DesignOps Summit
by Rosenfeld

@DesignOpsSummit #DOS2021
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SKETCHNOTES by @mjbroadbent

Design Operations Metrics

KRISTIN SUNDERMEYER
Director of Design Operations
Large, complex, long-term projects w/ multiple teams — MC GRAW HILL

&

previously a K-12 teacher
TYGRE MOREHART
Lead Designer, Design Operations
133-years-old EDUCATIONAL PUBLISHER for K-12 schools (B2B)

"We didn't actually overspend our budget. The allocation simply fell short of our expenditure" — KEITH DAVIS

$ BUDGET MANAGEMENT

Providing a holistic view of SPEND on a project gives DESIGN LEADERS the data they need to make evidence-based decisions when product teams ask for more..., and they always do.

When I started in 2015 we had a bazillion separate spreadsheets... pulling data for status/forecasting was really challenging. PERMISSIONS, VERSION CONTROLS, etc.

VERY TIME-CONSUMING — many LIMITATIONS

NO GOOD WAY to create ACCURACY

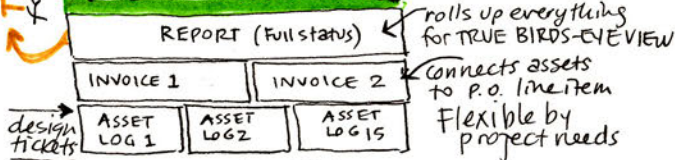Also MID-PROJECT SCOPE CHANGES: inevitable!

WE WERE WORKING ON A "BEST GUESS" BASIS A LOT.

SO We implemented SMARTSHEETS, Connected workspace w/ templates for every project BY WORKING TOGETHER

Met with other teams to identify COMMON DENOMINATOR(s)

TABLEAU for forecasting

SYSTEMATIC STRUCTURE
Cross-sheet formulas BAKED IN!

REPORT (Full status) — rolls up everything for TRUE BIRDS-EYE VIEW
- INVOICE 1 / INVOICE 2 — connects assets to P.O. line item
- design tickets → ASSET LOG 1 / ASSET LOG 2 / ASSET LOG 15 — Flexible by project needs

100-3,000 asset requests PER COMPONENT (e.g. Student Edition)

WE CAN TRACK:
- INVOICE "CODE"
- FINAL IMAGE (trigger billing)
- COMPLEXITY (tied to rate sheet)
- DATES & NOTES

♻ RESOURCE PLANNING

How we use metrics to show peaks and valleys across project timelines

"Teamwork is the secret that makes common people achieve uncommon results." — IFEANYI ENOCH ONUOHA

WE HAVE A WIDE VARIETY OF PROJECT PARAMETERS SO RESOURCING IS TOUGH. And why is it that those "oh, this is going to be a small project" always seem to be the worst?!?

We were looking at PROJECTS AS A WHOLE instead of DRILLING INTO THE TASKS and TIME NEEDED for OUR TEAMS We created a SCHEDULE that accounted for ALL TASKS (BASIC END-TO-END) then ASSIGNED GROUPS TO TASKS then, using a formula, IDENTIFIED TOTAL TIME ON TASK [WE CREATED A MEAN... SOME PEOPLE ARE FASTER THAN OTHERS and THERE ARE ALWAYS OTHER CIRCUMSTANCES.]

FORMULA CALCULATES % ALLOCATION BASED ON HOURS NEEDED, BEGINNING and END DATE OF TASK. I ADDED A SmartSheets METRICS SHEET that looks at the SCHEDULE to count ALLOCATION per week by GROUP → informs a CHART and DASHBOARD ROLLUP THAT LETS US SEE DESIGNER ON project OVER TIME [80% ALLOCATION MAX] to make decisions

MANAGERS CAN MAKE INFORMED CALLS

✿ PRODUCTIVITY TRACKING

How we capture people's time on task to get us to a standard set of "recipes" that we can when planning new projects

"If you don't pay appropriate attention to what has your attention, it will take more of your attention than it deserves." — DAVID ALLEN *Getting Things Done: The Art of Stress-Free Productivity*

OUR DESIGNOPS PROBLEM SPACE
- 80 DESIGNERS
- 100+ PROJECTS
- TIME ON PROJECT
- FOCUSED ON RIGHT THINGS?

3-36 month TIMEFRAMES

ESTIMATING is COMPLICATED! Many design managers have their own methodologies and "heirloom spreadsheets" [NO JUDGEMENT] WE NEED DATA to solve this

OUR HYPOTHESIS Conduct a Time Study
Track WHAT TASKS PER PROJECT and HOW MUCH TIME ON TASK — Lives in Smart sheets

● END-to-END PRODUCT LIFECYCLE incl. RACI

INITIATE › PLAN › BUILD › GO TO MARKET › IMPLEMENT › MAINTAIN

developed by Product Management with all the teams who help ship products

DESIGN → 18 TASKS → imported work in flight into **toggl** TIME TRACKING TOOL *USER FRIENDLY

DESIGNERS CAPTURED Time on Task for 1 YEAR Helped them have good conversations with their managers, too

WE NOW HAVE OUR BASELINE DATA!

* GREAT REPORTING!