



# Partnership Playbook

## Lessons Learned in Effective Partnership

**Frank Duran**

**Design Director**

**San Antonio, TX.**

## MISSION

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The mission of the association is to **facilitate** the financial security of its members, associates, and their families through provision of a full range of highly competitive financial products and services; in so doing, USAA seeks to be the **provider of choice** for the military community.

## CORE VALUES

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SERVICE  LOYALTY  HONESTY  INTEGRITY



## I am a Design Director at USAA in San Antonio, TX.

After several years in the technology field, I made the leap to creative life in the agency world by starting at MEA Digital where I worked on digital projects for clients like Kyocera, Centurion Boats, Callaway Golf, and Oakley. Soon after, I met my wife, moved to Texas and continued my career at T-3 giving me the opportunity to work on award-winning projects for Dell, JCP, Universal, Wall Street Journal and Marriott. As my family grew, I found a home at USAA where I continue to grow as a design leader.

- Community Organizer
- Design Leader in Fortune 100 Bank
- Father to 3 kids







- Who are you connecting with?
- How are you connecting?

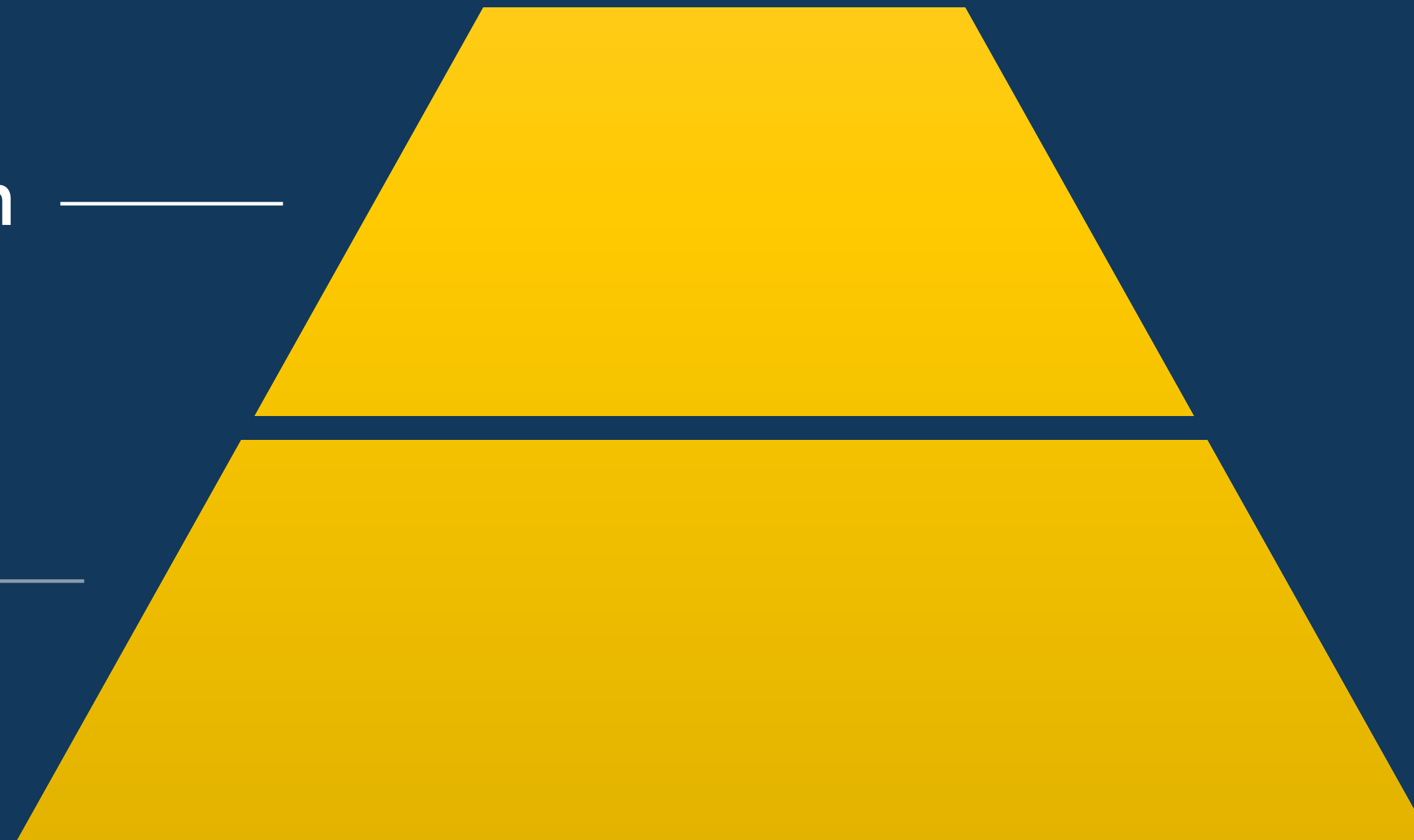
Connection —



- How are you communicating?
- What language are you using to communicate?

