

# Personas Review

May 2020 • @EmilyCampbell



## IC Designers

People responsible for executing on design work



**Soren Hamby\***

Andrew Euston  
Lizzy Brophy  
Andrew Cullen

## IC Front-end Engineers

People responsible for executing on front-end engineering work



**Lizzie de Cantor\***

Jake Reed  
Audra Tadlock  
Andrew Rohman

## CIOs

People responsible for the tools, practices, and platforms of information within the enterprise



**Julia Farina\***

Nitin Puri  
Waqas Hussain  
Lilian Wall  
Emily Campbell

## VP Engineering/CTO

People responsible for the tools, practices, and platforms of technology within the enterprise



**Kacy Boone\***

Dave Lewis  
Andy Smith  
Joe Gelman  
Kat Bacon

## Design Org Leaders

People responsible for the tools, practices, and platforms of design within the enterprise



**Nick Hahn\***

Micky Teng  
Catriona Shedd  
Alex Webb  
Stephanie Robinson

\* = Point of contact for squad

# Vision

As a company, we will hold a single and unified understanding of key customer personas, their needs and characteristics, how they differ by industry or segment, and the messaging and product value that engages them.

Teams will use this information autonomously within their work toward unified, customer-centered objectives, resulting in a **positive and consistent customer experience and increased growth.**

**“People don’t know how to work together in a changing world”**

-- Andrew Godfrey

# What you're going to take away

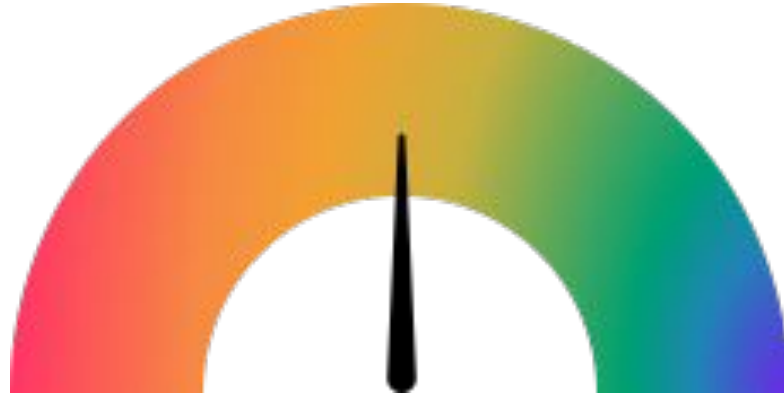
- **Weniger, aber besser:** Less, but more
- One experience, one team
- “Collaboration” over the rest
- More Micky, less Paulie



# Meet the CIO



## The balancing act



**Operations**

**Transformation**



**21st century CIOs  
lean into feedback  
& take their seat  
at the exec table**

**“The whole future of work is very human centered and very learnings driven... CIOs have never been respected like this before—it’s an opportunity of a lifetime. Now is the time to elevate yourself.”**

**Ashwin Ballal**

CIO and SVP





# CIOs own the technology agenda that underpins the success of the entire organization.

- ↑ Strategic role
- ↑ Transformation
- ↑ Revenue generation
- ↑ Customer centered (EX and CX)

## How is the role of the CIO changing at your company?

### Poll Results:

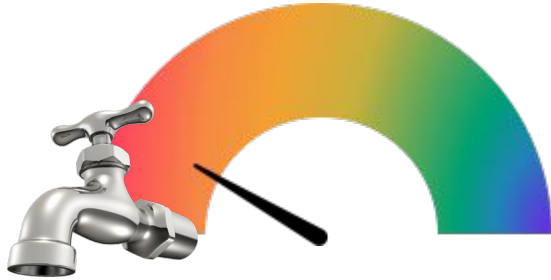
CIOs are becoming more strategic and gaining executive power	72%
CIOs are becoming more tactical and losing executive power	13%
The role of CIOs is not changing	15%





## Trusted Operator

100% of CIOs in 2015 → 50% in 2020



A traditional, steady-state officer often resistant to change.

