COLLABORATION
&
COOPERATION

2023 CCSQ World
Usability Day

How collaboration between policy experts and service designers can reshape product development

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Hello there!

POLICY/CMS DOMAIN SME

I'm Rebecca Bruno

I'm a Principal Policy Strategist at A1M Solutions. I leverage policy, subject matter expertise, and years of government experience for my work on an enterprise-wide HCD project for CMCS.

SERVICE DESIGNER

I'm Sara Camnasio

I'm a Sr. Service Designer at XCell. I leverage HCD, participatory design, interaction design, and ethnographic research methods as part my work at an enterprise design team within CMCS.

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What we'll cover today

We will talk about the power of subject matter experts (SMEs) and service designers collaborating by sharing about a project where we helped a cross-functional group of stakeholders align on the future vision for a product.

You'll hear about…

- ✓ Design & messaging examples that were successful for trust building with business & product partners

- ✓ Key strategies for service designers to engage with policy staff

- ✓ Tips for successful collaboration between service design + policy SMEs

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We'll talk about 3 challenges and how we approached them, with examples

CONTEXT
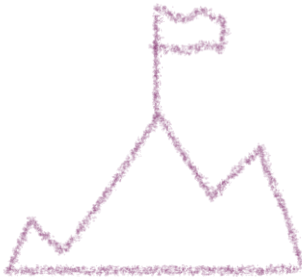
3 CHALLENGES + APPROACH

LESSONS LEARNED & TIPS

Q&A
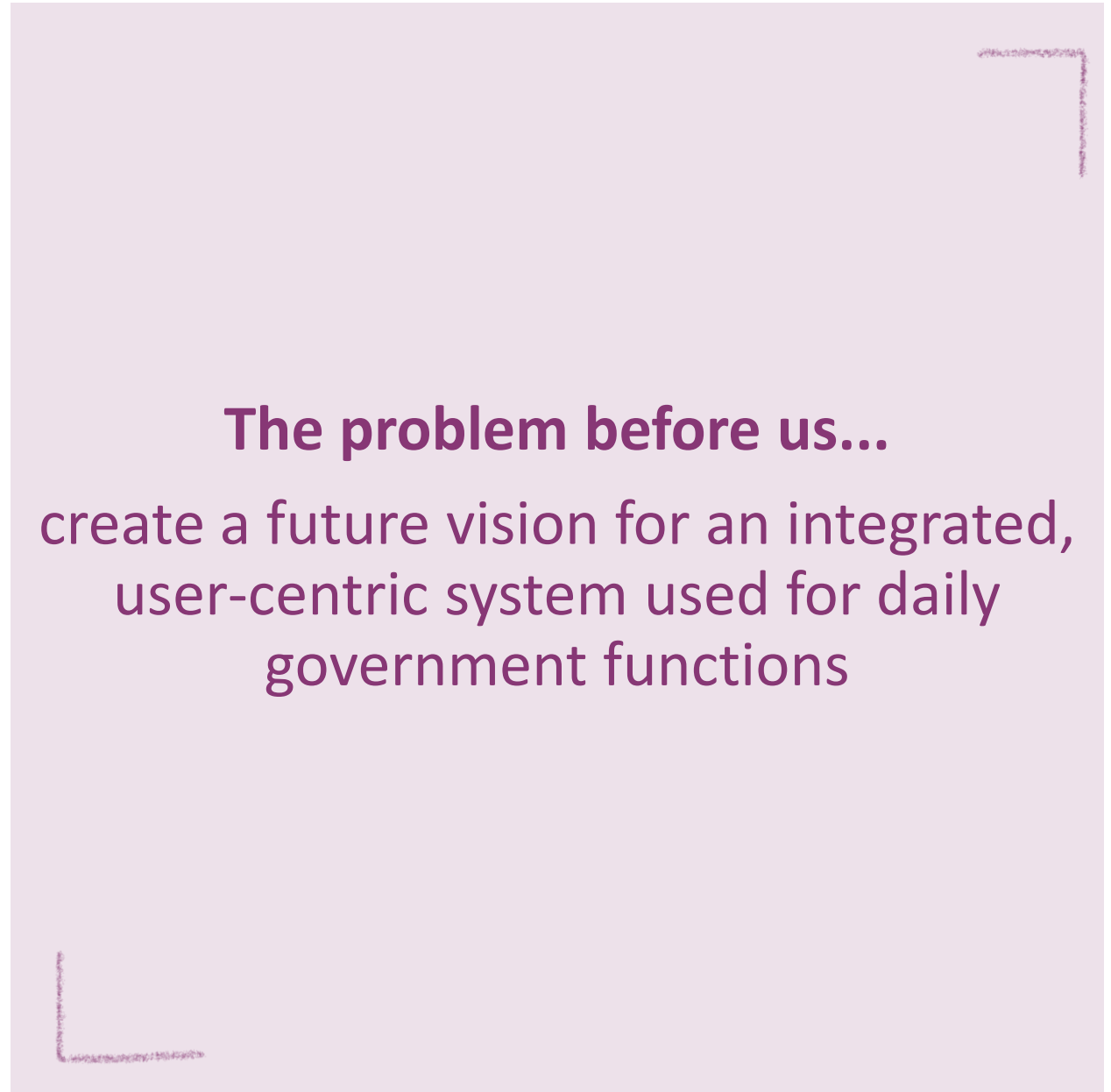
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Context

The project

An existing enterprise system of products at CMS is extremely fragmented and provides a burdensome experience for staff.

