Leading a UX Team

FINAL PAPER

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Section 1

Organizational Assessment

1. At Pearson, we are divided into several different teams across the United States (U.S.) and internationally. Within my team, which supports all U.S. related sites, our cultural goals revolve around sales of products, such as books and etexts, marketing campaigns, events, blogs, and webinars, as well as innovation in order to stay ahead of the game in the digital education arena.

2. Currently, the biggest driving force is marketing campaigns. These campaigns are geared towards faculty and staff for higher education schools. The focus is to help get the word out to existing customers/schools on new and upcoming products and services or to recruit new schools to begin using our products and services. Some campaigns are also created to advertise upcoming conferences. We also have events, webinars, and blogs that are more informational and cater to both schools and students. For example, we had several blogs and webinars relating to Covid-19 information. Speaking of Covid-19, this past year was a new challenge of converting everything to digital. All events and conferences were converted to online only, which was a huge undertaking for my team. That on top of several Covid related alerts, which meant several rush projects, but no one is really prepared for a pandemic! Lastly, my team supports product sites for books and etext, but for marketing purposes only. Sales is a big part of these sites, but the actual shopping cart pieces are managed by another team.

3. The main users of my team's websites are higher education students and higher education faculty/staff (K-12 is yet another team).

4. Student goals consist of gathering information (through blogs, webinars, events, and product pages), signing up for events and webinars, and ordering books or etexts. Faculty/staff goals consist of gathering information (through blogs, webinars, events, campaigns, and product pages), signing up for conferences, webinars, or events, and ordering products and services for their schools.

5. Our current development method is Waterfall. However, other parts of our company are using Agile. Our team received prior training on Agile, but the work process was never utilized. The consensus was that "Our team just isn't set-up to fit into something like that." It was discussed that we may be able to come up with a variation of Agile that could work for our team, but all efforts were lost. Therefore, my team still operates in a disorganized version of Waterfall.

Section 2
UX Maturity

1. Based off of the UX Maturity Model diagram, my opinion is that the Pearson UX team sits at a 2-3 range. Given that I am not on the UX team, I can only give a more outwardly opinion regarding our UX positions. Going off of the fact that we do have these positions shows that my company notices some level of importance when it comes to UX. However, I am not sure which projects this team(s) supports. I do know

that it is a mix of UI designers, UX designers, and researchers. I know this team(s) supports U.S. related projects. Given how little I know about this team(s), several questions come to mind: Do we have UI/UX teams for our other regions given we support several countries across the world? How many UI/UX teams do we have within the company? This is definitely an issue when you work for such a large company. Most importantly, when thinking of my team specifically, why don't we have our own UI/UX team or at least have one that we interface with regularly? All of these questions would be great for our team to know. More clarity and emphasis should be put towards UI and UX positions within Pearson.

2. Not having direct contact with the UX team I am aware of makes it hard to know if we are properly placed within the UX continuum. Given the previous statements above, Pearson needs some obvious improvements. I can also say that my creative team, more specifically my web team, would be better off working directly and consistently with a UI and UX team. I would say that our competitors most likely have this structure flushed out in a more organized fashion, but hard to say when companies reach such large sizes with so many different teams. Structure within teams has been an ongoing struggle for Pearson. Since starting with the company 6 years ago, teams have been moved several times migrating from several smaller teams back into one centralized team. Given these facts, Pearson's placement could be much improved on the continuum by placing more organization, transparency, and importance on these types of positions.

Section 3

Identifying Deficiencies

Current Team Structure:

My current position at Pearson is Senior Web Designer within the North America team. My direct web team is composed of 4 people plus a manager. The web team lives within a larger creative team, which is composed of Content Specialists, Email Designers, Graphic Designers, Video Creators, and Creative Managers. The creative team lives within the North American Marketing section of the company. Other members include Project Managers, directors, and higher-level management. My specific web team does occasionally have conversations with Web Developers and other web designers, developers, and managers on the Global Team (a large team that manages all of the international sites). We talk to the Global Team because we are trying to keep styles consistent across all sites. We talk to Web Developers because we use a system called Adobe Experience Manager (AEM) and we sometimes need back-end tweaks to the system.

Noticeable Deficiencies:

1. The web team is not always involved in kick-off meetings (which has improved, since we were never previously invited).
2. There are no design workshops for new projects, which means no journey mapping or blueprints.
3. There are limited design thinking sessions, when invited to kick-off meetings.
4. The team managers are sticklers to waterfall processes, but process is broken often, especially by stakeholders and Project Managers.
5. Working in AEM means fully designing and laying out pages all in one step, there are no initial low fidelity designs or rough designs.

