

# The Design Management Office

A GUIDEBOOK FOR DELIVERING  
DESIGN AT SCALE

**John Devanney**

with Meaghan Nishiyama  
and Jacob Pastrovich



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**So,  
your CEO  
bought into  
design...**

**now what?**



# Introduction

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Our design consultancy, Moment, has been around for over 15 years. In that time, we've always sought to redefine what lies ahead with our clients and their relationships with customers.

The innovations we help our clients achieve are made possible by industry disruptions driven by our connected world and new technologies created in the last 20 years. As a company made up of designers, we've grown up in this environment of digital disruption, and even thrived in it.

But while we were focused on the disruption in our clients' industries, many of us missed the disruption taking place in our own industry: design. We were slow to realize how the growth in both scale and influence of user experience and digital product design created new challenges and opportuni-

ties. We might have been late to recognize it initially, but we're catching up fast—a new dialogue is rapidly forming to fill the gap.

This is evidenced by a number of new contributions to the conversation about design leadership, management, and operations. From Artefact's efforts to measure design maturity via a thoughtful self-assessment survey, to John Maeda's creative leadership platform, to the book by Peter Merholz and Kristin Skinner that explores methods for building a successful and effective design group within a larger organization, to Rosenfeld Media's newly formed Design Operations Summit—it's clear that there's no shortage of territory to cover on the subject.

Starting in mid-2016, we began writing and speaking about the Design Management Office as a concept for organizing design operations. During our early exploration, we took clients through assessments of their design capabilities, and have given several conference presentations on design management. After developing the concept further, we decided it was time to create a more comprehensive resource: the book you're currently reading.

## **This guidebook**

As a practice, design operations is just getting started. We hope this short book will help build understanding of design management's value, and what creating and installing a

DMO—or whatever you might choose to call it—could mean for your organization. Through consulting for our clients, Moment will continue to do our part to better understand these challenges and how a DMO might help solve them. If you're a design manager or leader working with a large digital product design team—or even a small one—this guidebook is for you.

We look forward to continuing the conversation.



# How we got here and what lies ahead

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If you've experienced design management trouble, you're not alone, and neither are your colleagues. As an example, a few years back a friend of Moment landed a dream design job at a top consumer financial services firm. After years of design evangelism and doing great design work with their team, executives started listening, then taking action on their recommendations. Soon they became the VP of design, the first the company ever had.

After championing what design could do for the organization, it was time to deliver. But with this new role came the responsibility to make the design promises real. The “oh shit” moment set in—in both exciting and frightening ways. A fair share of “FUDs” emerged:

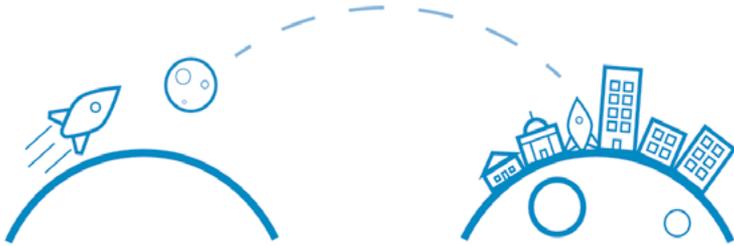
- **Fears** – failure, that design won't actually deliver on what I've said it can
- **Uncertainties** – how to execute design that actually delivers business results, what to take on in the first 90 days, how many designers are needed, budgets, larger business goals
- **Doubts** – designers' skills aren't up to snuff, that all of the C-suite is actually on board with the investment in design

This VP of design isn't the only one with these "FUDs," but before we dive deep, let's take a step back and look how we got here.

## **The Explorer and the Settler**

Over the last couple of decades, digital product and service design have gone through periods of rapid evolution. During the rise of the internet, the work largely focused around the desktop computer and browser. With the mass adoption of the smartphone, we added mobile platforms to our work. Now, as designers, our current area of focus is around multi-platform products and services.

These last 20 years of digital design have been, in a sense, an "Explorer Age," where designers and colleagues in adjoining disciplines have worked without a map. Each disruptive turn through a new technology or platform was a discovery that seemingly could only lead to exciting new experiences. Just think back to when the first iPhone and iPad were released. The possibilities felt endless.



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Design is no longer the vast unexplored territory it once was. We've moved from the "Explorer Age" to the "Settler Age."

Designers who grew up in these heady days remind us of America's early explorers—regular folks who left other lives, attracted to new territories by endless possibilities. Much like the farmer who left his land in the East for the vastness of the West, these were graphic designers who gave up print for web, writers who left their posts for jobs in content strategy, and industrial designers who gave up the physical for the digital.

While the exploration is far from complete, it's time to recognize that there are many areas that have been mapped fairly well. Our space—where innovation and discovery are the norm—is no longer the vast unexplored territory it once was. Paradigms have been set, patterns created to be reused, behaviors sorted out. In many places, we've moved from the "Explorer Age" to the "Settler Age."

This is most evident when it comes to designers themselves. Designers entering the field today are no longer making it up as they go along (as we once did). They're digital natives who have broad, user-centered skills and an intuitive understanding of well-established interaction paradigms. Instead of scouting and probing unknown digital environments, they comfortably inhabit these spaces.

We're currently at a point of convergence in the world of digital product and service design. The shift from "Explorer Age" to "Settler Age" in digital design coincides with a bigger development in design's business trajectory. After decades spent advocating for design-led approaches, thought leaders in design and business have progressed the conversation from how design can be valuable, to how to effectively deploy it.

In *The Design of Business* (Harvard Business School Press, 2009) Roger Martin argued for design thinking as the secret ingredient that helps companies innovate and ultimately win. Since then, you'd be hard pressed to find a business leader that argues the opposite, yet the design community often still fights the same old fight: evangelism. It seems that some of us are the last to realize that business at large has moved on and is now focused on operationalizing design.

We've been given a seat at the table to realize the value of design for business. Now is the time to shift our energies from evangelism, toward operations.

## **What's going on now**

Design's new seat at the business table has created new problems for designers and design leaders. If we all agree that design is important and drives value, how do we consistently deliver on that promise? As organizations mature beyond design awareness and invest in design capabilities, design leaders are the ones being held accountable for the return on investment. That means they'll have to build and manage large, often global, design teams. These large teams are also in a state of transition. They're moving from making interfaces, capabilities, and experiences to take on the larger challenge of bringing everything together to help their organization build relationships with users and customers.

There are a few things that companies with large design teams are up against: scale, careers, and measurement. Before any team can even attempt to take on the monster task of strengthening customer relationships, they need to first address these three pain points.

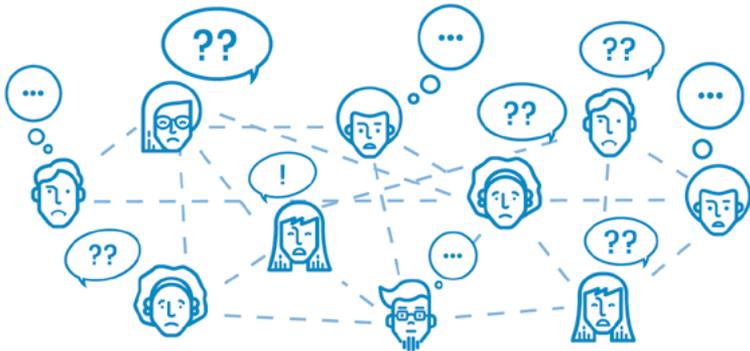
These next few scenarios might feel familiar.

## **The major pain points**

### **Scale**

If you're reading this, you might already be feeling the growing pains caused by scale—from your processes, your hiring practice, and the projects you take on. That's because tried-

and-true systems tend to break down in teams with over 20 designers. That's also the point where more management is required to build capacity and drive impact as teams span multiple products and geographies. When teams grow and become more interdependent on one another, it introduces new levels of uncertainty. It also becomes harder to undo and unravel complexities in order to reset expectations. Communication breakdowns make it difficult for teams to share knowledge organically and collectively create a decision-making framework.



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**Scale and growth add uncertainty among interdependent design teams.**

## **Careers**

Large organizations focused on hiring designers quickly realize that recruiting is a giant hurdle. It's directly followed by the next one: retaining the designers they just hired. Designers are a hot commodity and they have a lot of options: doing in-house product work, working for an agency, permalancing, or going freelance. For many, money isn't the deciding factor in where they choose to work—in order to keep designers around, they need career paths, to feel like they're an organizational fit, and interesting projects that keep them engaged. If you fail to check off the right boxes, you run up against high churn and turnover equaling sunk costs and wasted resources.

## **Measurement**

Measuring design's performance and value has been historically difficult. This is in part because designers are too often reluctant to put in the extra effort to articulate the value of their work in terms the business can understand. However, just because it's difficult doesn't mean we shouldn't be doing it. When product and technology stakeholders don't see the value design brings to their projects, they tend to discard design altogether. Projects without clearly agreed upon design metrics and measurements create the risk of the business pulling the plug. But just because the business looks for quantifiable results doesn't mean that design teams are equipped to deliver. Teams have to overcome culture, tools, and knowledge barriers before any measures go into place. Learning to communicate the value of design in a language that busi-

ness stakeholders can understand is critical to our industry's success.

