



# Agile ORLANDO JULY 24-28 2023

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# Spencer Putney & Newton Smith

## A Design State of Mind Makes for A Successful Product Team



**Agile** ORLANDO  
JULY 24-28 **2023**

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# Design is a frame of mind, and perception matters



Vladimir Lopatin (2019) vk.com/PITERSKII\_PUNK\_WALL – permission from artist



# A Design State of Mind Makes for A Successful Product Team

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Monday, July 24, 2023, 2:00 PM – 3:15 PM  
Agile2023 Conference, Orlando, Florida, Desotto 1  
Spencer Putney & Newton Smith

# Working Agreements



- Engagement is crucial
- Take care of yourself
- Set aside distractions
- Respect other ideas
- Others?
- Questions?

# Who Are We?



## Spencer Putney

- Vice President & Human-centered Design Transformation Lead at Wells Fargo Consumer Lending
- 30+ years of Product Development and Human-centered Design experience



## Newton Smith

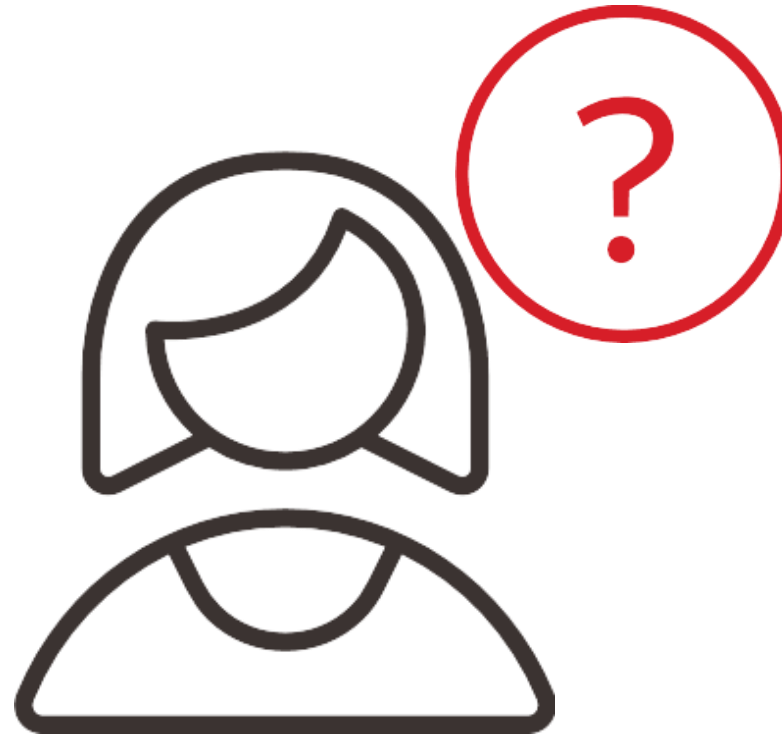
- Senior Product Designer at Wells Fargo Consumer Lending
- Lead Experience Designer with 7+ years of Digital Agency, Human-Computer Interaction, and UX Design experience

3 Minutes

Who Are You?

At your table, share:

- Your Name
- Your Company
- What is **D**esign to you?



Time's Up!

## Design With A Capital “D”

Design is a **mindset** and discipline using creative problem-solving processes that **enable solutions** to be informed, **inclusive**, compelling, and purposeful.

**Everyone is a designer** as it is all around us - be it a birthday celebration for a loved one or a presentation at work.