We helped leadership define a vision for the new centralized product, get stakeholder approval, and translate the vision to specific features for a product roadmap.
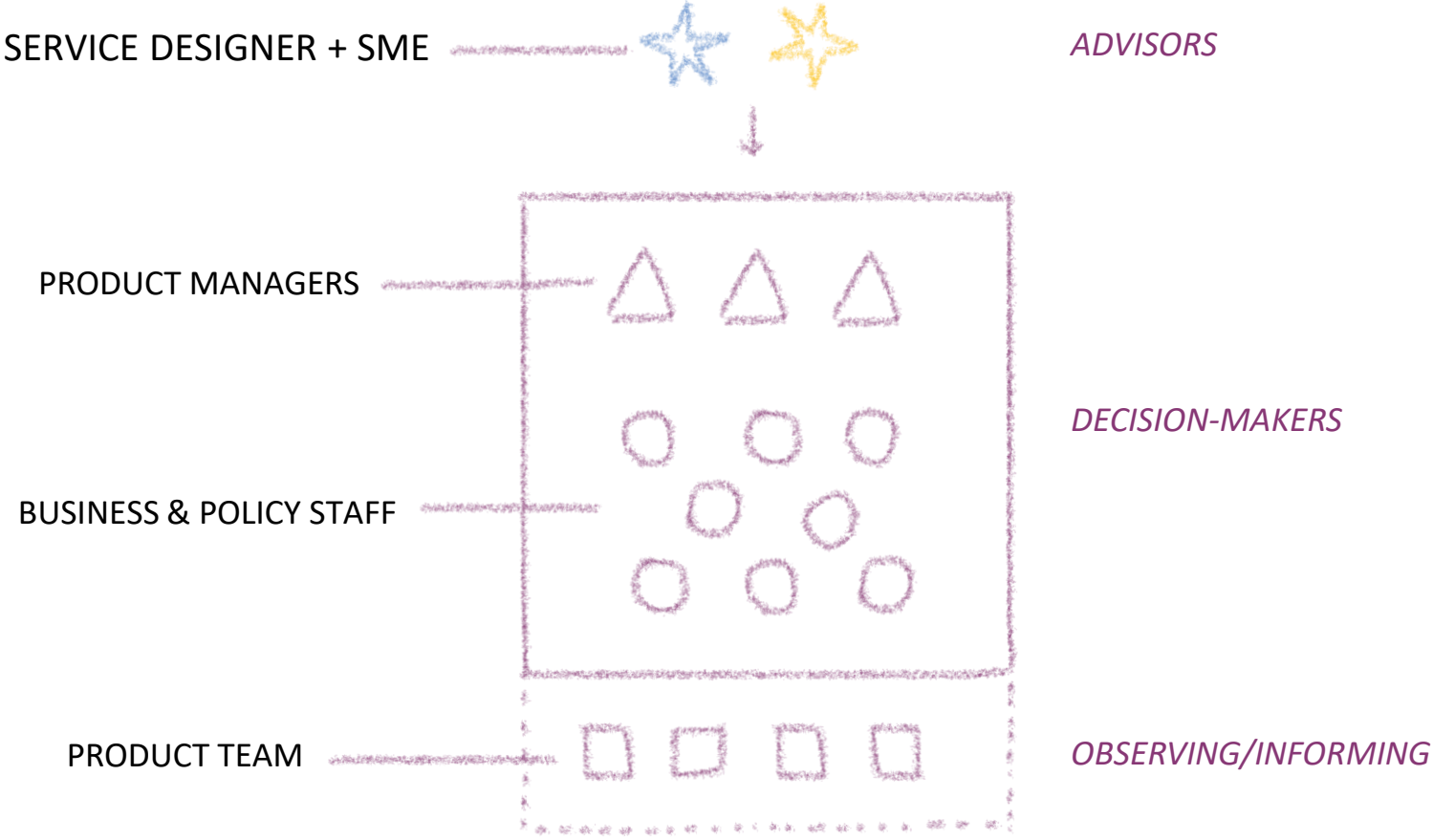
The problem before us...

create a future vision for an integrated, user-centric system used for daily government functions

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Context

- The product is a complex ecosystem of tools for several government processes, and it serves a very diverse group of users.

- The current experience is extremely burdensome for staff: they need to use multiple tools with logins to complete one process.

- We needed to successfully create a research-informed product vision that would resonate with policy folks and be feasible for the product team to execute.

- We needed to be mindful of over-burdening staff with research.

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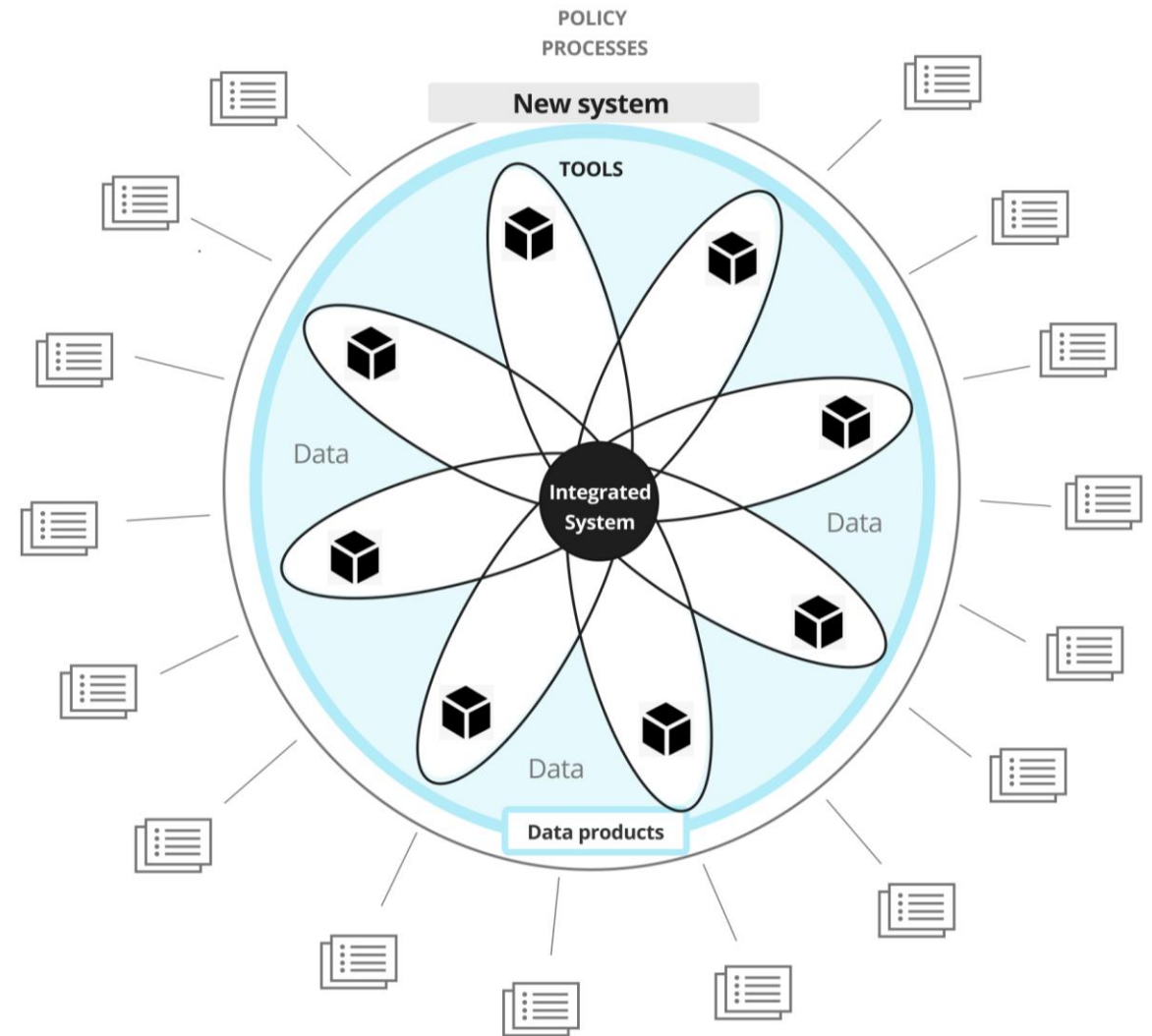
Leadership gathered key business and product decision-makers into a cross-functional team. This was the team that would need to align on the future product vision, define features and prioritize them, and develop a roadmap.

SERVICE DESIGNER + SME — — — — — — ☆ ✦   *ADVISORS*

PRODUCT MANAGERS — — — — — — △ △ △

DECISION-MAKERS

BUSINESS & POLICY STAFF — — — — — ○ ○ ○
○ ○
○ ○ ○

PRODUCT TEAM — — — — — — ▢ ▢ ▢ ▢   *OBSERVING/INFORMING*

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How we partnered and why it mattered

POLICY SUBJECT MATTER EXPERTISE WAS NEEDED TO...

- Integrate policy requirements
- Provide real, accurate content
- Explain government processes
- Bring understanding of users and business owners
- Develop communication and engagement strategy with policy stakeholders

SERVICE DESIGN WAS NEEDED TO...

- Translate complex policy into product and business language and features
- Bring a user-centered approach to the process
- Create storytelling materials
- Facilitate alignment between a large group of stakeholders with competing priorities

The collaborative approach helped **build trust** with key policy stakeholders and allow product leadership to successfully **begin working on a roadmap**.