The running theme between these three areas? How to consistently deliver on design's promise to bring results. To help address this larger, overarching issue, we shifted our focus from defining the challenge to designing a solution for it.

Surprisingly, there aren't many resources aimed at helping design managers formulate a comprehensive strategy that deals with the full scope laid out in the Design Management Framework, which you'll read more about in the next section. But first, let's touch on the concept of a Design Management Office and what it could do for you.





The background of the slide is a solid blue color. On the left side, there are several overlapping white hexagonal shapes that create a sense of depth and perspective, receding towards the left edge of the frame.

## **What's a DMO?**



# The DMO's potential

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In the past, maturing industries like manufacturing and large-scale software development have faced similar challenges that digital product design faces today. The need to manage complex teams across multiple tracks of work led to the creation of a construct known to managers everywhere: the Project Management Office (PMO). A PMO operates separately from an organization's typical project work to set standards, develop tools, and coordinate efforts in complex environments.

In working with our Fortune 500 clients and leaders in the design industry, we hypothesized a similar concept, the Design Management Office (DMO) that could deliver the value of design within complex organizations in a similar manner. The potential value of an initiative that is laser-focused on improving the quality of design delivery at scale intrigued us.

## What's a DMO?

Could a Design Management Office define the scope of what it takes to manage a large, distributed design team? Could a dedicated entity focused on the management of design teams improve quality and communicate ROI?

Our vision for design operations is a dedicated, centralized platform—whether it's a group, initiative, or office—that sits within an organization's design team. A Design Management Office should develop a comprehensive strategy for how design teams are brought to bear on organizational challenges. The Design Management Framework outlines these types of challenges in the next section.

A DMO should look across projects to reduce waste and overcome the communication, knowledge management, and decision-making issues created by scale. It should bridge the culture gap between designers and the rest of the organization by building the team's brand internally. Perhaps best of all, the DMO should free up designers to focus on delivering great design.

Now that we've established what a DMO is, let's talk about the steps necessary to set one up.

When it comes to design, organizational pain points typically boil down to three aspects of a designer's work: the **processes** they use, the **people** who do the work, and the **projects** they take on.

Separately, within these three aspects of design, there are different stages to consider in the progression towards design maturity:

- **Defining** a shared point of view
- **Equipping** designers with supporting tools and processes
- **Connecting** and relating to the rest of the organization

We call this system the Design Management Framework (page 26). It contains 12 components that describe the full scope of what design teams in large organizations need to manage in order to successfully and consistently deliver the value of design as they scale.

You'll find that each of the Design Management Framework's 12 components (we go into further detail in subsequent chapters) lies within one of the three stages: Define, Equip, and Connect. These stages are meant to help you orient how far along you are down the path toward successful design management. For example, if you feel your organization has solidly defined processes for user-centered design, research and insights, and solid design systems, then you should consider placing your focus on connecting and communicating with the organization.

## **The Design Management Framework**

The Design Management Framework's stages (Define, Equip, Connect), pillars (Process, People, Projects), and components will help you create a strategy to fit your organization's design management needs.

### PILLARS

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## **Process**

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## **People**

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## **Projects**

 **Define**

User-centered  
design

 **Equip**

Research  
and insights

Design systems

 **Connect**

Organizational  
transformation

Designing teams

Learning  
and knowledge  
management

Individual career  
growth

Standardized  
team approaches

Project pipeline

Project framing

Value communication

Impact evaluation



# Installing and operating a DMO

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After reading through the subsequent chapters and once you gain a deeper understanding of the elements that make up the Design Management Framework, you'll probably realize that no two Design Management Offices will operate in the same way. However, if you're in search of a clear path to design management nirvana, consider these three steps:

**Assess, Propose, and Operate.**

While you might already be managing a large team, understanding the groundwork you've laid is the first step to setting up a DMO. From there, you'll be able to evaluate and design the best approach with business priorities in mind. Lastly, the ongoing operation of a DMO takes dedication in order for it to have real impact on your organization.

## Setting up a Design Management Office won't happen overnight and that's OK—just remember any large organizational change takes time.

### **Assess**

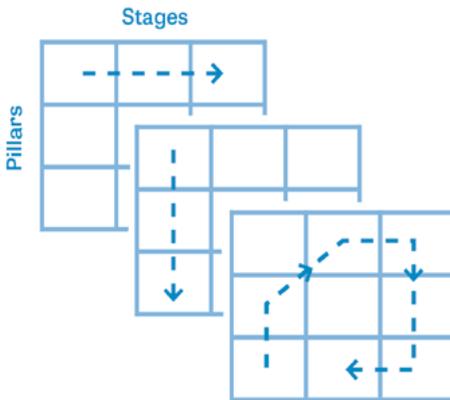
The first step to creating a Design Management Office is to make an honest assessment of the current state of your design operations. Start with the assessment worksheet (page 34) on your own to capture your perspective on your organization's strengths and weaknesses. After completing your assessment, gather teams, stakeholders, and partners and have these groups also assess design's impact in the same way.

Once you've gathered these valuable assessments, synthesize the information and highlight areas where stakeholders agree and disagree on opportunities for improvement and share with those involved.

### **Propose**

Once you've fully assessed your design operations with the proper teams, you can roadmap the best DMO approach against your business priorities. Again, use the Design Management Framework (page 26) as a guide.

You might choose to go stage-by-stage tackling the Definition components, the Equip ones, then onto the Connect phase. Or you might want to address all of the Process components, then move onto People, then Projects. Or maybe the assessment worksheet uncovers strengths in certain areas and weaknesses in others. Place your focus on laying the groundwork, then find ways to distinguish the areas where you'll place resources.



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There are any number of ways to move through the Design Management Framework. After assessing the current state of your design operations, you'll know where to place your focus.

After you land on an approach, outline the ROI you anticipate from your effort and roadmap more projects that will help you achieve your intended marks. Determine what your DMO team or structure looks like. It could be a long-standing dedicated team or a project-by-project task force. Secure

## **What's a DMO?**

a budget that corresponds (this could mean time or actual funding to hire outside consultants), socialize your plans with the company, get approval, then staff your DMO projects. Once your plan is in place, move on to operating your DMO.

## **Operate**

We've seen organizations run projects to improve elements of the Design Management Framework, only to fall short later on. Why? Because they fail to set up structures to execute ongoing improvements and they don't communicate their efforts. Much of the expected value of the DMO will come as a result of on-going operation and maintenance efforts.

To make sure you don't fall victim to the same mistakes, define a staffing and operations model for your DMO and socialize it with the organization. Decide who will be responsible for which components. Determine if you'll hire into special full-time positions or look to outside consultants to help you set up and run your DMO in the long-term. It's important that these are clearly stated from the outset. From there, install and assimilate your dedicated team. Establish an onboarding model for project-by-project team members so they completely understand the tasks at hand and create a system of regular communication and reporting.

Following your proposal or roadmap, run individual projects to improve capabilities, measure and communicate their value, and iterate on the operating model as needed. As you

run projects, part of properly operating a DMO is to do a temperature check. Ask, “How are things going?” Periodically gather the same group that filled out the DMO assessment sheet to see how you've improved or if there are areas where even more focus is needed.

### **The payoff**

A successful Design Management Office should:

- Increase the leverage of design teams by shaping projects faster and more effectively
- Improve quality by setting standards and constantly iterating on them
- Help build and retain a high-performing design staff
- Communicate the value of design in terms that business stakeholders understand

# Assessment worksheet

Use this as a tool to assess how your organization currently operates across the components of the Design Management Framework.

## **Rate by maturity or performance**

If you're just starting to put your design team together, rate each component based on the team's maturity, from 1 (haven't started) to 10 (highly developed). If you already have an established design team, rate by performance, from 1 (poor) to 10 (excellent). If you need a starting point or ideas for how to address the areas where you're underperforming, consult the "Playbook" sections after each component chapter.

When you're done, you'll be able to clearly identify areas for investment and improvement.

## **For a downloadable PDF, please visit:**

<http://momentdesign.com/idea/dmo-resources/>

1 2 3 4 5 6 7 8 9 10

**Process**

User-centered design

Research and insights

Design systems

Organizational transformation

**People**

Designing teams

Learning and knowledge management

Individual career growth

Standardized team approaches

**Projects**

Project pipeline

Project framing

Impact evaluation

Value communication





# **The Pillars**



# Process

Plenty has been written to explain the ins and outs of contextual research, user journey mapping, tool kits, and other aspects of the user-centered or human-centered design practice. Because you're reading this book, you've probably bought into the idea that selecting the right methods and applying best practices leads to better results. This chapter on process isn't meant to rehash the details of individual methods. Instead, we cover the common pitfalls design teams run into when trying to implement user-centered design in large organizations, and what can be done to avoid, then alleviate those pitfalls.

# Process

## Define

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User-centered design 41

## Equip

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Research and insights 49

Design systems 57

## Connect

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Organizational transformation 63



# User-centered design

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## **How to define a point of view on the ways the design team achieves a user-centered approach.**

It's well-established that products and services that closely align with an end-user's needs and wants are successful. It's also clear that user-centered design is an effective approach to designing those kinds of products and services. When we talk about user-centered design, we refer to a set of methods that provide an explicit focus on the user's context and needs throughout the design process. At small organizations with a few designers, it's easy to adopt a user-centered design approach, but when an organization becomes large, it becomes more difficult to ensure that user-centered design happens consistently.

