

BES500957

[Design Technology Leadership: Innovation through communication, collaboration and commitment]

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Learning Objectives

- Learn about the creation of a design technology **Vision** and mission, and the implementation of that plan across the firm.
- Learn about **establishing** KPIs (key performance indicators) and OKR's (Objective/Key Results) of a design technology plan.
- Learn about **formulating** standards, processes, and support systems for design technologists to succeed digitally.
- Learn about **fostering an environment** of innovation and pioneering the path forward in design technology.

Description

This class will encompass creating a design technology vision and mission for a firm. We'll focus on the elements and processes involved in implementing and executing a firm-wide digital execution plan. This class will involve building the standards at program and project level. The path to a successful design leadership lies in meticulous planning and diligent execution of digital standards, the establishing of baselines for milestones, and ensuring the plan has agile and resilient pivot modules to adapt. This class will show the process involved in building an accountability matrix and building key performance indicators (KPIs) to ensure streamlined program and project delivery. We'll highlight the development of quarterly goals and the monitoring and tracking of goals. Successful leadership is the building and fostering of an environment of successful innovation. This class will be a great opportunity for budding design technologists to gain insight and a holistic overview of implementing the vision " the right way."

Speaker(s)



Ravi Wood, BIM Manager

- Collaborator and Innovator.
- BIM Manager, Tesla Motors Inc.
- Top Rated class for BIM Management: AU 2019.
- Speaker at RICS IFMA Sweden 2016.
- Top Rated Speaker at Hong Kong BIM HKIBIM 2016.
- Speaker at AEC Next, NY Design Expo.



Ryan Cameron, AIA, LEEDAP, EDAC, NCARB

- Keynote Speaker: AIA Iowa 2019 + ACBD 2019
- Speaker at BILTNA, HCD, ACBD, BIMW, MU
- Top Rated Sessions: AU14,15,17,20
- Featured in Superusers: Future of Practice
- (Randy Deutsch, FAIA - Routledge 2019)
- CEO of Architect Machines, LLC
- National AIA TAP Committee Member 2022-26
- Globally Recognized Thought Leader



Ryan leads digital integration efforts at CMBA Architects that range in practice from data analysis and strategy, technology, and data-driven design. He is evidence-based certified as well as a licensed architect in several states. Ryan possesses the qualities to be a catalyst for change and adjusts the design technology trajectory of CMBA Architects to that of a leader among our peers and then maintain this position. Notable accomplishments for the firm include digital platform implementation of KA Connect Synthesis. Increase robustness and usage of Deltek products. Helped acquire and launch first CMBA mobile fleet. Created 3D Reality Capture services and secured new clients.

Ryan is consistently ahead of the industry in the exploration and adoption of advantageous tech applied to design and building. Many AEC peers at conferences such as RTC, HCD, BILT, ACBD and Autodesk University include Ryan's long list of public presentations and innovative work have been commonly cited as representing the vanguard of critical directions for the industry. Ryan is recognized in the field as having reached tens of thousands of AEC professionals around the world with his vast technical skill and speaking opportunities. You can also find Ryan prominently featured in Randy Deustch's critically acclaimed book: Superusers: Design Tech Specialists and the Future of Practice.

PREFACE:

This session will help propel valuable conversations at your firm when it comes to digital practice and technology integration. Use this handout and presentation as a one-two punch to help guide you and your team when discussing the vision, communication, process and culture at your firm. You will walk away with a guidebook for creating Vision through Journeys, Experiences and Purpose. Ready? Let's get started!

PART I: VISION

You will notice after the introduction to the session, it begins with Vision. Without a forward looking mindset, your efforts are doomed to fail. Why forward looking? The pace of change in the industry is rapidly increasing with new technologies and workflows of those technologies changing the way we practice design. Not to mention collaboration between disciplines, consultants, contractors, designers and specialists has never been more important. We face threats everyday from disease, supply chain issues, labor shortages and lack of purpose. How will your vision push through all the noise and continue you forward? Let's start with Why and ask a few questions.

What's your vision? Clearly defining this determines your success. It defines success and purpose. It propels your decision making process while aligning resources. It motivates and clarifies focus while expanding options. It all starts with asking Why.

The Value of Why:



The Value of How:

If the **Why** was really important, **How** would have to be the next most important. A number of years ago at a previous firm I was asked to facilitate a firm wide discussion at an exclusive annual business retreat. Eager to help out, I put together a session on the future of practice and led several round table discussions and helped other facilitators with their sessions. During one of the discussions one of the heads of a sector said “we need to wring all we can out of our people.” (making a towel twisting motion) People hesitantly nodded yes and agreed we all needed to work hard. However, I was astonished and in disagreement. If you’re vision was to create the best team in the industry, but **how** you do that involves working staff 55hr weeks for years at a time and/or worse, simply just taking their best ideas and after that juice is squeezed, toss them to the curb, your “How” is going to destroy your “Why”.

Spend some time on how you’re going to achieve the vision and make sure its purposeful. For example, they could have said, “We’re going to launch new ways of working between disciplines at our firm and we’re going to send people to the best conferences to learn.” The message is similar to everyone will “work hard” but it leads folks into the future and makes them want to stick around and they end up feeling valued.

An aerial, top-down view of a modern office space. Several people are seated at desks, working on laptops. The desks are cluttered with papers, pens, and other office supplies. The office has a bright, open atmosphere with large windows and a high ceiling.

Leaders must pay close attention to how their leadership is experienced, and consider whether digital tools, techniques, and technologies are making their companies’ key stakeholders — feel more valued.

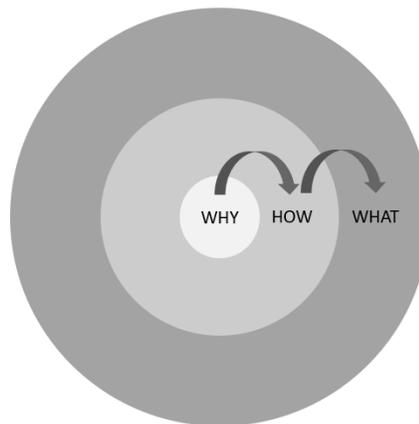
by: MICHAEL SCHRAGE, BENJAMIN PRING, DAVID KIRON, AND DESMOND DICKERSON MIT Sloan

New research suggests that digital workforces expect digital transformation to better reflect and respect their concerns and values, not just boost business capabilities and opportunities. In the current environment, “quiet quitting, great resignation” leaders must pay close attention to how their leadership is experienced, and consider whether digital tools, techniques, and technologies are making their companies’ key stakeholders — including employees, consumers, and investors — feel more valued.

I've seen more high performing teams get destroyed and torn apart due to a lack of acknowledgment from leadership to individuals. Its not about giving credit where credit is due. You could go forever without giving someone credit. Why? Most people will tolerate that if they see they are having an impact. Its when the leader takes credit themselves, or whether its on purpose or inadvertently gives credit to the **wrong person**. I've even witnessed it where an idea turned out to be a bad one and the leader blamed an individual. Leaders have one common trait, they are aware of what's going on around them. Occasionally they need a reminder. Like we mentioned earlier, if the HOW is bad, the WHY won't matter.

The Value of What:

Every single organization knows what they do. Its when they lose purpose when they start to go out of business. Let's face it, its interesting to talk about the product and all the facts and figures and get caught up in what you do. We have the biggest clients, the best gas mileage, the best projects. People don't buy what you do, they buy why you do it. Another way to think of this is, don't sell the product, sell the benefit. People don't buy what you do, they buy into why you do it. You still have to show up and do what you do best.

