People & Process - A progressive, people-centred transformation framework for digital products

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<u>Please note: This document is not fully completed and should be treated as a WIP</u>

Introduction

People. That's what our executions are all about. In one way or another someone will use your product(s), read your marketing materials, walk through your doors, talk to you on the phone, play your videos, reply to your tweets and much more. People are your method of making money, raising awareness and garnering loyalty.

It's with this that businesses now need to become much more savvy to people and understand their needs and requirements - whilst also appeasing the senior stakeholders and ticking the boxes marked "ROI" (return on investment) and "KPIs" (key performance indicators).

Furthermore, people are no longer *just* your end-user. They're employees, they're stakeholders and they're the general public. These are all people that could be affected by, or require use of, your business and skills.

This framework should help businesses grasp changes required by understanding people, their needs and their requirements. It also gives an over-arching view of wider business dependencies and requirements to assist in decision making processes. This allows businesses to set out achievable KPIs which in turn gives them measurable targets against any identified execution.

Whilst reading this document it's worth noting that this is written from the perspective of developing digital products and thus caters more towards technology as an output.

Background

Traditionally, agencies insist on adopting a discovery process to deeper understand the end user and to deep dive into the client business, whilst the client business traditionally believes that the process should still be very much that a brief results in a price, without the need for consultation or the deep dive an agency deems required.

The concept of discovery, as defined by the UK Government within their Service Design Manual, "will give you a high-level understanding of user needs, what the existing service landscape looks like and a sense of what your initial prototypes will explore" (Source: https://www.gov.uk/service-manual/phases/discovery.html).

It allows all those involved in the process of creating a product or service to understand the end-user, examine the existing landscape (which could include third parties, existing vendors, new vendors, competitors etc) and therefore make an informed decision on how to approach a project - which frequently, and quite often mistakenly, is defined up-front given the nature of the business undertaking a discovery e.g. a digital agency being commissioned to execute against a brief for a brand.

Depending on where you sit within a business, the following diagram outlines the approach to organisational change on numerous levels along with the dependencies of each to one another. Ultimately what this outlines is that should you remove any one of the key pillars, organisational change would be unachievable.
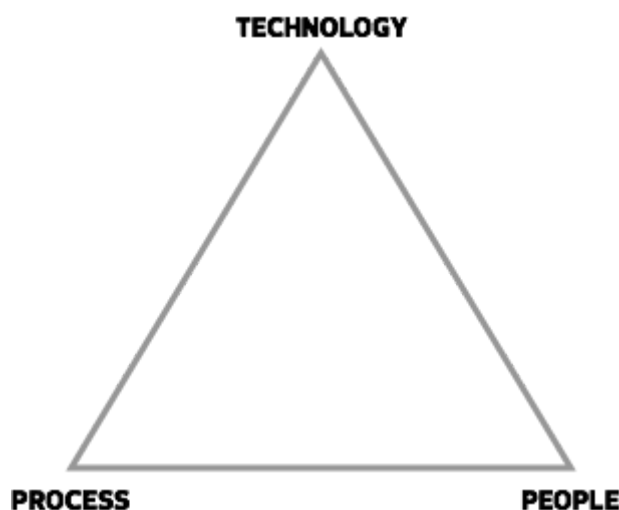
As described above, the basic premise of the model is simple - however, it can be argued that, without the foundations of understanding the people involved and the process involved, the technology becomes obsolete.

This particular model has recently been used heavily in the world of cyber crime. *"I take a contentious view and say that IT outages are rarely to do with technology,"* claimed Damian

Saunders of Citrix Technology. *"There's normally a role that technology plays in the outage, but when I look at the root cause, by far the greatest cause is people and processes."* (Source: http://www.bbc.co.uk/news/business-24962989)

Technology also implies that the end deliverable will be something of technical requirements and this isn't specifically true. For example, a small shop based in a community may want to understand what products are best for their customers when they look at refreshing their stock line. By understanding their customers, they'll also know the process by which to question them, and the best execution in which to do so - this execution could be simply chatting to them, flyering through doors, a physical questionnaire or an online questionnaire.

The deliverable is never guaranteed to be technology, but it will always be guaranteed to be some form of execution on the side of the business that is driven by end user and/or customer requirements. As previously stated however this document will outline the approach from a product development perspective.

Outline structure

At its very core the framework is built of three tenets that, from the ground up, allow a business to build a holistic comprehension of people and habits, and giving an informed view on execution.