“Efficiency through consistency”

Indirect impact on business value

## Business Co-Creator

36% in 2018 → 40% in 2020



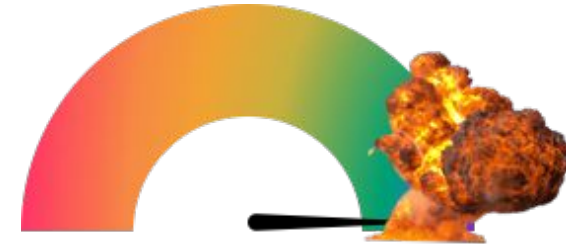
An exec partner that uses technology to connect the dots between departments

“Prototype, pilot, then invest for business agility”

Direct impact on business value

## Change Instigator

9% in 2018 → 10% of CIOs in 2020



A technologist that leans toward change for change's sake.

“How can I do something new here?”



ASK YOURSELF...

**Which version of this  
persona are we  
dealing with?**



## Trusted Operator



Steve Neff

## Business Co-Creator



Gail Evans



MERCER



Scott Spirit



"Our digital transformation will not only enable Mercer to successfully navigate the future of work, but by accelerating our own digital journey, we are uniquely positioned to help our clients do the same."

GAIL EVANS, Chief Digital Officer, Mercer



MAKE TOMORROW, TODAY





# Decision Criteria

## Business Protection



Business Savings

Business Strategy

Employee Needs

Business Innovation

- Uptime
- Data protection / Compliance
- Process consistency
- Security protocols

Trusted Operator

Co-Creator

Change Instigator



# Decision Criteria

**Business Protection**



**Business Savings**

- Vendor consolidation
- Automation, efficiency
- Return on Investment

**Business Strategy**

- Digital customer experience
- Fast, cheap pilots
- Strategic investments

**Employee Needs**

- Remote working, “next normal”
- Process friction
- Perception & learning mindset

**Business Innovation**

- Build resume
- Bleeding-edge tech
- Net new opportunities

Trusted Operator

Co-Creator

Change Instigator



# Biggest challenges.

Tech debt, lack of talent

Speed of change

Shadow IT

Leadership alignment



# Vender Evaluation

Internal User Experience

that creates a better

External User Experience

## Trusted Operator Lens

- Scalability
- Data security

## Business co-creator lens

- Elimination of workflow friction
- Efficient remote collaboration

- Ship digital customer experiences faster
- Rapid iteration, piloting, user- testing before development/delivery

InVision solves for this across the board

Audited security and compliance

3K saved per developer

Remote collaboration

Rapid and cheap learning

IT security integrations

6.5 weeks faster time to market (avg)

Design and dev workflow

Invest in the best bets





# Covid19 Impact

- Define your full arsenal of cost-reduction measures

+ Invest in business productivity and the next normal

There are four categories of investment that the CIO should prioritize:

1. **Deploy applications, backbone systems, and infrastructure** to support the accelerated shift of customers and suppliers to online channels.
2. **Transform parts of the architecture** to build in more flexibility in order to lower fixed operating costs—for example, using the flexibility of cloud services to consolidate legacy solutions. After the financial crisis in 2008–09, many companies used IT transformation measures to sustain cost savings over years. Note that measures such as cloudification typically take longer than a year.
3. **Automate business processes.** The combination of distributed/remote working and a drive for enhanced efficiency should propel the next wave of process automation based on robotics, workflow automation, and artificial intelligence.
4. **Sustain and enhance support for remote working.** Given the shift to working from home, it might become standard to supply parts of the workforce with a sophisticated, stable, and secure remote-working capability at scale. To do so, the infrastructure for remote access must be enhanced and hardened to support remote-working models.

Consolidate tooling

Invest in digital customer experience, digital channels

Invest in tools that support remote collaboration



# Covid19 Impact

McKinsey  
& Company

[A practical way for CIOs to manage IT costs through the COVID-19 crisis](#) (April 2020)

Define your full arsenal of cost reduction measures

Invest in business productivity for the next normal

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Aaron Levie ✓  
@levie

Spoke with multiple Fortune 500 CIOs in the past 2 days who have been implementing a fundamentally different IT strategy than they would have had a year ago. More cloud. More digital. More automation. Years of IT acceleration being compressed into months.

