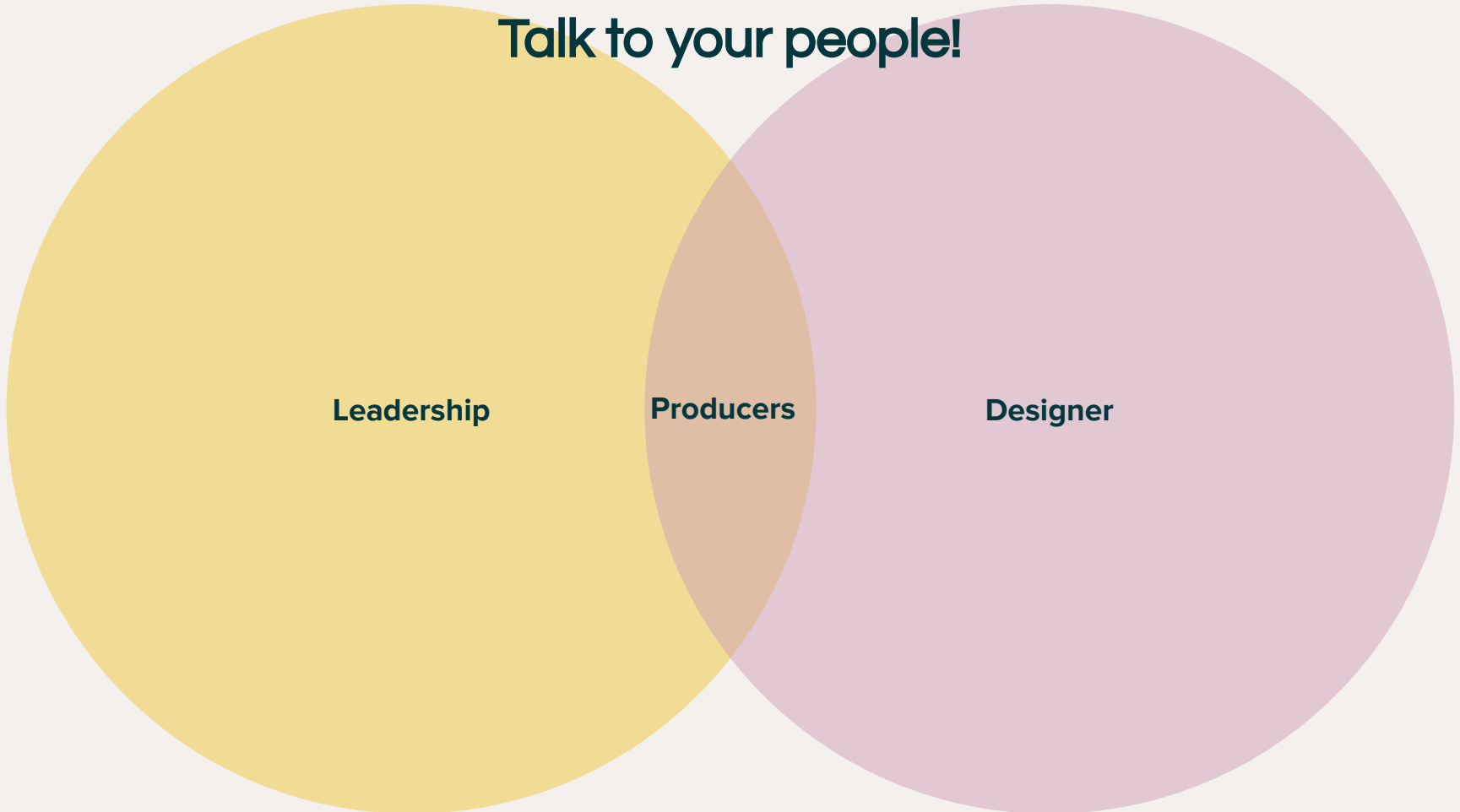


Talk to your people!

Leadership

Producers

Designer



Be Hyper focused on Ops.

Elements of an impactful discussion guide.

