

Leading Creative Teams

By Leann Manning

My Role

In my career, I have led several design teams at small and large companies. I have been a lead, senior manager, and director of design. My responsibilities included workloads, timelines, and the performance of design teams of various sizes.

I have been responsible for the UX product strategy with the companies I have worked for. I have fostered a design culture of collaboration even in remote environments.

I have also been responsible for showing the value and return on investment to the business leaders in my organizations.

Consistent Process

Style systems, design thinking,
agile, research processes, and
shared repositories



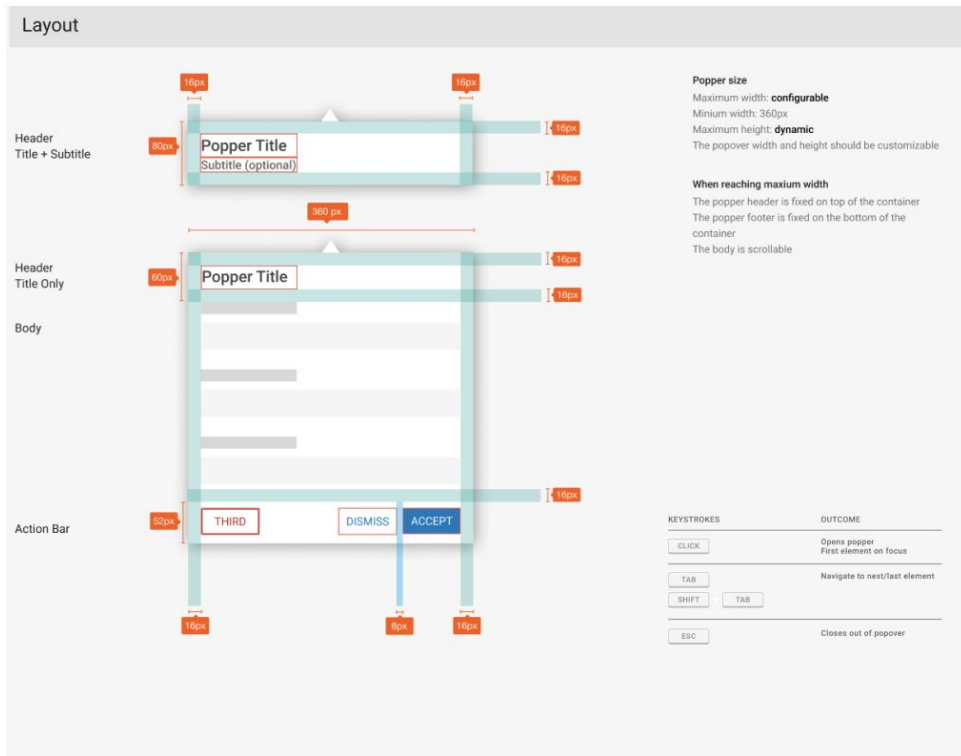
Style Systems

One of the most obvious ways to align a creative team is by creating a style system within the team's design tool.

I have created various style systems for creative teams and developers to use. I have used design tools like Sketch and Figma and built them directly in a javascript framework on top of an existing style repository such as Material UI.

I have learned having only the UI elements is typically less efficient. The team should agree on page and interaction templates that can be used consistently.

This type of style system helps the team stay aligned and consistent and ensures they follow accessibility and internationalization best practices in all their designs.



Design Thinking Processes

Effective creative teams should also follow a design thinking process for their projects.

The type of process, Double Diamond, IBM Thinking Loop, Stanford Model, IDEO Human-Centered Model, etc., matters less than choosing one and having the team follow it consistently.

I have learned the biggest issue is often stepping back from the solution phase when a solution has been handed to the team by a stakeholder.

Some ways I have ensured the team is not skipping the discovery phase is to have them write down goals and success metrics first and to always have more than one solution to every problem.