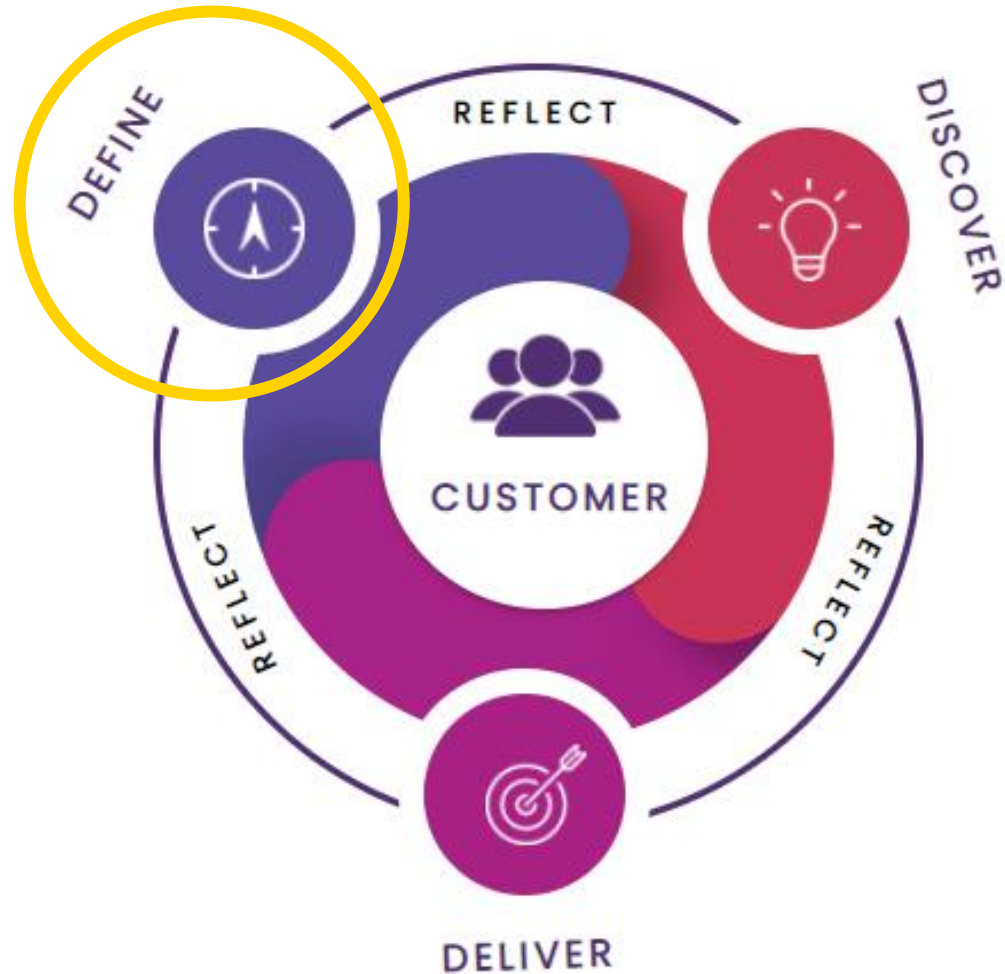
# Design With A Capital “D”

## Common Misconceptions

- Design is about making things look pretty
- Design is only valuable when applied to end-users and customers
- Design is only relevant when developing products and services



# The product management construct:



**DEFINE**

**Creates a clear direction for the product or service**

**DISCOVER**

**Tests ideas quickly, reduces risk, and moves the best ideas forward**

**DELIVER**

**Brings products to life**

**REFLECT**

**Promotes continuous learning and adapting**

# Real World Example: Just Build Me “X”

## The Situation

---

- Lending team partnering with 3<sup>rd</sup> party to sell products
- Told by senior leaders to create a specific experience based on depth of relationship
- Over six months of work with little progress
- Limited understanding of stakeholders, customers & systems

## The Design Approach

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- Built **stakeholder map** to understand all the players
- Created a **product ecosystem map** to lay out the processes and technology
- Developed “**How Might We...**” **statements** to identify opportunities to build value
- Completed a **Problem Assumption Matrix** to validate or invalidate ideas

### Key Design Activities

Audience Interviews  
Empathy Mapping



## At your table:

- Use persona interview template
- One person shares their perspective on sending/receiving money
- Remainder of table interviews
- Fill in as many sections as possible