8:57 PM · Apr 30, 2020 · [Twitter for iPhone](#)

535 Retweets 2.2K Likes

mer  
annels



Invest in tools that support remote collaboration

# Meet the IC Designer



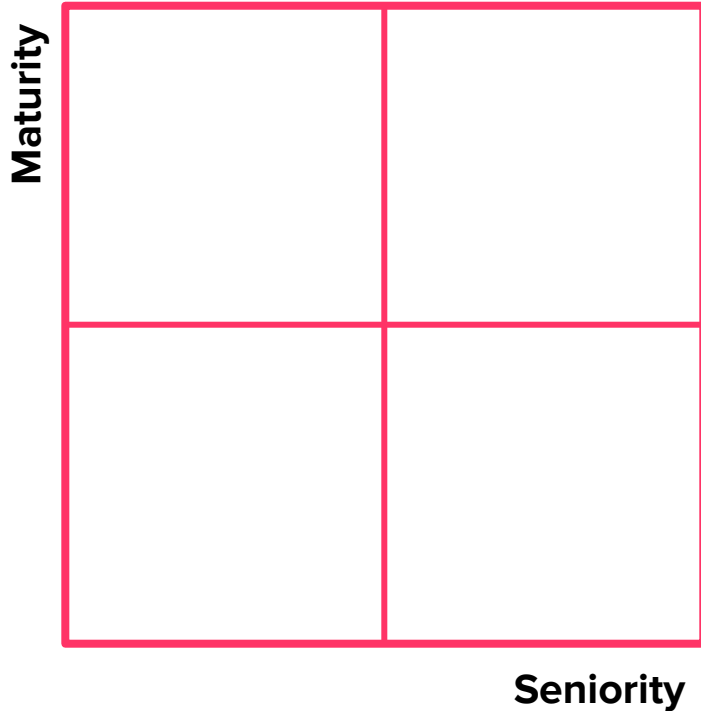
“As digital teams grow and projects become more complex, designers are being valued by collaboration and team enablement rather than only individual tasks.

**It takes two to tango**

*UX Trends Report, 2020*



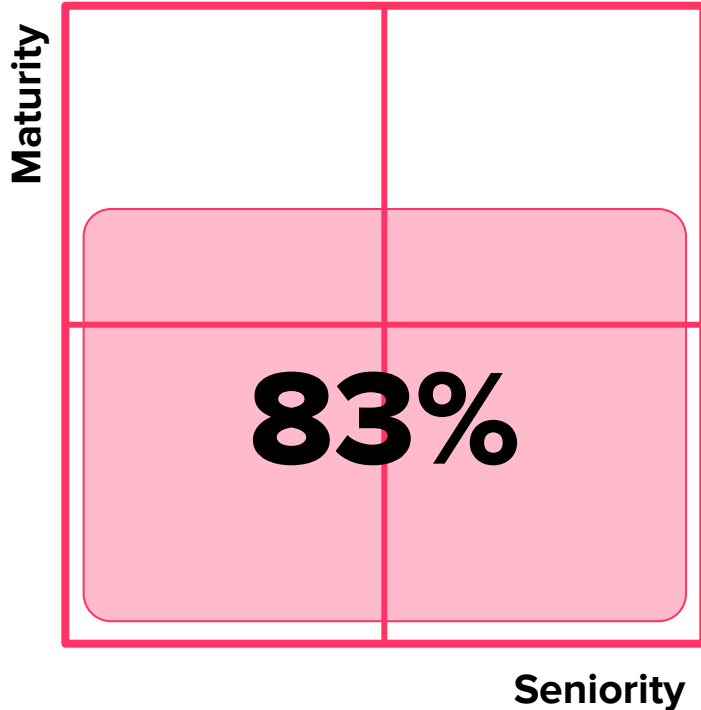
# Meet the IC Designer



## Not one size fits all

- Industry / Geography
- Maturity
- Experience & Seniority

# Meet the IC Designer



## Not one size fits all

- Industry / Geography
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- Experience & Seniority