EXECUTION
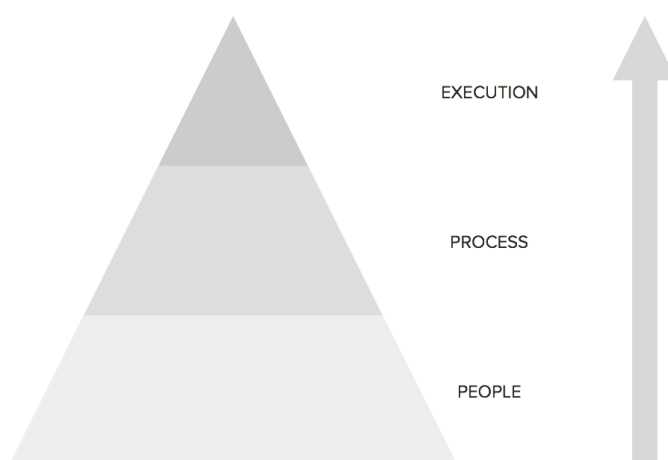
PROCESS

PEOPLE

The adoption of a pyramid model reflects that each stage is progressive. For example, we simply cannot begin to understand required processes without first understanding the people involved and their habits.

It is therefore imperative that people construct the core of any transformation strategy using this framework. The tools in which you use to identify these people are completely flexible as the importance lies in the comprehension of people - therefore methods such as executing primary research, developing user personas and creating empathy maps for users are more than applicable at this stage.

Once an understanding of people is prevalent it is then advised to undertake a complete review of process. In this case look at the outstanding technologies. What vendors are involved and in what way can they help? What is the current technical and information architecture?

Execution, in this case, is defined as technology. Once there is a comprehension of people and process, the relevant technology can be identified and a brief for the development of a product subsequently developed.

Expectations and Outputs

Defining validation/target group

Important to any process is to ensure there is a validation group available for testing. These should, ideally, be a mix of stakeholders as well as end-users of the product, in approximately a group of 8-12 to achieve a good breadth of feedback.

Outcome Vs Outputs

It's easy to get caught up in promising deliverables yet, in a discovery phase of a project, you never know what you might discover and how this might hinder you. Therefore the very best thing for a strong discovery phase is to gather all efforts around an agreed outcome that answers a key question to the identified problem. For example, a client may tell you they're having a 50% drop-off in comparison to last year on a particular tool, so the outcome should answer the question "how do I improve end-user retention to x tool?".

Timescales

Typically discovery phases can be a whole range of time periods dependent on bandwidth. In order to keep the process lean and nimble no less than 1 week should be spent on the process and no more than 3 weeks.

Team required

Identify the best people early into the process. From a client perspective have everyone relevant to the engagement in the room at kick-off, but ensure a well planned itinerary with the relevant parties invited to each session (so not all stakeholders are in every session).

Furthermore, the team on the side of the agency should echo all disciplines in some way, shape or form. This will allow for comprehension and knowledge across all departments and allows for swift handover and briefing as new members join.

Acceptance criteria

Define acceptance criteria for everything. Nothing should be unmeasurable, whether quantitative or qualitative (emotional response), and everything that acts as an output (though not yet defined at kick off) should be created and delivered with an internal acceptance criteria.

People

Quite simply we should understand the end-user to ultimately create a better product that people want to use, not making products we hope people will use. The people phase is not about ideas and these should be avoided in discussion.

This "make things people want > make people want things" concept echoes perfectly the idea of better understanding your users but ultimately better understanding user needs. Developing anything must always run with the question:

"What is the user need?"

User needs will act as an integral part of product development but also provide steer on product validation. It helps us ask whether we're doing something the way our users would like or whether the particular feature we're assessing has any relevance against our users' requirements.

Defining user needs

We're now in a world where we're awash with data. Businesses now hire analysts whose' sole responsibility is to gather data and disseminate it from all channels to be able to build profiles of their users and target them with messaging.

Some businesses however will not have this so it's important that during the definition of user needs the following is asked:

- Is there existing content? - what do your end-users like looking at the most? Which tools are most relevant to them? Is there other key data and tools that can be used at this stage to deeper analyse user behaviour to make incremental improvements to this content?
- What are people searching for? - use tools that already exist, such as Google Keyword Planner, to see what people are looking for within your target market to create relevant products.
- Is the business a retail or customer facing organisation? - ask staff for their take on customer requirements. What are they being asked in-store and why are they being asked it? Is there an opportunity to leverage in-store demand through other channels?
- What do you already know about your end-users? - are there already user journeys and personas in place? If so, are they still relevant and which stages drive most friction and most traction?
- What do you want to know about your end-users? - data is an imperative in many products, so how can you utilise new product developments to enhance your existing data pool?