Design Thinking Tools

Luma Institute		
Looking	Understanding	Making
Ethnographic Research	People & Systems	Concept Ideation
Interviewing	Stakeholder Mapping	Thumbnail Sketching
Fly on the Wall Observation	Persona Profile	Creative Matrix
Contextual Inquiry	Experience Diagramming	Round Robin
Walk-a-mile Immersion	Concept Mapping	Alternative Worlds
Participation Research	Patterns & Priorities	Modeling & Prototyping
What's on Your Radar	Affinity Clustering	Storyboarding
Buy a Feature	Bull's-eye Diagramming	Schematic Diagramming
Build Your Own	Importance/Difficulty Matrix	Rough & Ready Prototyping
Journaling	Visualize the Vote	Appearance Modeling
Evaluative Research	Problem Framing	Design Rationale
Think-Aloud Testing	Problem Tree Analysis	Concept Poster
Heuristic Review	Statement Starters	Video Scenario
Critique	Abstraction Laddering	Cover Story Mock-up
System Usability Scale	Rose, Thorn, Bud	Quick Reference Guide

Testing Business Ideas		
Discovery	Validation	
Exploration	Discussion Prototypes	Interactive Prototypes
Customer Interview	3D Print	Clickable Prototype
Expert Stakeholder Interview	Paper Prototype	Single Feature MVP
Partner & Supplier Interviews	Storyboard	Mash-Up
A Day in the Life	Data Sheet	Concierge
Discovery Survey	Brochure	Life-Sized Prototype
Data Analysis	Call to Action	
Search Trend Analysis	Simple Landing Page	
Web Traffic Analysis	Crowdfunding	
Discussion Forums	Split Test	
Sales Force Feedback	Presale	
Custom Support Analysis	Validation Survey	
Interest Discovery	Preferences & Prioritization Discovery	Simulation
Online Ad	Product Box	Wizard of Oz
Link Tracking	Speed Boat	Mock Sale
404 Test	Card Sorting	Letter of Intent
Feature Stub	Buy a Feature	Pop-Up Store
Email Campaign		Extreme Programming Spike
Social Media Campaign		
Referral Program		

Design Thinking Checklist

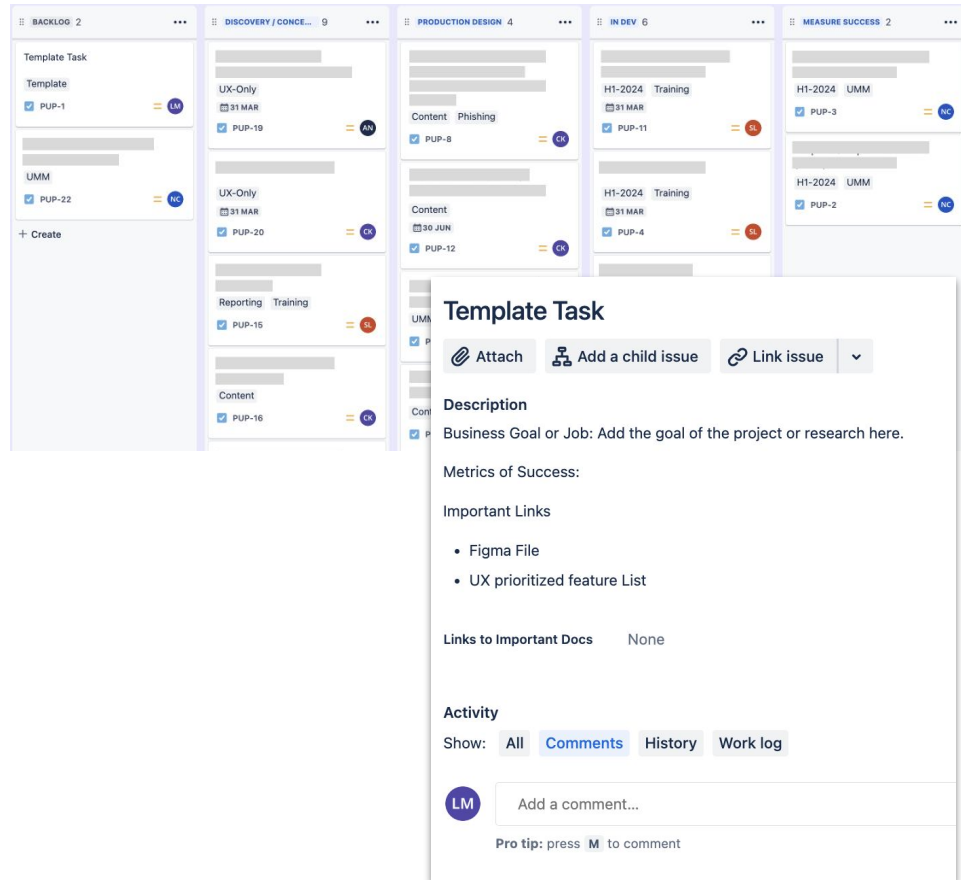
Discover	Explore	Align	Make/Decide	Test	Learn
<p>The team knows what problem they are solving and why it's important. (LUTED)</p> <p>The team has evidence that this is a problem.</p> <p>The team has evaluated if this problem is a result of another related problem.</p>	<p>The team has identified and categorized the user's pain points.</p> <p>The team understands the impact this will have on other teams.</p> <p>The team has brainstormed at least 3 possible solutions to this problem.</p>	<p>The team agrees on the job they will solve for.</p> <p>The team agrees on the outcomes they will want.</p> <p>The team has identified risks that will prevent these outcomes and has prioritized those risks by probability.</p>	<p>The team has some visuals for the concept.</p> <p>The team has done documentation about the concept and a shared plan with steps for creating the concept.</p> <p>The team has an implementation plan for how they will test this concept.</p>	<p>The team has tested this concept with users.</p> <p>The team has data showing the success or failure of the concept.</p> <p>The team has evaluated the results of testing together.</p>	<p>The team has identified why the concept was a success or failure.</p> <p>If successful, the team has discussed ways to improve on the concept.</p> <p>If a failure, the team has discussed alternative concepts to try next.</p>