# Maturity axis

- Degree of regulation
- Ability to shape their process/priorities
- Access to research and experimentation
- Overall appreciation for design
- How well their systems and platforms help move fast without debt



# Seniority axis

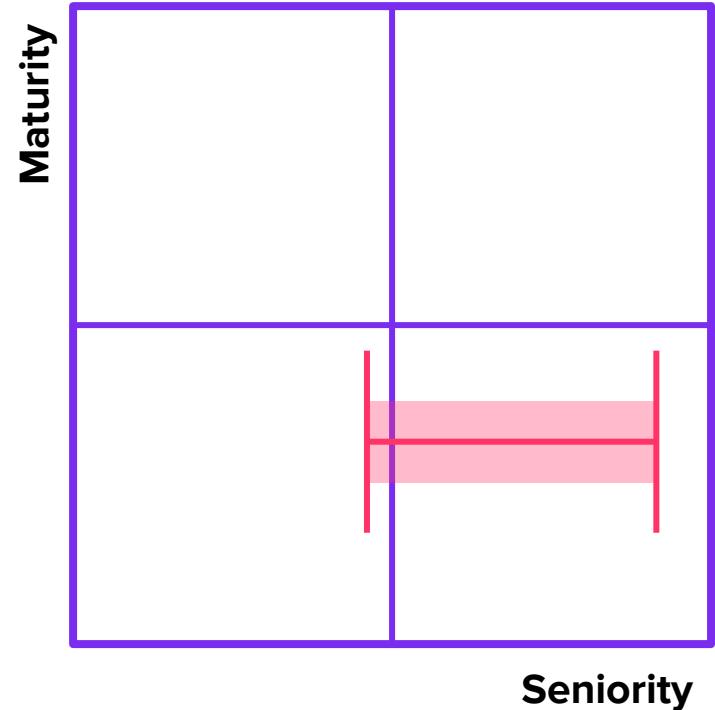
- How much say in tool selection
- Ability to adjust process / incentives for the team
- Coaching and learning opportunities
- Business language fluency
- Cross-functional partnerships



# Low Maturity - Mid-to-High Seniority

## Characteristics

- More designers with lesser skillset
- May have print-design background.
- Design leadership is absent or disempowered
- Report to mid-management then up through IT or Dev leadership
- Regulated environment leads to them lagging behind emerging trends







# Low Maturity - Mid-to-High Seniority

## Pains

- Strict regulations
- Focus on activities and production
- Spiral of tech debt from lack of design system
- Dev-led org means design changes to accommodate dev scope
- Lack of research/testing

## Gains

- Small wins organizationally
- Some say in tool selection
- Ideas and work lead to solving customer challenges
- Design (and research) as a team sport

# Tool Evaluation



Does this help me create visible customer impact, given our constraints?

## Storytelling

I want to visibly articulate broader thinking within the frameworks of a dev-driven / agile environment

## Impact practices

I want to adopt and scale best practices of more mature organizations given our regulated environment

## Systems

I want to spend less time repeating work but lack the resources / support for a fully fledged design system

## Community

I want to learn from and share examples of how other teams navigated the challenges I'm facing

## InVision solves for this by

- Acts as a storytelling platform for designers to share information from broad stories to small details
- Create user impact via security-proven, high productivity tools
- Providing specific examples on how to reach high impact outcomes in a regulated environment
- Outside validation on targeted practices to create organizational buy in
- Design systems tool and team that demonstrates how to benefit from systems incrementally
- Strong community to help you learn and grow from thought leaders and teams like yours

# Meet the Front-End Dev



**Small issues  
upstream,  
big issues  
downstream**



# Meet the Front-End Dev



All I'm askin',  
is for a little  
respect





## Common Characteristics

- Works on a small team of peer developers
- Loyal to efficiency and outcomes over tools
- Thinks in specifics, not big company goals
- To-do list is dictated by a PM system (Jira)
- Learner's mindset (constantly evolving landscape)
- **Respects and appreciates good design**