### The Interview, Step One: Persona

Ecosystem  
Interview Notes

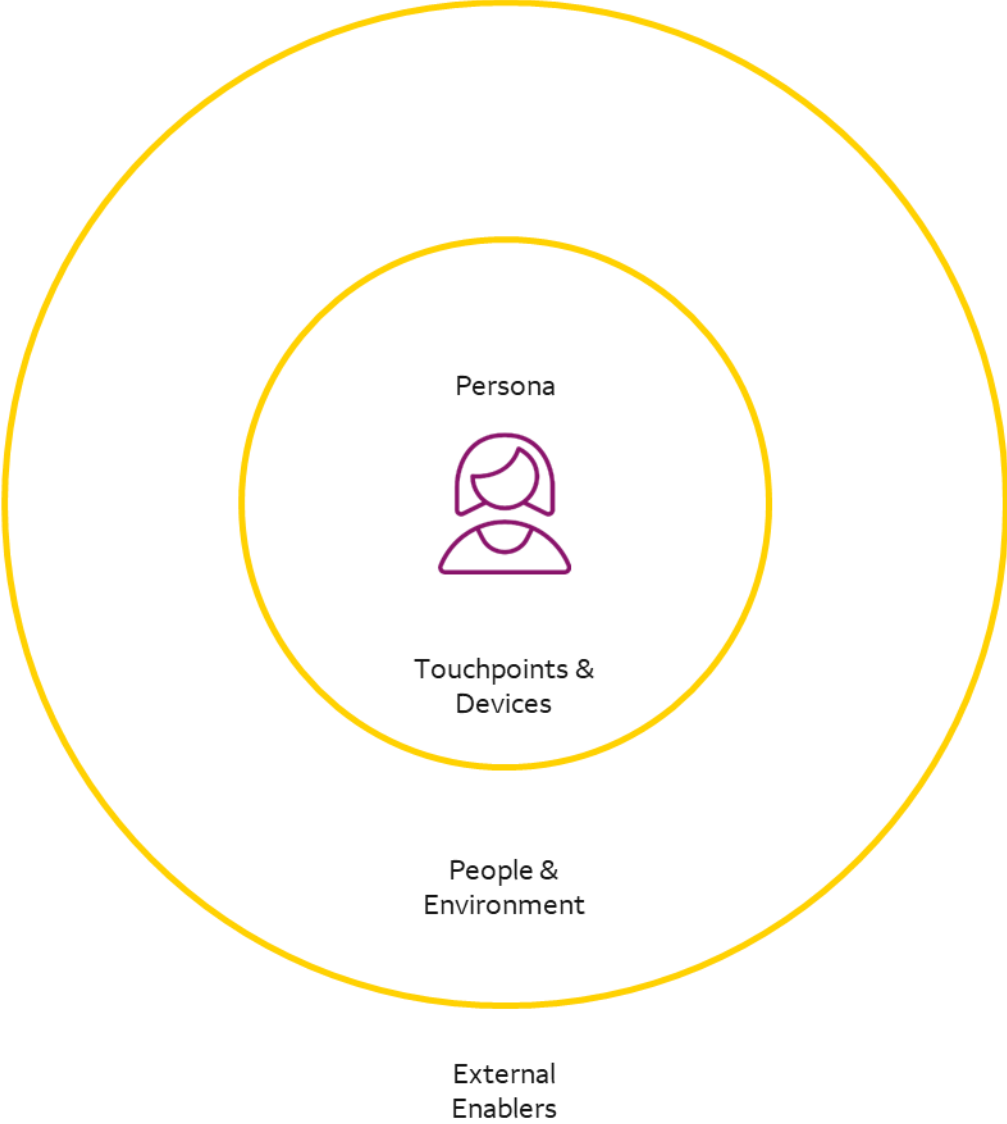


<b>Persona Actions</b> What are they doing? What contribution are they making to the outcome?	<b>Thoughts &amp; Feelings</b> What is the persona thinking & feeling during each step? Does the persona experience positive and/or negative feelings?
<b>Other People's Actions</b> What are other people doing? How are they impacting the outcome?	