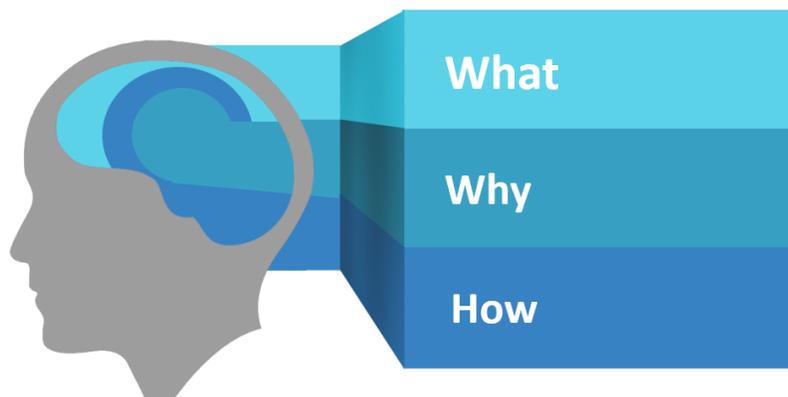


As a place of reference, let's start with Simon Sinek's circle of why (above image). And he talks about how some companies start from the what and work their way inward. We make great buildings (the what). They are simple to use, well-designed and user-friendly. (How). Want to hire us? (client asks Why) Or we have the biggest name clients, we do big projects, they're energy efficient. Uninspiring... It's the same old buy our car, hire our lawyers.

Great companies, start from the inside out, the example he shared was Apple.

Everything we do, we believe in challenging the status quo. We believe in thinking differently. The way we challenge the status quo, is by making our designs simple to use, beautifully designed and user friendly. We just happen to make great architecture. Want to hire us?

Totally different. People don't buy what you do, they buy into why you do it. Remember, another way to think about it is, "Don't try to sell the product, sell the benefit."
This is not our team's conclusion or opinion, its science. Its basic biology.

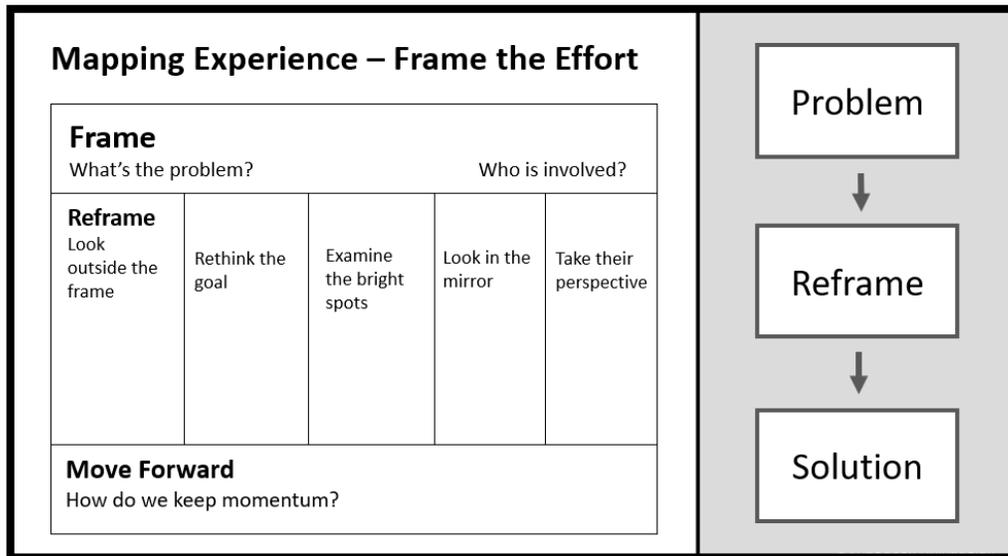


If you look at a cross section of the human brain from the top down, you'll see that it's broken down into three major components. Our neocortex corresponds with the outside of the circle, the what level. This processes rational and analytical thoughts and language. The middle two parts are our limbic brains. These controls our feelings, trust, all behavior, all decision making but has no understanding of language. So when you provide a solution with all the features, facts and benefits and figures, people understand it but it just doesn't drive behavior. Biologically it's a dead-end.

When we communicate with the inner brain, we start from the inside out to the part of the brain that controls behavior and then we allow people to rationalize it with the facts/figures. The part of the brain that control decision making, it has its hands on the wheels and feet on the pedals. I think people are starting to get it. The goal isn't to sell design technology or things that you have, the goal is to sell to people who believe what you believe. The best part of crafting your design tech team (or any team for that matter), is finding those you don't have to convince. Am I taking a job, am I taking a role in this amazingTeam, or am I going to transform it? Does this person believe in it more than the leaders?

How do we get this out of our people? For starters, we have to get all the stakeholders into a visioning session. Why does this team exist? What purpose does it serve? The team will need to identify problems they want to solve rather than find a solution looking for a problem. You need to discuss if this vision serves the (list) company, community, industry, clients or another possibility. Luckily there is no shortage of issues facing the previously mentioned list. Before we go rushing into a solution, we have to walk through the problem we're trying to solve. How do we know we've solved the problem? Have we started with defining the problem in the first place? Ask a quick high level question such as, "Wouldn't it be great if...."

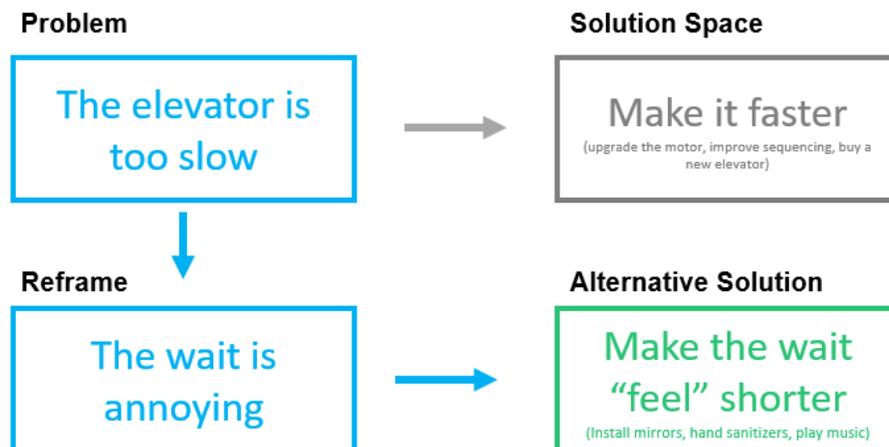
What if I told you this entire time up until now you've been generating one solution to one problem? You may even have an answer, but maybe its not "the answer". Just one of many possibilities. Now what if I told you there was a map that could help you find new answers and maybe even re-frame the problem altogether?
Its called **Framing** and Ravi and Ryan are going to share it with you today.



Let's think about an example:

If a building manager started receiving a lot of complaints about the speed of the elevators in their building, what should they do? Initially the first thought is to speed it up. It satisfies the problem right? How would we accomplish that? Buy a new motor? Improve the sequencing? Buy an entirely new elevator that has a faster rating? Sure, you've solved the problem in probably the most expensive way possible. Let's reframe the problem and start with asking the occupants why they think the elevator is too slow. "Well the wait is annoying." Ok, that's helps add color to our issue now doesn't it? What can we do to make the wait feel shorter? Perhaps you'll notice catchy songs playing. Have you noticed for tall tower elevators, mirrors are typically installed? This gives the occupant time to look at their appearance and are often saying, "I needed more time in the elevator, now that I saw that my appearance (fill in the blank).

Mapping Experience – Framing the effort



Now you know a little bit about how to solve the right problem. You simply need to get the stakeholders involved over the next few months with one-on-one meetings, groupwide surveys, empathy interviews and outside input people are willing to provide that adds value to the conversation. If you're unfamiliar with how to do this, reach out to Ravi and Ryan to have them help guide you on this journey. We can start by asking a few simple questions. Why do we exist? Who does this vision serve? Remember, vision statements describe the desired future position of the company or team. Let's take 10 minutes to answer some questions in the slidedeck and come back to the handout to come up with a vision statement. This is of course, after you've done months worth of research with your stakeholders. Below is an example outline to help you get off to a great start.



Creating the 10min. Vision Statement

A Mission Statement defines the company's business, its objectives and its approach to reach those objectives. A Vision Statement describes the desired future position of the company.

At "Team X", we (grow, craft, create, generate...(…)..) a better (life, design, world) in a way that's good for "Client type" or good for (name of cause or affiliation).

At **Design+** we craft designs that improve the way we work.

At **Design+** we provide world-class educational services that improve designers experience in learning new technology.

At **Design+** our design technology team tackles world-class design challenges that improve the way we work.