6. Retrospectives or "Lessons Learned Meetings," as my team likes to call them, are not enforced. They are here and there based on if the Project Managers (PM) "have time for them." Usually when hold-ups happen at the PM level, the follow-up meetings don't happen.
7. Analytics are being pushed more so, but there is still a gap with communication. The analytics team is separate, and we don't have regular meetings on how things are doing. The whole creative team is often in the dark on results from new and existing projects.
8. Web designers within my own team are siloed and not always on the same page when it comes to communication. Meaning, we are each assigned to our own group of projects. Then, down the road, projects are often swapped, and team members aren't always in the know of what has happened previously on any given project due to it initially being with a different designer. The idea here is to give everyone the same opportunity to get their hands on all projects.
9. Our entire creative team took part in Speed of Trust training sessions. Its benefits were discussed thoroughly for the following few months, but then trickled away with no plan of action to implement what we had learned.

Section 4

Deficiency Impact

The web team, usually the web manager and the one designer assigned to the project, is invited to kick-off meetings, but only in the case of new large projects. Kick-off meetings also usually involve a Content Writer, Graphic Designer, a creative manager, a Project Manager, and sometimes the stakeholder. As mentioned above, this is an

improvement, since the web team wasn't ever previously invited. However, the web team doesn't have kick-off meetings for new small projects. In those cases, it's a matter of the web designer grabbing a written description from our ticketing system, WorkZone, and figuring out the best solution on their own. Sometimes collaboration happens through emails and Microsoft Teams to further discuss questions. It's a balance between not having too many meetings and getting clarity around new projects, but this does create confusion and additional to work to gather all necessary pieces to get the project done.

Given our creative team functions within a Waterfall set-up, design workshops, journey mapping, user profiles, and blueprints, are all bypassed. This limits innovation, team collaboration, and most importantly, the importance of our team's expertise (especially within the web team).

When the web team is invited to a kick-off meeting, design thinking is involved, but in a limited fashion. Content has already been created and the stakeholder and Project Manager have already completed outlines for the project. Therefore, acceptable design feedback is very limited. During these meetings, even the design thinking that is provided by the designers is sometimes overruled by other non-designer roles. For example, Content Writers often overrule the ideas from web designers. Stakeholders ultimately have the say it what does or doesn't happen, so they can overrule all decisions. They are given way too much power over projects, which takes away from collaboration. Design expertise doesn't seem to carry the weight it should.

Waterfall processes are consistently broken. This creates a lot of rework, even on projects that are posted live and considered done. This creates a lot of disorganization and inconsistencies, which creates more room for error.

The web team has never created prototypes. Photoshop mock-ups have been requested and created, but this is rare and only for special asks. I know our UX/UI team does for the teams they work with. Since we don't work with them, we never see prototypes. This is partially because of how limited our web platform is, Adobe Experience Manager. The web team initially worked in WordPress, which allowed for more flexibility. Pearson switched to AEM in order to move to a more templated approach, which is more restrictive. Instead of the freedom to customize, the web team now resorts to work arounds, sometimes just to get around bug issues. The freedom to creative and innovate has been locked down by these templates. Without low fidelity designs, rough designs, or prototypes for new projects, habits continue, and innovation suffers even further.

Lessons Learned Meetings are few and far between. The destiny for whether or not these meetings happen are based on how many things utterly ended up going wrong. The more the projects veer off in the wrong direction, the less likely we are to have the meeting. There was a time when our creative team was really trying to enforce these meetings, but we received more and more push-back. The last project I worked on that was supposed to involve a Lessons Learned Meeting, the meeting ended up being canceled. The PM involved with the majority of the roadblocks simply didn't want to have one. I was literally told that when trying to push for the meeting to still happen. Allowing for this to even be an option means that things are happening on more of a personal level instead of what's best for the company as a whole. Again, no one should have that type of say-all to overrule what's really best for everyone and the company's future. It should be a team effort. Since this project, I've not attended any Lessons Learned Meetings. It's like they have become a thing of the past. Feedback on how

things can be improved moving forward has not continued to be shared and received, therefore improvements on future projects will be minimal.

Surprisingly enough, there was a time when Pearson didn't have an analytics team. After investigation, we found that there was one contracted employee basically keeping tabs on the entire company's analytics, which is quite frightening (and she wasn't even full-time). After this discovery, there seemed to be fast movement on getting a proper team in place. Nowadays, we have an analytics team, but they are, once again, very disconnected. Upper-level management sometimes receives results on specific projects (ones that usually generate the most money). That information rarely trickles down to our creative team, even our top revenue generating projects. The web team would especially benefit from knowing these details regularly, which has been pushed for, but still doesn't happen. Reponses are usually a "oh yeah, that's a good idea" or "let me see what I can do." Then, that conversation is lost into the abyss. We are mostly left in the dark, on the success of what we are building on a daily basis, which further hinders our company's growth, success, and innovation.

