FROM STRANGERS TO ALLIES
Disrupting the Perception of Design (etc) within an Enterprise

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Natalie Kuhn
Manager of Design
Capital One Commercial Labs NYC

Find me on LinkedIn, Twitter @N4T4Li3
“What do you think about this font?”

“Do you have any fancy paper? I know you guys are good at picking out supplies.”

“Do you like this shade of blue?”

“I need to cut paper and tape it to a board…I need your expertise.”
“Let’s talk about our OKRs as a full team.”

“I want to make sure you are in all of our strategy meetings and presentations.”

“OH – you are not only trying to improve our customers’ lives but help us change how we work as an organization.”
People as people not resources.
Show what you do, don’t just tell.
Be patient with others as they learn.
Meet My Team
Day to Day Teammates ...as of **March this year**

- **Estelle Shaw-Latimer**  
  Director, Product Mngmt.

- **Kirk Hudson**  
  Director, Client Services

- **Natalie Kuhn**  
  Manager, Design

- **Mark Shapiro**  
  Director, Engineering

- **Roger Hurst**  
  Sr. Manager, Scrum Master

- **Shani Sankersingh**  
  Sr. Manager, Product Mngmt.

- **Akshay Prabhu**  
  Master Software Engineer

- **Cynthia Bouvier**  
  Sr. Process Engineer

- **Brandy Fortune**  
  Pr. Associate, Design

- **Jennifer Bove**  
  Sr. Director, Design

- **Adam Lipsky**  
  Manager, Project Mngmt.

- **Rahul Venkateshwara**  
  Strategy, Business Manager

- **David Beath**  
  Director, Product Mngmt.

- **Jamie Yachera**  
  Director, Product Mngmt.

- **Alex Tetreault**  
  Sr. Manager, Product Mngmt.

- **Patrick DesMarteaup**  
  Business Manager

- **Alvin Carter**  
  Sr. Software Engineer

- **Andrew Davis**  
  Associate Data Engineer

- **Stella Jayara**  
  Sr. Automation Test Eng

- **Babu Rajasekhar**  
  Sr. Software Engineer

- **Sridhar Yella**  
  Sr. Manager, QA

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**OPEN x2**  
Process Engineer Role

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**Coming Soon...**

- **Faheem Rahman**  
  Director, Product Mngmt.

- **Olga Howard**  
  Manager, Design

- **Maira Iqbal**  
  PA, Product Mngmt.

- **Max Leyzerovich**  
  Manager, Design
Re-envision the onboarding process for our commercial clients
“Going through the onboarding process is like walking through a field of landmines…”

“I’d rather go to the dentist than go through the onboarding process again.”
Currently…

“It was as bad as I expected – I have done this before and it is like this with all banks”

Good news… we are meeting expectations!
So much opportunity guys!
But first... we need to closely assess and reformulate how we work
1. Develop strong partnerships
2. Redefine processes based on needs
3. Continuously talk to customers
4. Break down silos to pool resources
5. Create, test, learn, rinse, repeat
Develop strong partnerships
Moving the Needle

We knew that we needed team cohesion in order to be able to profoundly impact our customer’s experience, to do anything at all
Speaking Different Languages

Let's have a co-creation session

Is it in JIRA?

Add that to the backlog

Using the SAFe Framework

PI Planning

Ecosystem Map

Design Thinking

Dual track?

S2... S3... S4...

Design style guide

Opportunity Map

Assumption Prioritization

Card sorting

Retrospective

Ideation session

Empathy Interviews

Tech discovery

Time for hypothesis testing

Concept testing

Service Blueprint

Storyboards

Refinement this afternoon

House of Lean

Usability Testing

Low Fidelity Prototype

Impediment

Kan ban board

Opportunity Map

Service Design

Service Blueprint

House of Lean

Design style guide
We Practice Every Day

- Getting to know each other
- Being respectful – people not resources, experts in their field
- Active listening, participation
- Working off shared goals, roadmap
- Making everyone accountable
- Having fun together when we can!
Redefine processes based on needs
Coaching One Another

We would need to teach each other about various processes and frameworks to best determine how they could work together for us to have any chance of delivering
Additionally we would need to be **flexible** as a team to test new ways of working... as well as **comfortable with failing** to truly start working differently.
We Started with Education

- Design Thinking, Design Research, Service Design Trainings*
- Lean, Agile, SAFe Trainings*

*These courses were lead by teammates giving us the opportunity to be mentors to one another
Leading SAFe®

Leading the Lean Enterprise with the Scaled Agile Framework®

V 4.5.1

SAFE = scaled agile

no design = as we need it, discovery is needed

how does agile help avoid risk & what design discovery processes?