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Challenge 1

How can we create a product vision for a complex, decades-old ecosystem of tools that resonates with policy staff?

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Context

- Policy stakeholders were fatigued by years of providing feedback with limited results.

- Policy people are extremely busy and overburdened.

- Policy people are very concerned with precision and the words on the paper – keeping them at the vision level takes work and lots of repetition.

- There are a lot of users with different priorities, so we needed a group that were empowered to make some decisions to move us forward.

- Everything would still be tested with all user perspectives.

Our mission

Articulate a product vision from research findings, create a compelling story that resonated with policy stakeholders and get approval to move forward

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The SME started by creating a policy artifact that mapped all the different components of different policy processes.

This allowed us to build a solid policy knowledge base and created a shared understanding between the two of us.

Policy processes
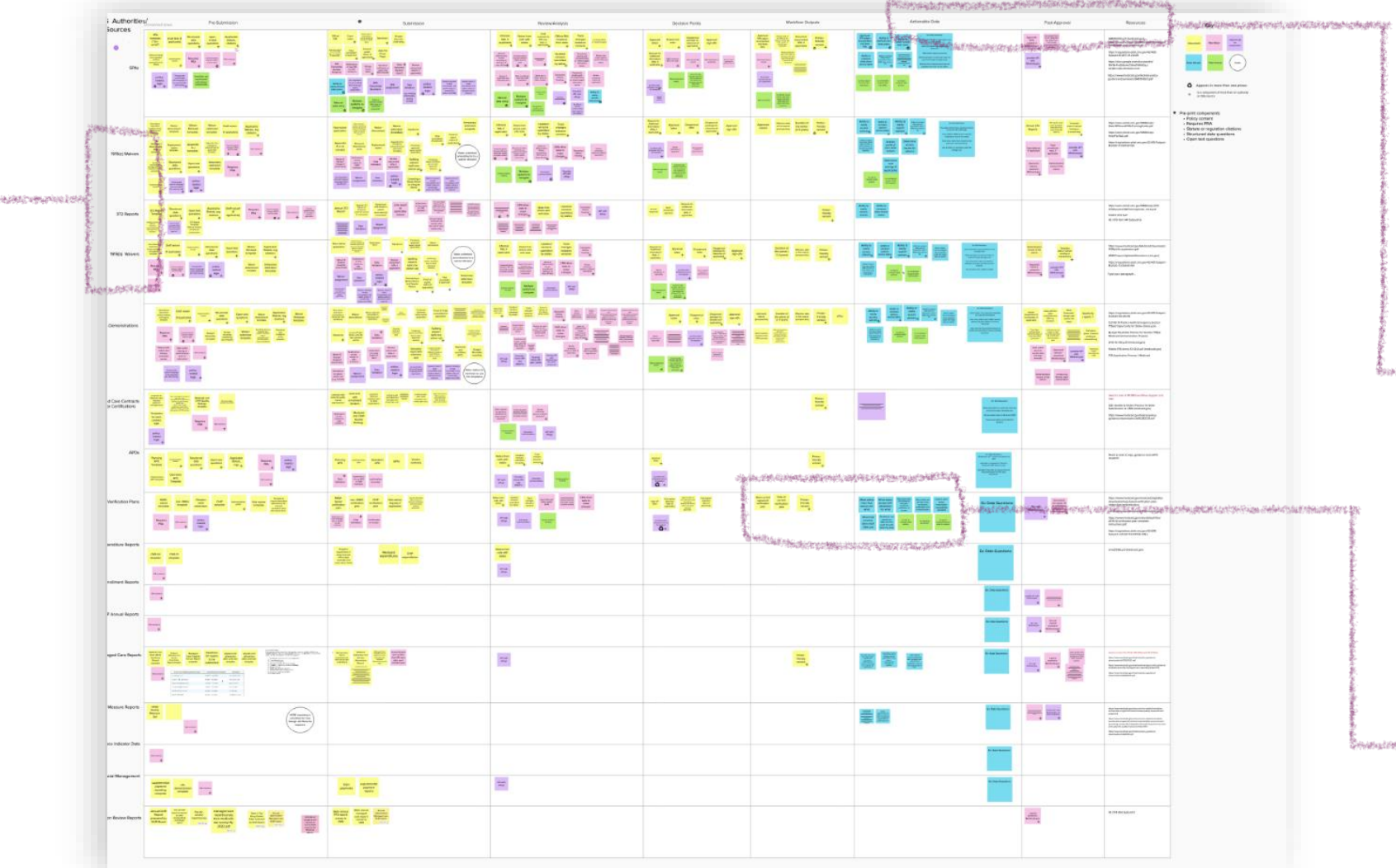
Phases of the policy process

Outlining:
- Documents
- Workflows
- Pain points
- Data needs
- Opportunities

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The service designer created a "collaborators map" to show transparency to stakeholders about whose voices would provide input into the vision work.

Sharing this early allowed us to build transparency & trust with stakeholders about the process of creating the vision.
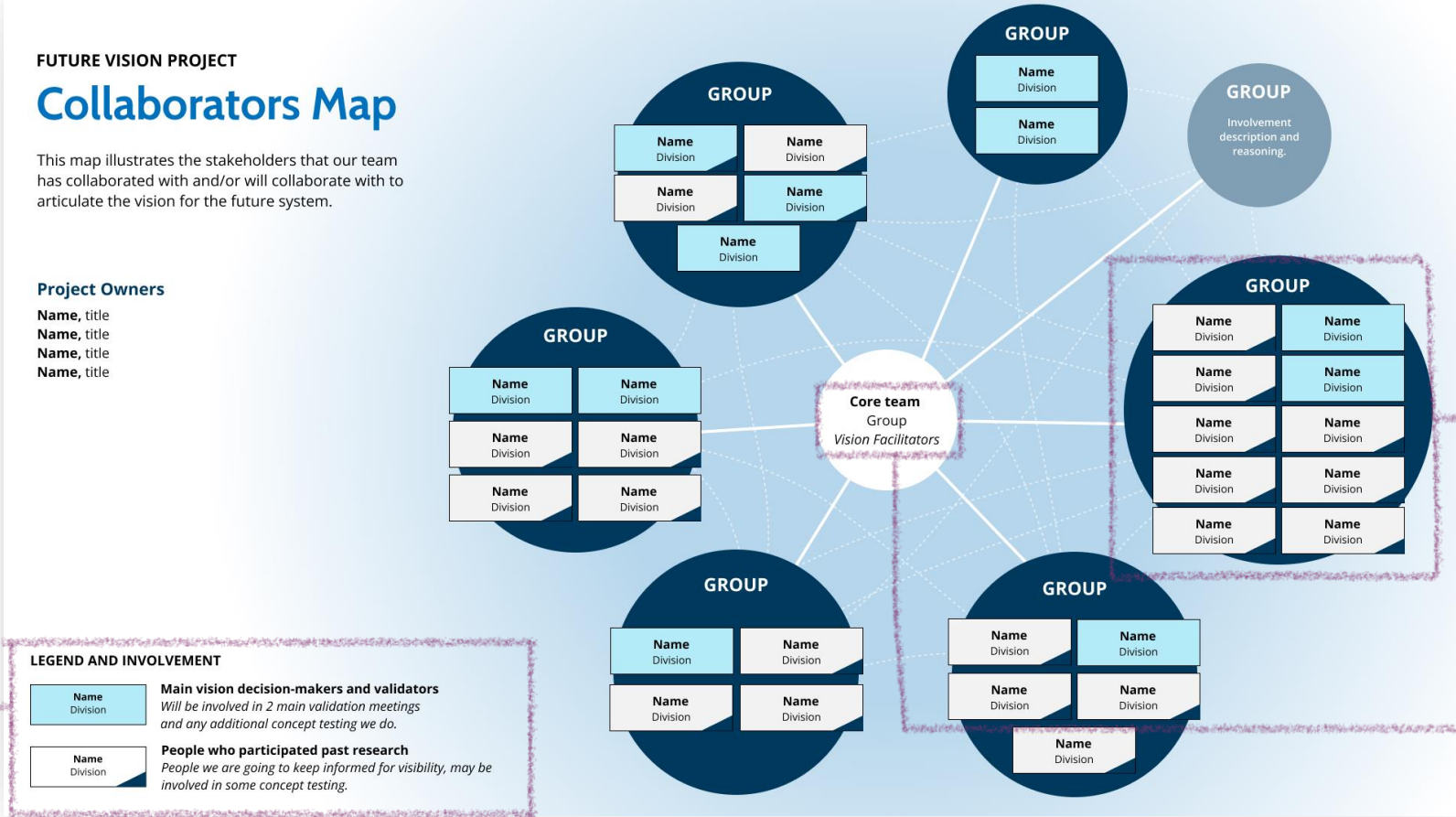
The different levels and phases of involvement with the vision development work