Agile Team Process

The creative team needs to fit into the Agile process. Design should not happen just at the start, and specifications should not be thrown over the wall to developers. It also should not be an afterthought that happens when the feature is already being built.

I have attempted to bake UX into the product lifecycle process and keep work transparent to stakeholders by using a tracking board (JIRA Product Discovery, Microsoft Planner, Trello, etc.) The team adds the item they are working on, which is tied to a product initiative. They can then move this item into the various buckets in the design process, show the progress, share mocks and updates.

This is particularly helpful for larger organizations with interconnected products because all team members can see the board, see the features being worked on, and reach out to team members to collaborate on projects that may be interconnected.



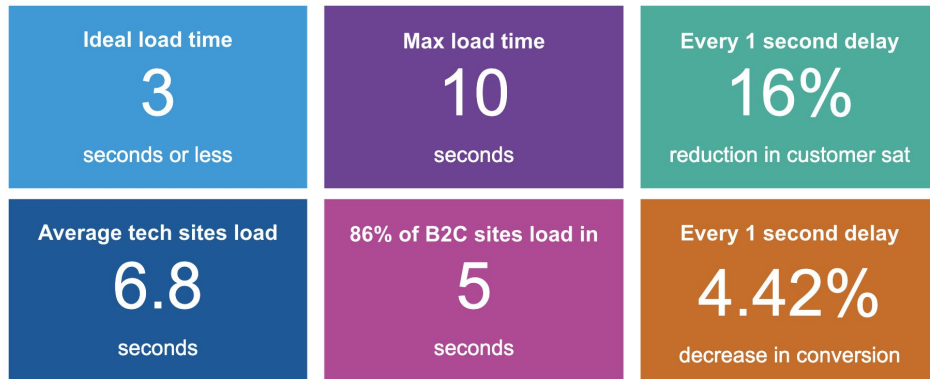
Standardized Research and Requirements

It can become quite confusing for stakeholders when "failure" in usability tests scales differently depending on which team member runs a test.

The way the team conducts research and the scales they use to determine success or failure must be consistent and agreed upon by all members with clear metrics.

An example would be, **"If users successfully complete 60% of the tasks in the test without assistance, the test passed."**

Additionally, having standardized requirements on page load, data freshness, and supported browsers/devices prevents confusing scenarios for users.