Make it focused but have some fun! 🔥

Overview: This discussion guide will be used to rethink how we communicate across the Product Design Team.

Participant Info

Name:

Role:

Openers

- Tell us about your role at Zendesk?
- What is your team focused on right now?
- What is your understanding of the role of Design Operations?
- How do you envision Design Operations assisting you and your team(s)?
- Give us a quick temperature check of how you think your team is feeling about current rituals and processes?

Ask the nitty gritty ops questions .

After your baseline is covered dig deeper into those three categories:

People, **Practice** and Portfolio

Practice

- Team Rituals
 - How do you stay connected as a team? How often?
 - How do you stay connected to the broader design organization?
- Collaboration
 - How do you document the collaboration with stakeholders?
 - Are there any standardized templates that you use to document your teams' design process?
- Design Quality and Review
 - What is your process for reviewing design work in flight?
 - How often do you participate and why?

Be a good listener Take a lot of notes Collect Assets.

You chats could look like this:

Practice

- Collaboration
 - How do you document collaboration with stakeholders?
 - Not very rigid, **“it is a very fluid process.”**
 - **What was the Old Process?**
 - Slack Channel
 - Content Brief
 - Jira Board
 - **What is the New Process?**
 - Slack
 - Jira - Briefs logged there
 - Repeatable template
 - Partner with Designers
 - **“It’s a little bit like the wild west”**

**Conclude with thank you
for your time and honesty!**

Include what you will be doing
with the data.



Discussion Guide Tips.

- 1 Talk to people from multiple disciplines and levels.
- 2 Tailor your topics to your audience.
- 3 Use that as an opportunity to collect existing assets.



UX Weekly data

Leaders and designers know that as the organization continues to grow that UX Weekly needs to mature, but don't know what that would look like.

↑ Zendesk Product Design Culture

↓ Lacked Strategic Value

↓ Low slide engagement

↓ Not sustainable

Sound bites

"I would like to hear more about our strategy."

Love hearing about the work

"Leadership doesn't even attend, so why should I?"

"This meeting is not sustainable."

"It is a waste of time."

"I hate Spam"

"I wish it had more structure."

"I wish this provided more visibility for our partners."

"It makes me feel connected."



Orchestrated

Connect the right instruments
together at the right time.

Discussion Guide



Execution.

```
graph LR; A[Discussion Guide] --> B((Effectiveness Scale)); B --> C[Execution.];
```

Discussion Guide

**Effectiveness
Scale**

Execution.

An **Effectiveness Scale** helps ops
come in Orchestrated.



We measured the effectiveness of meetings against 7 criteria

1. Audience

Are the right people in the room to make decisions?

2. Purpose

Is the intent clearly understood by the attendees?

3. Documentation

Are there consistent templates and repositories that are actively maintained?

4. Cadence

Is this meeting happening at the right intervals?

5. Effectiveness

How is the agenda of this meeting executed for its intended audience?

6. Participation

Is there active engagement from all attendees?

7. Culture

Does this meeting adhere to our core values?

Meeting effectiveness scale

	Redesign completely	Needs work	Working well	Very effective
Audience	No decision makers present	Some decision makers present but not enough	The main decision maker is present	All decision makers are present
Purpose	Not stated	Stated but still unclear	Stated	Clearly stated and understood
Documentation	Doesn't exist	Exists but isn't used	Exists but isn't consistently used or updated	Exists and is always up to date
Cadence	Happens way too often or too rarely	Happens but not enough or the meeting length is wrong	Could be better with a slight tweak	Happens just the right amount
Effectiveness	Completely derailed, no action items, and no agenda	Little direction, hard to get through the meeting	Pretty good, but usually requires a follow up	Very effective with clear takeaways and action items
Participation	Low participation or a few voices dominate	Fewer than half of the attendees are engaged	Over half of the attendees are actively engaged	Everyone in the meeting is actively engaged
Culture	Does not feel like Zendesk	Some people are living the values	Lives the values but could improve	Fully embodies what Zendesk is about



UX Weekly Effectiveness Evaluation

	Redesign completely	Needs work	Working well	Very effective
Audience		Leadership does not always attend		
Purpose		Unclear and not adhered to		
Documentation				Slide deck provided maintained
Cadence		Happens too often		
Effectiveness		It is not effective as leadership is not always there, too in the weeds.		
Participation		Too many people and disciplines		
Culture				Good way to kick off the week

Needs work

Based on our research these are our recommendations for the UX Weekly.