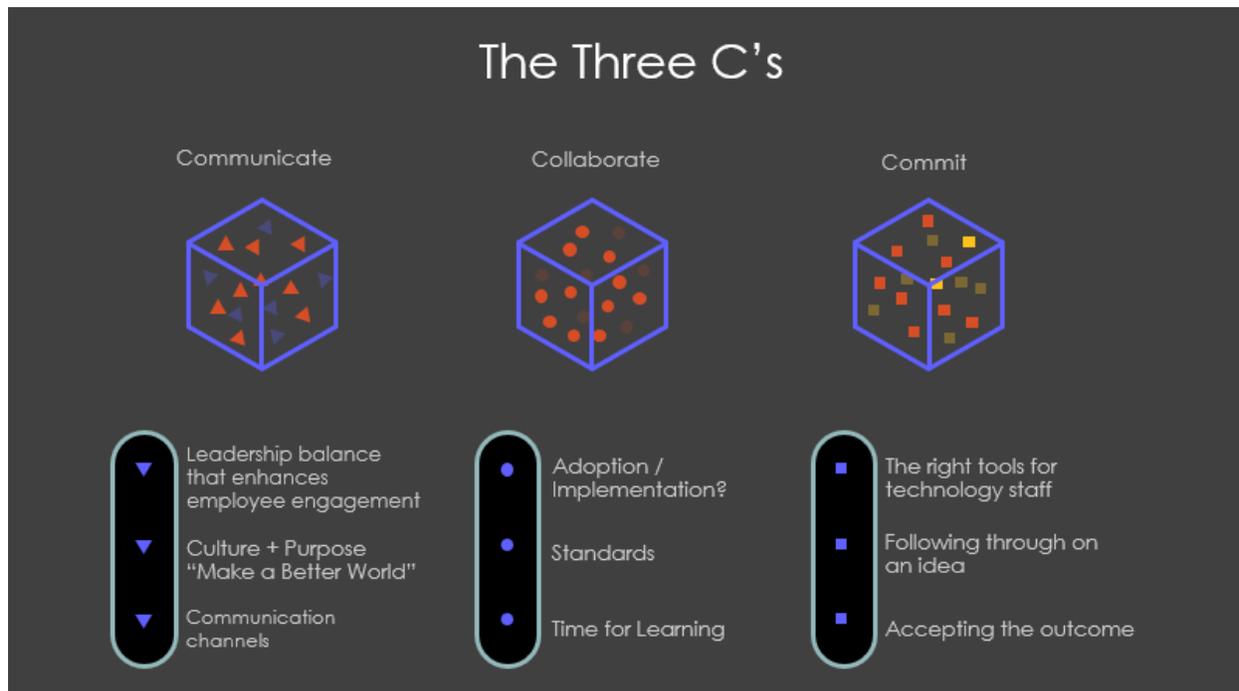
Congrats, you are on the first step of your Vision Journey! This isn't where the discussion ends for us. When you get back to the office. Open up this presentation and go through it with your colleagues. Find a vision, build a blueprint, visualize your strategy and execute

We can talk about these ideas, resources and topics later this evening and in future communications. The great thing about the AU community is that they choose speakers who are not only experts, but they are also available for questions at any time. Cheers!



PART II: METRICS

There are many C's in leadership, many of which apply to technology leadership. Building off our companion [presentation from AU2020](#), we chose to argue these three C's. Communicate, Collaborate and Commit. We'll talk about these over the next few pages.



Communicate. What are some things we mean communicate? For starters, communication requires employee engagement. A balanced leader helps enhance that interaction. We also mean communication in an office culture way. If people are too scared or apathetic to speak up, you're developing the wrong culture. You need a **culture of sharing**. Last on the list, your people need a rock solid place to voice their communication. For CMBA, that includes using KA Connect Synthesis platform. Its called the Quad. Much like a campus Quad, it's a place where people can share ideas, meet up, have fun, and stretch. We've also seen firms use Discord and MS Teams as alternative platforms for sharing.

Collaborate. It takes buy-in from many parties in the organization in order to achieve group adoption. Are you implementing a new design workflow? Maybe you should get a group to help gather knowledge and test it so it doesn't flop when you launch. This could include collaborating to update standards but its also a place for learning. Collaborating can be an exchange and be about learning. Learning from each other. Become a **culture of learning**.

Commit. Does the staff have the right tools? Do they have too many tools? Did the team follow through on the idea? If it didn't work, are they able to accept the outcome and pivot?

Let's ask the basic question. How are you communicating with your team? What is your communication style? What is and is not working in your approach?



Did you bother asking what people want to learn about? This is a key insight we want you to take away from this session. Often times leaders formulate what is wrong on their own and come to their own conclusion on what to pursue. If you have a ton of staff interested in VR/AR but you throw in a 3D printer to the mix somehow, what do you think is going to happen? Even a simple survey with a list of general technologies and let those bubble up to the surface during conversations.

Processes, technologies: everything is moving fast.

What is your innovation cycle?*

What value will upskilling your people create?

How will this fit or fill a specific competitive goal for the firm?

Do you have the space to innovate?

Good leadership centers around good communication, good questions. Aligned with your vision, you begin to lay the building blocks of your design technology team.

** This is often described as the process lifecycle from day one roll out, to becoming the legacy process. Some firms take 5 years, some have moved to a 3 year innovation cycle. Constantly checking the status quo. What was once new, eventually becomes old.

Final question, are you speaking the same language? This is a challenge for many organizations. Have you ever come away from a meeting thinking one thing and then finding out it was something else? Its also one of the most important things to get right. You want to speak to staff. And we mean **with** them, not **through** them as though you're giving orders. We find that pairing down complicated systems and terms into what they really do at a basic level helps. i.e. Revit, FormIt, Rhino fall into "3D modeling platforms". While you might use some very technical terms when speaking to your sophisticated team, do yourself a favor and pair those definitions down for your team and for the C-suite.

More examples,

Technical verbiage: Additive Manufacturing, SLS, SLA, PolyJet, etc...

Non-Technical verbiage: "3D printing"

Technical verbiage: Portable air monitoring device, Air Quality Sensor

Non-Technical verbiage: Gadget, Gizmo

We've seen it where a new CEO or CIO will step into their role and do **not** have a common language defined. The team has built a certain culture, language or agreed upon industry slang. If that new CIO can't walk the walk, they'd better at least be able to talk the talk. Often the case, that new leader won't make it far past their first three years.

Collaboration:

As a counterpoint to our ever increasing amount of collaboration. Are we suffering from collaboration overload? Is your day filled with zoom mtg invites packed so tight you're jumping from one meeting to next without time to process the previous meeting? We can't answer this for you, other than to say, you should ask your team if there is too much or too few meetings. And do this on a regular basis. This is a terribly important point to make as it leads to exhaustion and employee burn-out. Collaboration one after another that lead to slow or no progress can tear teams apart rather than bring them together. Rest assured you will have one or two meetings every so often that take away from the conversation. Providing purposeful leadership is one way to avoid that. Each meeting needs to have a well-thought purpose. The more re-occurring the collaboration, the greater the chance of falling stagnant without constant supervision and call-back to the vision.

Commit:

Now you're able to free up your time, this allows you to continue your focus on accomplishing your team's tasks. Insight from a previous [top speaker presentation from AU 2018](#), a few key points are as follows:

- Focus on the goals, assess team's natural abilities to accomplish goals. persistence and properly define goals.
- Evaluate which deadlines are most critical and prioritize. commit to the ones that are perceived to take the most work.
- Break tasks into smaller parts and divide into smaller teams to take on those challenges.
- Assess the risks to make sure basics are covered.

Ultimately this begs the question, **How will we know when we met our goal?**

This does not involve “getting organized” or drawing boxes around ideas. This is a collaboration of people who want to share a common goal. We have to find a way to measure success. Remember we talked about defining it by asking Why. Now we need to curate those metrics and start establishing KPI’s (key performance indicators) as well as the more robust, OKR’s (objectives and key results).

Let start by finding a common language we can all agree with by defining terms.