UX Rating Scale

The following scale shows the user experience impact if a feature is cut from the project.

1. The job can be completed in all cases, but it is not a delightful experience.
2. The job can be completed in all cases, but the experience is inconsistent and possibly confusing.
3. The job can be completed in most cases, but most users (50% or more) find it confusing to use.
4. The job can be completed in some cases, but most users (50% or more) will need help or require extra steps to complete the task.
5. The missing feature will result in the one of the following:
 - Users will be unable to successfully complete the job in most cases.
 - Users will struggle to use the feature and be dissatisfied with the experience.
 - Project will not accomplish the predetermine goals or success metrics.

Shared design repositories

Your team will definitely not be efficient or consistent if they are constantly researching the same topics, creating new presentations, creating new job maps, creating new personas, etc.

Creating a shared space for research recaps, job maps, personas, and presentations helps the team stay aligned and consistent while avoiding redundant work.

Important Documents



UX Research Repository



Standardized Requirements



Program Admin Job Map



Learner Job Map



Design Checklist and Templates



UX Research ToolKit

Collaboration

Teamwork

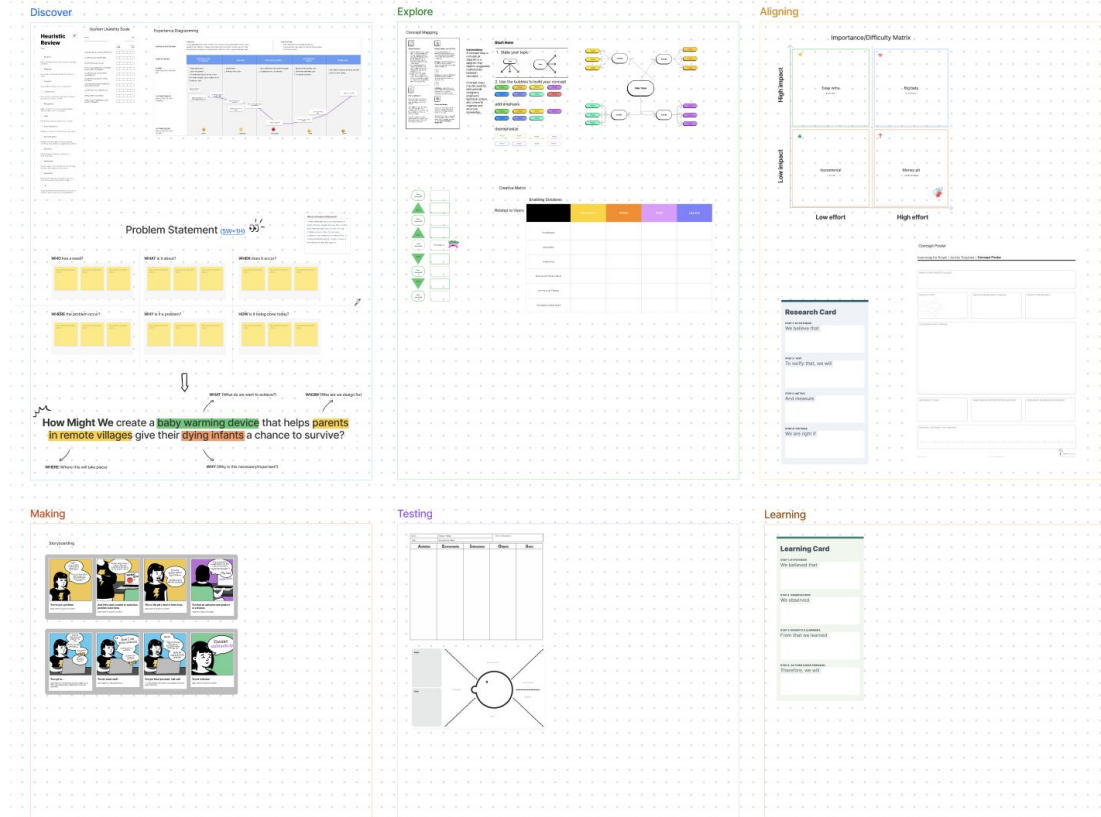


Workshops

In a world where many organizations utilize a hybrid or remote model, it is essential to be intentional about scheduling time for collaboration.

