Warts and All

Designing in the open for increased agility
What does it mean to work openly?
1 Open-process
Working in the open within a team.

2 Open-output
The value of making work visible across teams.

3 Open-source
Making your work reusable by a larger community.
Why would we want to work openly?
The myth of the lone genius
Design as gift giving
WHY WORK IN THE OPEN?

Increased Agility: Working in isolation can be slow, expensive, and wasteful.

- **Ego-Centric**: It reinforces the myth of the lone creator which, can make it difficult to separate the creator from the work created.

- **Sunk-Cost**: The more time we’ve spent going down a specific path the more expensive it becomes to change direction.

- **Narrow perspective**: Working alone delays bringing in the perspectives and expertise of non-designers.
Professional maturity through collaboration
The better a designer is, the more open they are to discussing small changes and getting feedback. It’s a virtuous cycle leading out of secrecy and into productive openness.

– Ryan Singer, Product Strategy | Basecamp
WHY WORK IN THE OPEN?

What can we do to accelerate the maturity necessary to work openly?

How can we create environments that make collaboration possible?
Process & Products
Embracing the open kitchen in Design.

Modern restaurants started to embrace the open kitchen model once they realized customers were not only interested in purchasing the food that they had to offer, but were also craving a more holistic experience of dining. And they saw that people were willing to pay extra money for that experience. Customers value the craft much more once they see what it takes to create high-quality dishes at lightning speed.

– Fabricio Teixeira
Our employers and clients are buying way more than our technical skills. They are buying our authenticity, our transparency, our openness, our ability to collaborate with our peers, our ability to recover from failures. This transformation in the way companies buy design is making designers realize they are selling a process, not a deliverable.

– Fabricio Teixeira
From the open kitchen to the open office

Humana’s Digital Experience Center (DEC) is a software lab, accelerator, and incubator. The team focused on delivering contemporary software products and teaching contemporary software design and development practices.

TACTICS FOR TEACHING AND LEARNING

• Co-located
• Pairing in all disciplines
• Embedded partners
• Client SMEs + DEC technical expertise
How do we work more openly?
Collaboration, co-working, and communism
Collaboration, co-working, and communism
Collaboration, co-working, and community property
When design work and processes are transparent—both internally on the design team but also externally to non-designers within the company—more people can provide valuable perspective and everyone can benefit from the shared learnings or approaches... everyone gets better by being exposed to different ideas and shared learnings.

-Tanner Christensen
Attitudes to encourage collaboration, co-working, and shared ownership

Defer Judgement
When seeing or hearing new ideas defer judgement and default to generative collaboration.

Strong opinions loosely held
When faced with new information be flexible. Develop new opinions, move forward, and continue learning.

Assume good intent
Operate with the belief that everyone on your team is skilled in their role and want what is best for your team, your product, and your users.

Feelings Matter
Stay in tune with your teams feelings and morale.

Be available and interruptible
Every member of a team should be available and open to interruption, questions, and conversation.

Embrace the fuzzy edges
The intersections in responsibilities, roles, and knowledge are spaces for collaboration, and can create a sense of shared ownership for the product team.
don’t sweat the Tools and techniques
COLLABORATION

Be in the same place as your team

Create an environment that continually exposes opportunities for co-work and collaboration.

Share what are you working on

- Everyone on your team should know what you’re working on.
- Stand-ups and sharing updates on what you are doing are helpful, but activities should be made visible somewhere online: Trello, Jira, Zenhub, Tracker, etc.

Co-located

- Being elbow to elbow with your team you can see what they are doing and hear what they are talking about
- This casual exposure to the team’s activity can create moments of serendipity.

Distributed

- Hang out in the same places
- Always-on communication
- Share things that are rough and not fully formed
- Let people know your whereabouts
Screen-sharing and collaborative tools

Tools that allow collaborative editing are essential to creating an open environment.

Communication

• Slack (several people are typing…)
• Google Meet/Appear.in/Zoom

Co-authoring

• Figma
• Google Docs
• DropBox Paper
• Mural or Miro

Hand-off tools

• Wake (paid)
• Material Gallery (free)
• Invision
• Figma
• Zeplin
• Sympli
Cross-functional teams

When teams are built on diverse ideas and perspectives, they’re more likely to innovate.