1. Audience

The full product design team.

2. Purpose

Strategic practice related updates and connect as a team.

3. Documentation

Documentation is maintained but enhanced with meeting recordings and recap emails.

4. Cadence

A 120-minute meeting every two weeks.

5. Effectiveness

Leadership is accountable for updates as well as ICs to make it easier to surface roadblocks.

6. Participation

IC's, Content Designers, Producers, UX Researchers, Leadership!

7. Culture

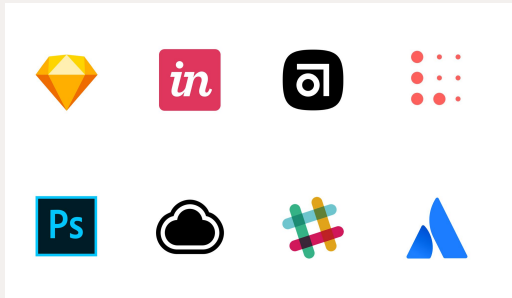
This is a forum for everyone to come together and see what's happening as a team.

The Effectiveness Scale is transferable.

It can be applied to any tool, process, or ritual that needs to be redesigned!



Tool Effectiveness Scale



	Impeding Design Work	Needs work	Working well	Very effective
Level of Zoom	This tool promotes working in a silo and does not inform appropriate stakeholders about design work.	The tool does not enable informing stakeholders at the appropriate level.	The tool somewhat keeps stakeholders informed but not at the desired level of zoom.	The tool informs all levels of necessary stakeholder engagement at the right level of granularity.
Purpose of Tool	The tool is not serving its intended purpose for the designer and team needs.	The tool enables design work to get done but not in an efficient manner.	The tool enables design work to get done and works well for designer needs.	This tool is efficient and allows for robust design work to get done in an easy way.
User / Owner	The designer is the primary user but cannot maintain version control in an easy way.	The designer is the primary user but has issues with ownership of version control.	The designer and collaborators can maintain version control.	All stakeholders can access the latest version of the file in a seamless way.
Output	The desired output can't be met and is only a fragmented portion of the experience. Other needed.	The desired output can be met but may require additional tools to	The desired output is met with little need for supplemental tools	The desired output is met with no need for supplemental tools
Cadence	Isn't being used consistently all by designers.			ins.
Level of Effort	High level of effort to use maintain and learn the tool			used on a consistent majority of the team.
Collaboration	Tool does not enable collaboration and cannot be used by stakeholders and team members.			level of effort to obtain and learn the tool.

- 1. Level of zoom** Who is this tool informing? What level of granularity is needed?
- 2. Purpose of Tool** Is this tool enabling design work to get done the most efficient way?
- 3. User / Owner** Who is the primary user? Designers? Directors? Leadership?
- 4. Output** What should users gain from using this tool? Reports? Tasks?
- 5. Cadence** How often is this tool being used? Is it being used by majority of the team?
- 6. Level of Effort** Is the tool easy or difficult to use based on the desired output?
- 7. Collaboration** Can the tool be used to asynchronously collaborate across teams?