Luckily, creative teams excelled at this before remote work became so prevalent. It's essential to nudge the team to run workshops with each other and their respective teams to foster a collaborative environment.

I have created FigJam files with various types of workshops, the design phase they should be used for, and "how to" instructions to reduce the workload on my teams.



Team Building

Your team can only respect each other if they get to know each other personally. Sharing design mocks and collaborating on projects is not enough to build team camaraderie. Creative teams need opportunities to have fun with each other, which is especially important in a remote environment.





A technique that has worked well for me was to run monthly team-building activities. Each team member would sign up for a month to create and run the activity. This made the activity less "top-down" and left it in the hands of the team.

We had activities like Two Truths and a Lie, Virtual Connect 4, team trivia, and a zombie game.





TEAM TRIVIA

Ft. Leann Manning!





What is one thing on your bucket list?

A. Spend the night in a haunted castle 	B. Snorkel in the Great Barrier Reef 
C. Go whale watching in Iceland 	D. Watch the olympics in person 

What song always gets you pumped up?

A. HUMBLE. - Kendrick Lamar 	B. Black and Yellow - Wiz Khalifa 
C. Thunderstruck - AC/DC 	D. The Final Countdown - Europe 

Which one of these things would you most want?

A. Ability to read people's minds 	B. 365 days of Halloween 
C. A flying car 	D. Ability to control the weather 

Zombie Game

Most of us have fallen victim to the mistakes on this list at least once or twice in our lives, each of us zones out and enters "zombie mode."

If you have done the item on the list in the last 6 months, then the you have "got bitten" and must blackout your screen. Last one alive survives the Zombie apocalypse.

1. Forgot to lock the front door lock
2. Got out of the car to check that front door locked
3. Took a bite of a food with the wrapper still on
4. Put a non-food item in the fridge
5. Forgot where you parked
6. Tried to get into the wrong car
7. Missed a meeting
8. Thought it was a different weekday
9. Forgot a birthday
10. Accidentally missed a deadline
11. Forgot to eat lunch
12. Forgot you had lunch and ordered out
13. Misplaced your glasses
14. Misplaced your coffee cup
15. Misplaced an important paper
16. Accidentally deleted an important email
17. Forgot your keys
18. Forgot your wallet
19. Locked yourself out
20. Misspelled your own name or email address

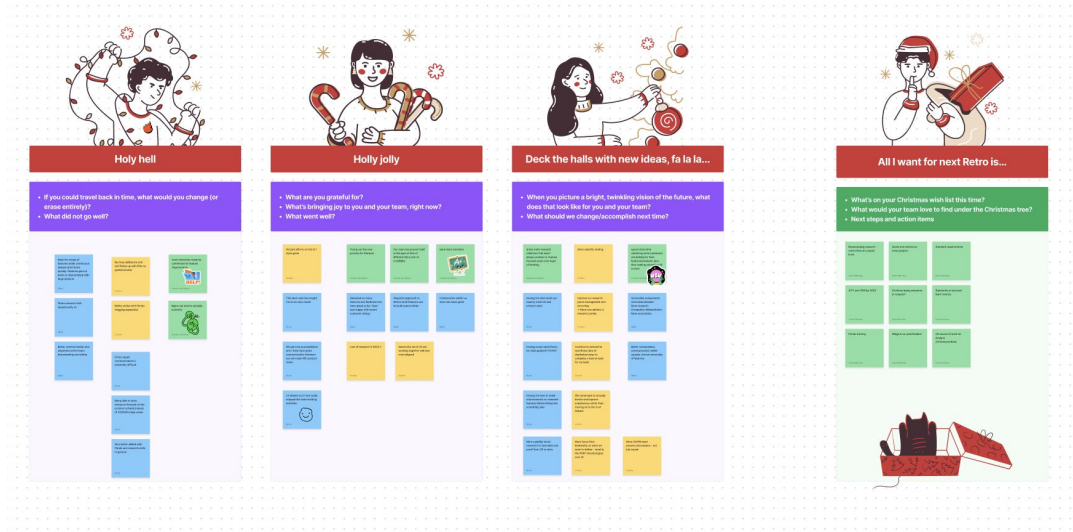


Annual Retrospectives

Running retrospectives with the creative teams at the end of each year is enlightening and cathartic.

