
Helping them help us

Enterprise toolkits for vendor efficiency, consistency & velocity

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1.

Onboarding
Kit



2.

Discovery
Kit



3.

Design
Kit

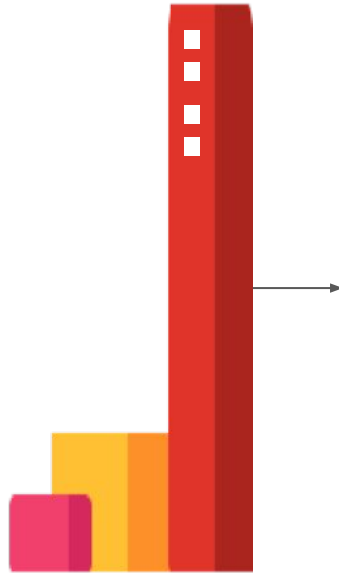


1.



Onboarding

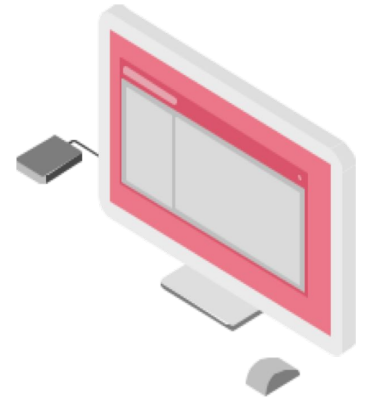
How do we build efficiency during the onboarding process?



Company



Team

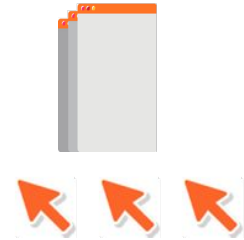


Project for a very specific industry



1. Onboarding

How do we build efficiency during the onboarding process?





Onboarding Kit

Tax 101 kit for
UX designer
removes doubts

Firm specific resources

- Org Charts
- Mission Statement
- Tools Overview
- Ecosystem Overview

Industry specific—tax technical resources

- Acronyms Cheat Sheet
- Overview of complex regulations and processes
- Tax Forms Dictionary



2. --- Discovery

Have you experienced stakeholder resistance to adopting user-centered workshops?

“Discovery activities, user-centered workshops are time consuming and costly”

“Let’s cut the workshops from the proposal”



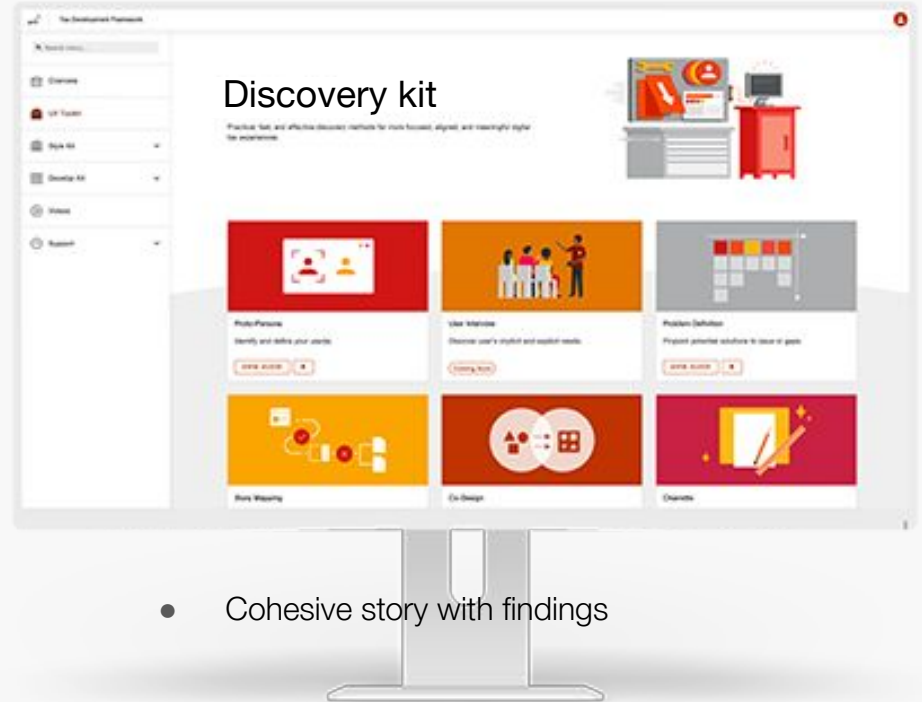


Discovery kit

offers a curated list of short discovery methods for tax technology



- Time-conscious & familiar
- 30 mins to ½ day long
- Facilitation guides
- How-to videos
- Templates



- Cohesive story with findings

3. Design

The missing design system
The multiple design systems
The project re-do

- Cool and necessary
- Lack of singular source of truth
- Free-style
- No reusability
- No shared language



Design Kit increases velocity and consistency

- No need to reinvent the wheel
- One source of truth
- Singular library of UI Symbols
- Consistent logic
- Consistent implementation

Foundations



Accessibility

Best practices and guidelines to cover your user base.