# Pains (we can do something about)

## Bad Requirements

- Designs don't match the style we agreed upon on as a team
- I'm working from an incomplete design
  - States
  - Consistency
  - Device types
- All this leads to context switching, which is my kryptonite

**“I hate nothing more than opening a ticket and feeling stuck or not knowing how to approach a task.”**



**“I hate nothing more than opening a ticket and feeling stuck or not knowing how to approach a task.”**



## Pains (we can do something about)

### Communication Misfires

- My opinion is only wanted in certain contexts - *Can we build this?*
- Design setting expectations for things that I don't agree with
- Limited perspectives leading up to a handoff
- Poor prioritization pulls me into work I wasn't planning for

**“I can build literally anything you send my way, but it doesn't mean we should.”**





**“I can build literally anything  
you send my way, but it  
doesn’t mean we should.”**



I love it.

Yes - if they didn't exist, I wouldn't have a job!

I love the whole creative part - I am not able to do the stuff they can do. I look at what they've done and really enjoy.

## Do you like working with designers?

Oh yeah! I'm a huge fan.

**Yes - they are a really good team. There is really just no joy in creating ugly shit.**

Yeah, I really do.

Yes. The first time I met with my designer I was incredibly relieved.



**Developers recognize  
a dependency on  
design to do great  
work.**





# How we can connect to a developer

**People:** Celebrate & draw awareness to the symbiotic relationship —what good looks like.

**Practice:** Own the challenger mindset with their design partners — we have their ear.

**Platform:** Build tools that facilitate collaboration and mutual respect between developers, designers, and other stakeholders.



# Tool Evaluation

Does this help me solve my most pressing problem, and can I prove it?

## Specific

I want to be confident that I'm receiving designs that are complete — in state and requirements.

## Collaborative

Does this help me deliver my POV on feasibility, performance, and user impact before the design lands in Jira?

## Ungated

Project-based developed creates ripe opportunities for POCs and adoption, but the tool needs to be free to start.

## Well documented

I seek out documented examples of how others are using a tool to solve a problem. This is table stakes for trust.

### InVision solves for this by

- Tools that help developers get the specific information needed to build.
- Continuing to solve for the right level of detail for a developer.

### InVision could be better at

- Challenging designers to consider value of dev POV.
- Forming opinions for how early and often to bring developers into collaboration.
- Improving our documentation or community centered content for developers.
- Creating a FTUX that allows developers to test us without relying on design.

# Meet the Design Org Leader



“Everyone likes  
post it notes”

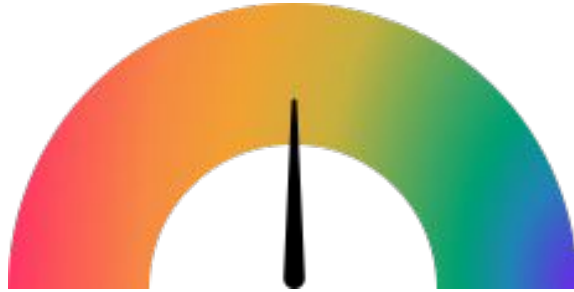
The language of design has  
been adopted but behaviors of  
design are laggard



# Meet the Design Org Leader



- **Efficiency**
- **Development-driven**
- **Cost center**
- **Production**



- **Effectiveness**
- **Customer-centered**
- **Profit center**
- **Discovery**



**“90 percent of companies aren’t reaching the full potential of design, even as, in the past five years, double the number of companies have added senior design roles to their organization.”**

McKinsey  
& Company





## What design leadership lacks.



### Clarity

**Fewer than half** of design leaders feel their CEOs fully understand their role.

**Only a third** of CEOs and their direct reports can state confidently what a head of design is accountable for.



### Ambition

**Only 1 in 10** CEOs says their senior designer plays a meaningful role in strategy development.

**Only 1 in 6** design leaders believes they are positioned to deliver their full potential value to the company.

Source: 2019 McKinsey survey of 200 heads of design and 100 senior executives



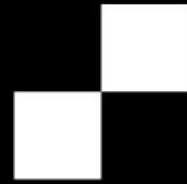
## The remedy?