Retros give the team a chance to vent about the problems they face and carefully consider what actions they could take to make future changes.

I will typically use the results from the retrospectives to assist in creating team goals for the following year.



Clear Goals & Success Criteria

Measuring results, candid feedback



Goals, Success Metrics, UX Champions

The fastest way to sink team morale and get poorly performing teams is by not having clearly defined goals. It is the single most important thing I do as a people leader.

The goal must be easily understandable, comprised of a single idea, and measurable.

Every year, I create goals for my entire team and the success metrics I want to see achieved.

I have also seen great results by assigning team members as "champions" on a particular topic (Accessibility, Research, Style System, etc.) This allows me to cater to individuals' interests and strengths.

Responsibilities	Deliverables
UX Consistency and Accessibility	All PSAT UX components for admins and learners in one place with established rules for use and best practices Terms established through documentation and consistent. (Ex: Clone or Copy) All PSAT UX components for admins and learners meet WCAG 2.1 accessibility standards by end of 2024
Internationalization	All PSAT UX components following internalization best practice by end of 2024 Continued research into global market needs (Ex: Competitor space in EMEA, APAC) Present to stakeholders quarterly
Internal Relationships	Quarterly touchpoints with Content, SEs, Support, Success, and Managed Services to get product feedback. Quarterly check ins with Greg Stewart for competitor insights. Present insights quarterly with stakeholders
Research and Test-Learn	Establish research best practices for UX team use Organize and build a process for managing user outreach Establish standards for test and learn metrics (3.5 or over customer satisfaction rating, 3-month page utilization baseline, etc.)

Goals

- Goals and Metrics established before dev work begins. This includes Pendo tracking or data dev needs to deliver.
 - Pendo training completed by H1
 - Goals, Jobs and metrics for success established and shared on planner board and with the UX team monthly.
 - No feature has missing goals or metrics in the H1/H2 recaps
- UX shares customer insights with the entire squad monthly.
 - Determine a delivery method to share results with the squad. (Teams, monthly meeting, etc.)
 - Determine a sharing cadence (daily, weekly, monthly - no less than monthly)
 - Share any research, customer feedback, Pendo analytics with the squad.
- UX features prioritized by risk and impact and shared with leadership.
 - Provide a list of features for each project and the UX impact
 - Track and escalate cuts, changes, causes
- Team exclusively utilizes established components, processes, and best practices in projects.
 - All designs meet WCAG 2.1 (2.2) accessibility standards
 - All designs account for internationalization
 - All research and test and learn metrics follow established best practices
 - Team is accounting for internal and external feedback in decision making.

Evaluate, Observe and Provide Opportunities

It's necessary to observe team members interacting on their teams. I will often join stand-ups or sit in on workshops. This is partially to observe performance but also to jump in when they need help or provide guidance and ways for improvement.

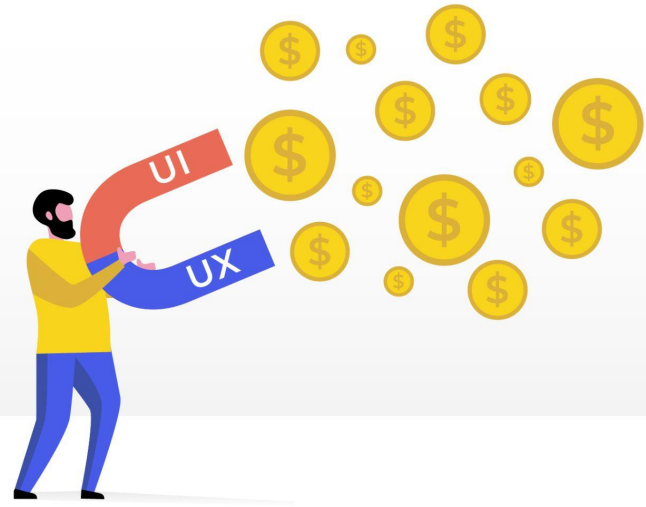
It is crucial to provide team members with candid feedback and a path to improvement. I have rarely had anyone be upset that I gave them areas for improvement.