Who is involved from different groups and divisions

Placing ourselves on the map

FUTURE VISION PROJECT

Collaborators Map

This map illustrates the stakeholders that our team has collaborated with and/or will collaborate with to articulate the vision for the future system.

Project Owners
Name, title
Name, title
Name, title
Name, title

LEGEND AND INVOLVEMENT

Name / Division — **Main vision decision-makers and validators**
Will be involved in 2 main validation meetings and any additional concept testing we do.

Name / Division — **People who participated past research**
People we are going to keep informed for visibility, may be involved in some concept testing.

GROUP — Name Division, Name Division, Name Division, Name Division, Name Division

GROUP — Name Division, Name Division

GROUP — Involvement description and reasoning.

GROUP — Name Division, Name Division, Name Division, Name Division, Name Division, Name Division, Name Division, Name Division, Name Division, Name Division

Core team — Group — *Vision Facilitators*

GROUP — Name Division, Name Division, Name Division, Name Division, Name Division, Name Division

GROUP — Name Division, Name Division, Name Division, Name Division

GROUP — Name Division, Name Division, Name Division, Name Division, Name Division

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Together, we started creating storytelling artifacts to explain the current state of the suite of products and how it could change in the future. The first visual was called "A day in the life."
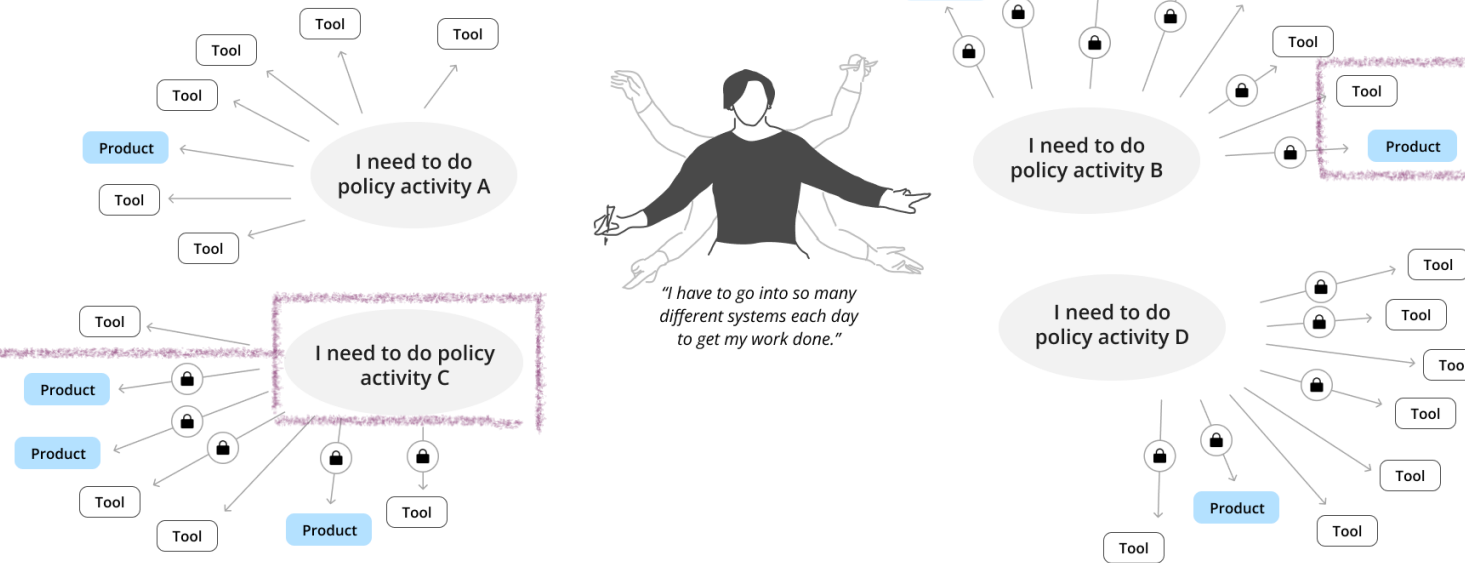
Context about the visual and what it represents

The myriad of systems, tools and logins needed for each task on their plate

All the work on their plate on a daily basis

CURRENT

A day in the life

The diagram below illustrates a day in the life for a "high burden" user working primarily within the *current*, existing systems, as well as working on tasks that are not in a system at all. This visual illustrates today's state, without the the vision being implemented.

User Authentication
Within product suite
Outside product suite

I need to do policy activity A

I need to do policy activity B

I need to do policy activity C

I need to do policy activity D

"I have to go into so many different systems each day to get my work done."

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Together, we started creating storytelling artifacts to explain the current state of the suite of products and how it could change in the future. The first visual was called "A day in the life."

This helped us communicate to policy staff what the current vs future experience would *feel like* for them.

FUTURE   *DRAFT CONCEPT ONLY*

A day in the life

The diagram below illustrates a potential *future* day in the life for a "high burden" user within the new system of tools that is informed by the vision crafted in collaboration with stakeholders. This vision is set tentatively 3-4 years from now.

User Authentication

Future Product Suite

Data

What tasks are assigned to me?

"My work is more streamlined and it takes less time to do tasks."

Future system

I need to do policy activity A → Workflow/tool → Data / Data / Data

integrated data

I need to do policy activity B → Workflow/tool → Data / Data / Data ...etc.

I need to do policy activity C → Workflow/tool → Data / Data

I need to do policy activity D → Workflow/tool → *integrated data* Data / Data / Data ...etc.

How their tasks will map to the new system and data

How the mental model for the work would change and be centralized and simplified

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We created a process story visualizing all the potential future features and parts of the experience, so policy stakeholders could see how their day-to-day work would potentially change.

Laying out the entire possible future workflow and features in a visual allowed us to gather early feedback and concerns from policy and product partners.