- **User centric strategies**
- **Collaboration**
- **Data**

McKinsey  
& Company



## Business Thinking for Designers



# Design Leadership Forum

by InVision



## Our Focus:

- **Employer brand**
- **Design Ops**
- **Maturity as a business goal**
- **Speak in the language of bets and risk, not just design**



# Tool Evaluation

Does this help me start and stay aligned with design to decrease miscommunication, rework, and inefficiencies

## Impact practices

I want to adopt and scale best practices of more mature organizations given our constraints

## Partnership

I want design to be seen as a profit center and strategic partner to our peers and stakeholders

## Design Ops

I need to scale the design culture, workflow, and team across multiple products and business lines

## Community

I want to learn from and share examples of how other leaders navigated the challenges I'm facing

## InVision solves for this by

- Broad service ecosystem supports teams in their maturity journey through direct support and educational/community resources
- Visual storytelling enables design leadership to demonstrate to peers the value of engaging directly with customer upstream in the process
- Reduces cost for the entire product-dev-design team through more efficient workflows and reduced waste
- DSM makes incremental design systems easier to build and accessible outside of design
- Demonstrate the value of design thinking and related practices in a digital/distributed environment

# Meet the Engineering Leader





**The right hand to  
the CIO's left,  
developing for an  
increasingly digital  
external AND  
internal audience**

### **Priorities**

- From cost center to profit center
- Delivering efficiently toward great products
- Improve collaboration at the team level
- Decrease debt and waste
- Save money on SaaS so I can invest in my people
- Make my team happy



**Objective: Become a strategic vendor to heads of engineering at target accounts**

**Key Results**

- More adoption by developers across the board
- More and broader integration into developer tools
- More access to heads of engineering (they are seeking us out)





# Vendor Evaluation

Does it help us waste time? Does it integrate into our platforms? Is my team happy?

## Efficiency

My team will invest in the tools that allow us to move fast and with agility without waste

## Team satisfaction

I am more concerned that my team has the tools they need than with the specific tools they choose

## Collaboration

Does this create or repair silos?  
Does this minimize rework?  
Does this create clear alignment? Is it universal?

## Scale

Is this something that can be adopted across teams, platforms, products, and business units with minimal cost associated

## InVision solves for this by

- Promotes team collaboration and reduces friction of that process
- Increases ROI of developer time
- Concepts allow for anticipating future engineering needs and planning
- Integrates into developer tools\*
- Low cost of adoption
- Scalable across multiple contexts