### Challenges

Standard user-centered design methodologies give teams the flexibility to select individual methods based on the context of a project. While this flexibility is generally a good thing, in large organizations, too much is a liability. The number of projects scattered across an organization's product and service ecosystem means that teams and their approaches to user-centered design easily become disjointed. The variety means that teams must adapt the principles of user-centered design in many different, complex contexts.

With forces of scale at play, teams naturally interpret and apply principles of user-centered design inconsistently across projects, or in some cases, ignore them altogether, especially when under pressure. Project success becomes closely linked to personalities of individual designers and stakeholders, rather than something more reliable and scalable: a common, shared approach.

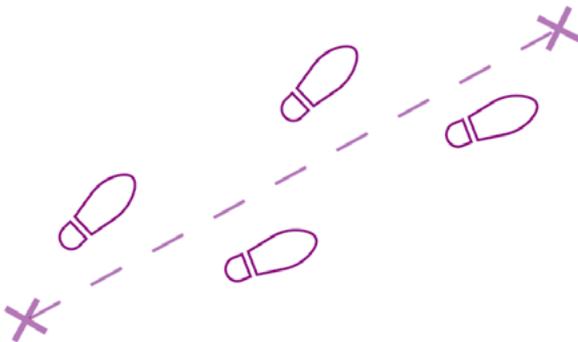
Think about the projects your teams are working on right now. How many of them are truly centered around an end user's needs and wants? How many are centered on something else, like a stakeholder's needs or wants, or the capabilities of a piece of technology, or what your competitors are doing? If any of your design team's projects center around anything but the user, you run the risk of a product that doesn't benefit anyone, especially the company's bottom line.

## The DMO approach

A DMO should define a point of view for user-centered design that helps teams consistently apply methods across projects, rather than reinvent the wheel each time. We don't suggest that you try to come up with a prescriptive step-by-step recipe for design. Teams still need the flexibility to tweak processes to fit a project's needs, just as a chef would adjust a recipe to fit the number of people they're cooking for. Instead, create a framework (or recipe) that describes the key principles, methods, and tools (ingredients) for user-centered design in your organization.

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A step-by-step recipe for design limits flexibility.



## Process

The Stanford d.school's toolkit, The Bootcamp Bootleg is a great example of a user-centered design resource. It consists of seven design principles called D.Mindsets—things like “Show Don't Tell” and “Radical Collaboration.” It also includes the now widely accepted five modes of design thinking: Empathize, Define, Ideate, Prototype, and Test. The kit first defines each mode then explains why the mode is important. From there, the bulk of the kit is a set of methods to follow. It's “more of a cookbook than a textbook, and more of a constant work-in-progress than a polished and permanent piece.”

## A Design Management Office should help teams consistently apply user-centered design methods across projects.

A DMO should create or select a resource similar to The Bootcamp Bootleg to give your designers a baseline set of expectations to work with that helps them advocate for the end-user, select the right methods, and recognize when a project veers off course. It should allow designers to focus on being great collaborators that get work done, rather than reinventing processes. The payoff? Consistently good products.



# Playbook

## User-centered design

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### **Determine the players**

Understand your organizational stakeholders by mapping product, business, marketing, and technology stakeholders against your product and service ecosystem.

### **Playbook your philosophy**

Document your design principles and approach. Outline how you'll disrupt blockers and create opportunities for innovation on projects and initiatives.

### **Define your methods**

Using the principles of user-centered design, establish a framework of methods that makes sense for your organization. In addition to individual methods, establish key goals, resources, and activity types.

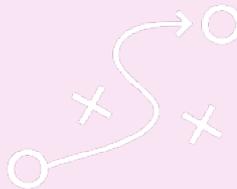


## Identify the tools

Put tools, processes, and resources in place that support your approach (read the sections about research and insights and design systems for help with this). Wherever you can, leverage tools that project teams have already created.

## Evangelize and iterate

Make sure designers understand your framework for user-centered design. Coach them to share it with stakeholders using language that makes sense for the organization.



## Process



# Research and insights

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## How to equip design teams with resources that support research and insights

In theory, conducting design research to glean insights is nothing new, but many organizations lack a consistent, repeatable approach. For our context, “research” refers to a broad range of activities that collect quantitative and qualitative data about users and their experiences. “Insights” refers to the actionable information synthesized from the research. Both are required throughout the design process. Without effective mechanisms for collecting data and generating insights, true user-centered design isn’t possible.

## Challenges

When research and insights get disconnected from the design process, it’s usually because the mechanisms to inte-

## Process

grate them aren't robust or healthy. When designers and researchers don't follow a common recipe—or if they never get one in the first place—to properly bring all the research and insights ingredients together in the correct proportions, the result is a dish nobody wants to eat.

Collecting perspectives from the people that use a product or service is an incredibly compelling and useful exercise. When user research gets lost in the design process, it's often because teams fail to really understand or empathize with their users' stories. Or it's because the stories were too hard to collect in the first place. Or they don't recognize the value, so they skip it. To them, engaging directly with users and customers is too difficult and time consuming. Unable to immerse themselves in the lives of their users, project teams struggle to develop the empathy needed for user-centered design.

It might be obvious to state this, but the flip side of not enough access to users is too much. When data is too easy to come by and there's a lack of rigor around hypothesis-formulation, teams drown because they're unsure how to transform the research into insights that are comprehensive and actionable. In this situation, individuals desperate to glean something from the data cherry-pick findings that fit their own hypotheses or needs. Without regular planning, execution, and analysis, it's hard to get a sense of what the organization actually knows or doesn't know about its users, or how its products and services perform at any given time. This renders data collection and research effectively point-

less. The challenge is to start with the overall goal, then adopt methods to help get there.

## A Design Management Office should make it easier for teams to engage directly with users to collect data and generate insights.

### **The DMO approach**

A DMO should put common tools, processes, and resources in place to make it easier for teams to engage directly with users, collect data, and generate insights at key steps along the way. It should also centralize research efforts to minimize confusion and waste.

At Moment, because we're a design consultancy with many of years of combined experience, we once had an “embarrassment of riches” problem when it came to research: lots of methods and tools, but a lack of organizational understanding around which ones to use and when. As a result, one of our managing directors, Alexa Curtis, developed a solution by mapping research methods to stages in a product's lifecycle. We now separate methods into Generative and Evaluative buckets, then categorize by secondary research, quantitative, qualitative, facilitated, and communication tools. From there, the methods map to the stage in a product's lifecycle:

## Process

new product definition, first release, minor release, major release, or product retirement. When teams get stuck on which method to use, they can refer back to this map, using the product's lifecycle stage as their guide.

There's a wide range of options for collecting user insights—from completely in-house to totally outsourced and everything in between. A DMO should help decide what mechanisms make sense for the organization and its projects, like if you should conduct research with your design team or hire an outside firm to collect the data. Centralizing the investment in these mechanisms takes advantage of scale, making it possible to undertake initiatives that wouldn't be possible otherwise.

By centrally coordinating research initiatives and methods, a DMO allows design teams to focus on the execution of a range of robust mechanisms for data collection and interpretation. It also cuts time previously spent on defining new research analysis methods. In the end, teams will be able to better justify their investments, and free up designers' time to focus on delivering work.



# Playbook

## Research and insights

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### **Map participants**

Outline everyone currently driving research and insights, including secondary data sources and external partners.

### **Clarify methods**

Separate on-going measurement activities—per-project value and user testing to generative programs—then establish and apply standard methods.

### **Estimate investments**

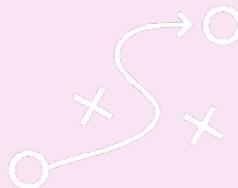
To set expectations and timeframes up front, create estimates for methods and approaches, consulting costs, and other expenses.

### **Develop facilities and tools**

Define and build facilities for on-going measurement and user testing. Publish standard tool kits for performing, synthesizing, and communicating research.

### **Set standards for action**

Define standards for making research and insights actionable by setting requirements for target users, platform application, and implementation feasibility.



## Process



# Design systems

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## **How to equip design teams with systems that support their processes.**

Design systems come in many shapes and sizes. There are long-standing precedents for reusable patterns and systems and some say they're a fundamental characteristic of good design. For the context of this book, a design system refers to any collection of guidelines, styles, templates, patterns, and components that enable consistent, on-brand design. The immediate benefits for users are products and services that are easier to recognize, understand, and use. Design systems also reduce inefficiencies by preventing project teams from spending time and effort on developing new and conflicting systems for each project.

## Process

GE's design system is a great example. It follows a simple formula: Visual Language + Interaction Patterns + Technology Framework. The main goals for their systems are for product teams to be able to use them without UX support. They set out to accelerate software development, align designers distributed throughout their organization, empower designers to focus on the important stuff, and, ultimately, to evolve product experiences in a unified way. GE has accomplished this through guidelines and coded components distributed via an intranet site that also includes design principles, personas, reference applications, and more. GE has since extended their system to other divisions and functions at the company, including healthcare and communication design.