Key Performance Indicator (KPI)

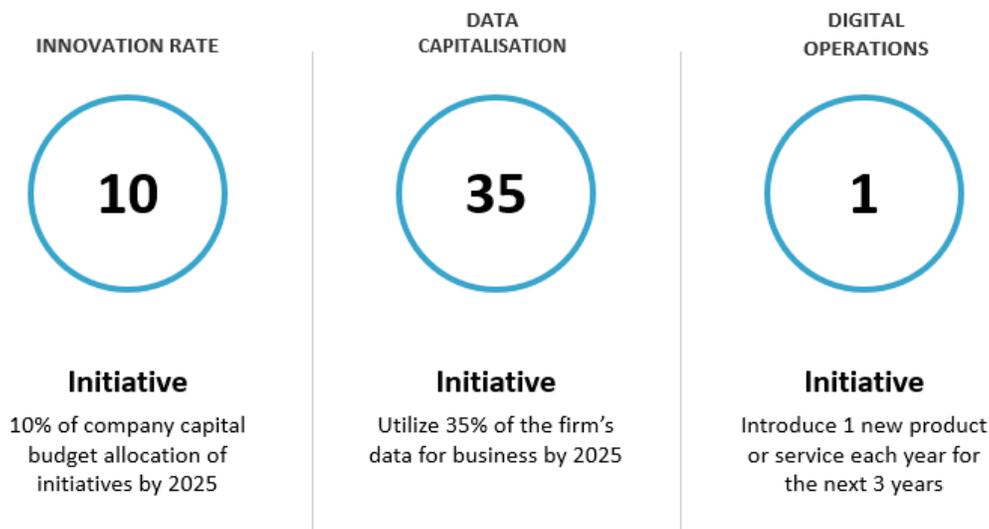
A quantifiable measure used to evaluate the success of an organization, employee, etc. in meeting objectives for performance.

Objectives and Key Results (OKR)

A performance management framework designed to encourage companies to set, communicate and monitor broad organizational goals and results.

What are some examples? Its as easy as setting up some KPI’s you want to track. For instance, 10% of company capital budget allocated for innovation initiatives. Does anyone know what the average percentage firms budget for R+D efforts? We’ve asked this question to dozens of firms, mostly large firms and the answer is always the same, 1 to 2 percent of yearly profit. Another example might be how much the firm wants to leverage its underlying data. Utilize 35% of the firm’s data for business purposes by a certain date. Digital operations, launch a new product/workflow/service each year for the next three years.

KPI Example:

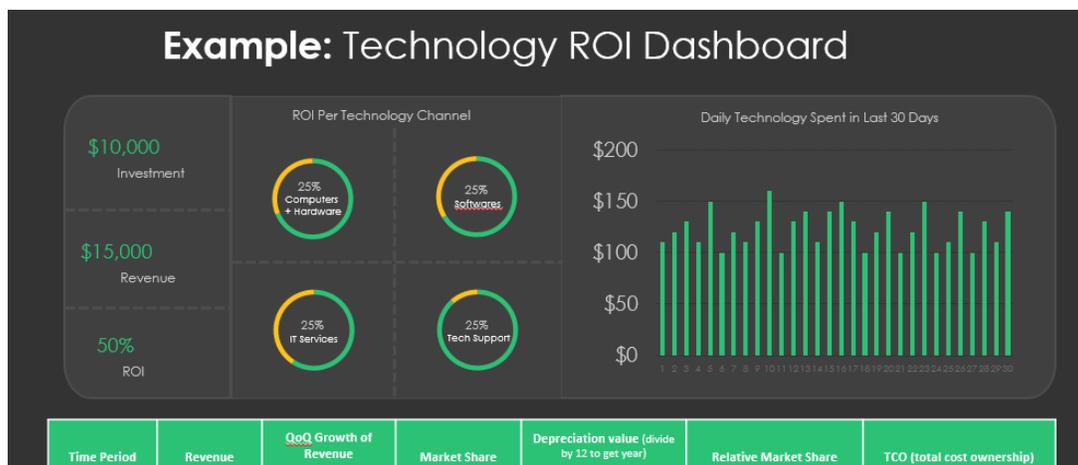


OKR Example:



Here's an OKR example: Objective: Improve our documentation and information management procedures. Key result: Implement a better system for tracking incoming requests, Review software options for incoming document tracking, Start a weekly office highlights newsletter to all team members regarding this process. Think of OKR's as a goal ...and three or four things you need to do to achieve that goal. This is not to be taken lightly as the wrong projected key results could lead to the wrong objective being solved. You need to think this through logically. For that, we anticipate you'll read John Doore's: Measure What Matters book.

Remember that your KPI's and OKR's are supporting information that will change periodically. They are bits of data to help you prepare for a much larger goal. Maybe you want to track the effectiveness of design technology as it relates to the firm's operational goals.

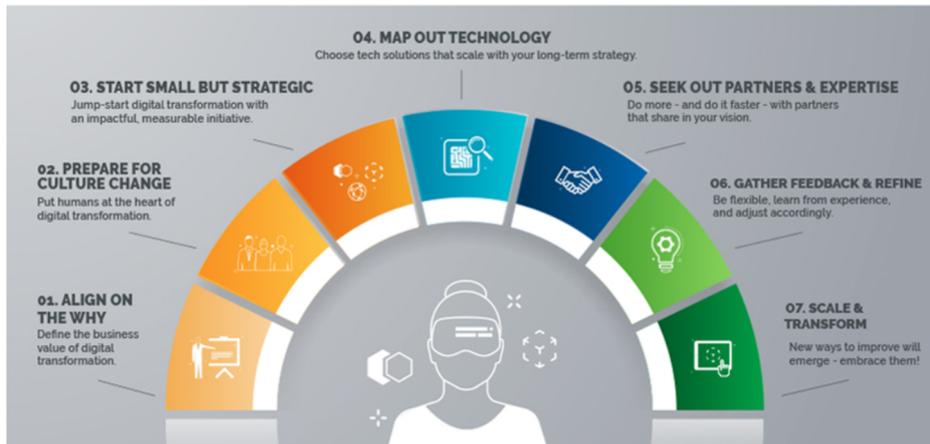


We mentioned our second learning objective was defined as "Problems and Needs". Learn about establishing KPIs (key performance indicators) and OKR's (Objective/Key Results) of a design technology plan. As a technology leader, its important to understand insights, data and analytics in order to move your team forward.

“Design Professional’s will need to have a basic understanding of what data means for them if they are to succeed.”

Company leaders or stakeholders often wonder how short- and long-term business goals can be matched to a specific technology while keeping costs and risks low. One answer is the technology road map and road-mapping process. Technology road maps are complex and have many nuances. A critical element of a technology road map is identifying the strategic goals the organization wishes to achieve. By communicating through your road map that you know why, what, how, and that you have an action plan, you stay connected to your business strategy and maintain a sense of key priorities, even when you’re presented with new information, according to www.ptc.com.

Here we see a simple seven step process to get you from A to Z on your technology roadmap.



Part II : Recap

We talked about the 3 C’s. Communicate, Collaborate, Commit. Using those as a guideline, develop some KPI’s to help track your progress. Come up with some achievable goals and set out some OKR’s to help you progress down the path.



Part III: Process

One simple thing every leader can do to develop new leaders in the team is to help them understand how to eliminate unnecessary constraints. Today's world is embattled with technology and firms continue to stack more and more on the individual to learn. We must understand there is a point you can reach that over-burdens the staff to where they just can't use all the tools at once. Its better to find the few you can master. Whether it's optimizing license usage, establishing guidelines for users, setting up learning studios or just simply forming teams to help keep it all running. When the staff do become overloaded, one of the constraining reasons can be technology debt. This is a term derived from the excessive purchasing of technologies that end up going unused over the majority of that products innovation life cycle. Remember, by now you've asked the team what technology is most important to them and helps everyone accomplish the vision and goals of the organization. The technology you adopt should be useful, user friendly and improve design outcomes for your firm.



TECHNOLOGY DEBT

Its not an ROI question if no one ends up using the technology.



Just getting one objective launched can be daunting. An example: Hypothetically let's say a firm wanted to invest in virtual reality. The CIO or CTO made this great declaration that every office at your firm will have at least one VR workstation. They use the phrase "game-changer" and really promote it as something the firm ought to be leading. What steps do they need to take? Aside from answering "why", first ask if every office has an interest in VR. For this example, we'll say they all do. Let's say they are approved for over \$100,000. Every office now has one VR headset and the software to run it. Great, now we need to check to see who's using it.