Balanced Teams

• Bring an inclusive balanced team approach to all efforts
• Meetings on ostensibly narrow topics can benefit from “unrelated” expertise from other team members.
• Getting partners and cross-functional team members directly involved in discovery research helps build a shared understanding of users and their problems.
COLLABORATION

Working Together

Work one-on-one with your team on the same things, at the same time.

Pairing and Co-Creation

• Work on the same thing at the same time
• Working with, not for, clients and users.
• Users - generative research activities
• Bring clients into the creation process
  • journey maps
  • content organization
  • process visualization
  • prioritization exercises
  • ideation
Mindful Conversation
Steps for applying mindful meditation to team conversations

01 Listening
Listen completely. Give your full attention to the speaker. Don’t speak except to acknowledge saying, simply “Go on”

02 Looping
Close the loop of conversation. Let the speaker know that you’ve really heard them. “So what I heard you say…”

03 Dipping
Check in with yourself to know how you are feeling. Stay mindful of your body and notice when you get distracted.
Co-lurking is not co-working

Observing people work is very different than working together with them. When we have observation without participation input stops being a conversation and becomes feedback and instruction. This interaction suggests a hierarchical relationship. Feeling “watched” can have the opposite of the intended effect of co-creation. When people feel that they are being monitored it can make them feel they are being judged and in response they may be less likely to share and share early.
Pairing
Pair design is not feedback. It’s not that one person goes off to design alone, then brings it back later to see what another person thinks. Pair design keeps the conversation and iteration going continually, to avoid having to rethink a whole chain of decisions at some arbitrary point in the future.

–Chris Noessel, Design Fellow | Cooper
In contrast to feedback or collaboration, in Pair Design we have shared ownership, equal say, and equal skin in the game, forming a thought partnership where the goal is co-creation, not competition or critique.

– Suzy Thompson, Practice Director | Cooper
Knowledge share is important for mentoring new designers. You can quickly onboard new designers to a specific project or team. The second designer in the pair can give context to design decisions, visual language, etc.

—Paul Farino, Pivotal Labs
(pairing) reduces communication issues and documentation overhead, develops cross-functional empathy, and gives the whole team increased understanding of product vision.

– Tim McCoy, UX Strategist | Cooper
PAIRING

Pairing should be like square dancing...always changing partners.

PAIR ROTATION DISTRIBUTES KNOWLEDGE

When there are multiple pairs, each pair switches to work with other designers (creating a new pair). Pairing across disciplines as often as possible. Pairing can help empower and educate client/visiting designers.
Make everything smaller.
...Well, you don’t want to show something that is weak, or poor, so you want to hold off until you get it right. And the trick is to actually stop that behavior. We show it every day, when it’s incomplete. If everybody does it, every day, then you get over the embarrassment. And when you get over the embarrassment, you’re more creative...

– Ed Catmull, President | Pixar
Small units of work

We should aspire to make each unit of work as small as possible. Ask ourselves “What do we need to learn next?” and then figure out the least amount of work we can do to learn that thing?

Iterate...quickly

It is easier to feel confident in making decisions if you know that they will be able to refactor as they build, test, and learn.

Keep teams small

On a larger team direct access to the design and research process can cause teams to feel overwhelmed and unable to understand the process at a glance.
Communicate with clarity.
Signal vs. Noise
Concise communication with clients
Delivering design
Creating visibility within your org
Deliberate sharing and internal promotion - Broadcast your progress

Regularly sharing release notes and updates on progress and milestones. It is a standard practice to send updates to clients and stakeholders on short-term progress and project milestones. These external communications can also be used to create transparency within an organization.
Cross-team Critique
Look for Advice
Radiate information
CREATING VISIBILITY

18F: How Open Forest is Connecting the Public with the Outdoors

National Forest visitors and Forest Service employees frequently requested online forest product permits. OpenForest facilitates access to the national forests for members of the public.

In November 18F launched a pilot for Christmas tree permits. Piloted with four National Forests. Very simple workflow that asks the user for very basic information, let’s them pay for their permit online, and print out a paper permit that they take with them into the forest.
Open Documentation

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What opportunities do you have to talk about or demonstrate the progress your team is making?

What is something you’d like more people to know about the work your team is doing?
CREATING VISIBILITY

Radiate Intent

A consequence of radiating information is that you can also start radiating intent. People will be able to tell what you’ve done and what direction you are headed in.