With the above questions answered and examined (and this can be over the course of a few hours, days and/or weeks) you'll be better placed to build out user needs and requirements.

Validating and quantifying user needs

What is most important is that user needs are fully validated. The purpose of validation is to fully ensure that the user needs, and subsequent stories, are relevant to the users and not just to the business.

Validation is best undertaken across the identified testing group as outlined during the kick-off to the discovery phase.

During validation it's advised to, where possible, quantify a user need into a tangible and reportable factor. When deploying and iterating the product, this will allow for a business to further tweak and refine based on user expectations. To be able to settle and agree on these particular targets (KPIs) there needs to be:

- Assumed user numbers
- Existing data on product usage (where possible) or understanding of feature demand where data is not available
- Understanding of existing KPIs across other products.

There is no particular algorithm to be undertaken to add this quantifiable factor, but more so common sense should be considered. Ask yourselves what is deemed to be realistic and what is deemed to be relevant and set goals related to these.

Outputs

In a typical people phase you would expect the following outputs:
- Current user personas
- Current user journeys
- Qualitative and quantitative research
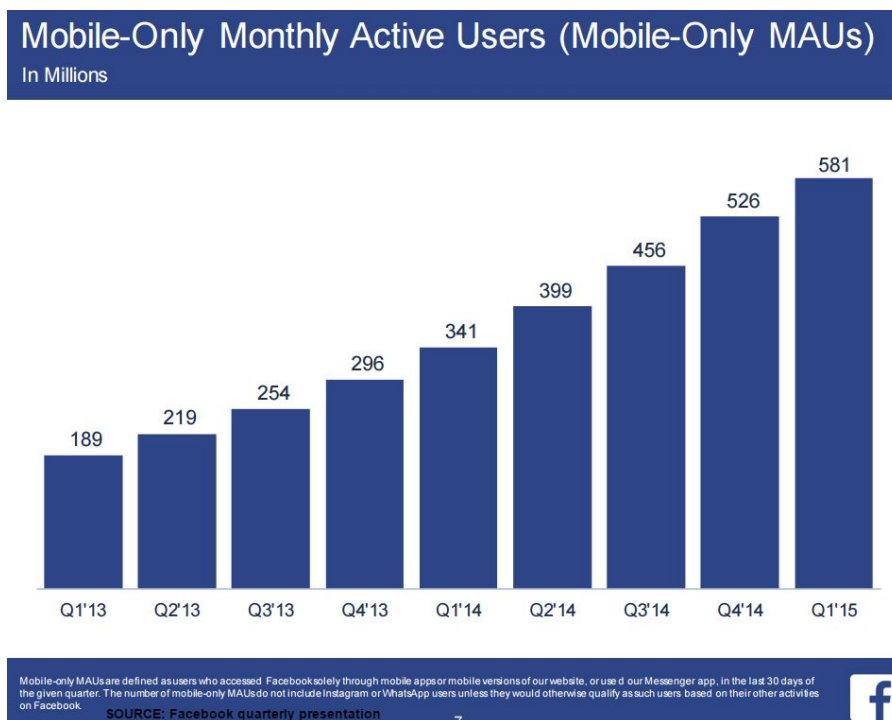- User needs - validated and quantified

Framework

Now we've established context, it's time to take all this data we've gathered by bringing it all together across a series of tables to give us a clear manifesto of relevant forward movement (momentum).

Why momentum?

In the world of digital advertising and marketing we see words like velocity over used, and really lack any relevance. At it's simplest definition, velocity means "speed" - not a rate of speed, but simply speed itself. Therefore the use of velocity in projects and/or products is simply defined by the rate of work and adoption.

Momentum however implies something that gathers speed. This is perfectly echoed in the Oxford Dictionary definition, describing it as "the impetus gained by a moving object" (Source: http://www.oxforddictionaries.com/definition/english/momentum). For example, a car gains momentum as it approaches a decline.

Momentum works in a theoretical sense also. In terms of marketing and advertising, we can apply momentum to most parts of a project - development, deployment, growth and so on. For example, Facebook sees a continuous increase in Mobile-Only monthly active users, ultimately leading to positive momentum.

Mobile-Only Monthly Active Users (Mobile-Only MAUs)
In Millions

Q1'13	Q2'13	Q3'13	Q4'13	Q1'14	Q2'14	Q3'14	Q4'14	Q1'15
189	219	254	296	341	399	456	526	581

Mobile-only MAUs are defined as users who accessed Facebook solely through mobile apps or mobile versions of our website, or used our Messenger app, in the last 30 days of the given quarter. The number of mobile-only MAUs do not include Instagram or WhatsApp users unless they would otherwise qualify as such users based on their other activities on Facebook. **SOURCE: Facebook quarterly presentation** 7

Businesses like Facebook however continue to develop products and services that keep users returning on a regular basis but also allow new users to develop habitual life processes that keep them using these particular products and services.