## Challenges

When it comes to delivering the value of design in large organizations, design teams often view design systems as low-hanging fruit. They're a compelling and tangible example of how design eliminates inefficiencies and enhances products and services, but they often lose relevance faster than anticipated. Adoption of the systems drops off as a result. Additionally, design teams get bogged down if they don't start with a clear idea of the range of products and services their system needs to support, or how the system will get incorporated into the user-centered design process. When adoption efforts fail, it's usually because there isn't a dedicated team to maintain, update, and continually keep the system relevant.

The goal of implementing a design system is to make it easier for project teams to spin up products and services. However, if the design system ethos goes too far, it can be used to shut down exploration and creativity. Playing it safe in the name of consistency is an easy trap to fall into.

## A Design Management Office should be in charge of creating, implementing, managing, and evolving an organization's design system.

### **The DMO approach**

Putting a design system in place is a major undertaking that requires significant upfront and ongoing investment. Getting return on that investment means driving continuous adoption, and that's only possible by maintaining the system after its initial launch. A DMO should manage creation, implementation, continual evolution, and enforcement of design systems.

Improving overall design quality by providing teams with comprehensive standards and guidelines is a tangible way for a design team to deliver value at scale. It eliminates wasted efforts and noticeably enhances front-end business products and services.

# Playbook

## Design systems

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### Map your touchpoints

Understand your platform and service ecosystem by mapping all current and planned touchpoints across the organization. Note and highlight design system usage and consistency.

### Set standards

Determine what brand and platform best practice standards to utilize and how to best execute them.

### Determine your formats

Use the tools that will help create and disseminate your organization's design system. (Google's Material Design, IBM's Living Language, Salesforce's Lightning Design System, and VMware's Clarity are all good references.)

### **Flexible, accessible, and useful**

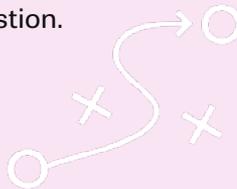
Ensure that your system is adaptable and that it can evolve. There will come a time when you'll need to start fresh.

### **Communicate and assimilate**

Educate your organization—including non-design teams—on the design system and express the value it brings.

### **Perform checkups**

Have brand or platform standards changed? Have teams stopped taking risks? Evolve the system if you've answered “yes” to either question.



## Process



# Organizational transformation

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## **How to connect the rest of the organization to the design process.**

Design thinking and empathy for users can have a huge transformational impact on organizations. By building a shared understanding and vocabulary around user-centered design—and having it permeate beyond design teams—it's easier for product and service teams to collaborate.

For large organizations across a number of industries, design thinking and user empathy have quickly crept into the conversation and proven to be critical components for survival in today's competitive landscape. *Harvard Business Review's* September 2015 issue, "The Evolution of Design Thinking" was a pivotal point. It signified that the business world had

## Process

taken notice of design's potential to deliver value. We now need to capitalize on those signals.

## Challenges

Today, you'd be hard-pressed to find design thinking and customer empathy not mentioned in corporate strategies and communications. However, incorporating design into organizational cultures, structures, and processes is much easier said than done. When design teams fail to envision and help manage the integration of design into the organization, it leads to confusion and even dismissal.

## A Design Management Office should shift corporate culture and manage an organization's ability to change.

Sometimes people feel threatened by specially-trained designers, especially when they use uncommon language and project a sense of entitlement. Far from smoothing things out, "adding design" can cause disruption, confusion, territoriality, and even hostility. Does it mean that employees without "designer" in their title neglected fundamental customer-centric aspects before designers arrived? No. Large organizations usually have long-standing and deeply-rooted cultures, structures, and processes that need to be understood and respected when trying to integrate design.



On the flip side, design teams feel like they walk around with a scarlet “D” when integration gets rocky. They can feel like they’re cut out of larger business processes. Designers can do their part to connect by avoiding intimidating design jargon, and do everything they can to stop making teammates feel like they “just don’t get it” because they’re not “designers.” Teams need to avoid territorial urges that poison the culture necessary for user-centered design. Design is about collaboration, not division.

### **The DMO approach**

Evangelizing design by getting people bought into the idea that it provides value is just a first step. Rather than pushing designers into the corner of a newly minted office, they need to fully integrate with the organization to realize and maximize their potential.

Successfully communicating and navigating this transformation is extremely difficult, though. Having a team that can deploy designers and highlight the areas where they can best contribute is difficult at large organizations. The realization and understanding of the value of design fluctuates depending on which team or leader you talk to. Ultimately, a DMO should help shift corporate culture and manage the ability to change.

Intuit is a great example of design successfully transforming the company as a whole. Over ten years ago they looked to change their organization by becoming a design-driven

## Process

company and embed design thinking throughout. They wanted to empower over 8,000 employees to drive innovation and improve customer experiences through an effort they called “Design For Delight.” To reach their employees, Kaaren Hanson, a design director at the time, shepherded and helped build what they call the Innovation Catalyst program. The Innovation Catalysts are Intuit designers and design managers who spend ten percent of their time with teams outside of their own. They help other teams learn design methods and apply design thinking to their problems. Intuit’s end goal was to embed design into the DNA of the organization, which they successfully did judging from the influx of customer experiments and product innovations that they’ve accomplished.

A DMO should expand on design evangelists’ enthusiasm and provide additional education to help organizations understand what design thinking and user empathy are and why they’re important. A DMO should work with stakeholders to figure out how to incorporate design into culture, structures, and processes. Taking this approach allows designers to focus on day-to-day design work with minimal disruption. It also enhances their ability to collaborate with the rest of their product and service teams to do great work.



# Playbook

## Organizational transformation

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### **Empathize with the organization**

Find out how your organization perceives design teams by polling non-design teams and business leaders. Do the same with designers to see how they feel they're perceived by the rest of the organization.

### **Map pain points**

Visualize various points of friction based on process, structure, culture, and geography.

### **Share resources**

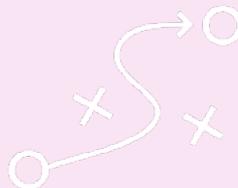
Highlight areas where designers can contribute to the education of the organization. Provide ways to share tools and resources with peers and stakeholders.

### **Develop a shared vocabulary**

Help designers speak the rest of the company's language and help educate the company on how to better communicate with designers.

### **Make it a conversation**

After integrating design thinking, re-poll teams to measure effectiveness and communicate the design team's value on an ongoing basis. Hold meetups so both sides regularly interact.





# People

For businesses already bought into the value of design, investing millions of dollars on staffing, equipment, conference rooms, and workspace might feel like it's enough. But what does it really take to build sustainable teams? How do you resolve tensions around relating to and assimilating with the larger organization? In today's overheated and competitive marketplace for digital designers, it's hard enough for organizations to get talented designers in the door, let alone keep them there. Organizations need to provide opportunities for designers to grow and learn. In the next four sections, we address what it takes to build sustainable teams.

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# Designing teams

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## **How to define team structures that fit the needs of the work.**

The quality of design work depends on the quality of the people performing it because design is, at its core, a very human craft. First attracting strong multi-disciplinary designers and then deploying them across the organization to tackle a range of problems are necessary steps in building sustainable teams. Knowing what types of designers to hire is crucial in avoiding wasted money and resources. In the end, defining, then setting up an environment that fosters creative thinking and attracts the right design talent will pay dividends.

## **Challenges**

Designers are a category of professional that large organizations might not be familiar (or comfortable) with. Teams of designers require particular space, tools, and infrastructure

to produce their best work. Beyond tangible things like whiteboards and Post-it® Notes, companies need to form a strategy for bringing designers on to projects alongside business and technology stakeholders. If these structures don't exist when your designers arrive, they'll find the nearest exit and join an organization that has its act together.

Teams must also negotiate how to deploy designers across the organization's product and service ecosystem. Furthermore, how will these designers establish a culture of creativity and iteration in an organization that's highly analytical and averse to the failure that comes with iteration? The vastness of product and service ecosystems makes it hard to figure out how to deploy designers against projects. There are any number of ways to “design the design organization.”

## A Design Management Office should provide oversight and structure across disciplines when it comes to matching teams with projects.

### **The DMO approach**

A DMO should take a bird's-eye approach to creating a comprehensive framework for the essential disciplines and skills expected from design teams. It should partner with human resources and operations teams to define a recruit-



ing strategy that allows the organization to attract top talent in a highly competitive market. It should advocate for design teams, making sure they have the space and equipment they need to support their work. A DMO should also create structures that take into account the organization's overall makeup and product/service ecosystem. Projects should match up with teams that are best equipped to take them on.