Communication —

Connection —

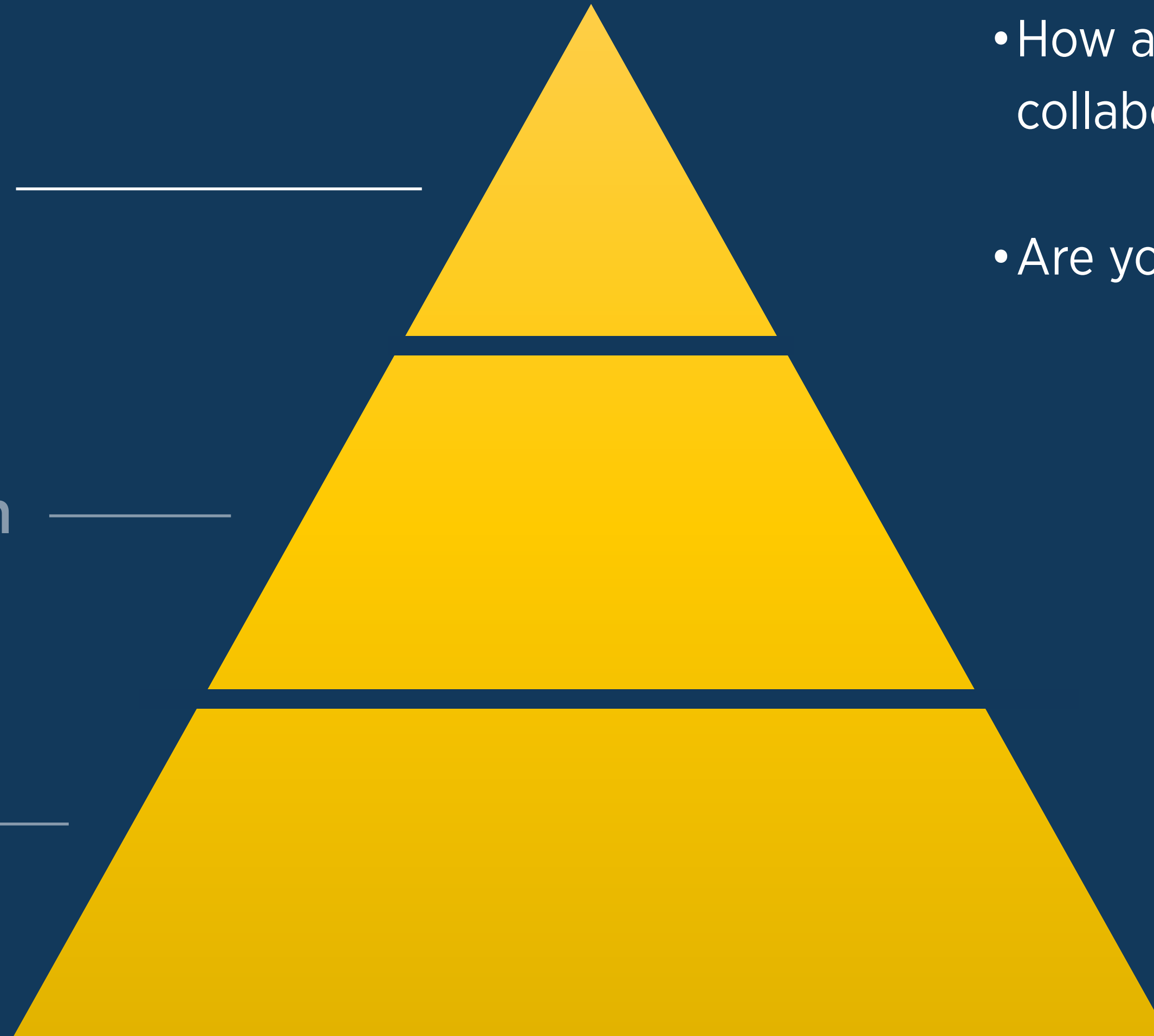


**Collaboration** —————

- How are you measuring collaboration?
- Are you creating advocacy?