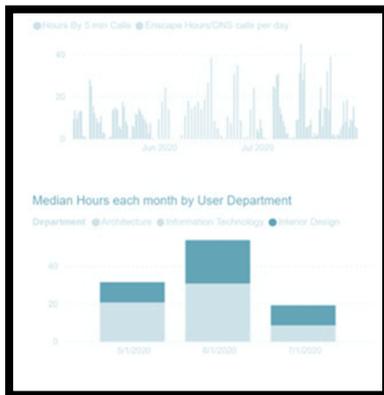
How does it work? User friendliness often ranks high among polls when it comes to technology. Otherwise people tend to not use the technology, leading to zero ROI and expensive "digital" paperweights. Does the new technology require special learning? Does it required space in the office? These are things you have to include when purchasing these tools. Otherwise it'll be left to staff to "Build the weight room, before they can work out."

Do not incentivize usage. You may think offering gift cards as an incentive to boost your VR (or other technology) usage will work, but in affect, it diminishes acceptance. The staff that had no

intention of ever using it, won't magically start using it or embrace it just because you offered a \$25 Amazon card. What should the CIO/CTO do? Asked local office leadership to encourage and engage in the technology. The optics are completely different when the office manager makes time to support staff's usage of new technologies rather than try to gift them money.



Use technologies that are collaborative. Can you think of a single piece of VR equipment being used collaboratively? The CTO/CIO can now consider purchasing more equipment since teams are using it in groups. Great, now everyone can be in the same 3D virtual environment together! (picture to the left) Try not to send one VR unit to an office of 100 and one VR unit to an office of 30. Its better to use peer acceptance in one office that has all the cool toys than it is to be a loner, struggling to gain acceptance.



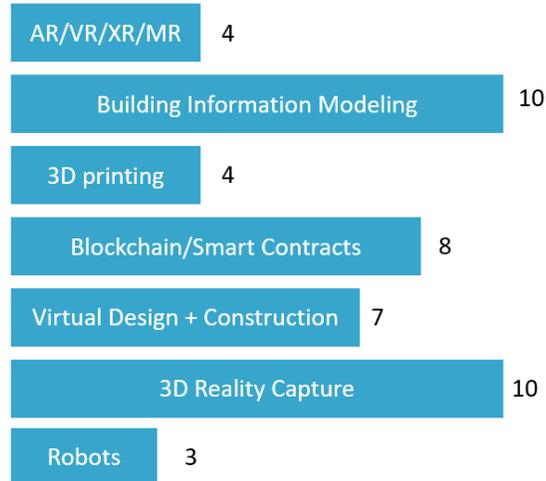
Keep track of usage. You can ask your IT department to set up a simple script to track the license pulls of a certain software. Mind the usage so you can create an automated report. Typically we see usage spike when summer interns arrive and a drop when they leave. This will help you manage your technology debt by making sure your licensing strategy can accommodate spikes in usage.

Often left out of the equation is the ability for the CIO/CTO to engage with their software vendors. If your firm is doing great work with the technology? Why not co-author an article and reshare it?

What are some ways this could have failed? For starters, not buying the right laptops so that anyone could check out the VR equipment and take it to a client meeting is a non-starter. It would also be unfortunate to assume that every office is in sync with this vision for this one tool. Maybe they wanted to hire staff with a different skillset? It's a bit like saying every office can now only listen to country music. Recognizing established cultures would not only show you're nuanced to their ecosystem, but that you understand them as an office.

What are some technologies your firm can look into? Below we have a starter-pack of ideas to ask members of the technology group at your firm. Remember you don't have to keep up with all your competitors. Find your vision, find what you want your firm to be known for, who you want to recruit for and what will clients appreciate?

Example technology list:



Try not to view the categories as competing against one another or put a value score next to them that applies where you are strong or weak.



Think of them as a composite of your firm’s skills. It will change over time as your staff ultimately want to excel at multiple technologies. But first you have to get started and we start where staff have the most interest. How do we go about building an explicit link between employee experience and value? Companies should align their people, culture, structure and tasks with one another and with the digital environment so that the team can address the constantly changing landscape.

Composite



Build an explicit link between employee experience & value.

Companies should align their people, culture, structure and tasks with one another and with the digital environment so that the team can address the constantly changing landscape.



Track personal development and engagement data

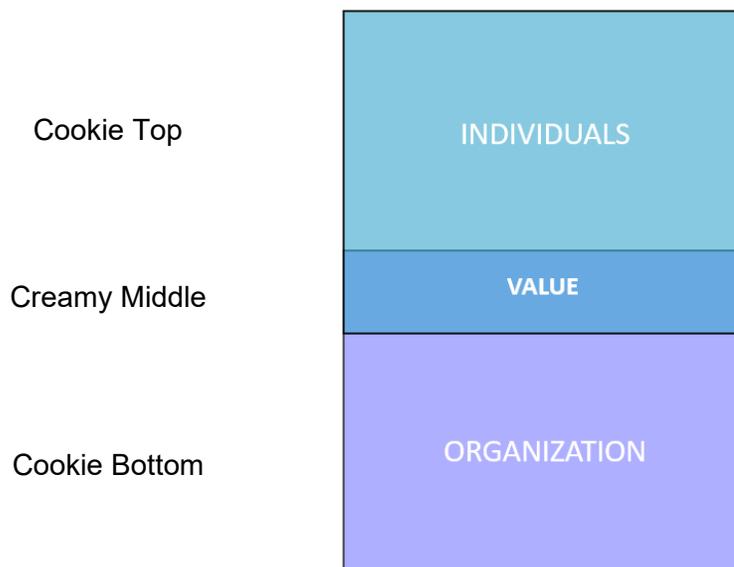


Accurately predict outcomes based on decisions from data



Attain value metrics based on agreed upon outcome

There are several approaches to making that happen. Use Alignment Diagrams. Below is a simple venn diagram explaining the overlap between individuals and the organization. Where all the interactions take place is where the value is exchanged. Think of it as the Oreo cookie.

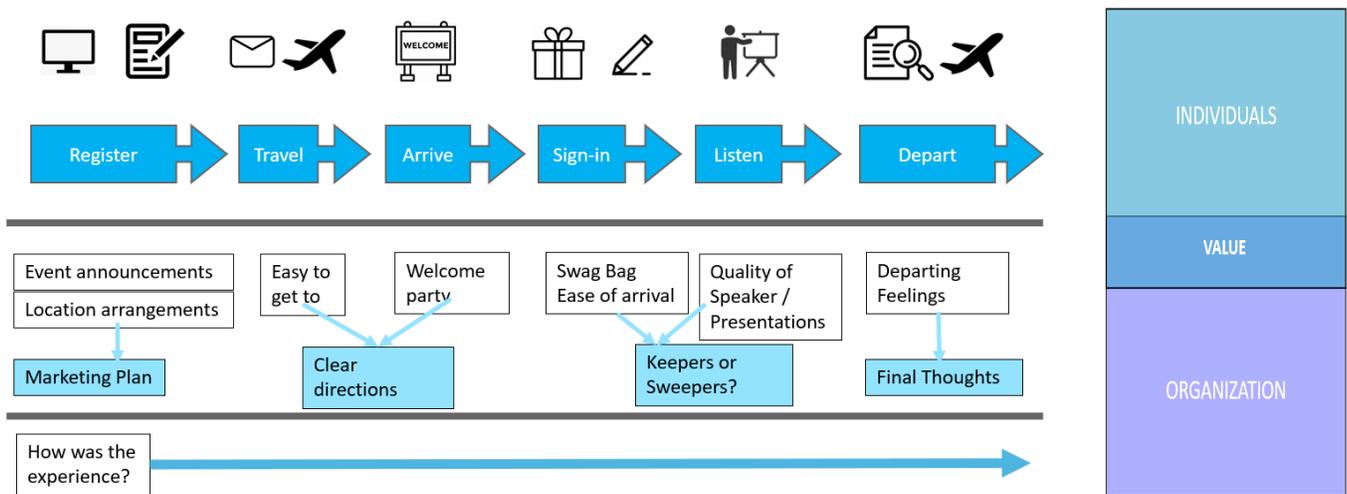


The best way to explain this would be to walk through an example service blueprint, client journey AND experience map, and mental model diagram. It seems easy to understand since we all went through this to get here today, so how did we register for the conference?