Effectiveness Scale Tips

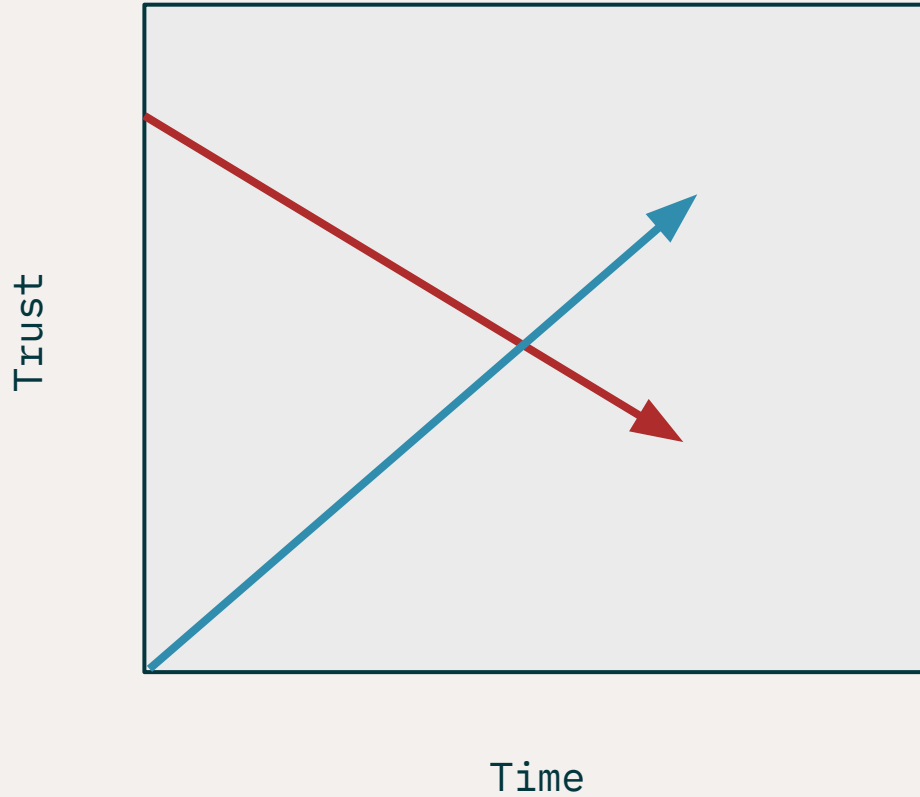
- 1 Use concrete examples to ground your assessment in each area.
- 2 Review scale with leadership to receive a gut check.
- 3 Have an idea of a solution ready.



Timely

Execute on your recommendations quickly and strategically.

Time is not on your side.



We have a multitude of design tools.

You can utilize any design thinking tool to stay timely and bring your stakeholders along your transformation journey.

Brainstorming workshop

2 x 2 Matrix

Journey Map

Storyboards

Stay timely by using a **Project Charter**.



Use existing tools to elevate good practices.

We already had great project charters so we used them to communicate our execution strategy the same way our product development team does.

Initiative		
What problem are we trying to solve for who?	Overview <ul style="list-style-type: none">• Problem 1• Problem 2• Problem 3	
What is the impact for the Product Design team?	Overview Sentence <ul style="list-style-type: none">• Impact 1• Impact 2• Impact 3	
Goal and Success Criteria	Overview Sentence Definition of Done: -	
Milestones	Week 1 - Week 2 - -	
People	Leads	
	Stakeholders	
	Participants	<ul style="list-style-type: none">••
Links	Miro Board	

Make it thorough.

Get into the details and directly address those gaps from your effectiveness evaluation.

This will keep you grounded as you roll-out your recommendation.