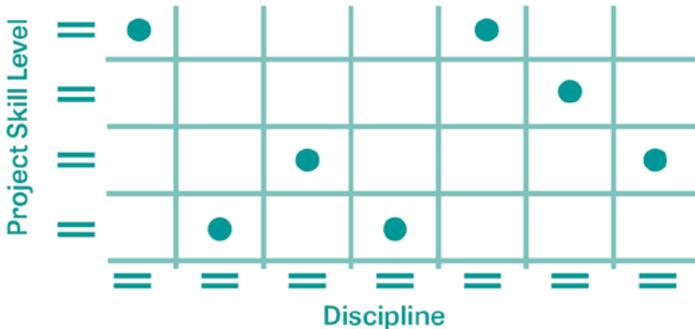
From their book, *Org Design for Design Orgs* (O'Reilly Media, 2016), Peter Merholz and Kristin Skinner's model for design teams is a combination of role definition and team structures. They define several core roles, like product designer, communication designer, user experience researcher, and design program manager, as well as some ancillary roles like service designer, content strategist, and creative technologist. Depending on the complexity of the challenge, organizations determine which of these core and ancillary roles are required to accomplish a project. Merholz and Skinner's model defines teams as pods of four to seven individual contributors, with design leaders, user experience researchers, service designers, and design program managers providing support and connection across multiple teams in a "Centralized Partnership." This centralization is similar to the DMO approach. At the core, what they describe is a method that organizes teams around business problems, rather than trying to organize the problem around the functions or available skills. The model's main goals are for teams to develop commitment across products and features, a connection to the culture, and to avoid

## People

disruption from inevitable reorganizations.

Maximizing each designer's skill set strengthens teams, ensuring each designer contributes fully, and results in a higher sense of job satisfaction. Because design is a broad field, digital designers need to be “T-shaped” generalists. By working on a wide range of projects, designers keep their skills sharp and well-rounded.

Start with a designer profile that reflects the multidisciplinary skills the organization needs. Do this regardless if you have specialized titles or lump designers into a single bucket.



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Create a profile for each project to reflect the skills necessary to complete the work. Build designer profiles similarly so they are a helpful input to project staffing.



At Moment, we look at seven core disciplines:

- Research and insights
- Product strategy
- Interface architecture
- Visual systems
- Client experience
- Process leadership
- Engagement management

As designers work on projects, they, along with their managers and mentors, assess their proficiency in these disciplines to track their professional growth. We also use a similar matrix to map the needs of a project back to the skills of the designers. For example, if a project is heavy on product strategy and visual systems, we make sure designers that fit that profile work on the project. This approach produces strong results on projects time and time again.

Once a structure is in place, there's the challenge of making sure designers have the skills to match project needs, which we'll cover in the next section on learning and knowledge management.

By providing oversight and structure across disciplines, the DMO creates an objective way to put teams together to match project profiles. Consistently tracking how designers and teams perform and how projects are profiled will help the organization make adjustments that increase the quality and level of design output.

# Playbook

## Designing teams

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### **Visualize your needs**

What are the types of initiatives your teams engage in? What skills are critical to their success? Outline these factors and assess your current performance as a group.

### **Sketch your profiles**

Who are your designers? What disciplines do their skills fall under? What depth of expertise do they exhibit? Map this against the range of problems they're asked to tackle. Where are the gaps?

### **Build a hiring strategy**

Collaborate with human resources to build role descriptions, recruiting targets, and interview processes.

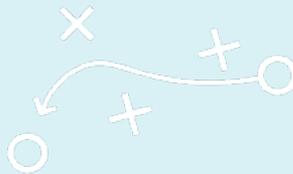


### **Envision work spaces**

Develop your vision for the types of physical spaces and tools necessary for success by balancing needs for collaboration and heads-down detailed work. Take into account your geographic diversity, team sizes, and methods for interfacing with the rest of the organization.

### **Plan onboarding**

Define a deliberate process for integrating new designers into the organization. Provide ramp-up on subject matter expertise, introduction to key tools and processes, and connections to key stakeholders.



## People



# Learning and knowledge management

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## **How to equip design teams with business and technology knowledge.**

Encouraging learning and knowledge-sharing among designers helps them keep up in a complex and rapidly changing field. Constant learning also helps organizations innovate by applying learnings from other teams to projects in parallel areas.

## **Challenges**

At small organizations, knowledge transfers organically because designers sit close enough to other teams—everything permeates at a quick pace. As teams grow, taking that sharing ethos and applying it at scale becomes difficult. The

other tough part is actually realizing the “we need to make a change” signals when an organization goes from small to big, sometimes seemingly overnight.

When teams grow larger and more distributed, efficiencies break down and it becomes necessary to put mechanisms in place that help create a shared knowledge base. Without these mechanisms and a DMO to ensure knowledge transfer remains a key part of an organization’s activities, left to their own devices, design teams will likely spend countless hours creating “new” tools. Instead, if they relied on a set of shared resources, they could have accomplished the same result in a fraction of the time.

Designers fresh out of school have skills and knowledge around new technology and innovative techniques that are often more sharp than those of a seasoned designer. However, the more experienced designer will have a leg up on the new designer in other ways because they’ve been working to understand the ins and outs of running projects, including the intimate details that only experience can bring. When siloed, each of these groups fail to learn from each other, when it would be beneficial for both sides to share their knowledge and expertise. The same goes for newly learned skills and resources created while working on projects. It’s great if a designer creates new tools, but if the rest of the organization doesn’t know about them, then how can you maximize their potential and grow the tools? It’s the old “tree falling in the woods” adage.



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Like a tree falling that no one hears, if the organization doesn't know about tools teams create, how can anyone maximize their potential?

Companies fail for any number of reasons. One of them is the inability to adapt and change to and with industry shifts. It's important to have a dedicated team that considers new technology and what it means to the organization as a whole—how to “get smart” and be prepared when new projects come along that utilize new technology. The same goes for technology or techniques that fall from favor—knowing when to pull the plug is invaluable. Companies need teams that will constantly check their pulse and keep them alive longer.

### **The DMO approach**

Organizations that consider learning and continual knowledge-sharing integral to their success are more likely to come out on top. It's one thing to preach the importance of learning, but creating mechanisms to ensure that it flourishes is the difficult part. This is where a DMO comes in handy as an

outside set of eyes and ears.

Centralizing knowledge management and distribution removes pressure from design teams to have an understanding around every piece of learning material, which is especially difficult at massive organizations.

### A Design Management Office should offload learning programming from designers so they can focus on growth on projects.

As design teams take on new projects—whether with new clients, on new platforms, or with new technology—they're constantly learning new skills, big and small. Even on the individual level, it can be hard to realize the impact a project or skill has on the company as a whole. With a DMO's dedication to tracking both internal forces (projects and explorations) and external ones (new technology), it should create a mix of internal tools and external resources (books, expert speakers) to ensure the material designers learn from is up to date and part of the design zeitgeist. In short, a DMO should create venues where knowledge can be shared—events, internal meetups, conferences, workshops, and more.



At Moment, we create weekly, company-wide meetings where teams share their progress on projects. Additionally, designers regularly give internal workshops to teach their colleagues new skills and tools. We also encourage designers to speak at and attend conferences and classes (and we give them a budget to do so). We also consistently staff internal R&D-style projects to develop a point of view on emerging technology—things like Augmented Reality and Voice UIs. The outputs range from internally distributed presentations and documents to conceptual digital products that we share with the public. We do this to sharpen our designers' skills in new areas and grow the company's knowledge in emerging tech.

A DMO should identify opportunities for cross-pollination and collaboration better than individual design teams. It should also function as a critical distribution channel that educates designers on the tools and processes developed to support project work. A DMO should offload learning programming from designers so they can focus on mentorship and growth on projects. That's not to say you shouldn't still encourage the labor of love, a DMO should simply help provide the proper venues and maximize exposure.

# Playbook

## Learning and knowledge management

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### **Understand your learning spaces**

At present, where and how do your designers share knowledge within your organization?

### **Map resources to profiles**

Decide what materials and venues (physical and digital) you'll need to create.

### **Centralize where possible**

Create internal, best-in-class tools that the rest of the organization will use. Communicate how designers can access them.

### **Plot new paths**

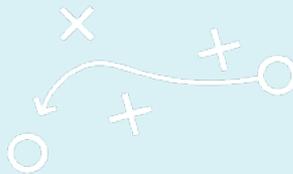
Find new avenues for learning and sharing where they don't already exist organically.

### **Mind the gaps**

Regularly take stock of your resources and find out where knowledge gaps exist. Plan how to fill those gaps.

### **Enable entrepreneurialism**

Create a space or “office hours” for designers to go when they have ideas or create resources that should become part of the organization’s canon.







# Individual career growth

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## **How to equip designers with a career tailored to their skills and growth.**

Both producing and supporting a clear growth path for designers are key in retaining designers and creating sustainable teams. In today's competitive atmosphere, it's difficult to recruit quality designers when they have so many options to choose from, like going in-house at a startup, doing design for an established product company, going freelance, or going to an agency that works in an array of industries. After putting time and resources toward growing and training designers, ensuring that they're incentivized to stick around will generate long-term value.

## **Challenges**

Because large design teams are relatively new in digital prod-

uct design, their organizations have just begun to experience the negative effects of turnover. Without career paths and performance review processes in place, the future is fuzzy for individual designers. Without defined expectations and mechanisms for growth, designers don't get the mentorship they need and get stuck on projects where they no longer grow because they become experts in complex subjects and systems but aren't promoted into leadership roles. All of this contributes to attrition, low output, and dissatisfaction.

### A Design Management Office should define career paths that fit the needs of the designer and organization.

High turnover rates, especially among designers, are a massive drain on company resources—things like training, knowledge sharing, client and team relationships. However, by offering opportunities for individual growth and giving designers the power to affect their future, they see a clearer growth path, which, among other things, leads to higher job satisfaction.