Projects being swapped within the web team causes confusion and background information is often not communicated well. A lot of guess work is involved as well as efforts to get the needed information that should have been provided initially. I like to call it, "cracking the Davinci Code." A disorganized Waterfall set-up creates a situation where team members are siloed, and team collaboration is missing.

Lastly, the Speed of Trust training not having an implementation plan allowed for old habits amongst management to return. Since that training. Management tends to be very hands-off causing a large disconnect in communication, organization, and support.

Section 5
Time for a Change

Organization – Proposal for Upper Management

1. Implementation of Agile, which could include customization to fit team needs. This could include aspects of Lean UX method to include viewpoints of several designers instead of putting the focus on one designer at a time in a siloed project approach. Given we received prior training on Agile, we could continue that training to find the best solution for our creative team structure. Implementation of an Agile development method structure would provide the following benefits:

    - More extensive overall communication across teams within creative and outside of creative. Also, within more specialized creative teams.
    - Structured and timely meetings.
    - Early on design thinking to provide the best design approach at the same time as other initial decisions about the project are being discussed.
    - Projects would be broken down into more detailed components, user stories, to help each team member better visualize every detail of the project. Including their specific task as well as dependencies outside of their tasks.
    - All-inclusive kick-off meetings, design thinking sessions, detailed user stories, workshops, initial low fidelity designs, blueprints, Lessons Learned Meetings (retrospectives) would all provide clarity across team members. This would help to eliminate confusion when designers are switching across different projects. All designers would be involved on all new projects, especially with initial planning.

This would also help communication with teams that have previously been more on the "out skirts," such as the analytics team. All team members would work together to create and implement ideas on how to evolve projects into going more smoothly next go-round.

- Agile would provide a very structured process for all projects to meet deadlines and sections of the projects would be worked on cohesively and in sync with one another. This would allow for errors to be noticed and correct earlier on in the process, instead of last minute or after go-live.
- More structured management processes that could be consistent across the board. Would allow for an opportunity to implement what was learned during Speed of Trust training sessions to increase organization and support with all teams.

2. Implementation of a fully customizable AEM template. This is something that has been discussed in the past but didn't come to fruition. Currently, we are able to minimally customize certain components and implement certain work arounds, but a fully customizable template would allow for a lot more freedom (like we used to do in WordPress). This, in combination with Agile processes (such as early on design thinking, workshops, low-fidelity prototypes, high-fidelity designs) would allow for next level innovation.

Customers

3. Having a more structured and organized internal process as well as more room for innovation would create more satisfaction among customers. Usability would be

cleaner and improved causing teachers and students to be more willing to visit and use our websites. We would also advance in "wowing" our customers with the latest and greatest trends. Stay ahead of the competition. All of this, in turn, would most likely increase sales as well.

Section 6

Strategy Outline

Once approved by managers, there will need to be an evaluation and discovery period to figure out what software solutions would be the best fit. In order to implement Agile, we would need to have software that can handle proper user stories and task assignment. Our best options would be to use JIRA, which we previously used for many years, or, most preferably, stay with our current system, WorkZone (if it can support an Agile set-up). Also, look into software options for prototyping, journey mapping, and user profiling (or personas).