Elizabeth Ayer, a product manager at 18F, wrote a great post about the value of radiating intent in an organization:

Her basic premise in response to the phrase “It’s better to beg forgiveness than ask permission” is to say “I intend to...”
4 reasons that radiating intent is better than begging forgiveness:

1. Gives a chance for someone to stop you before you do a thing, in case it’s truly harmful

2. Gives people who have information, or want to help, an opening to participate

3. Leaves better evidence of your good will

4. Shows others that adventurous behavior is acceptable in the org.
Contributing to the community
CREATING VISIBILITY

A web design system for the Forest Service

The United States Web Design System (USWDS) is a design system for the federal government. The USWDS makes it easier to build accessible, mobile-friendly government websites for the American public.

The Open Forest project developed angular components from a fork of the USWDS. The open source USWDS accelerated the design and development work for the Forest Service.
Opening up to a broader audience
EXPANDING YOUR AUDIENCE

Write about what you’re doing and learning

Blogs are great places to share work. The 18F blog serves as an ongoing source of news of what we are working on and helps document our methods and processes. Because positions are termed (maximum of 4 years) at 18F the blog has also become a repository of organizational wisdom.

A SEARCH ON THE 18F BLOG FOR “OPEN” RETURNS A TON OF RESULTS LIKE:

• The case for open source software
• How reusable is open source software?
• Creating an open FEC
• Open data democratizes innovation
• What agencies have to say about working in the open
• One agency’s investments in open source mean others benefit
• 18F: an open source team
• Etc...
EXPANDING YOUR AUDIENCE

Open Forest: Blog posts help users and the team

The project had an open wiki but also shared out blog posts so those not actively looking at the wiki changes could learn about the process of building this in the open.
EXPANDING YOUR AUDIENCE

Personify: Building an audience for an inner-sourced project

A TOOL FOR SHARING RESEARCH

While at Humana in an effort to demonstrate the value of user research and illuminate the decision-making process on a high-profile project our team forked Mosaiq an open source Wordpress theme the team at Nasdaq had made to document their work. This tool allowed us to open up our research and share it in a way that any interested stakeholder could access it.
EXPANDING YOUR AUDIENCE

A virtuous cycle of teaching and learning

As soon as you learn to do something you should teach someone else to do it.

Exploring new tools, technologies, and processes was part of our role at the DEC. These lunch talks gave us the chance to share these new ways of working with a much wider audience than we would have a chance to engage with directly.
EXPANDING YOUR AUDIENCE

Method Cards: Documenting and sharing techniques

PUBLIC DOMAIN DESIGN METHODS

18F designers and researchers working in their “spare time” started documenting their research and HCD methods. These methods were documented to be tailored to doing design work in the government. Over time and through iteration these cards have become a trusted resource in the public and private sector. For many people (myself included) the Method Cards have been their first introduction to 18F.
EXPANDING YOUR AUDIENCE

Where can you share what your team is doing with a wider audience?

What are things you’ve learned that you could be valuable to a larger community?
Open source: making work reusable
Open source process & open source code
OPEN SOURCE

Using free and open source software allows for product customization, advances interoperability between tools, and improves the overall quality of the final product.

Flexible usage
FOSS is particularly suitable for rapid prototyping and experimentation. The testing process generates minimal costs, and the process encourages the identification and elimination of defects not recognized by the original development team.

Cost-savings
The ability to modify FOSS enables 18F to respond rapidly to changing missions and markets. Support and maintenance of open source code provides a real cost advantage where multiple copies of software are required, or when the user base grows. The total cost of ownership is shared with a community, rather than solely 18F.

Community involvement
Publicly available source code enables continuous and broad peer review. Developing in the open also allows for other opinions to help adjust the direction of a product to maximize its usefulness to the community it serves.

Reusability
By coding in FOSS, we help populate a larger commons that cities, states, businesses, and individuals can participate in. This creates real economic value by lowering the burden of replicating similar work or by allowing the private sector to build off of and create new businesses around code developed at 18F.
OPEN SOURCE

18F: How Alaska is using transparency to attract modern software vendors

ADDING TRANSPARENCY TO THE PROCUREMENT PROCESS

- Published a lightweight request for information (RFI) asking for relevant open source examples
- Created a “Vendor Info” directory in our GitHub repository
- Turned questions from vendors into GitHub issues and are responding to them publicly.
- Initial RFP drafted in GitHub, so vendors can see it as it’s being written and submit questions and suggestions as it is drafted.
Thank you.