# **Recommendations and next steps**

**Challenge our hero to rise to the moment**



# One Narrative, One experience, Multiple journeys

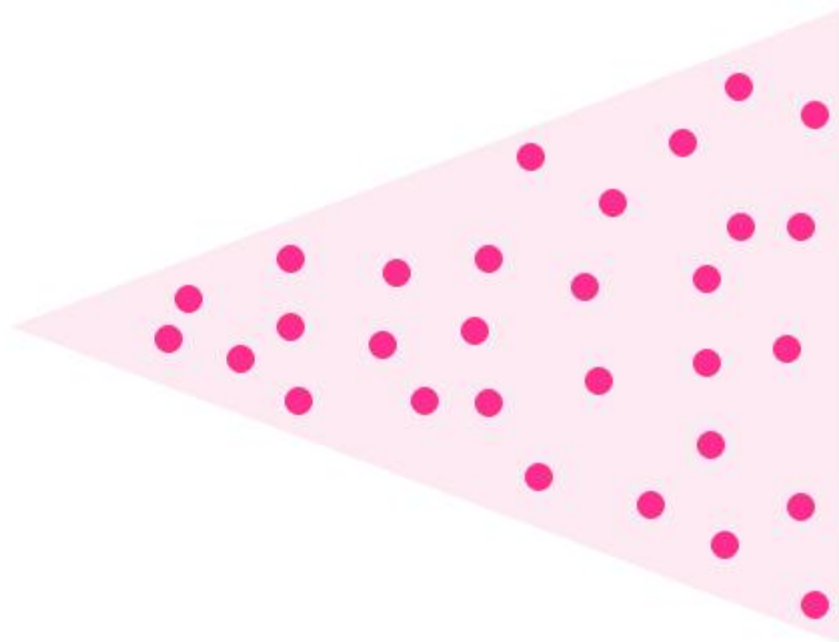
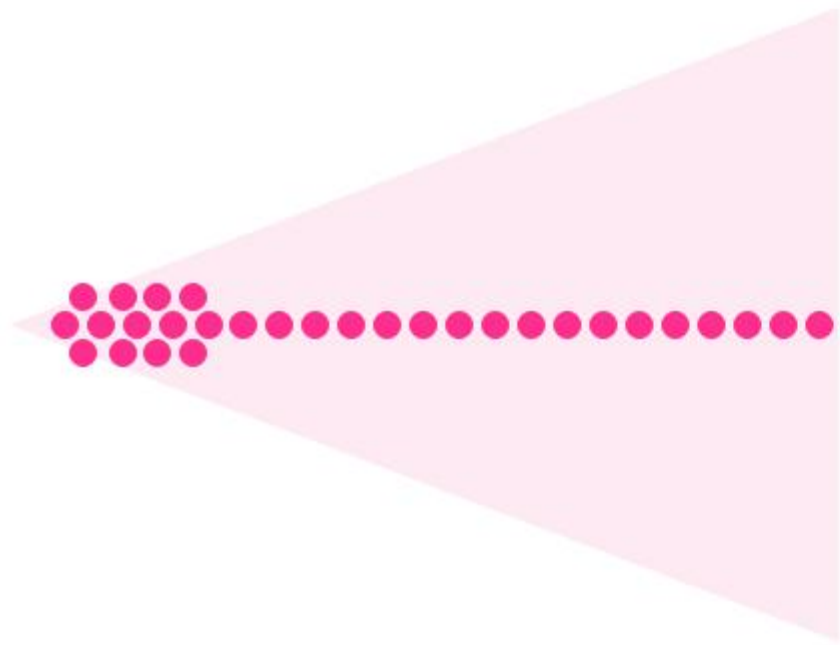


**Experience:** Metrics and research suggest each persona's experience meets and exceeds expectations

**Interactions:** For each moment in the collective and persona journey, are we satisfying need or creating joy?

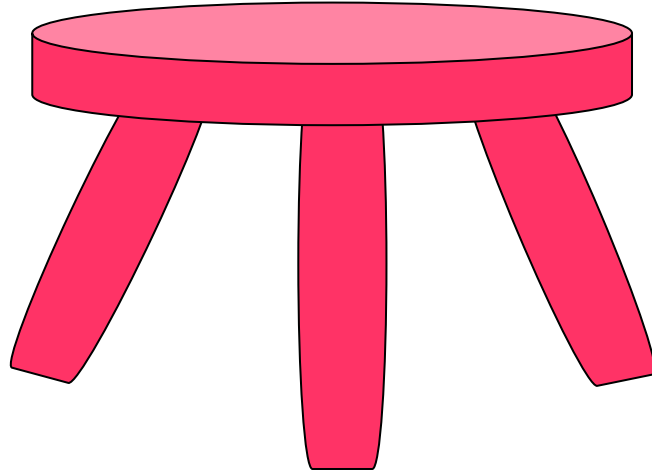
**Journey:** Isolate the value drivers for each persona and ensure we provide solutions along the way

**Stories:** How do we create a single shared mental model of these people and their needs?



**Shoot laser beams, not buckshot**

Same 30 pieces, very different results



**Narrative:**

A single set of stories for the business related to each persona and the customer experience overall, tied to value drivers and real data

*DRI: Rachael K & team, Sarah S*

**Product:**

For each persona's JTBD and drivers, a clear product narrative for what we have and think we should build and how to measure in a customer-centered way

*DRI: PM/PMM*

**Enablement:**

Every InVisioner can communicate our narrative targeted to each persona and the value we expect from our product and translate this to OKRs, CSPs, Metrics, and other tools of understanding and alignment.

*DRI: Adam G & team, Ben G, Rebecca K*

**Questions?**