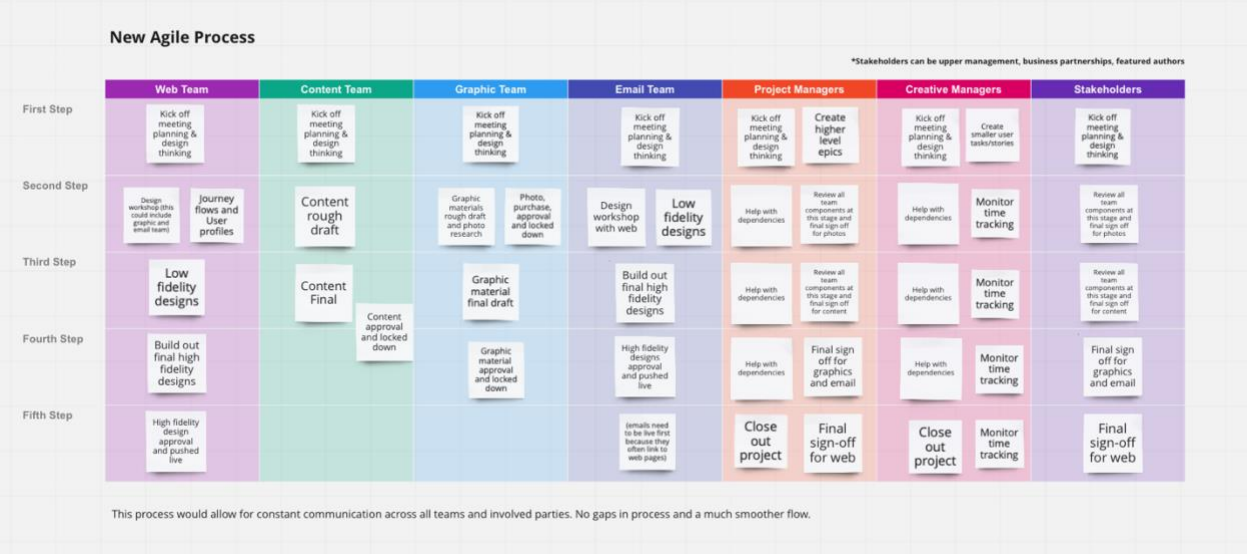
Once software decisions have been made, training sessions would need to take place. This could also take place simultaneously with the software decision making process. Our creative team previously completed basic Agile training. This training should be re-implemented and continued on to the next phases. Most likely, a refresher class would be needed. Also, the Speed of Trust training, previously taken mostly by managers, should be continued. The initial impact of that training was very positive and influential, but gradually dissipated. Continuing this training will create more of a prolonged and permanent impact. This would mostly focus on leadership but would make a shift throughout the company.

After a bit of training is in place, teams can start practicing themselves to see what issues and questions come up. Example scenarios should be used, not real projects, when first practicing the processes within the new software. Gradually, a shift will be made to using for real projects.

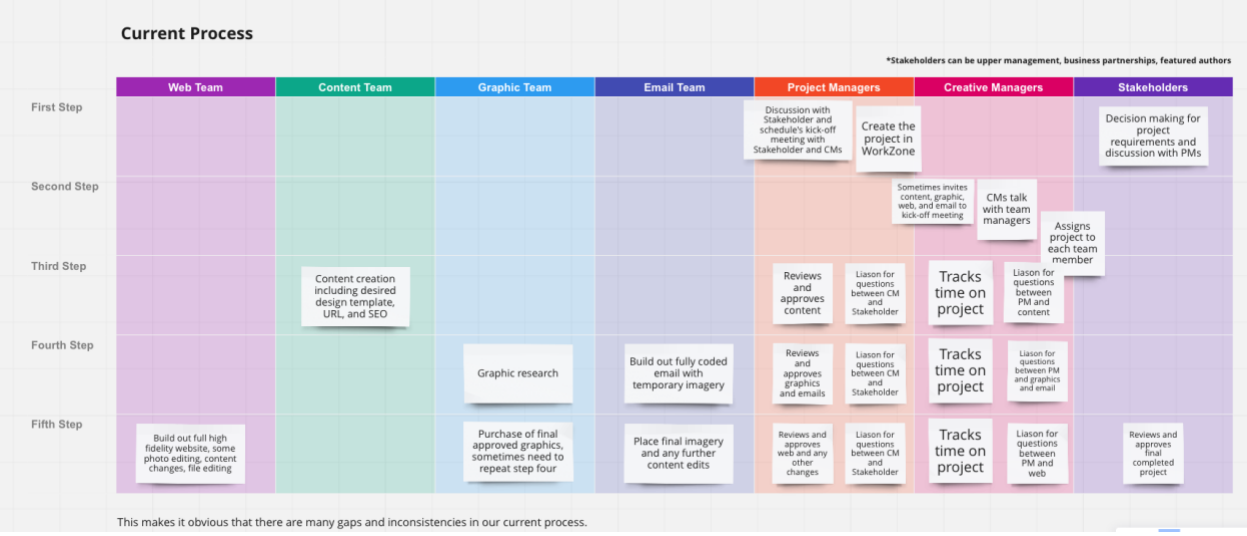
Support from training companies must be in place to mostly help management, but also other employees as needed. There should be on-going hands-on support from management, for those they directly manage, until everyone is used to the new systems.

Through practice and training, teams will develop a process of how to best interact within one another. Meaning, within each smaller team, like the web team, as well as within the larger teams. The web team will learn the process of how to work with the content team simultaneously. The same process will be followed by all teams within the larger creative team, the creative team working within the larger marketing team, and all teams that may be more indirect when working with dependencies. All teams will gradually learn to work with one another more cohesively, collaboratively, productively, efficiently, and confidently to help push Pearson to the next level of innovation for that which matters most, education for all.

The new Agile process flow could look like the following:



Versus the current process flow:



You can also view my board at full size in Miro at:

https://miro.com/app/board/o9J_lKVDtJc=/