Communication ———

Connection —





Collaboration —————

Communication ———

Connection —



EFFORT



# Connection



# “3 in a Box” Model - plus+

Start with Business, Tech  
and Design representation

Who fills these roles? -  
despite their titles

Consider your company  
needs when adding to the  
“box”

# Decision Makers + Influencers

Seek out the decision makers

Continue to discover the influencers

Effective connections includes decision makers and influencers

# Concrete Asks = Better Connections

Be upfront with the need/  
ask

Be prepared to  
navigate connections to  
the correct stakeholder

Its worth the effort up front  
to save backtracking later

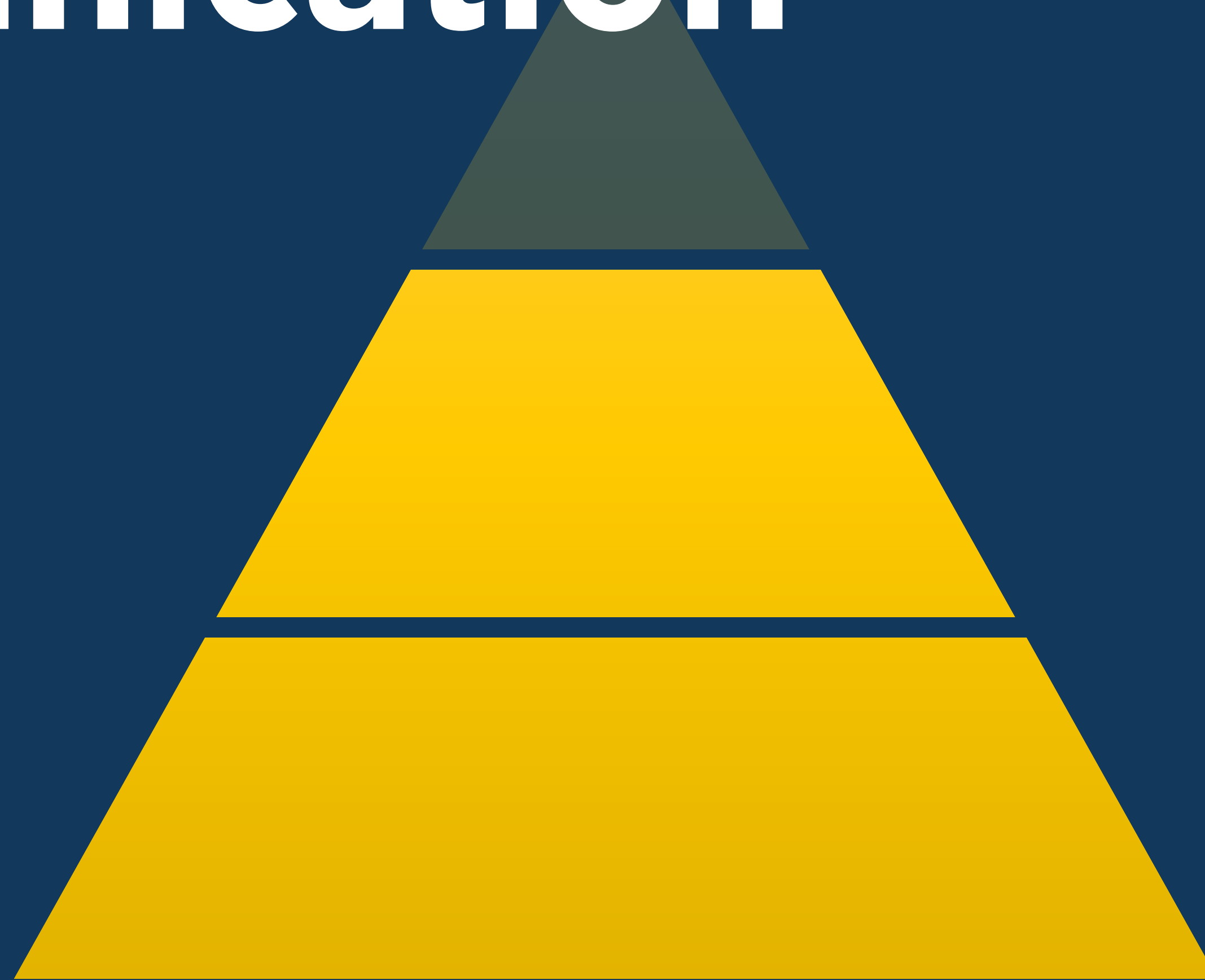




Inspired by True Events...



# Communication



# “Seat at the Table” vs “Build the Table”

Set Expectations for  
Engagement

Define the value of a  
“Seat at the Table”

“Build the Table”, invite, and  
set extra places

# Establish and Maintain Routines

Exec - level alignment and communication

Core working group alignment, sharing, and feedback

Routines = predictable engagement = better communication

# Answer Business Needs / Concerns

Educate yourself about  
business strategy and  
roadmaps

Connect design  
outcomes to business  
performance and risk  
metrics

Keep channels open for  
feedback...employ multiple  
tactics





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# Collaboration



# Measure Connections + Communication

Evaluate your connections -  
Are you getting the input  
you need?