#### **The DMO approach**

A DMO should define career paths that are both desirable for designers and that make sense for the organization. The accompanying management program should provide designers and teams with real-time feedback.



Clear career paths help designers set goals and achieve milestones, which are key ingredients for job satisfaction and retention. Career management creates a vital feedback loop that helps the design team understand how their designers are (or aren't) growing and take action, instead of losing an employee.

Creating mechanisms to aid in individual career growth can look dramatically different at every organization, usually depending on the size.

A good design position constantly pushes a designer's abilities. At Moment, we help our designers grow through our career management program. We also share the progression of designer titles and what's required to level up. While we're always iterating on our own program, it's got three main flavors:

- **Designer record** – consists of a designer profile (see page 76), goals and areas for improvement, and a timeline of every project a designer has worked on
- **Career manager** – facilitates quarterly check-ins to reflect on learning, goals, and growth, which are inputs into project staffing
- **Feedback** – expectation that leaders should mentor and teams should provide immediate, candid criticism and praise at project retrospectives

This system has done wonders to put career growth in the hands of our designers. Ian Swinson discussed Salesforce's

similar techniques during his presentation, “Designing and Driving UX Careers: A Framework for Empowering UX Teams” at Enterprise UX in 2016. In that presentation, he talks about design careers as a framework made up of skills, rather than a ladder or clear-cut path everyone must follow. We encourage you to check out his talk for inspiration and help with defining the necessary skills for designers.

If you're ready to take the career growth of your designers seriously, consider what skills are necessary at your organization, and then find a system to track and manage those skills. Doing this work up front will help you recognize and promote designers that are ahead of the pack.



# Playbook

## Individual career growth

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### **Matrix the skills**

Define success for your designer roles and the levels of expertise—from perform, to mentor, to teach.

### **Pair mentors with designers**

Match experienced team members with newer practitioners. Provide tools to help them make career choices over time.

### **Review regularly**

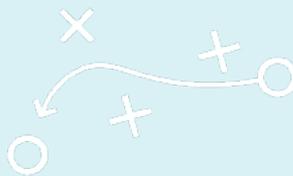
Assess profiles and goals with each designer's mentor or project lead. Connect the output of reviews to recruiting and staffing to help fill skill and experience gaps.

### **Drive feedback**

Set up expectations that there will be feedback at key project moments, milestones, and check-ins.

### **Recognize growth**

Regularly review designer skill levels and accomplishments against role definitions and your organization's skills matrix. Promote individuals as soon as possible.



## People



# Standardized team approaches

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**How to connect with the organization to deliver quality work through proper planning, scoping, and communication.**

By communicating with other teams on how design teams approach projects, it allows both sides to confidently interface with each other and sets expectations from the beginning. Standardized approaches also help to navigate bias and risk aversion through processes that self-sufficiently steer projects toward success. Overall value increases thanks to consistency from project to project.

## Challenges

Left to their own devices, teams have the tendency to create

a new approach from scratch for every project. This “do it your own way” method lacks consistency. If an organization approaches projects in different ways every time, there's little continuity for individual designers or other stakeholders to hang on to. That lack of consistency has adverse effects—it makes design teams look sloppy and degrades their reputation. On the flipside, when organizations set project approaches that are too rigid, it squashes creative thinking and sucks the fun out of design work.

Instead, the sweet spot is somewhere in between. Be consistent, but flexible enough to address the nuances of each project's problems. At Moment, to maintain consistency across every project, we have three types of project approaches, each with its own selection of planning and execution tools, but not predetermined detailed plans or off-the-shelf frameworks.

**A Design Management Office should help designers understand challenges and select the right approach to solve them.**

### **The DMO approach**

With a DMO in place, teams adapt to changes along the way because they're better prepared to have difficult conversa-



tions when expectations are unclear or misaligned. A DMO should prepare designers for these situations by helping them understand how to translate the challenge, identify the type of project, and select the right approach.

At Moment, we typically think of projects in three ways:

- **Vision**
- **Creation**
- **Evolution**

A **vision** to explore and illustrate opportunities that excite and rally stakeholders; the **creation** of new products and capabilities; and the **evolution** and strategic change of existing of products and services. While your organization might classify the projects you do differently, no matter how you do it, a DMO should help teams realize which bucket their project falls into. This helps teams then decide which activities they'll pursue to best tackle the challenge.

As a company, Airbnb frequently reorganizes due to their rapid growth. Regardless, Katie M. Dill, their director of experience design, keeps one approach at the center of every design team's focus. Inspired by Walt Disney and Pixar, Airbnb uses a highly visual storyboarded user journey mapping approach. This approach constantly refocuses the team around the Airbnb experience—instead of the product itself—helping everyone work toward detailed OKRs (Outcomes and Key Results) for functional areas such as growth, booking,

## People

and revenue. Their shared philosophy around the journey helps Airbnb contextualize detailed projects alongside host and guest journeys.

While user-centered design is about the methods being used, standardized team approaches are more about how to combine methods based on projects. For example, if a project will create a new capability or service, the team might do a competitive audit of the product's landscape. Along the way, the standard approach should include regular check-ins with stakeholders to ensure the project is on the right track. This helps uncover a deeper understanding on both sides as to what the challenges are and how to re-scope a project if need be.



# Playbook

## Standardized team approaches

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### **Identify project types**

Create an approach for each type of project that includes standard meetings like kickoffs, retrospectives, status updates, and team events.

### **Mentor and coach soft skills**

Coach active listening and how to handle difficult conversations to help designers interface with business stakeholders.

### **Create a playbook**

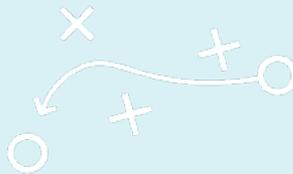
Create sets of activities, exercises, and planning materials based on project types.

### **Spark new ideas**

Shape opportunities for teams to mesh outside of projects to give insight into other areas of the organization.

### **Invite collaboration**

Include non-design teams in design conversations to help coach designers on how to best present their work to the rest of the organization. Show business teams how designers plan for the work they do.





# Projects

You've hired all these designers, now it's time to see results. Designers have to execute, then communicate how their work impacts the bottom line. Other teams have to track successes and failures with metrics, and it's time for design to do the same. You might be able to say, "We've increased revenue by ten percent since we expanded our design team," but eventually the C-suite will want to understand the ROI in a more detailed way. Design teams must understand the larger picture and create compelling products and services that will utilize and maximize capabilities. In the next four sections, we break down projects to demonstrate design's impact at scale.

# Projects

## Define

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# Project pipeline

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## **How to define what kinds of projects the design team does.**

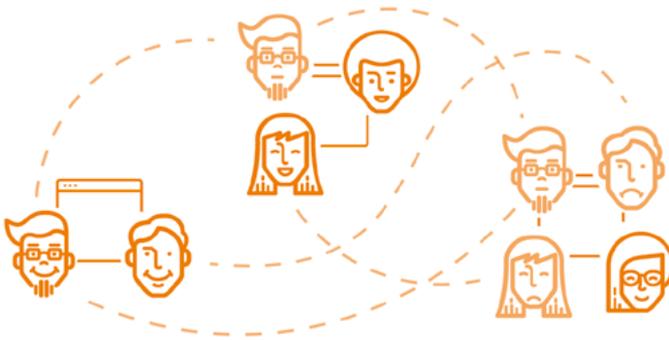
When we talk about a project pipeline, we mean the number and types of projects the design team can take on. Understanding the project pipeline helps teams match capacity with demand. Knowledge around the types and number of projects that can be completed in any given time leads to better utilization. It also protects teams from projects that don't align with larger business objectives. By defining the business goals that design projects are responsible for, the design team's role becomes clearer.

## **Challenges**

No matter how many designers you have, it never seems like enough. Without a clear process for engaging with the rest of the organization and how to staff teams, many suffer from “the

## Projects

designer shuffle” when business priorities shift. Projects and initiatives start, then stop, get new team members, lose others, or never get off the ground in the first place. It creates frustration, increases timelines, and degrades the quality of delivery.



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**When organizational priorities shift and projects change, teams suffer from “the designer shuffle.”**

In the long run, poor pipeline management contributes to disengagement by others in the organization who come to believe that it’s just not worth the trouble to work with the design team and is a factor in designer turnover. Without a definitive project pipeline that’s aligned with business objectives, project leads have a hard time making a case to protect their team’s makeup through a project’s completion.



## The DMO approach

A DMO should stay focused on the organization's overall business priorities and manage the design pipeline with those priorities in mind. It should understand the design team's capabilities and ensure each project is framed accordingly. Rather than running interference, a DMO should understand the hunger for large, programmatic shifts in the organization. It should also know that incremental changes might need to come first and set expectations accordingly. Time and resources, again, should be managed through tools like project plans, definition of ROI, and design offering visualizations.

## A Design Management Office should manage the design pipeline with the organization's business priorities in mind.

An office in the United States' General Services Administration called 18F regularly collaborates with other agencies. They have a publicly available Partnership Playbook which is meant to help other government agencies understand what it's like to work with 18F. In it, they set clear expectations by way of seven principles used in working with their partners. These principles include, statements like, "We focus on understanding the problem first," and, "We transfer projects back to your team for ongoing support." If someone looking to

## Projects

partner with 18F didn't know what it was like to work with a digital services team, they certainly do now.