What is your value proposition going to be? And how are you going to get alignment with what your client finds valuable?

Let's start with evaluating the process of traveling to a conference as an example. You register, get transportation, arrive, check-in, listen to some sessions and then depart. Certainly this can be broken down further. Draw a hard line right below the individual's activities and we label the interactions. How did you know the event was happening? Announcements. Was the location easy to get to? Was there a welcome party, gifts? How was the quality of the speakers? Lastly, as you leave, I imagine you'll be reflecting on your thoughts you experienced at the conference. The conference staff had to create a marketing plan, route maps, reserve conference centers, evaluate speakers. Now draw another hard line. How was the experience? That is what the staff is responsible for before, during and after the conference.

Service Blueprint Example

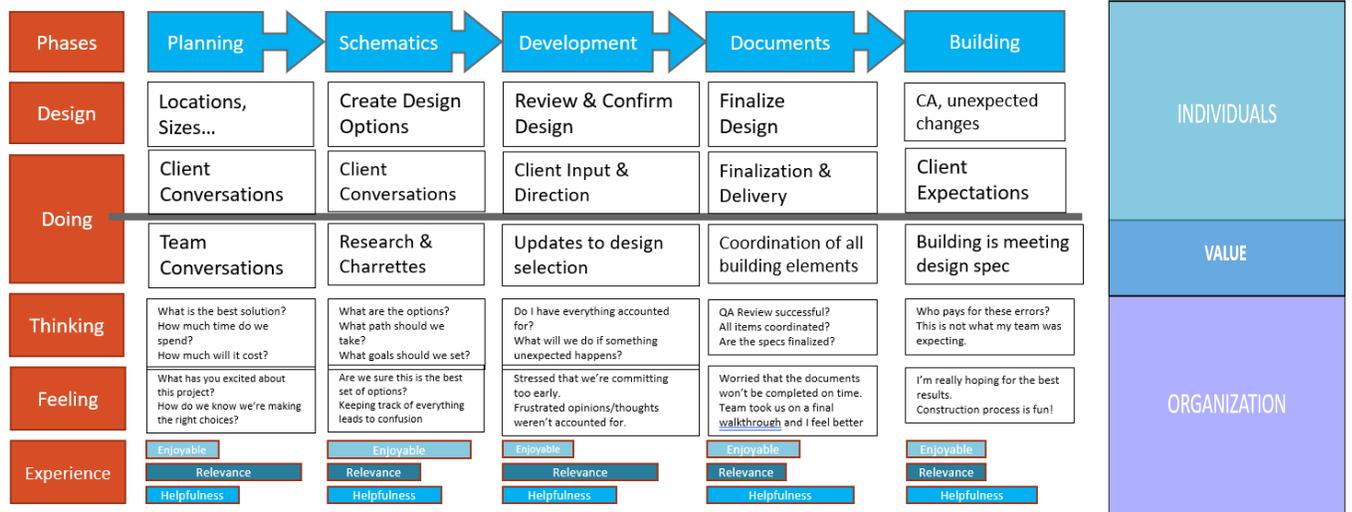


We just showed a diagram for an example of a Service Blueprint. Really highlighting the options that are out there. Now we're going to drill down and diagram out an example of a customer experience (below). In this case, a trimmed down building design journey. This is a simple chart. Let me start by asking how many of you have a post-occupancy survey as part of your design process? Ok, now how many have a survey for each phase of design? We live in a world where you can give instant feedback to the Uber driver, your dentist, your hotel, why not your design team?

The focus should not be on a specific technique but rather on the broader concept of value alignment.

Let's now put ourselves in the client's shoes and go through what its like to be a client (whether internal or external) to our process and see if we can't find some ways to improve.

Customer Experience Map



Let's change gears to a typical design schedule, whether its building design, construction or media production, they all have pockets of completion and process flow. Above we have our planning column, feedback, our SD column, feedback, DD column, feedback and so forth. If I asked someone from the audience where the "line" should go, where would you strike it? Where are the interactions taking place between the client and designers? Right here, in the middle of "doing".

So that means our Oreo top is from here to here. Interactions in the middle and bottom that the organization is responsible for if they want to have a good client and good experience is here. We mentioned earlier about feedback. How many firms are practicing good feedback methods?

How many of you have some thoughts about this? Are you thinking this is a good thing to add to the end of each phase of the project? Maybe you do this by texting the client? How was your experience? That ultimately presents a good touchpoint for keeping a relationship on such a critical juncture between each phase. If there are some stumbles, at least you'll know where you are failing consistently and should look to improve.

And for those of you really paying attention, there are all sorts of innovative opportunities along the way to improve this or that or these parts of the process that are cluttered or hard to tease out. What would you add or take away from the process? Too many people today are on a trip to the finish line and not expressing their thoughts on how to make a more enjoyable experience for everyone involved.

Alignment diagrams covered:

Service Blueprint Example
Customer Experience Map

See also:

Customer Journey Map
Mental Model Diagrams
Spatial Mapping

We don't have time to cover all five engagement mapping exercises but if you want to learn more about clients making choices and all their touchpoints along the way, check out a journey map. If you're looking for something more broad in terms of human behaviors, feelings and motivations, check out mental model diagramming. Or if you need to visualize the processes in 3D check out spatial mapping.

Keep in mind that Alignment diagrams will not provide you with the answers in themselves.

"How we think of technology as a strategic advantage depends on how we correlate it to the firm's value proposition."

~Ryan Cameron

Part III : Recap

Quick Recap: Alignment diagrams enjoy longevity above all else. They help build empathy with the client, whether internal or external. Rally everyone around the big picture. They can help inform team members living in silos that they need to break out of them. They align everyone to the same set of relevant goals. And finally, walking through "the process" can help reveal innovative opportunities that you maybe didn't see before. Sounds a lot like the steps to helping form your Vision doesn't it?

Every single project or presentation for the rest of the time here needs to illustrate the high level explanation of why they did it, how they did what they did. Not just the here's the client, here's the project, here's the script we used. Alignment diagrams are a type of tool that points to such new opportunities. **They visually align a description of the individual's experience with the offerings of an organization.**

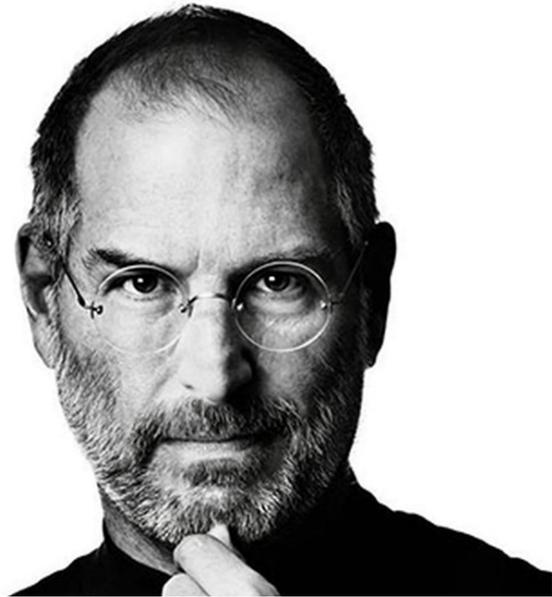


PART IV: CULTURE

To get us started, The business of design is changing. Blending the right combination of people, process and projects. You need to take it to the next level and create value that means something. This means you will have to take risks. This means you will have to create a purpose bigger than yourself.

“It doesn’t make sense to hire smart people and then tell them what to do: we hire smart people so they can tell us what to do.”