Step name
PROCESS STORY

FUTURE FEATURES

Which process step the story is on

Simple illustration or wireframe of the story moment

Proposed future features

2 OF 12

Story points illustrating a scenario step by step

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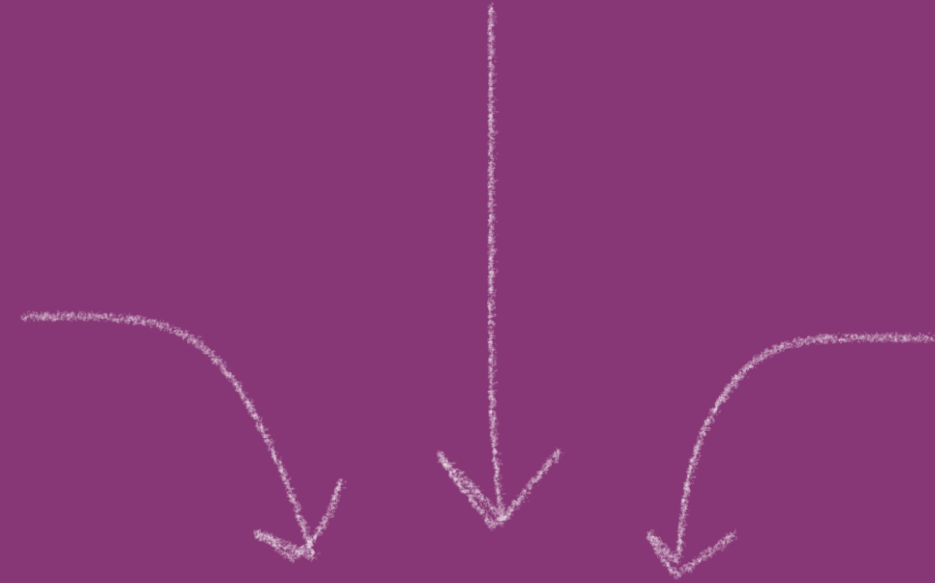
Challenge 2

How do we get product leadership to absorb the future vision to make sure they are able to build what users need?

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Context

- Even though we created the materials for the vision, we are not the ones responsible for making it a reality.

- We needed to work with product managers to facilitate translating the future vision into features and epics.

- We also needed to ensure that these features/epics were understandable by policy stakeholders and that we were fully addressing their needs and pain points.

- Coaching and facilitating working sessions were a major need in this phase of the work.
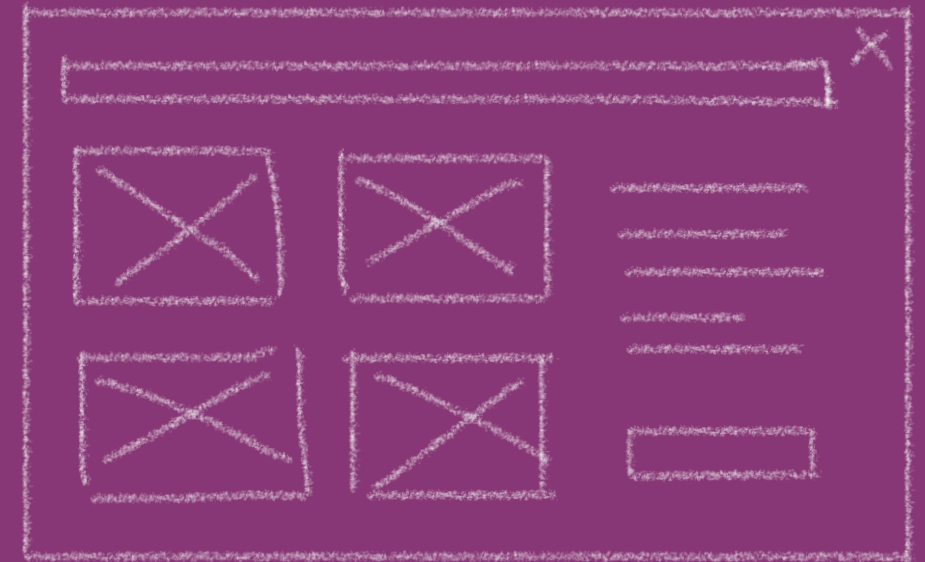
Our mission

Coach product team to absorb our team's artifacts, translate their roadmap into something that was digestible by policy staff, and help developers execute

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We created a "Future Features" spreadsheet to help the product team absorb the future vision we outlined in the storytelling materials and help them move towards a roadmap.

Figuring out the right format to translate the story for the product team allowed us to ensure the product vision was actionable and implementable.

Feature	Sub-features	Feature exists in old systems	Research notes	Absorbed by product team and aligned	Comments related to alignment with product teams	MVP or 2.0
Feature name				🟠		
	Sub feature description	yes		🟠 in progress	We might need to break up this feature into multiple features.	Missing
	Sub feature description	partial	There are major pain points with lorem ipsum	🟠 in progress		Missing
	Sub feature description	no, net new feature		🟠 in progress		Missing
Feature name				✅		
	Sub feature description	partial	Some of the desired functionality is missing: lorem ipsum	✅		Future state
	Sub feature description	yes		✅		Future state
	Sub feature description	yes		✅		Future state
	Sub feature description	yes		✅		Future state
	Sub feature description	partial		✅		MVP

Relevant research insights to each feature from all the research our team conducted

Noting whether features are net new or not

Gathering initial road mapping data

Tracking our progress in translating story features into real features and epics for the product team

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To help product managers explain to policy stakeholders the larger context of ongoing product work related to the vision, we provided them with a facilitation template.

Creating transparency and providing context about product efforts helps build trust with stakeholders and clears up confusion.
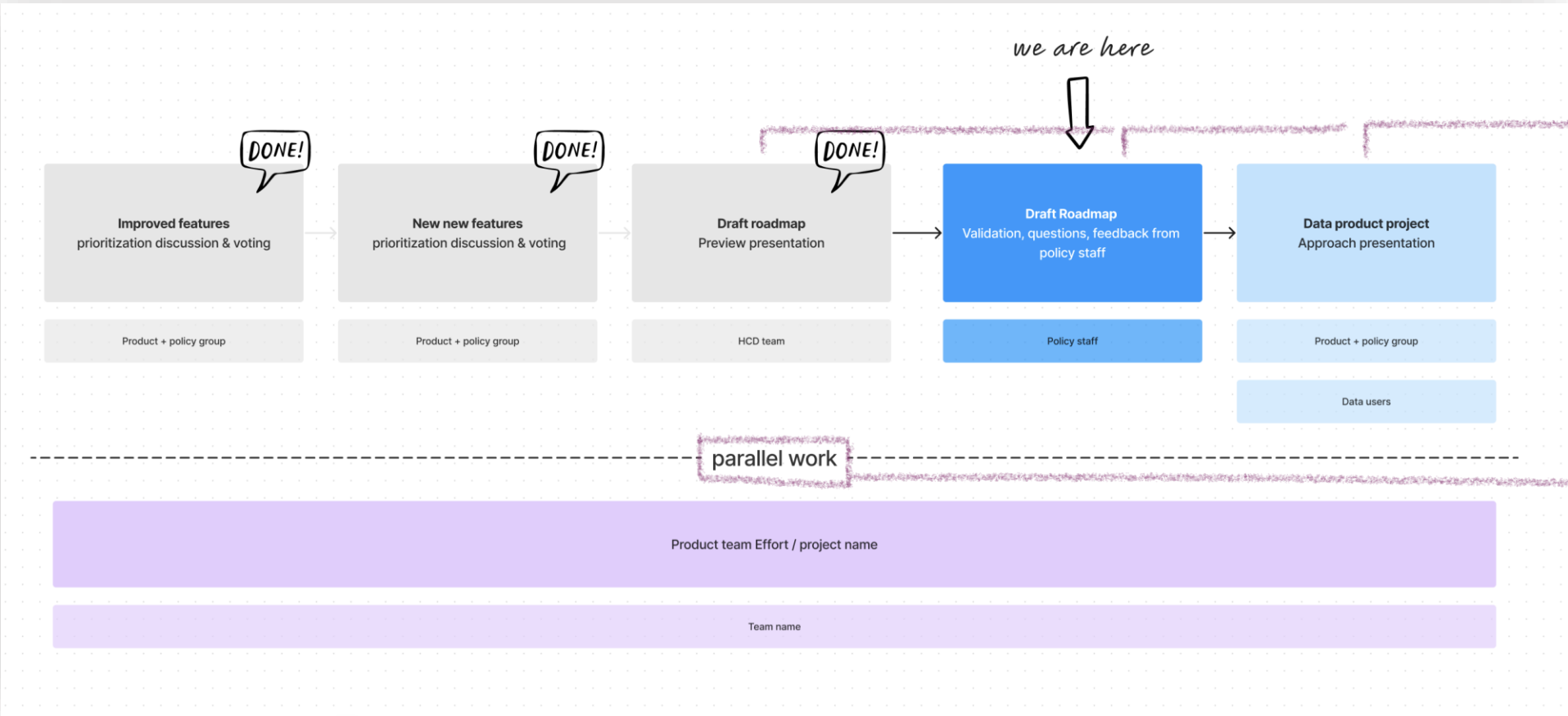
Showing what has been completed and what's coming up

