Digital whiteboarding and other techniques for remote collaboration and ideation

UXPA Boston: May 10, 2018

Ethan Perry
Design Manager & Lead
IBM Talent Management Solutions

Kristina Beckley
Design Manager & Lead
IBM Collaboration Solutions
We have transformed our design and development practices by committing to Enterprise Design Thinking & Agile.
Collaboration, ideation & alignment are central to Enterprise Design Thinking & Agile.

We have had a lot of practice.
We work for a large global company and have colleagues and customers in many countries.

F2F isn’t always practical...
Many Options for Remote Collaboration

Suited to Different Needs
Enterprise Design Thinking
“Designers...don’t try to search for a solution until they have determined the real problem, and even then, instead of solving that problem, they stop to consider a wide range of potential solutions. Only then will they finally converge upon their proposal. This process is called ‘design thinking.’”

— Don Norman
“The mission of IBM Design is to create a sustainable culture of design at IBM.”

—PHIL GILBERT, GM IBM DESIGN
Design thinking is a proven way of coming to better solutions in less time.

We’re aligning large, dispersed teams and empowering them to continuously deliver better, more human-centered outcomes to the market.
The Principles guide us

See problems and solutions as an ongoing conversation.

A focus on user outcomes
Drive business by helping users achieve their goals.

Restless reinvention
Stay essential by treating everything as a prototype.

Diverse empowered teams
Move faster by empowering diverse teams to act.
The Keys align us

Lead teams to great user outcomes using our scalable framework for team alignment.

Hills
Align teams on meaningful user outcomes to achieve.

Playbacks
Stay aligned by regularly exchanging feedback.

Sponsor Users
Invite users into the work to stay true to real world needs.

Learn more: https://www.ibm.com/design/thinking/
Aligning the team around user outcomes

**Empathy Map**
What opportunities are presented when we understand our users and their work?

**As-is Scenario Map**
How can our team quickly collaborate to identify a range of possibilities to meet our user’s needs?

**Big Idea Vignettes**
Which of these ideas are most important and feasible within our given release or planning period?

**Idea Prioritization**
What does an idea actually feel like as an experience?
We have developed successful adaptations for remote workshops and alignment.

Tools + Tips = Success
Jump into the whiteboarding demos

Handouts on the chairs have login information for our UXPA account on mural.co

Log in and start collaborating!
Working with Remote Teams

Give the team a chance to get to know each other
- Use ice breakers
- Set up time to get people familiar with the remote collaboration tools
- Make it clear that the expectation is that the focus is on working together during the session
- Diverge → Converge
- Shorter Sessions
- Asynchronous with playbacks when timezones just don’t work
- Consider all remote or part F2F
- Consider number of participants

Silence on a call is fine while people are working on generating ideas or sharing information.

Make sure to recognize when people are contributing - and don’t be afraid to call on people.

If there is a participant who is not bought in to the style of working, talk with them offline (ideally before the group session).
Getting Started
Digital Whiteboarding & Empathy Maps

*See handout to join the live demo
Adapting “Big Ideas” for Remote Whiteboarding

Many techniques translate easily... some require changes to work well

Drawing is a challenge on digital whiteboard - photos of drawings can be used

Text is a better option for remote

Bring in icons for voting on ideas
Ideation: Big Ideas & Prioritization

BRAINSTORM - GROUP - PRIORITIZE

Use this when you have defined the problem you're trying to solve and you're ready to start exploring solutions.

1 **Define your problem statement**
   What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

   **How Might We** create a better way to wake up in the morning?

2 **Brainstorm**
   Write down any ideas that come to mind that address your problem statement.
   Remember, the key rules of brainstorming are:
   - Defend judgment
   - Go for volume
   - Build on the ideas of others
   - Stay on topic
   - Encourage wild ideas
   - Be visual

   PRO TIP: Select a sticky note and click the pencil icon in the menu to sketch.

   **20 minutes**

   - Coffee shower
   - The shower gives you coffee while you're getting clean
   - Alarm clock chase
   - The alarm clock runs away from you until you catch it and turn it off
   - Rent a drill sergeant
   - Service to send people to wake you up
   - Tower of blocks
   - Alarm clock drops blocks on you to wake you up
   - Alarm clock
   - The alarm clock wakes you up
   - Coffee alarm
   - The coffee alarm sets off as you're getting clean
   - Tower of blocks
   - Alarm clock drops blocks on you to wake you up
   - Rent a drill sergeant
   - Service to send people to wake you up
Aligning the team around user outcomes

**Empathy Map**
What opportunities are presented when we understand our users and their work?

**As-is Scenario Map**
How can our team quickly collaborate to identify a range of possibilities to meet our user’s needs?

**Big Idea Vignettes**
Which of these ideas are most important and feasible within our given release or planning period?

**Storyboarding**
What does an idea actually feel like as an experience?
Sketching and prototyping

Based on the ideas, opportunities, and stories identified during ideation the team can flesh out design concepts using:

– Paper prototypes
– Digital prototypes
– Playbacks via web meetings
– File sharing and online prototypes to gather additional feedback
Design thinking drives a focus on our users. We explore different alternatives to enable users to achieve desired outcomes.

User research lets us move from low fidelity to high fidelity designs of target experiences.

Playbacks enable us to define development tasks that will realize the desired outcomes.

Continued research with sponsor users give us insight on how to improve the experience.
Traditional agile approaches have a product owner who determines requirements. Design thinking incorporates a focus on the user.

Scrum meetings for team communication

Iteration planning to identify areas of focus for next 1-2 weeks

Agile development approach

Iterative, incremental and evolutionary

– Short feedback loop and adaptation cycle
– Quality focus

Development

Design

Iteration 1  Iteration 2  Iteration 3

Iteration 1  Iteration 2  Iteration 3
KANBAN + RETROSPECTIVE

Announcements / Other stuff

Retrospectives
It helps a great idea to reflect on what went well, what could be better, and what you can do to make positive changes to your process.

Iteration 17.19 - Retrospective

Planning
Visualize your progress in a week with a simple Kanban Board.

Iteration 17.20 - Thurs 10/5

<table>
<thead>
<tr>
<th>What went well</th>
<th>What didn't go well</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Backlog</th>
<th>Doing</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amatsu</td>
<td>Amatsu</td>
<td>Amatsu</td>
</tr>
<tr>
<td>Joe</td>
<td>Joe</td>
<td>Joe</td>
</tr>
<tr>
<td>John</td>
<td>John</td>
<td>John</td>
</tr>
<tr>
<td>Moeke</td>
<td>Moeke</td>
<td>Moeke</td>
</tr>
<tr>
<td>Samantha</td>
<td>Samantha</td>
<td>Samantha</td>
</tr>
</tbody>
</table>

|                |                     |         |
Design Assignments 2018

Project Management

Cross-Project story

Sponsor Users

Device Strategy (Web, Mobile, Electron)

Design Guide  Jim  Style Guide  React Components

Project A

Project B

Project C

LEGEND

circle = more than one project
square = one project
black border = primary project
gold = FED
purple = UX
blue = UX
green = Visual Design
pink = Project Management
orange = Content

NOTES

All areas should have and be actively using a Git repo in the Design org for their design task/issues tracking and planning.
Remote collaboration can be a great way to adopt design and agile activities across teams in different locations.
Questions?