Initiative	Product Design Bi - weekly
What problem are we trying to solve for who?	<p>Product Design currently does not have a forum to inform our team of People, Practice, Portfolio updates.</p> <ul style="list-style-type: none">• The team needs a way to stay informed about the happenings across the team and across regions from top to bottom.• The team needs more ways to build relationships across disciplines and regions in this virtual environment.• Product Design should have a self-serviceable way to showcase the initiatives they are working on.• As we adapt to this new environment, we need a place for folks to come together.
What is the impact for the Product Design team?	<p>Currently the experience of communication across the product design team is fragmented, inconsistent, and invaluable.</p> <ul style="list-style-type: none">• Leadership will be consistently informed about the happenings across the team.• Relationship building across disciplines and teams• Efficient and consistent communications and meetings• Create a sense of community and belonging• Adapt and create a more mature design practice
Goal and Success Criteria	<ul style="list-style-type: none">- Audience - The full product design team.- Purpose - Project Updates (Wins and Challenges, Ops Updates, Production, Design System).- Documentation - People, practice, and portfolio always included.- Cadence - A 120-minute meeting every two weeks.- Effectiveness - This format has a larger audience, but frees up time. Leadership is more accountable for updates, and it's easier to surface roadblocks.- Participation - IC's, Content Designers, Producers, UX Researchers, Leadership!- Culture - This is a forum for everyone to come together and see what's happening as a team.
Milestones	<p>Discovery 3 weeks - Interviews with all Managers, Directors and representatives from each design team.</p> <p>Synthesis 2 Weeks - Will include themes, sound bites and recommendations.</p> <p>Design / Programming 4 - Weeks - Mocks of new format, documentation.</p> <p>Feb 2 🍷 Product Design Bi - Weekly Launch 🍷</p>

Timebox it.



Clearly communicate your timeline to your leadership team so they can amplify your work and see the results in real time. Apply it to everything!

Again, modeling positive behaviors that will be the foundation of your team's brand.

Milestones	<p>Discovery - November - December 3 weeks - Interviews with all Managers, Directors and representatives from each design team.</p> <p>Synthesis - Jan 2 Weeks - Will include themes, sound bites and recommendations.</p> <p>Design / Programming - Jan 4 - Weeks - Mocks of new format, documentation.</p> <p>Feb 2, 2021 🔥 Product Design Bi - Weekly Launch 🔥</p>
Deliverables	<ul style="list-style-type: none">- Discussion Guide- Synthesis Deck- Evaluation Scales- Roadmap- Asana Epics / Tasks- Bi - Weekly Designs<ul style="list-style-type: none">- Deck- Launch Email- Presenter Emails- Confluence Documentation

Project Charter Tips

- 1 Show impact of the change.
- 2 Bring people on the journey.
- 3 Laser focus on the goal.

**So, what came out
of all this work?**

A new way of gathering as a team .



Product Design Bi - Weekly





Product Design Bi - Weekly

A place where design leadership and peers can connect to each other, learn about the practice, and share awesome work.

100

Product Designers
Researchers
Content Designers
Architects
Producers

1.5

Hours
Every 2 weeks

Documentation

Product Design Bi - Weekly



Created by Christina Rodriguez
Last updated: about 3 hours ago · 2 min read · 83 people viewed



Have you ever wanted one place for everyone to get together and chat about all things Product Design? We are introducing the **Product Design Bi-Weekly!** This will be a place to give high level announcements, show the awesome work that Product Design is doing, as well as, for us to just have a little fun!

Curated Agendas

Hello

Practice / Team Announcements

The Chonk
Presented By: Vedran

Glint Survey Results
Presented By: Product Design Leadership

What's Next?

Culture & Connection

Today we will be kicking off with an afternoon/morning hello!

Practice Updates

Digital First: Video Tools

As we continue to iterate on our digital first approach, please check out best practices for making video.

What you will find

- Tools to record
- Best practices.
- Saving instructions!

[Video Tools Link](#)



Video Tools



Created by Christina Rodriguez
Last updated: just a moment ago · 5 min read · 8 people viewed