In the same way that 18F sets working expectations, a DMO should help provide the organization with more understanding around how much bandwidth designers have in order to complete projects. While a DMO should ensure that design teams don't get distracted with projects that don't tie back to business goals, it should also protect teams from these requests in the first place.

A DMO can also impact efficiency. If a design team doesn't understand what's coming down the pipeline, they tend to take longer to complete a project if there's no end in sight. If completing incremental projects on schedule will lead to a big transformative opportunity, teams work more productively to be able to work on big exciting challenges later on.



# Playbook

## Project pipeline

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### **Develop an inventory model**

Identify where project requests come from, the stakeholders involved, and a method for tracking projects from inception to delivery.

### **Define engagement criteria**

Outline a framework for how to engage the design team and determine the best points in the process to start discussions. Communicate the criteria to your stakeholders and help them connect to the processes.

### **Standardize shapes**

Determine a set of project approaches and communicate with stakeholders by setting their expectations around the likely shape of an engagement (team size, scope, timeframe, and methodology).

### **Publish the pipeline**

Regularly share the initiatives you're engaged in with stakeholders to give them visibility into what the team is working on and what upcoming bandwidth looks like.

### **Create a backlog**

Manage the projects you plan to work on and make a published version available to necessary parties.



## Projects



# Project framing

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## **How to equip design teams with tools and resources that solve business problems.**

When we talk about properly framing a project, we mean that there should always be a brief that explains the current state, the opportunity, and the desired vision for where the project can lead. Project framing increases efficiencies by helping teams get projects aligned, organized, and off the ground quickly and ensures that projects are poised to solve a real business challenge. Tools also help collect relevant data for evaluation and communication at later stages.

## **Challenges**

Organizations and stakeholders that have an understanding around two things: 1. the business problem and 2. the effect a design project could have on the problem, are off to a great

## Projects

start. But just because they make a connection between problem and solution doesn't mean that the connection is understood every step of the way.

Take a project that aims to tackle user acquisition—at the outset the goal is clear: get more users. But as requirements pile up from business stakeholders and as designers attempt to tackle other issues, the whole thing falls off the rails. How could this happen, especially when the business goal was clear up front? It comes down to matching problems to approaches, and communicating expectations. While there's a certain amount of ambiguity around any design project, teams can't use that as an excuse when what they deliver doesn't do anything to affect the bottom line. When teams start without a brief, they have little clarity around the ask and everyone ends up with something they didn't want.

Design could take a page from advertising's book on this one. The creative brief is meant to inspire ideas and ground the team, giving them something to aspire to and a north star to follow.

**“The most important thing about the creative brief would be that it has to inspire the people who are given the task of solving the problem. [...] Simplicity is everything. The more concise, and the sharper the point of view as to what is the problem, the better the work will be.”**

— John C. Jay, *Uniqlo*; Former Global Creative Director Wieden+Kennedy



It doesn't get much more simple than that. Get to the root of the problem you look to solve, then solve it. The more problems you try to add, the more difficult and muddled things get.

## A Design Management Office should help design teams understand each project's impact on larger business objectives.

### **The DMO approach**

Project framing really comes down to looking at the problem and selecting the right approach, then communicating that approach with the rest of the organization. A DMO should aid teams in setting clear expectations from the start by resetting the setup.

We all know that budgets move around, grow, shrink, or get pulled from underneath projects entirely. By defining the ROI along with the project plan, it's easier for stakeholders to buy into a project and budget when they see the value up front. If you can start by saying why a project needs to happen, you're halfway there.

A standardized framing kit—something as simple as a one-page brief template—helps teams create a shared vocabulary around their projects for communicating with fellow

## Projects

designers and business stakeholders. A DMO should create tools that clearly state a project's ROI to help design teams understand each project's impact on larger business objectives. As a result, they'll have a clear goal to work towards. A DMO should also frame the project by creating a mini communication program where design teams share their successes by highlighting the problems they've solved and what types of outcomes the organization can expect as a result. Overall, equipping the organization at large with ways to establish design requirements will help projects in the long run.



# Playbook

## Project framing

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### **Define the value proposition**

Systematically define the business objectives of the initiative and facilitate alignment among all key stakeholders.

### **Identify anchors and rocket boosters**

Outline what factors are blockers to success (anchors) and what elements are opportunities for unique success (rocket boosters). Iterate on the shape of the project to incorporate these.

### **Communicate go-to plays**

Share project briefs and approach templates with teams before projects kick off. Repeat and reuse until they become a second language.

### **Adjust course when needed**

During projects, assess how well the work being done matches the original brief and adjust accordingly to set and reset stakeholder expectations.

### **Save and share vision**

When the project ends, the team will already know the next steps for future work based on the current project. Capture and share these next steps and make them easily accessible.



## Projects



# Impact evaluation

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## **How to equip design teams to evaluate their impact.**

Understanding the value earned from a project is important for many reasons and so are the insights gathered by the team, the business, and the users. By conducting evaluations with a clear set of metrics, design teams gain a clearer view of how their work affects the company as a whole, including future work. Organizational leaders also gain a better understanding around design's ability to impact and add value to the organization.

## **Challenges**

Design work isn't measured often because it can be difficult to do so, especially compared to, say, the clicks an online ad receives or the number of downloads an app gets. Sure, design might have played a role in both of those projects, but

## Projects

so did marketing, development, and many others. The value that new interfaces, capabilities, services, and relationships bring to an organization is hard to measure.

In the design process, we make decisions based on our instincts, experience, and the research we've done with users. However, these decisions are merely a starting point, and should be evaluated with real data and changed if that data uncovers problems. When organizations don't measure the impact of the work their design teams do, they will fail to replicate successes and are doomed to repeat their flops.

### **The DMO approach**

A DMO should standardize methods with design teams in order to set and gather insights around their work.

## A Design Management Office should create a shared language between design teams and organizational decision-makers.

Barbara Koop, the head of UX at Funda, a top online real estate platform in the Netherlands created a predictive soft KPI—or Qualitative Performance Indicator, as we call them—scoring system called Customer Happiness Impact Factor (CHIF). Her system uses performance and behavior analytics,

regular quantitative measurement, and periodic qualitative evaluation as inputs to her system. By forming hypotheses around the impact of a project on CHIF, Funda is able to align the team, stakeholders, and executives on the expected business impact. Additionally, Funda is able to evaluate long-term impact well after projects launch.

A DMO should ensure the standards to which designers are held (like the measurement of the ROI of a project) are fair and realistic. The same goes for business stakeholders. Their success metrics for design teams need to realistically tie back to the company's KPIs. In this sense, a DMO acts as the go-between, or design ombudsman, holding both sides accountable.

A DMO should create a shared evaluation language between design teams and organizational decision-makers. It should also ensure that feedback gets put to use on an ongoing basis. When teams hand over final designs, they should also include metrics that help other stakeholders track the success of the design work. This also serves as a solid reminder for the reasoning behind design changes and next steps for the evolution of a product after there has been time to see the impact. When both sides understand each other and design's value is quantified, it's good for the business as a whole.

# Playbook

## Impact evaluation

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### **Engage organizational leaders**

Understand KPIs and other metrics your stakeholders will use to measure the impact of each design initiative.

### **Shape Quality Performance Indicators**

Settle on a standardized set of qualitative results driven by design. Make sure they impact organizational KPIs.

## Define measurement methods

Check in before, during, and after a project with regards to the value metrics. Set oversight for evaluation and reporting well after a project is complete and start conversations around next steps and process iterations.



## Projects



# Value communication

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## **How to connect the design team's value with the rest of the organization.**

Communicating design's value throughout an organization on an ongoing basis is critical to attaining larger success. Part of that success should be achieved through the collection and broadcasting of feedback from the team and the business. In other words, the inherent value in communicating exactly what design teams do leads to a larger understanding of design's power. It also makes the case for better resources for design teams and more high-profile projects. Understanding design's value might not be new to you, but having design teams committed to projecting what they bring to the table will only help achieve your goals. When the organization understands what types of value the design team brings, both the business and tech teams also flourish.

### Challenges

You've got all the components in place: a talented design team, project frameworks, happy designers, and solid approaches to systematic thinking. You deliver great work time and time again, but fail to get the budgets and recognition your team deserves. What gives? It's because the rest of the organization doesn't actually know or understand the value the design team brings to the business.

## A Design Management Office should open doors to inter-team collaboration.

Because designers and business stakeholders have been siloed for so long, the cultural divide widens when the two don't speak the same language. Business stakeholders often expect design to solve problems it can't and that's not because they don't want to understand, it's that they need to be met on their level. One of the contributing factors: Design teams are notoriously bad at consistently communicating the value they bring to projects. Designers need to get comfortable quantifying what has historically been thought of as a qualitative entity. The CEO probably doesn't care that you conducted user research, but what she does care about is that the product your team just designed will add additional revenue streams to the business. Take credit for your work,

or someone else in your organization will find a way to claim the numbers and the budget.

Learning to speak the language of business better doesn't mean simply adopting and relying on existing KPIs that measure pure performance. Designers need new metrics that feed into those KPIs. They need to use a combination of quantitative and qualitative metrics to regularly report the ongoing successes (and occasionally own up to failures) of their work.