Evaluate  
communication quality  
- Are you getting and  
giving input?

Collaboration requires  
constant effort - Are your  
partners engaged?

# Maintain Alignment

Business and Design  
strategy alignment = value  
and better outcomes

Actively make  
connections using data  
and synthesis

Group activities reinforce  
alignment - one team

# Enable Advocates

Has dialog changed to include design-led perspectives?

Are partners advocating for design activities?

Design is open-source, but requires facilitation





Inspired by True Events...





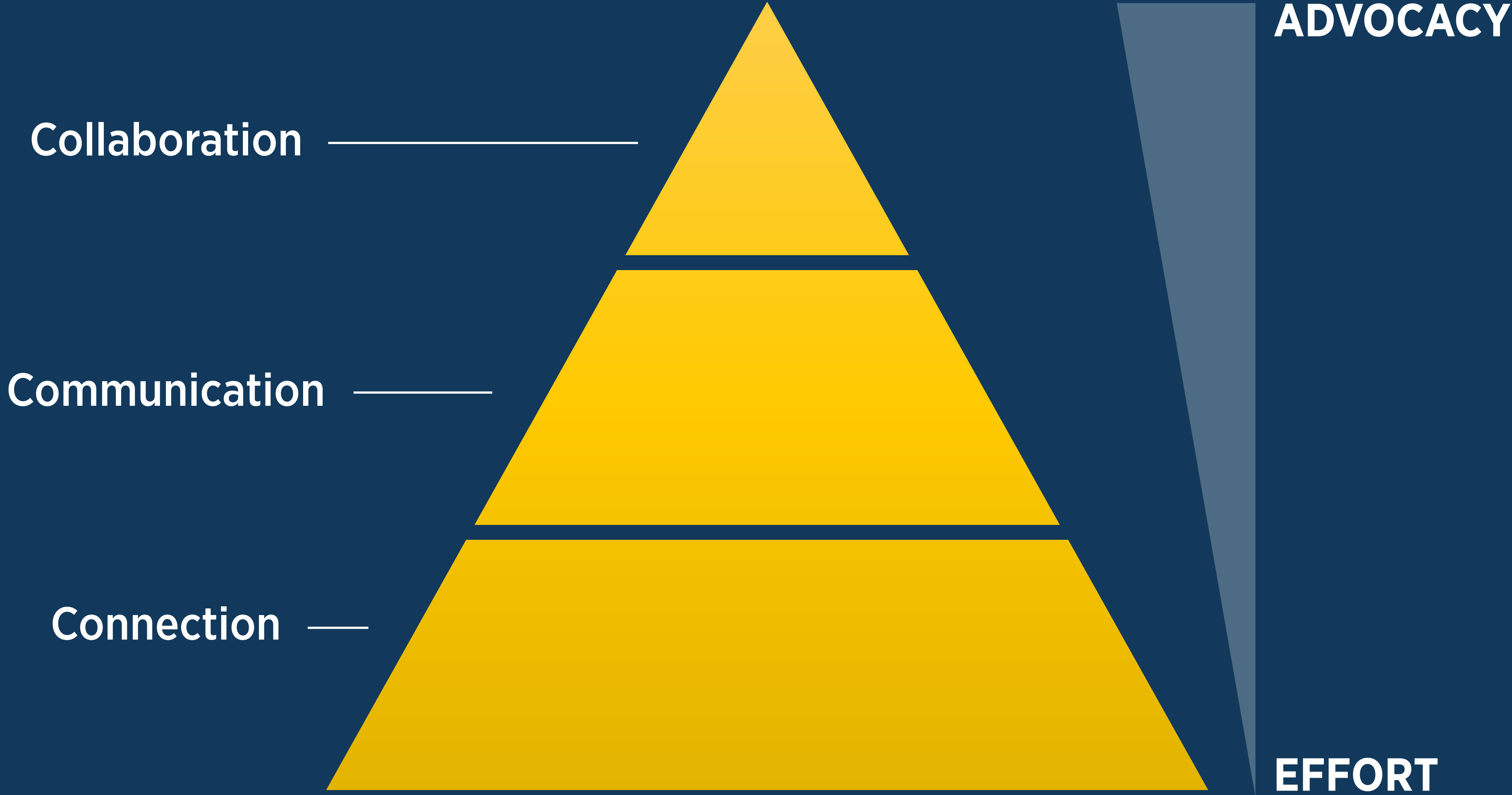
Collaboration —————

Communication ————

Connection —



EFFORT





# Thank You

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