Simply put, this is done through user understanding, technological capability and a marrying of those needs to create a seamless experience that users want, whilst not being organisationally led. Referring to earlier in this document, the aim of this framework is to make things people want as many businesses before us have done.

Where to start?

We need to really roll back to the fundamentals of the work we've already undertaken.

We've identified momentum as a huge player within a successful framework delivery and as such this should be continued within any documentation. At the simplest of levels, we should look to deliver in the following areas:

- Quick Win - 0-3 month delivery (typically a prototype in product development)
- Tactical - 3-6 month delivery (enhancing a prototype in to MVP)
- Strategic - 6+ months (continuous improvement)

For some good insight into a very loose product development approach such as the above you can read *"#now, #next, #later: Roadmaps without the Drudgery"* from Noah Weiss, SVP Product at Foursquare (source: https://medium.com/@noah_weiss/now-next-later-roadmaps-without-the-drudgery-1cfe6565 6645#.k9jm8rng4). At it's core it acts as a simplistic prioritisation framework that allows for continuous improvement, iterations and development without causing upset within an organisation by following typical agile processes.

It should also be noted that the framework can be adapted - so instead of simply sticking to the concept of "#now, #next, #later", you could break the framework into months, or create milestones that have measurements attached to them as gatekeepers to unlock the next section of development.

Adding meat to the bones

Core framework

At the very core of the framework, and subsequently any successful delivery, is people. Through the use of a discovery phase you should have identified target market groupings, end-user groups or somewhere thereabouts. Therefore these groups form the basis of the framework.

Using this as the basis, you should set the headers of your document up as the following to reflect the above:

Customer Group	Quick Win	Tactical	Strategic

Defining the Pillars

Once the customer group is identified, we then need to outline the touch points that we want any end deliverable to work across. Our core touch points for retail, for example, could span across the following:

- In-store
- Online
- Mobile
- Store Card
- OOH
- Social

These act as our pillars that we will build upon to create whatever end product. These are adaptable and replaceable depending on vertical and/or desired execution.

Adding these to our table we can begin to see the following structure:

Customer Group	Quick Win	Tactical	Strategic
In-store			
Online			
Mobile			
Store card			
Social			
OOH			

User sentiment

We can see now that, below customer group, we have relevant touch points pertaining to the customer group. What we'll now do is further expand upon these so that we can capture all the information required to give us the solid foundation for our end deliverable.

Keeping the end-user at the heart of all development we should analyse and anticipate sentiment. We need to be asking *"what do we want our users feel?"* and *"why do we want them to feel this way?"*. Sentiment understanding is important as it will form the basis of the end customer experience when matched against the technological deliverable required.

A sentiment should be attached to each pillar, so as such should look like the following structure:

Customer Group		Quick Win	Tactical	Strategic
In-store	Sentiment			
Online	Sentiment			
Mobile	Sentiment			
Store card	Sentiment			
Social	Sentiment			
OOH	Sentiment			

Understanding dependencies

Sentiment is ultimately designed to underpin and validate our concepts. The next step is truly understanding the dependencies involved from the tenets of our three model pillars: technology, people and process.

Technology dependencies should outline the current technology available. An organisation should be asked what their current architecture is and the vendors they currently work with, but within the framework mapping only the relevant requirements. Furthermore, the technology dependencies should also look at the future of technology and asking what technologies can be adopted to deliver against the end-user sentiment in the future.

People dependencies outline the training and understanding required. So, for example, how do we onboard the users or explain new features of the product to them. Above all else it should identify whether the use of particular technologies is already understood in the wider market and, if so, is onboarding or explanation required.

Finally we need to understand the impact on process. By analysing existing process at this stage we can adequately assess the impact of change on a business. This may help the business to create a training program or inform users and staff prior to deployment to ensure service levels are never affected and that product satisfaction remains high.

To map these out we outline the table in the following way (in this case just one section is done as an example):

Customer Group			Quick Win	Tactical	Strategic
In-store	Sentiment				
	Dependencies	Execution			
		People			
		Process			

Example

Boots UK Limited is an organisation in the UK that hires over 55,000 people and recorded a revenue of £23.4billion in 2013/14 (Source: http://www.boots-uk.com). This is divided across numerous entities with its core business activity sitting in high street retail.