It is also essential to look for opportunities for team members to grow their skills. Find projects you know will be challenging, but provide them with a learning experience. As a people leader, I find low-stakes opportunities for growth and remain a resource to them if they get in over their heads.



ROI of UX

Business minded team



Product Retrospectives

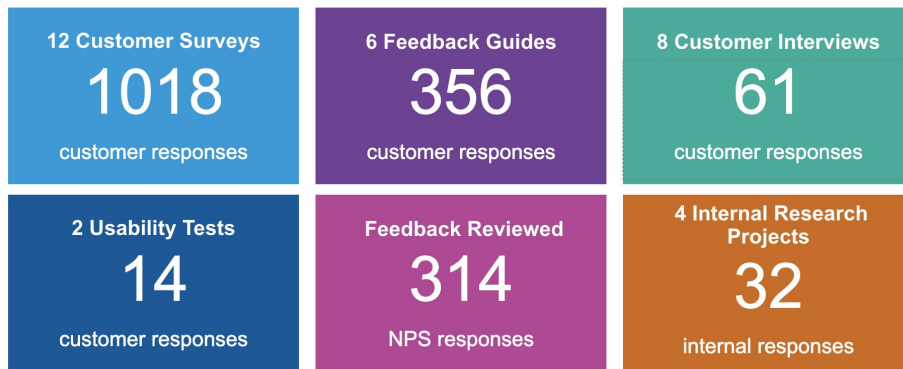
Show UX successes constantly to anyone who will listen.

It's critical to frequently showcase research, interactions, mocks, and prototypes to stakeholders.

I typically run monthly research recaps for all product teams and leadership. This shows the valuable work of my team but also provides stakeholders with customer research they may not have otherwise known.

I also scheduled bi-annual product retrospectives, where my team discusses each feature released over the last six months, whether that feature achieved the business goals set, and provides evidence of that success or failure.

Research Recap 2023 – 2,109 responses



Expected Goals and Outcomes

Admins would rank updates to assignment (grace period, clone) **3.5 out 5 in customer satisfaction**

Admins would use Draft (feature clicks) **350 times within 1 month time frame**

Admins would use Clone button (feature clicks) **2500 times within 6 months time frame**

Admins would use Grace Period toggle on/off (feature clicks) **2500 times within 6 months time frame**

Delivered Outcomes

Admins ranked updates to assignment (grace period, clone) a 4.2 out 5 in customer satisfaction

The feature has 480 feature clicks within 1 month

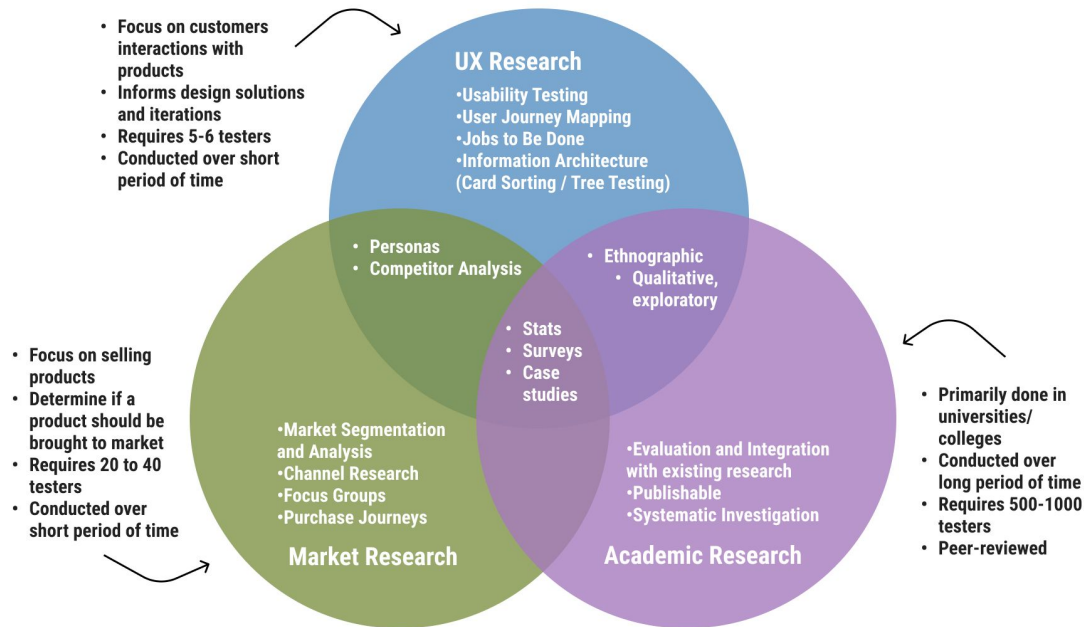
The feature has more than double the usage (6503 feature clicks) within 6 months