Colors

Applying PwC brand colors



Grid

Bootstrap based; and expanded to fit your project needs.



Icons

Offering a wide variety of fu



Typography

Modular type-scale built for responsively.

Components

Alerts



Avatars



Badges





Design Kit and brand approval

- Brand approval in the enterprise organization
- One step closer to brand approval
- Speak same language

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APPROVED



Improving the kits by soliciting feedback from both external and internal designers

- Monthly design retrospective
- Toolkit wins & pain points

Design Review Retrospective | May 2020



What went well?



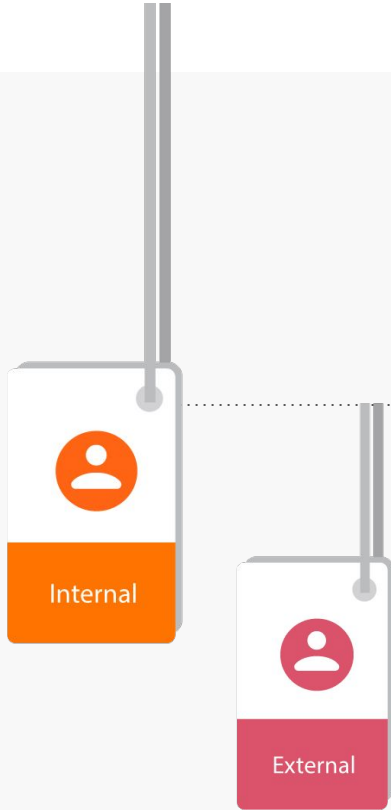
What didn't go so well?



What

Build your kit

What should you watch out for?



and Us ~~vs~~ Them Mindset

Trust vs Tension

“External designers are here to take my job”

“External designers are going to do a better job than me”

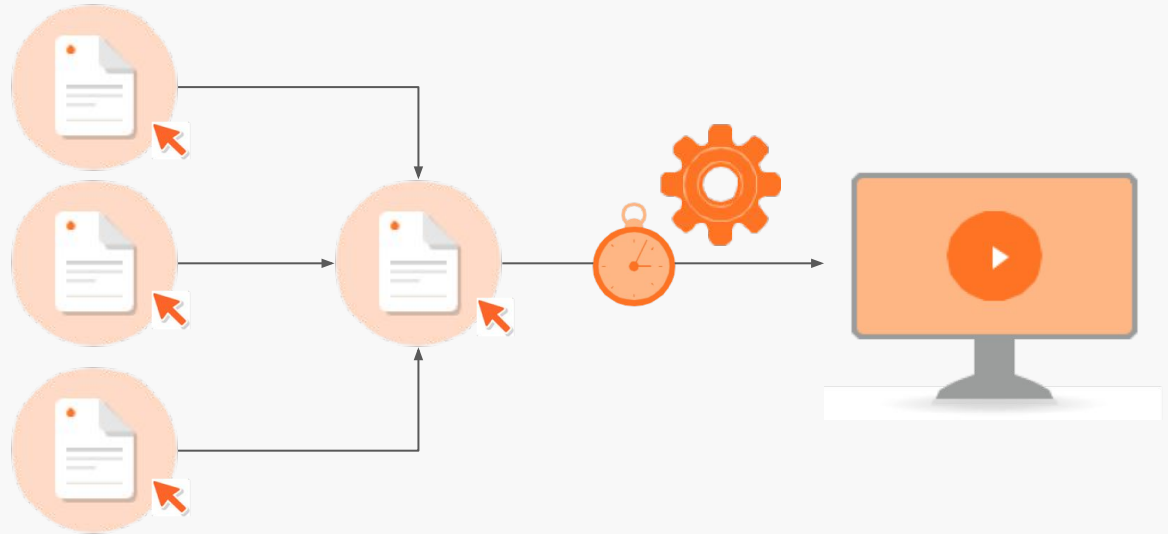


“Their success is our success”



