

# SaaS Tech Co - Design Lab Workshop

## Duration

2 days with Customer Reliability Team

## Goals

- Discuss and align on new user training for the product 2.0
- Prototype and test one or more specific pieces of training
- To take advantage of this rare face-to-face time with each other (remote company)
- [stretch] Information architecture and process ownership

## The Workshop

We used specific communication and creativity warm-ups...

- Speak it plain: One person gives a deep explanation of something technical / complex, the other person does simplest possible version
- Thirty Circles: Accessing your creativity

## High-Level Overview

1. Explore and capture learnings from past training
2. Develop fresh customer personas
3. Customer journey map using swimlanes for personas
4. Atomize the product into learnable elements - vertical breakdown (as opposed to a horizontal, task-based breakdown) - an encyclopedia rather than a guided tour
5. Explore and capture design constraints for the learning program (always / never + structured lean coffee questions) - this captures the 'how'
6. Module brainstorm - "how might we teach ... [component from top of atomize]" - beginner, intermediate, advanced - creates large set of potential modules
7. Vote on 4 modules from anywhere across the set
8. Define and sketch out the modules - using a structure we provided
9. Feedback / vote on the 4 to bring them down to 1 ready for design dash
10. Design dash to build module (broken out into teams)

11. Lab session where each team got to follow the instructions from the other team with a silent partner from that team who was making notes
12. Learning / gathering / shareback

Everything from the two days fundamentally landed on the last two steps, which were the opportunity to go as deep as possible to check all of the assumptions up to that point.

## Outcomes

The team went from almost no alignment on where to begin user training to a set of training that could be polished and rolled out.

### Specific Outcomes

1. Some team members initially expressed anxiety as they felt like they were going to build something where one of the steps would fail (given the limited time). They learned important lessons about prototyping as they stepped back and thought “I can just say ‘in this step, I will pretend to be the computer system we don’t have’ and tell you the information you need”. In other words, the process liberated these individuals to be more creative both in the moment and in future.
2. One member of the team elected to try the lab on his iPad due to an issue with his laptop. This delivered a wealth of unexpected signals and learning about the customer experience of their product and emphasized the serendipity that can arise from this kind of prototyping environment.
3. The sentiments from the team afterward was that they’d learned more in the lab together than they’d learned in the previous couple of months. They recognized that this learning wouldn’t have been possible without all the prep work they’d done over the two days.
4. The process led to specific decisions around what to prioritize over the next 6 months. This included cross-functional discussions the team would take away to have with other teams.
5. There was a renewed energy around customer conversations as inspired by the persona analysis work, with members of the team identifying key customers they’d like to get more connected to.

## Feedback

### Team Captain

The team worked with us collaboratively to turn a handful of bullet points into a highly productive two day workshop on a relatively short timeline, all the while navigating potential scheduling conflicts and keeping me up to date on status. Super happy with the outcomes. Highly recommended.

*Cameron J - VP Customer Reliability*

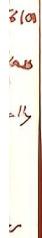
### Participants

*"PeopleStorming did a fantastic job of keeping us on track and helped us make things visible that were otherwise sequestered in everyone's head."*

*"PeopleStorming did a fantastic job taking a raw idea - a feeling or desired direction - and helped us turn that into an actionable plan where everyone knows who is responsible for individual deliverables, and we all have a shared sense of priorities."*

*"The PeopleStorming facilitators managed to take a daunting topic and help us as a team to disassemble it into workable pieces and then build our priorities back up around them."*

*"I really enjoyed the two days with PeopleStorming. They kept our discussions moving forward and on track so we could focus on our ideas and concerns. I have never worked with facilitators before, and it was great. Thank you!"*



# People Storming

Happy, Healthy, High-Performing Teams