The feature has more than 15X usage (42,641 feature clicks) within 6 months

Describing UX to Non UXers

"But you only asked 5 users.." is a phrase that, unfortunately, UX leaders are still battling against. This is typically due to a need to understand how UX research differs from marketing or academic research.

I have run lunch and learns to discuss this topic with non-UXers to enlighten the organization about the differences and avoid this dreaded question.



Business Focused UX

It's easy for a UX team to get wrapped up in the customer's needs, empathize with their struggles, and want to push for features that help solve problems. However, it is essential to remind the team they work for a business that needs to be profitable to continue assisting those users.

For this reason, I show my team and stakeholders how the UX team's work ties back to dollars. This can be challenging with qualitative research. I have had success by tagging customer comments based on pain points, finding the annual revenue of that customer via Salesforce, and estimating the total potential loss of revenue for not addressing a customer's pain point.

Feature	Oct	Nov	Dec
Dashboard	569	556	373
User Uploader	344	363	272
Image Uploader	235	204	182
Reporting Dashboard	267	247	204
Article Search and Filter	150	143	174
Article Review	130	94	114
Account Settings	91	87	69
UX/UI	91	79	65
Article Customization	76	104	75
Article Explorer	66	87	96
User Profile	67	60	49
Profile Reporting	56	45	32
Article Reporting	45	35	22

Feature	Est of NARR Loss
Dashboard	\$ 2,360,180.00
User Uploader	\$ 832,739.00
Image Uploader	\$ 730,342.00
Reporting Dashboard	\$ 400,000.00
Article Search and Filter	\$ 236,367.00
Article Review	\$ 230,624.00
Account Settings	\$ 162,000.00
UX/UI	\$ 141,614.00
Article Customization	\$ 137,000.00
Article Explorer	\$ 107,500.00
User Profile	\$ 100,000.00
Profile Reporting	\$ 85,000.00
Article Reporting	\$ 75,000.00
Updated Articles	\$ 75,000.00
Integrated Help	\$ 70,000.00
More Content	\$ 69,000.00
Archive	\$ 65,000.00

Tag	Count	Potential ARR Loss
Dashboard	12	\$ 842,384.87
User Uploader	7	\$ 276,022.42
Image Uploader	2	\$ 406,455.12
Reporting Dashboard	1	\$ 386,245.20
Article Search and Filter	7	\$ 253,717.53
Article Review	5	\$ 266,631.87
Account Settings	5	\$ 207,329.90
UX/UI	10	\$ 155,219.86
Article Customization	1	\$ 63,136.79
Article Explorer	1	\$ 153,058.09
User Profile	11	\$ 312,869.60
Profile Reporting	1	\$ 60,701.54
Article Reporting	1	\$ 60,701.54
Updated Articles	1	\$ 94,345.00
Integrated Help	3	\$ 128,972.87
More Content	8	\$ 142,447.20
Archive	1	\$ 116,324.60

Thanks!