~Steve Jobs

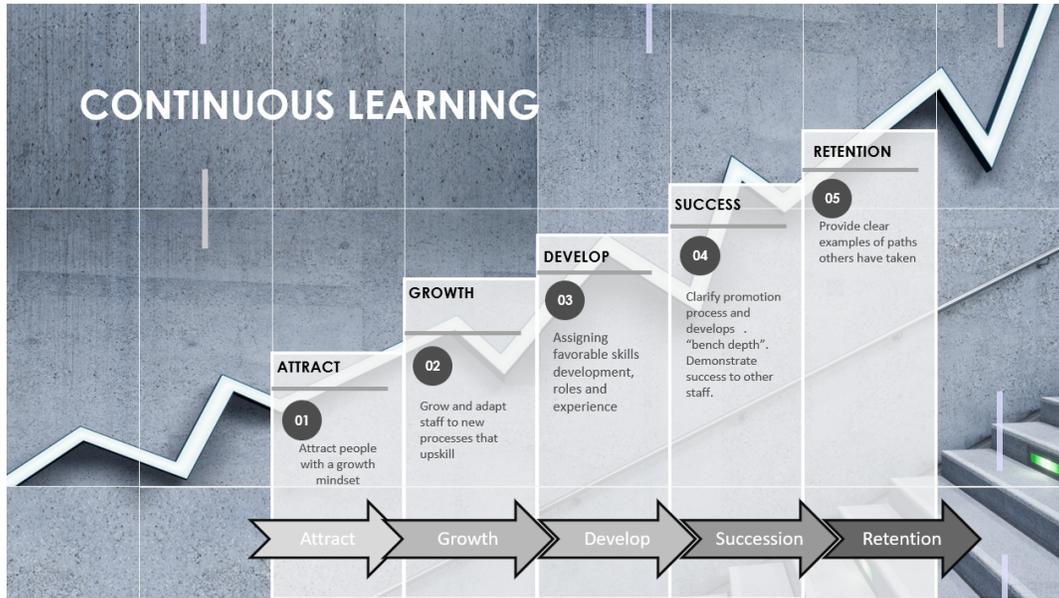


A recent report from McKinsey stated that:

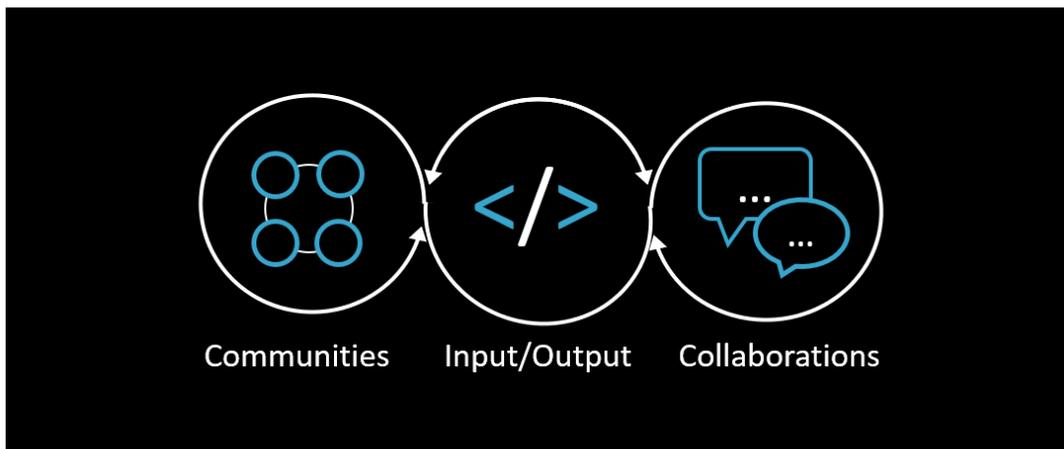
“We find 90 percent of companies believe they’re going to have a skills gap over the coming years. But only 16 percent believe that they’re fully prepared to meet that gap.”

Let’s assume this is generally correct. Most of you have probably known something like the above quote was true and we need to figure out ways to fill the gap. Looks to us like we need to pick up some books and learn some new tricks.

Of course, not just a continuous learning process but creating a culture of learning. What are some steps we can take? We start by making learning attractive to staff. Next we grow those people in the organization. We do this by putting them on a path of their choosing to help cultivate their career. Their success is shared throughout the firm and we use those examples as clear paths others have taken. Firms that do this are 45% more likely to retain staff. And we all know it takes significantly more resources to replace tenure staff than it does to attract. Think about it.



How do we do that? Platforms, community. Engaging staff on a daily basis and building off those contributions.



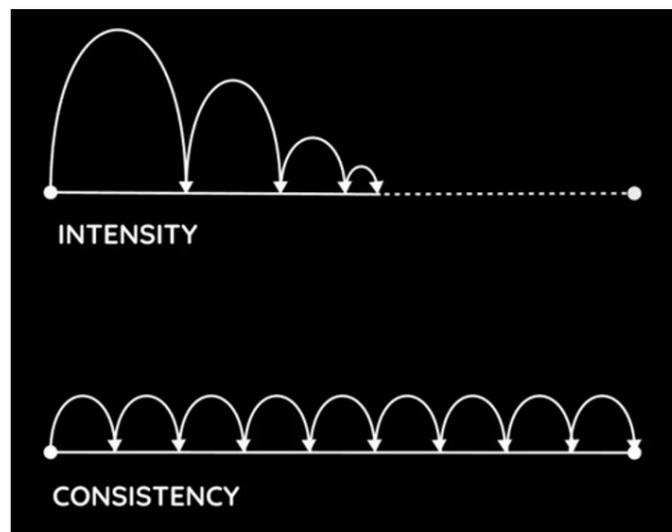
Find the
learning
methods

Are you designing for how people learn?

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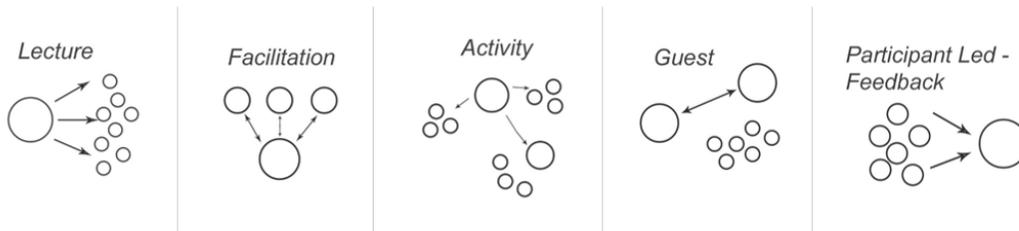
We think the real big question here that we're trying to answer is, Are you designing for how people learn? Now we will discuss some ideas centered around the idea of learning.

I want everyone to think about their learning platform. Is it a really intense first step and gradually loses steam? How did training day go? Over-hyped? Did it fizzle? Or do you strive for a consistent output? What are some ways we can facilitate learning. We don't all learn at the same speed, nor are we all interested in the same topics that we think apply to our business. Controlling the energy that flows through this process is incredibly important. What are some ways?



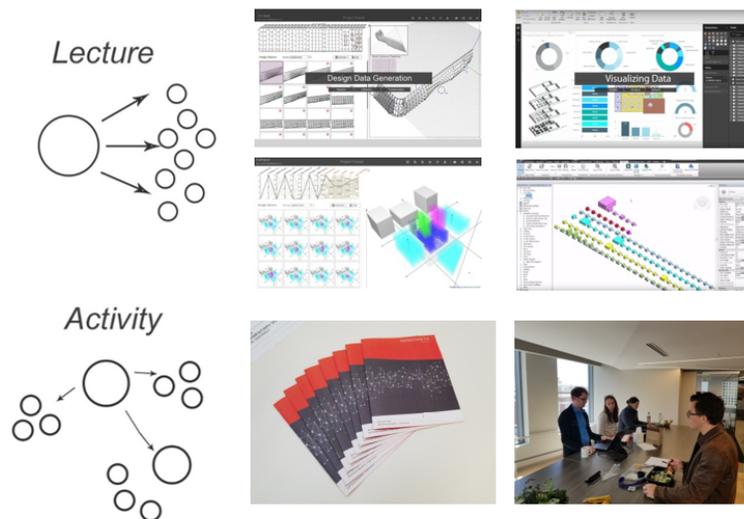
Build.Framework

Provide a wide assortment of learning opportunities.