Showing other product efforts that the policy folks might be involved in to connect the dots.

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We also created a template to help the product team map the current state experience of different policy programs that will need to be supported by the future product vision.

This template will hopefully help standardize language and service experience across the organization.

Swim lanes for different groups of policy staff (users)
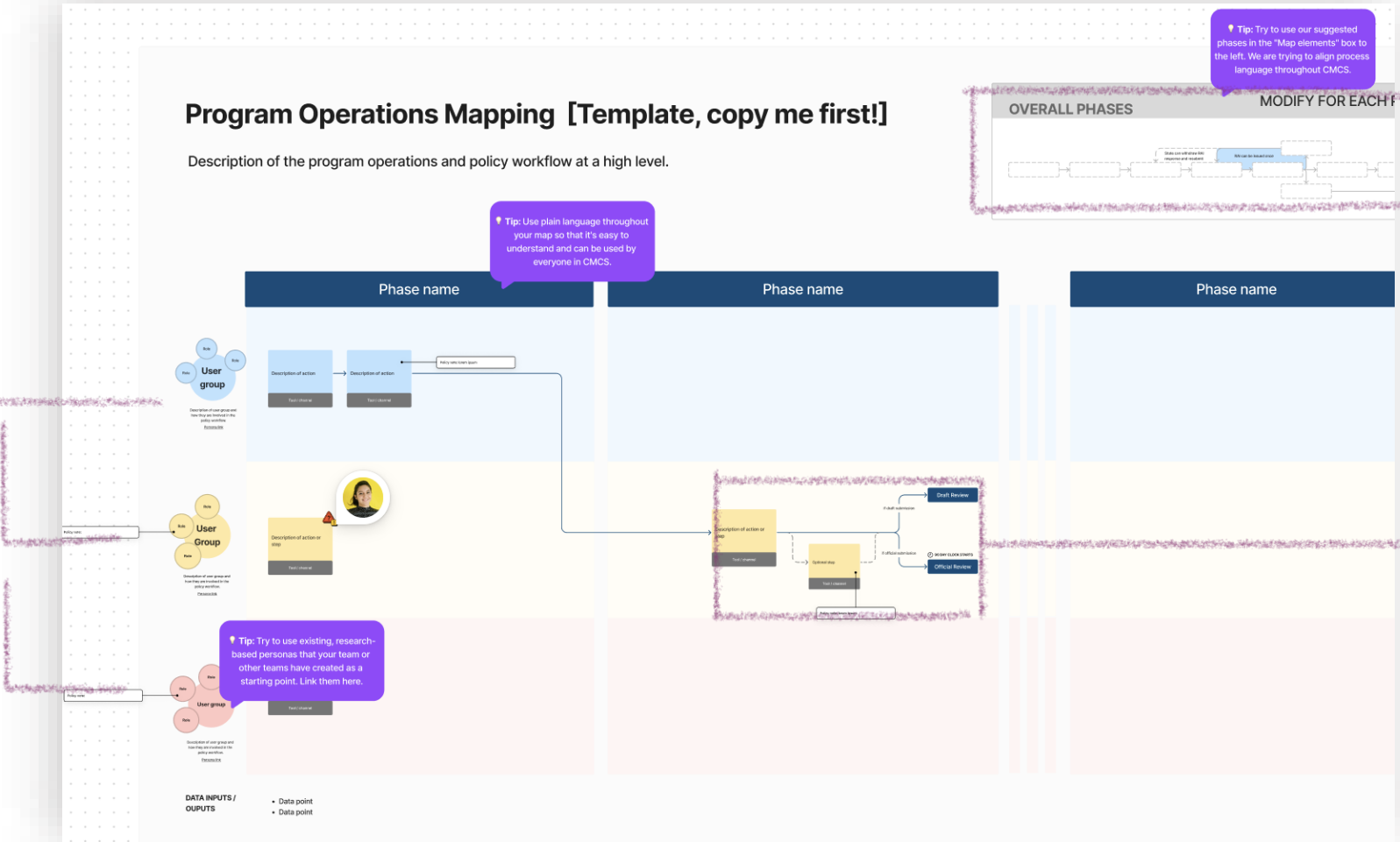
Standardizing language by using the same phases as the vision materials

Happy path and exception paths outlining actions each user is taking + policy annotations