"transparency" in alignment of values in organization

execute values in alignment

what is our value stream? based on + trending

1. How do we define the WHAT/WHY
   - in ready-to-ship acceptance criteria - work until testing
     - need a set of criteria that will fail

1. Do you define the WHAT/WHY
   - in ready-to-ship acceptance criteria - work until testing
     - need a set of criteria that will fail

2. Run uses KPI? While rest use OKR?
   - added another reason

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- terms in flow chart - unclear & cause confusion

- too easy to make assumptions & grand process

- what is happening? caret is what standing about role of that happening

- is anyone accountable?
Ongoing Assessment, Refinement

- **Being SMEs** in different areas
- **Making recommendations**
- **Being open, flexible to change**
- **Testing, learning** – with various meetings, ceremonies and practices
- **Exploring other parts of the organization** for inspiration
3 Continuously talk to customers
We knew we would have to speak directly with clients, and associates, if we ever wanted to truly understand their needs and how we could positively help them.
Innovation Lies Between All Three

HUMAN
(DESIRABILITY)

BUSINESS
(VIABILITY)

TECHNOLOGY
(FEASIBILITY)
You Can Learn About Your Customer in Many Ways

- Observing people
- Analyzing their artifacts
- Interviewing people
- Living their experience
- Introducing new experience
You Can Learn About Your Customer in Many Ways

- Observing people
- Analyzing their artifacts
- Interviewing people
- Living their experience
- Introducing new experience
We began shifting the paradigm of building products and services within a vacuum, we stood up a research process and started talking directly to our clients in their workspaces.
All of the New Things

- **Research Guide** & Debrief Sheet
- Client Screener *(who we need)*
- Outreach Templates
- **Phone Calls** – Client POCs
- Additional **Expectation Setting**
- Salesforce Client Notes
- **Recent Client Interaction** Notes
Outreach Templates

Research Guide, Debrief Sheet
How did you interact with the client you are onboarding today? Please include the method of contact and topics. *Called them today about...*  *Emailed them for...*  *Sent a text to remind...*
As a project team (product, design, tech) we are looking for themes, or patterns, to influence our new work – we are not creating one-off features aka one comment to one improvement.
Happy Customers

We have found that both clients and associates alike appreciate being included in the discovery and concepting phases.
“I just want to say thank you guys for all the work you are doing, and the follow ups. I really do appreciate it. I speak for Drew as well. **We really do appreciate this – you are making everyone’s lives a lot easier...**”
We Keep Showing Them New Things

- Started with **interviews**
- Moved into **showing concepts**
- About to start **co-creation sessions**
- Constantly modifying work
- **Introduce MVPs** they can use today
- Clients, associates *like* being included!
4. Break down silos to pool resources
Being a Part of Something Larger

We are looking to improve onboarding throughout the entire Commercial Bank, to do that we need to knock down some major walls in order to have any real impact.
This Team is Going to Get a Lot Bigger…

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Kirk Hudson  
Director, Client Services

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Manager, Design

Mark Shapiro  
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Coming Soon…
Looking at Layers of Each Pain Point, Opportunity
Creating Opportunities to Better Align

We have created **new platforms** to bring together teams who have never worked together before – quarterly meetings, mixers

*ex. Sales + Product + Customer Service*
One Step at a Time

• Leverage work in flight
• Look for new solutions that help multiple groups not just one
• Pool backend, database work
• Manage politics while continuing to engage with additional teams
Create, test, learn, rinse, repeat
Breaking it Down

We cannot wait six months to a year to release improvements to this process – we have been breaking our vision concepts into MVPs to release regularly.
BECOMING A CLIENT PAIN POINTS, HYPOTHESES

This is a birds eye view of what goes on between Capital One associates, their clients, their tools and their backend systems.

It highlights where our hypotheses and concepts fit into the overall process – which ones appear in many places, which ones in just a few or one area.

RESEARCH THEMES

INCONSISTENT PROCESS
COMPLEX LANGUAGE
UNHELPFUL TOOL SET
DUPLICATIVE DATA COLLECT
LOW VISIBILITY
INSENSITIVE METRICS
**Hypothesis / Opportunity Map**

**BECOMING A CLIENT PAIN POINTS, HYPOTHESIS**

This is a birds eye view of what goes on between Capital One associates, their clients, and their tools and their backend systems. It highlights where our hypotheses and concepts fit into the overall process – which ones appear in many places, which ones in just a few or one area.

## Process

- **Themes**
- **Client Pain Points**
- **Associate Pain Points**
- **Hypothesis & Solutions**
Every Little Bit Counts

Even in creating something as “small” as a Word document checklist for associates has an impact on the process, and brings us a great deal of learning to build out further.
Breaking it Down

- Leverage long, short term roadmap
- Work as a team to break out MVPs
- Get MVPs into process ASAP
- Learn from MVPs, refine, relaunch
- Every MVP helps to learn, adapt
- Make sure MVPs truly add value
1. Develop strong partnerships
2. Redefine processes based on needs
3. Continuously talk to customers
4. Break down silos to pool resources
5. Create, test, learn, rinse, repeat
People as people not resources.
Show what you do, don’t just tell.
Be patient with others as they learn.
Also – it’s all about togetherness.
Traveled together
PI Planned together
Made maps together
Collaborated day to day together
Broke down org silos together
Co-created concepts together
Facilitated retros together
Made LT presentations together
Hung out at happy hours together
Visited teammate homes together
... gotten good at together
All About that Mindset

Without the openness of each teammate we would never have made it this far, in fact, we probably would have killed each other.
What does that mean for the work?

• Stronger concepts, solutions
• Faster progress on roadmaps
• Reduction of duplicative projects
• Higher morale, enjoyable work
• Sight on profound impact
• Excited, engaged customers
You can too!
A Long, Winding Road

- There is no silver bullet
- You have to do all the things
- Show and do, don’t just tell
- Put in the work, it will be worth it
- Don’t lose steam, be patient
- Respect, and having fun, is key
Thanks!