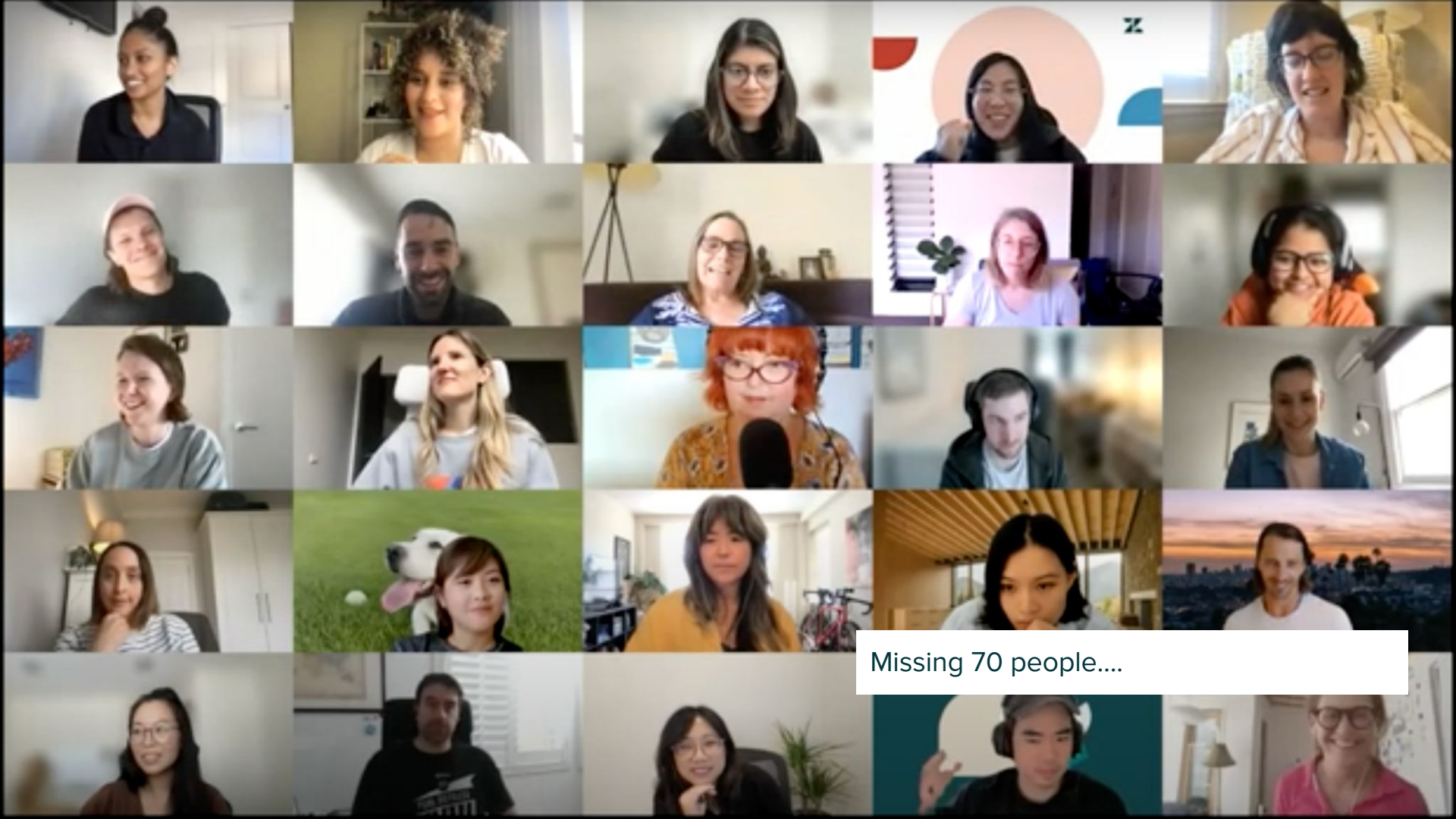
As we continue to be a digital first company we are finding that video is becoming more important! Here are some of the tools we use at Zendesk and some tips and tricks for each.

Table of Contents

- Types of Videos to Record
- How we feel about banter.
- How To's
- Our 3 tools
- Cloud App
- QuickTime Player
- Zoom
- Sharing and Saving your Videos



I believe that video guidelines will help us all.



Missing 70 people...



Tim Allison 11:04 AM

Positive feedback today from folks on the Bi Weekly. Wanted to say *thanks* to the Producers for the flexibility and openness on the programming. Was a good blend of practical insight, growth, project work and new initiative. Also, the video clips/preso stuff landed well, we should think more about how we scale that medium and make it part (where appropriate) of design-comms.

Key Takeaways.

To come in H.O.T



Honest

Ops-focused Discussion
Guide



Orchestrated

Effectiveness Scales



Timely

Project Charters



thank you