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Close-up of Figjam template
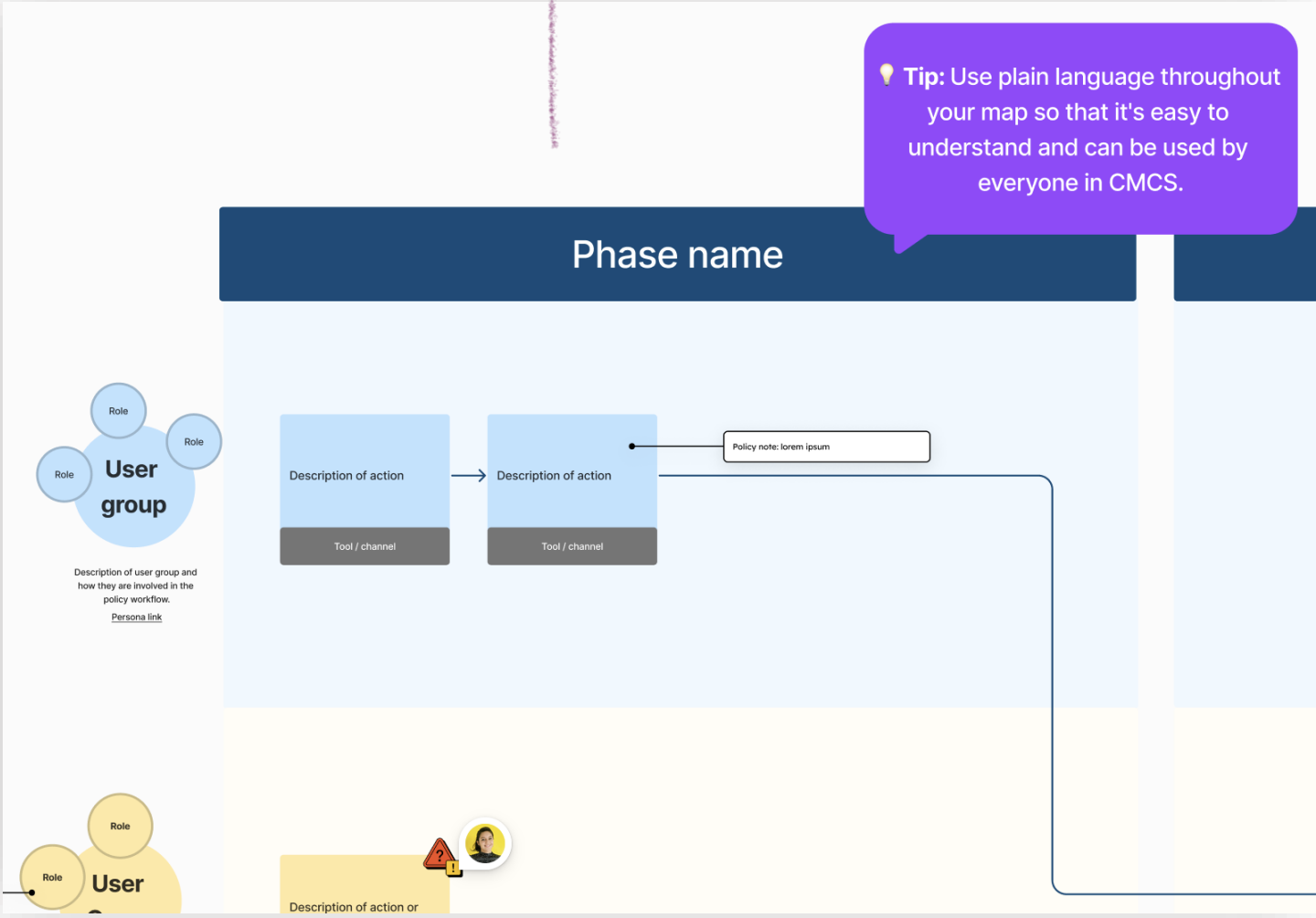
Mural template

PowerPoint template
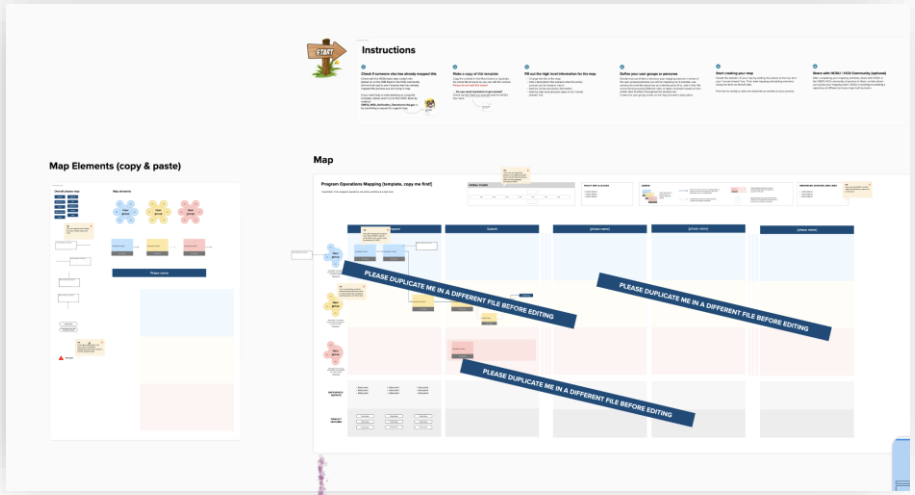
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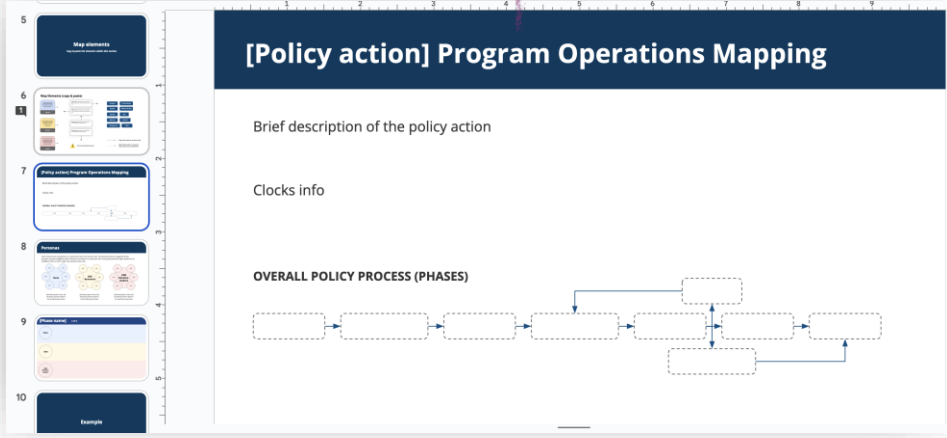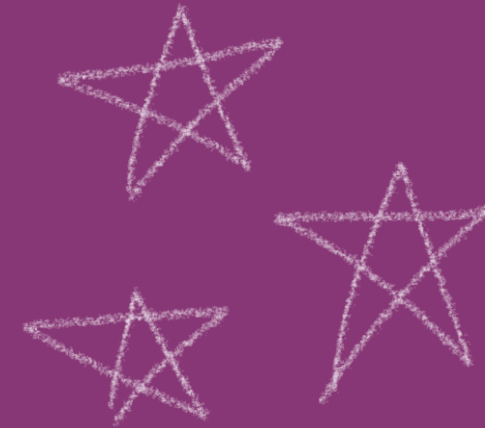
Challenge 3

How do we get a group of policy staff to understand, provide feedback, and ideally sign off on future system features to build a roadmap?

(Read: how do you build trust and engage in deep collaboration with policy?)

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Context

- Product roadmaps tend to be technical and non-descriptive, and usually not written with business and policy people as the audience.

- The business and policy stakeholder group represents a wide range of needs and priorities – aligning them all was going to be a challenge.

- Needed to prioritize features to work on first, which is hard when each feature is critical to the whole process.