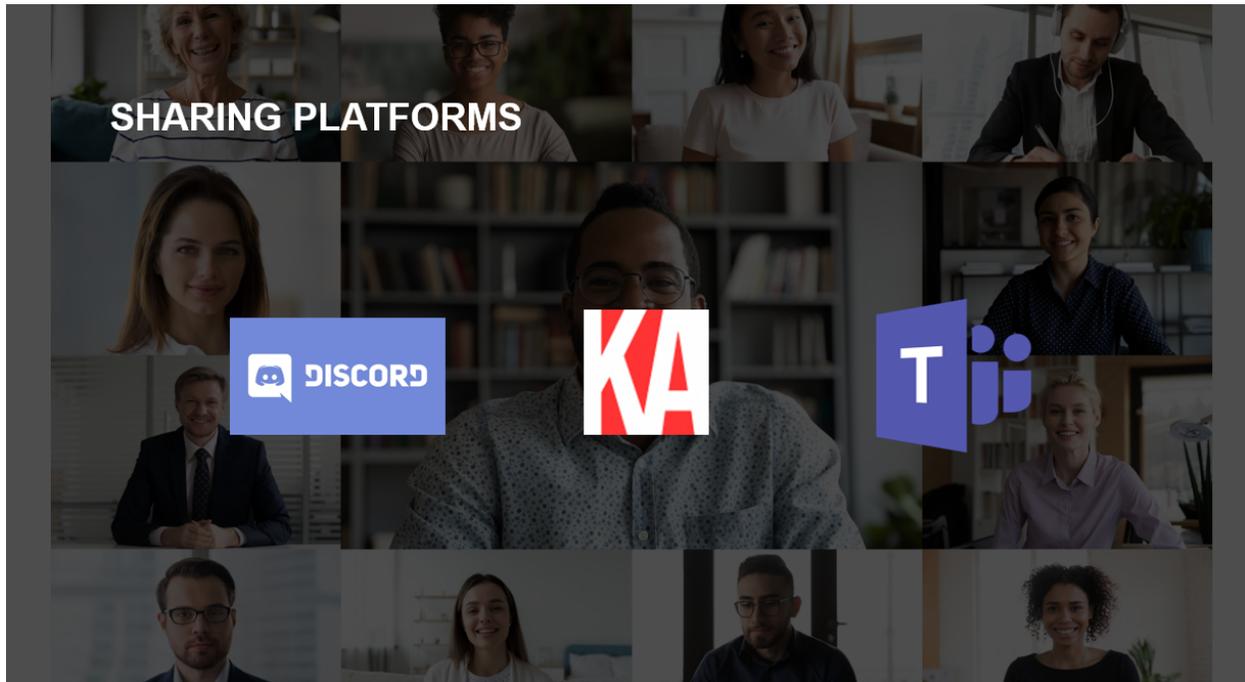


There are many ways to build the learning framework. Lecture, Facilitation, Activity, having a guest lecture or two stop by or our personal favorite, Participant Led-Feedback sessions. Remember the right framing. These are not “Training” sessions, they are “Learning” sessions. Training is a work to enforce an action. Learning is an option given to the teacher from the learner. Who is your ideal client or audience in this situation? **You want learners who are anticipating that these activities can help their careers.**

Build.Framework.Content

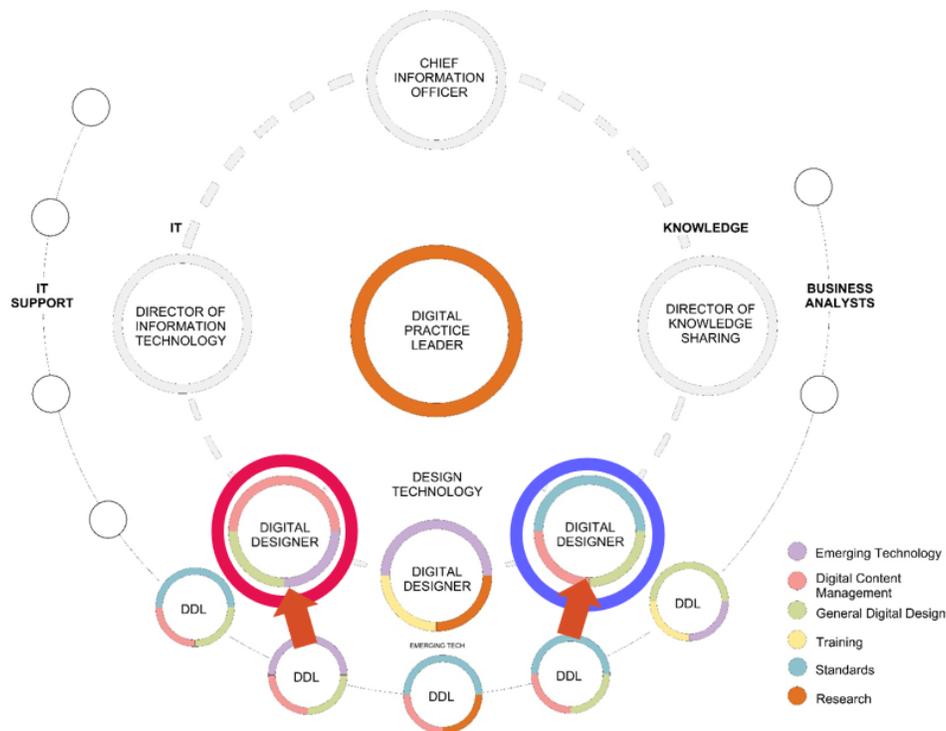


Maybe you have a YouTube channel or an in-house video learning series. That’s a good example of learn-as-you-go / learn-at-your-pace where the learner decides what path to take. Play, pause, rewind. Sometimes its just better than live TV. Another example of an activity is holding a Hackathon at your firm. Plato once said, “You can discover more about a person in an hour of play than in a year of conversation.”



Understand your platform for sharing. Some firms have a discord channel, KA Connect Synthesis, Microsoft Teams. Allowing your teams to share frequently, fluidly and collaboratively ultimately leads to higher output, better outcomes and establishes comradery.





Build a culture of Leadership.

Lastly we want to cover the idea of creating a culture of leadership. In a post-Covid 2020 world, we see shortages in staffing and resignations all over. When we think of resiliency in staffing we often see an outdated concept of the standard, static hierarchy diagram. C-suite up top, followed by several direct reports. A very traditional way of thinking about organizations. Unfortunately in the modern world we're seeing staff turnover rates higher than ever before and vacancies not getting filled with "close but not close enough" candidates. Imagine if you would, a series of digital design leaders, with similar interests, but different weights in each category of their expertise.

Now imagine an orbiting circle inside them that positions their digital technologists to help architects/engineers find specialized designers to fill a specific series of design goals for the project. Inside that orbit you have C-level or master general level leaders that are looking to the future of practice. You see, digital design specialists might have several interests but do not want to be pigeon holed for that one thing everyone relies on them for. They want to move around, change orbit, learn new skills. Pursuit is a driving force in their lives. Allow for them to change their position, utilize their thirst for learning/sharing/thought leadership. Have a plan in case they may leave abruptly. The above diagram indicates a 1:3 ratio of Digital Practice Leader to Lead Digital Designers, with roughly a 1:2 ratio between the DD and DDL. You will have to decide this ratio based on your firm's digital practice needs. Setting up a system in place is far more effective than trying to predict what will happen next. What will you do?

Part IV : Recap

We've learned a great deal from our short time together. For the most part, we have just over forty five minutes to an hour of time to talk or roughly a 25 minute read. You, the reader have questions, we have questions too. Let's recap our last section and continue the journey. We've covered a lot of ground together and want to share this closing opportunity with the things we've learned along the way. We talked about how a culture of learning can lead to a culture of sharing and ultimately a culture of leadership. This requires leadership to be understanding, patience and ready to pass the torch. Following this packet of information which includes the presentation slide deck, handout and Live Recording at AU2022 – New Orleans, you'll be ready to start diving into design technology leadership!



Special thanks to Autodesk's Janis Miller Kellerman, Sidney Shaola, Adam Sopko for all the work you do to help make Autodesk University so special! Thank you to CMBA Architects and Tesla Motors for allowing us to attend.

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