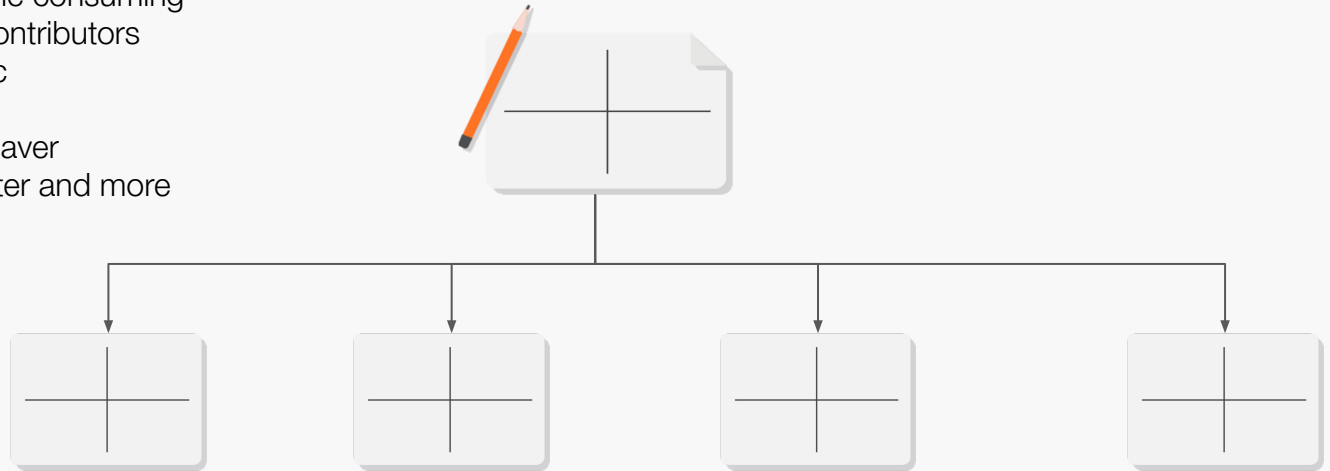
Slow and Steady

- Perfection on day 1
- From scattered links to “presentable” content
- Perfection is temporary
- Kit (Content and technology) will evolve with time



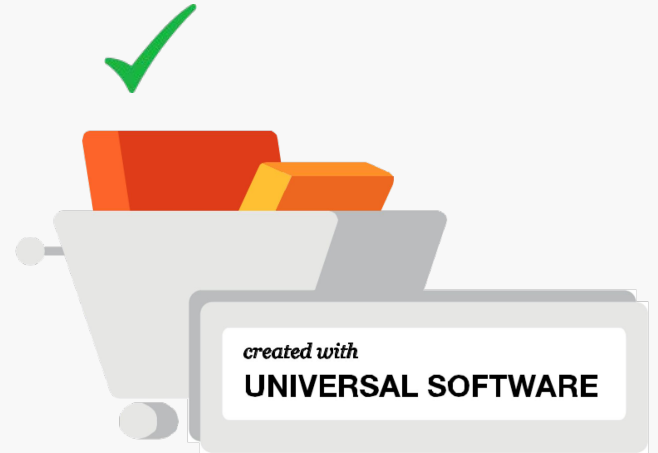
A kit for the kits:

- Content creation is time consuming
- Incohesive, Multiple contributors
- Lack of outline or logic
- Templates and Speed
- Kit for kit was a time saver
- Crank out content faster and more consistently



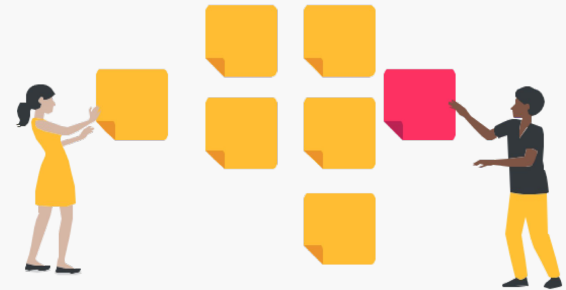
Universal

- **No Special license**
- Personalization & Adoption
- Accelerate workflow



Adoption & Buy In:

- Toolkit sponsor
- Small project as case study
- “Design Magic”
- From severe resistance to high adoption



Content Updates

- Have a plan
- Don't treat it as a side project
- Manage the toolkit like a project
- Dedicated time and resources



In Essence



**Onboarding
Kit**



**Discovery
Kit**



**Design
Kit**

- Remove inefficiencies
- Improve quality, consistency & velocity
- Shared knowledge & tools
- Create impact, share vision



Thank you



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