The high street retail arm of Boots has some key customer segments that play a large part of their revenue channels but moreover is key to them building brand perception in the long-term to ensure a loyal customer base. These customer segments will be the pillars of our framework and are as follows:

- Teens
- Long-term illness
- Parent and baby

To drive further context, and for the basis of this example, we'll give each a positioning statement to ensure that we understand the importance of them to the business.

Teens	Providing teens with an environment comfortable enough to buy products that help them build confidence and lay the foundations of self-actualisation
Long-term illness	Giving patients the care and attention they need to help them focus on achieving a better, happier life
Parent and baby	Providing parents with the right tools, products and advice to allow their child to grow healthy and strong

These would typically be outlined in the discovery phase of the project, however now that we have some understanding we can start to build some sentiment requirements based upon how Boots wish to position themselves within these target markets.

Further to that, Boots will have key pillars that are relevant to them alone. These could be:

- In-store
- Boots Advantage Card
- Mobile
- Online
- CRM
- Digital Marketing channels i.e. Social, Paid, Blogs etc.

We'll now focus purely on the teens target market whilst in-store for this example. The overall sentiment Boots want from the teens is to become a trusted place that they can go whereby they feel there is no judgement and prejudice, and they can shop for items that may be intimate to them or new to them with sufficient levels of advice to help them grow and make better aligned choices in the future based on experience. Teens build their

experiences on trial and error, and Boots should be the place that holds their hand to do so. Breaking this out, we could look at the sentiment across quick win, tactical and strategic as the following:

In-store	Quick Win	Teens are aware of Boots but are unaware of the benefits of Boots to them. They want to feel guided but they want to do that through independence and of their own volition.
	Tactical	Teens shop at Boots but don't see a repeated benefit to them. They want to feel they're welcome with open arms but they don't want to feel like their personal space is being invaded.
	Strategic	Boots has become a regular destination for Teens. They now want to understand how their purchasing habits can be beneficial to them and what they can do to achieve the best value for money by being a loyal customer.

We now have a high level grasp of Boots' commitment to Teens and how they want to attract them into the brand and build that long term engagement. What now needs to happen is to understand the dependencies required in order to do so and, at this stage, quite a holistic view to better understand the journey they take.

The following example maps against the quick win sentiment as an example:

Customer Group			Quick Win
In-store	Sentiment		Teens are aware of Boots but are unaware of the benefits of Boots to them. They want to feel guided but they want to do that through independence and of their own volition.
	Dependencies	Execution	**To use tech, what would we require in-store?** ● Cellular signal ● WiFi **What tech capability do we own?** ● Open eCommerce APIs ● Product info APIs **What tech capability may we require?** ● iBeacons ● NFC tags ● GPS ring-fencing

		People	**How do we currently communicate in-store?** ● POS advertising ● Store colleagues ● Leaflets **How do we ensure our staff have all relevant information to hand?** ● Store colleague iPad application ● Store catalogue ● Expertly trained colleagues **How do we help our customers discover new products and services?** ● Paid advertising - TV, Online (social), PPC ● Blogs ● Website ● Mail blast ● Existing app users ● Direct mail
		Process	**How does this sentiment impact on our process?** Ensuring that staff are aware of up to date product lines for teens. **How do we do this?** ● Store colleague iPad application ● Internal mail blasts ● Verbal comms from line manager ● Internal memo

Benefits

The requirement here is to build out each section so that all possible scenarios that respond to the user sentiment are thought about and tackled. The opportunistic points at this stage are:

- You identify commercial opportunities - e.g. Boots as a business is still issuing physical internal memos. By going to a more streamlined, digital process, they can save on paper costs as well as time to live for deploying a message.
- Understanding is in black and white - at any point anyone should be able to view this document and be fully up to speed with the rationale behind any decisions made.
- It's a guide - at no stage is this telling you what to create. You should use this purely as a steering document, a canvas, that provides the basis of any concepts and ideation.

Output

The final canvas becomes a living, breathing and editable document that can be revisited time and time again. It becomes the guiding statement for the product or service development and should be a central point of call when creating these.

How this manifests itself is purely down to the output determined during discovery. It can be as visual as you so wish, or based purely within a spreadsheet that can be easily accessed and edited by all involved.

Conclusion

What we have within this document is an outline framework to create a transformation canvas. This transformation can be organisational, behavioural, digital or any other function of business - however the focus of this document outlines digital transformation and how to tackle that.

The framework is not strict and rigid. It is designed for people to adapt and play with, but give them the basis of understanding to help create a people-centred deliverable.

The argument to use this framework is ultimately extremely simple - it keeps your users at the heart of the development and therefore helps you create products and/or services that people want to use, rather than forcing upon them processes that drive friction and ultimately a lack of harmony.