- Have to help policy stakeholders understand agile and HCD process.
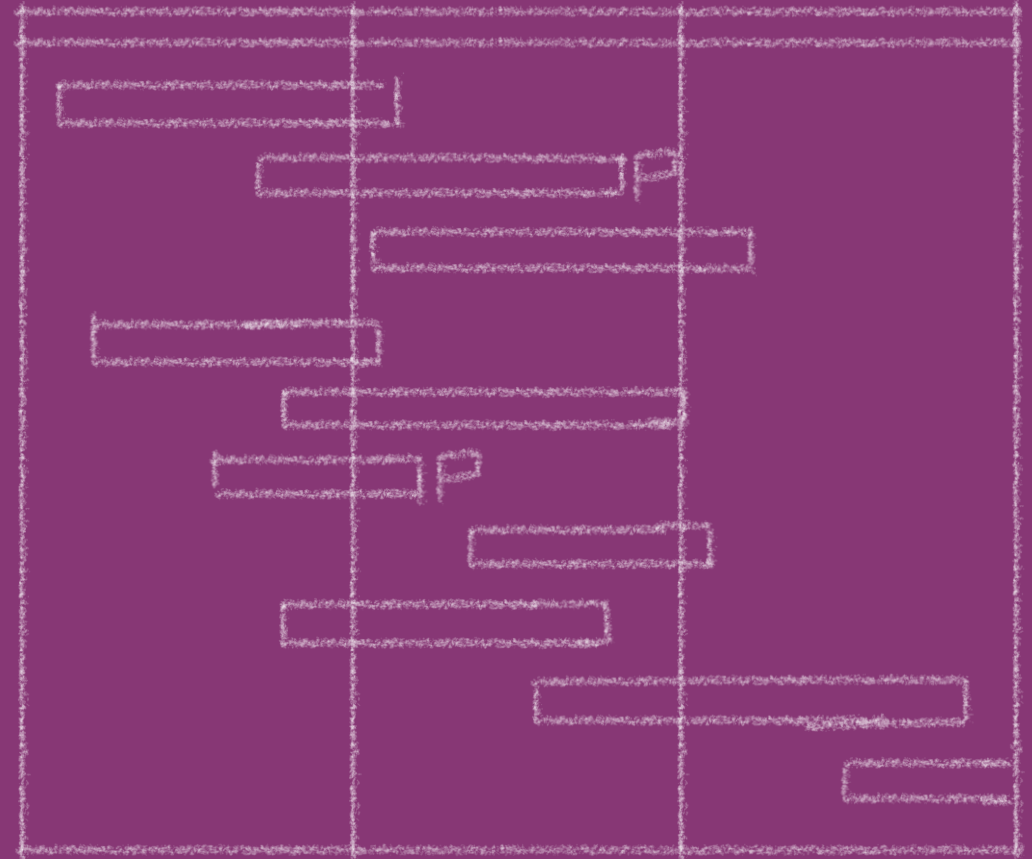
Our mission

Now that the product team had "absorbed" and translated the future vision into product features and epics, we needed policy stakeholders to validate and provide input on priority levels

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We created "feature cards" for the future functionality we had included in the process story. We presented the features one by one to gather questions, feedback, pain points, and concerns.

Sharing technical product functionality in an easy-to-understand format enabled us to gather early, in-depth feedback from policy staff.

Which phase of the policy process the features would be in

Simple wireframes/ illustrations of functionality

Step name
PROCESS STORY
Description of what happens in this phase

FEATURE NAME

FEATURE NAME

FEATURE NAME

FEATURE NAME

FEATURE NAME

Feature names are in plain language and describe some detailed functionality, but stay away from the weeds of requirements

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After we validated and presented each feature, we refined them and facilitated a discussion and voting exercise to identify the highest impact functionality that product should consider prioritizing.

Voting for highest impact and reach

Names and votes for each participant

Feature cards were numbered for easy reference across all materials, including the future roadmap

PDF version was emailed to stakeholders for reference during meetings

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Policy stakeholders were highly engaged in the discussion and the prioritization exercise yielded clear high priority items and lots of initial feature requirement data the product team could use.

Engaging policy stakeholders in early decision-making is an important co-design practice that builds trust, respect and reduces risk in the long run

Clear top voted features emerged that denoted high priority items for the future roadmap

Facilitator captured post-its with comments, questions, concerns, documented pain points that policy stakeholders brough up

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Lessons Learned

What value did the policy SME get from partnering a service designer?

Storytelling – translating ideas into visuals and turning dry policy/process content into storytelling materials

Facilitation – how to use design tools for storytelling & facilitation and how to conduct expert facilitation for the artifacts we created together with the policy stakeholders

Zoom in / zoom out balance – getting out of the weeds when they're not needed

Translating complexity – helped me frame the right problem to solve

Mutual respect – we knew we needed each other's input!

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- ☑ Be precise, but don't start in the weeds

- ☑ Review designs - make sure content won't raise red flags

- ☑ Encourage design practitioners to learn about the program and its users

- ☑ Help designers understand why some things won't work

- ☑ Be a champion for service design/HCD

Policy/Domain SMEs, I'm talking to you!

Here are some tips for collaborating with our **service design or HCD** colleagues

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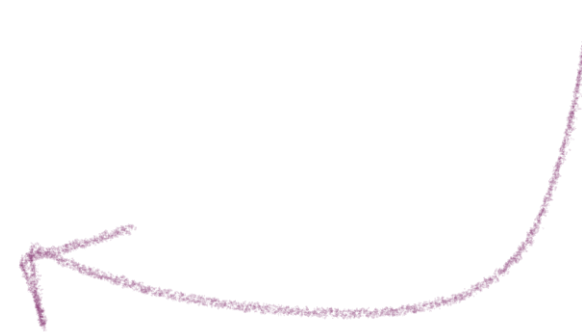
What value did the service designer get from partnering with a SME?

Trust building – allowed us to very quickly gain trust with policy staff stakeholders and policy leadership

Speed – made research more efficient and saved staff time because we already had so much internal knowledge, could create things fast!

Politics intel – understanding of what will float vs not float in terms of solutions, language sensitivities, power mapping

Nimble team – being able to respond to policy questions on the spot, help push back when needed or address feedback live

Complementary expertise – SD sets structures and creates containers, SME fills content and advises on how to socialize it
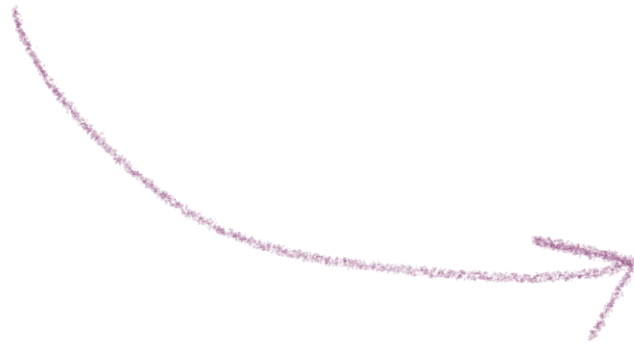
It's fun! – Learned so much from each other, experimented so much

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Service designers, I'm talking to you!

Here are some tips for collaborating with our **policy SME** colleagues

- ☑ Communicate the rationale behind your process decision
- ☑ Learn when to get in the weeds and when not to. Keep zooming in and out
- ☑ Lean on your SMEs for nuanced knowledge but also do your homework!
- ☑ Stay away from design jargon
- ☑ Lean on visual note-taking – it's a way to collectively sense-make and build trust with collaborators.

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Key Takeaways/Lessons Learned
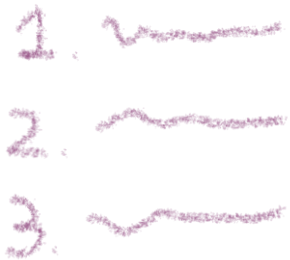
Set expectations up front

Context setting is key
Where are we, where are we going
Explain HCD and agile processes

Be prepared

Language is important
Do your homework
Understand the program

It's a marathon, not a sprint

Cultural change
Lots of coaching
Ongoing engagement

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That's all folks!

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