### **The DMO approach**

When an organization has more visibility into a design team's work, non-design teams gain a greater understanding around how to best work with the design team. A DMO should set up mechanisms that communicate the value of each design project with the goal of opening doors to inter-team collaboration. Rather than wait until the end of a project, it should also set checkpoints during the project to communicate the ongoing value of the work. This ensures that business stakeholders are reminded of the design team's progress.

To give design teams a greater chance to shine, a DMO should set aside budget and bandwidth to create a formula, sets of metrics, and venues to share the impact of the design team's work with the rest of the organization.

## Projects

The value communication of design is in its early stages, but a dashboard that a consumer bank accesses internally—a Design Value Tracker—could be extremely useful. Let's say the bank wants to look at four broad metrics across their customer's journey:

- **Onboarding** – up to and including the first time a user engages with a digital product
- **Using** – scenarios where a user commonly engages with a digital product
- **Communicating** – instances where a digital product informs a user of something
- **Supporting** – when users initiate contact for service

Let's take that Supporting characteristic and dig a little deeper. The instances where a customer needs support should occur at a low frequency, but it's a highly important experience that could make or break their relationship with the bank. If the bank could have a better handle on when and why things go wrong, they could create projects to help make changes.

The support experience can be broken into four smaller Quality Performance Indicators (QPIs), or “predictive” analytics, that feed into the KPIs. In this instance, they are:

- **Reaction** – the customer's reaction
- **Resolution** – whether their problem was resolved
- **Content** – the content they interacted with
- **Tone** – tone of that content



If the bank identifies the tone as one of the sources of customer dissatisfaction, they can make predictions based on that metric. Inaction would further lead to customer churn, but changing a call center script or the tone of the support copy could help retain customers over time.

This line of thinking helps set metrics at the outset of a project, taking into account the business stakeholder priorities that will be used to measure design's success. The KPIs that design will have an impact on can help predict future action in the performance of the product.

After determining how to measure design's impact at your organization, take that next step and find or create a communication channel that makes sense for your organization. Quantitatively communicate the ongoing value that design delivers to the product organization. By considering the value early on and highlighting the ways designers can share it back with the organization at large, they know the key checkpoints they'll need to meet along the way. In the end, when business stakeholders and design teams set regular communication and reporting expectations, they come away with a greater sense of understanding of the value brought to the table.

# Playbook

## Value communication

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### **Identify existing platforms**

Determine which existing inter-organizational communication tools to leverage and how to best utilize them.

### **Build new venues**

Town halls, videos, tutorials, internal newsletters, in-person meetings, and show-and-tells are all great ways to share specific success stories and build empathy for processes between groups.

### **Quantify the qualitative**

Develop quantitative measurement programs to communicate qualitative successes. Help design teams overcome their cultural discomfort with measurement.

### **Dashboard your new metrics**

Set up tools and dashboards to communicate movement of your new metrics over time by mapping specific initiatives to show their impact.

### **Build ongoing dialogue**

Find out how various business groups perceive design work. Discuss the gaps between expectations and performance. Iterate on measurement methods and standards along the way.



## Resources

The following is an informal list of resources that we've found helpful while writing this book. We're sharing them here so you too can gain a better understanding of what else is happening in the world of design management and operations.

### Introduction

**Page 8 – Contributions to design management:** Seattle-based design firm, Artefact created a ten-minute self-assessment called the Design Maturity Survey (<http://dms.artefactgroup.com/>) for people to better understand where their organization stacks up. The always-insightful John Maeda and his Creative Leadership platform (<http://creativeleadership.com/>) has proven an invaluable resource over the years. The book, *Org Design for Design Orgs* (O'Reilly Media, 2016) by Peter Merholz and Kristin Skinner is a must-read if you work in the field of design management.

**Page 8 – The DMO's beginnings:** Our first post about the Design Management Office as a concept for organizing design operations is on our website (<http://momentdesign.com/idea/the-design-management-office/>).

### How we got here and what lies ahead

**Page 14 – The business of design:** Roger Martin's *The Design of Business* (Harvard Business School Press, 2009) is essential reading.

## **What's a DMO?**

**Page 34 – Assessment worksheet:** A printable PDF version of the assessment worksheet is available on our website (<http://momentdesign.com/idea/dmo-resources/>).

## **Process – User-centered design**

**Page 44 – The Bootleg Bootcamp:** Download the Stanford d.school's toolkit from their website (<http://dschool.stanford.edu/resources/the-bootcamp-bootleg>).

## **Process – Design systems**

**Page 58 – GE's design system:** During his role as executive design director at GE, David Cronin shared the ins and outs of GE's system at the 2015 Enterprise UX conference (<http://slideshare.net/davcron/the-ge-design-system-and-thoughts-about-craft-at-scale>).

**Page 60 – System references:** These are all great examples and resources for creating a large-scale design system: Google's Material Design guidelines (<http://material.io/guidelines/>), IBM's Living Language (<http://www.ibm.com/design/language/>), Salesforce's Lightning Design System (<http://developer.salesforce.com/lightning/design-system>), and VMware's Clarity (<http://vmware.github.io/clarity/>).

## **Process – Organizational transformation**

**Page 63 – Design's business value:** We suggest getting your hands on the *Harvard Business Review's* September 2015 issue, "The Evolution of Design Thinking," and, more specifically, Jon Kolko's article, "Design Thinking Comes of Age" (<http://hbr.org/2015/09/design-thinking-comes-of-age>) from that issue.

**Page 65 – Intuit's transformation:** Read more in the article, "The Innovation Catalysts" by Roger L. Martin (*Harvard Business Review*, June 2011 (<https://hbr.org/2011/06/the-innovation-catalysts>)) and more about the Innovation Catalysts on the Intuit Labs website (<http://intuitlabs.com/innovationcatalysts/>). Suzanne Pellican, a former vice president of experience design at Intuit also wrote about the Innovation Catalyst program in the 2015 O'Reilly article, "Design thinking in the corporate DNA" (<http://oreilly.com/ideas/design-thinking-in-the-corporate-dna>).

## **People – Designing teams**

**Page 75 – Roles and team composition:** Chapter 5 in Peter Merholz and Kristin Skinner's book, *Org Design for Design Orgs* (O'Reilly Media, 2016) covers these topics.

**Page 77 – Disciplines and profiles:** Read more about Moment's seven core disciplines and our designer profiles in the post, "Never the same thing twice" (<http://momentdesign.com/idea/never-the-same-thing-twice/>).

## **People – Learning and knowledge management**

**Page 85 – R&D:** Check out some of Moment's R&D-style projects, including the award-winning Peer (<http://moment-design.com/peer>), Loree (<http://momentdesign.com/loree/>), and the Future of Transportation (<http://momentdesign.com/future-of-transportation/>).

## **People – Individual career growth**

**Page 91 – Designing and Driving UX Careers:** Get Ian Swinson's full presentation from the 2016 edition of Enterprise UX on SlideShare (<http://slideshare.net/RosenfeldMedia/designing-and-driving-ux-careers-a-framework-for-empowering-ux-teams-ian-swinson-at-enterprise-ux-2016>).

## **People – Standardized team approaches**

**Page 99 – Storyboard experiences:** Watch Airbnb director of experience design, Katie M. Dill's 2015 Managing Experience presentation (<http://vimeo.com/125621422>) to hear more about the company's storyboard approach.

## **Projects – Project pipeline**

**Page 109 – Partnership Playbook:** 18F's robust set of principles is available on their website (<http://partnership-playbook.18f.gov/>).

## **Projects – Project framing**

**Page 116 – Creative brief:** Plenty has been written about the creative brief, but we found the “Briefly” video by Bassett & Partners (<https://vimeo.com/107567840>)—which includes the John C. Jay quote—particularly entertaining. The Project Brief Toolkit (<http://project-brief.casual.pm/>) is also a great resource to start framing your projects.

## **Projects – Impact evaluation**

**Page 124 – CHIF:** Read more about Funda head of UX, Barbara Koop’s CHIF system in her deck, “Metrics for Evaluating the Impact of UX Strategy” (<http://slideshare.net/UXSTRAT/ux-strat-europe-2017-barbara-koop-metrics-for-evaluating-the-impact-of-ux-strategy>).

## **Projects – Value communication**

**Page 132 – QPIs:** There’s yet to be a lot written about the communication of design’s value, but the InVision Blog post, “Design leaders answer: How do you track your design’s effectiveness?” (<http://invisionapp.com/blog/track-designs-effectiveness/>) is on the right track.

**Playbook:** Printable PDF versions of the Playbook pages in this book are available on our website: <http://momentdesign.com/idea/dmo-resources/>

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## About the authors



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The debate is no longer *if* design is valuable to business. The conversation has shifted to *how*. But what do we do now that we've committed resources to building design-led organizations?

This short book is your guide to realizing the value of a Design Management Office—an initiative focused on improving the quality of design delivery at scale.

**Inside you'll find ways to:**

- Increase the leverage of design teams by shaping projects faster and more effectively
- Improve quality by setting standards and constantly iterating on them
- Help build and retain a high-performing design staff
- Communicate the value of design in terms that business stakeholders understand