# The Interview, Step One: Persona

## Ecosystem

Interview Notes



<b>Persona Actions</b> What are they doing? What contribution are they making to the outcome?	<b>Thoughts &amp; Feelings</b> What is the persona thinking & feeling during each step? Does the persona experience positive and/or negative feelings?
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<b>Other People's Actions</b> What are other people doing? How are they impacting the outcome?
--

## At your table:

- Use persona interview template
- One person shares their perspective on sending/receiving money
- Remainder of table interviews
- Fill in as many sections as possible

### The Interview, Step One: Persona

**Ecosystem**  
Interview Notes



<b>Persona Actions</b> What are they doing? What contribution are they making to the outcome?	<b>Thoughts &amp; Feelings</b> What is the persona thinking & feeling during each step? Does the persona experience positive and/or negative feelings?
<b>Other People's Actions</b> What are other people doing? How are they impacting the outcome?	

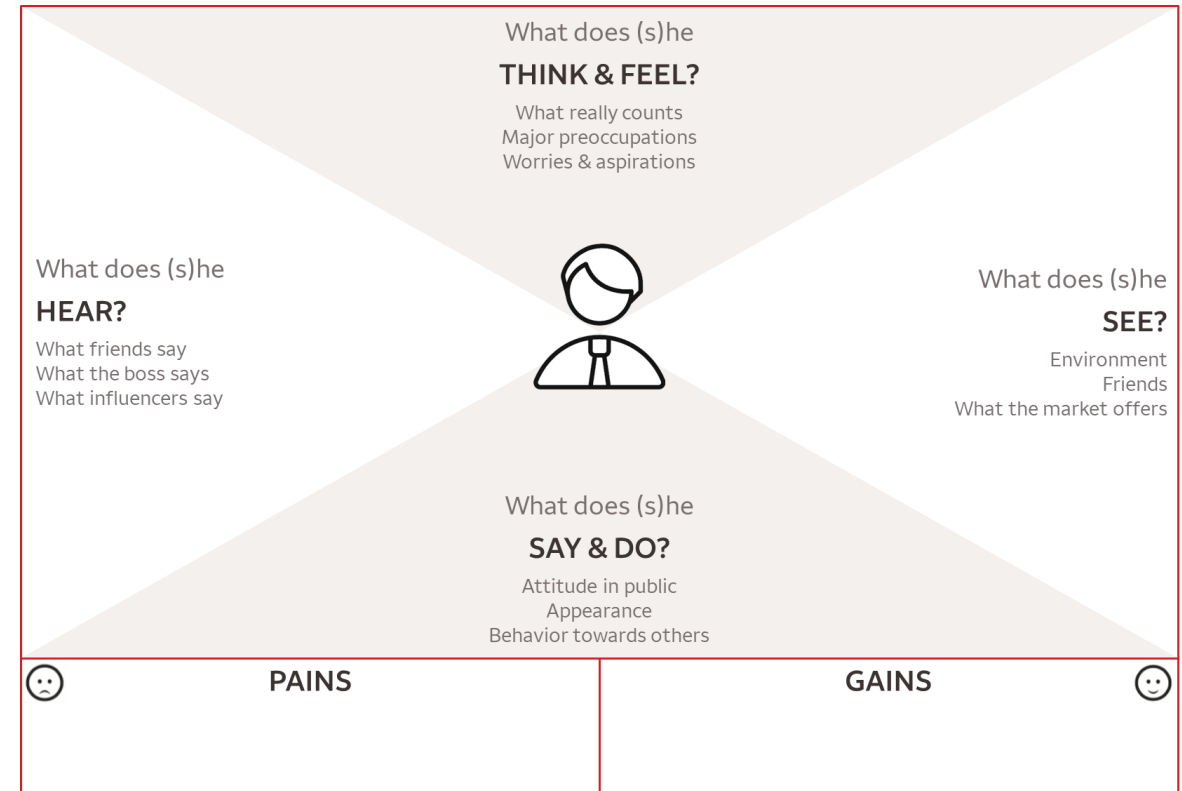
7 Minutes

# Persona Selection & Empathy Map

## With your full table:

- Discuss your interview notes
- Complete sections of the empathy map
- Remember: this is not YOUR perspective

The Interview, Step Two: Empathy Map



Time's Up!



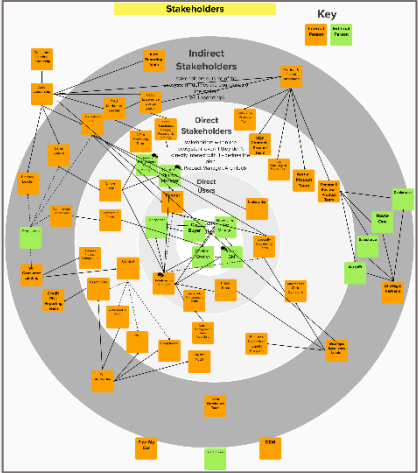
### Any observations?

- Anyone have experience using these practices?
- What surprises?
- Would using these tools help in your definition process?
- How is this design?

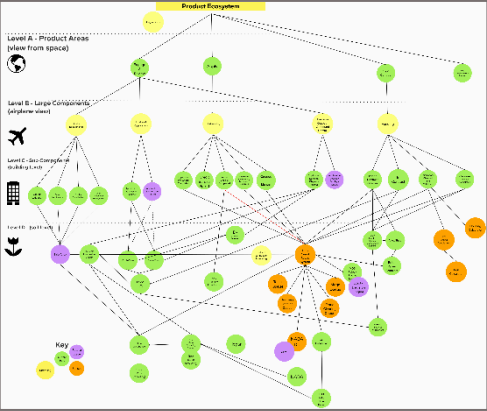


# Real World Example: Just Build Me “X”

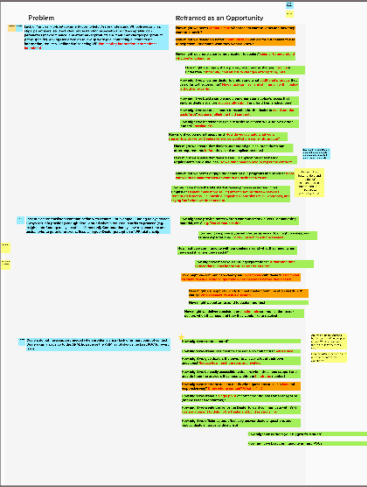
Stakeholder Map



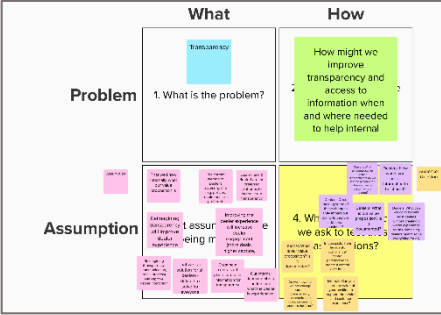
Product Ecosystem Map



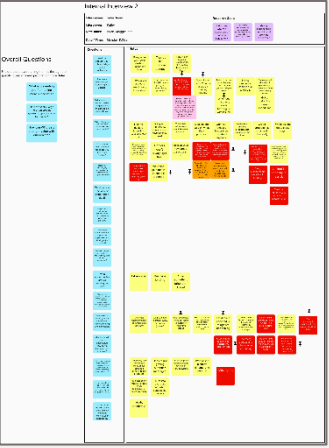
How Might We Statements



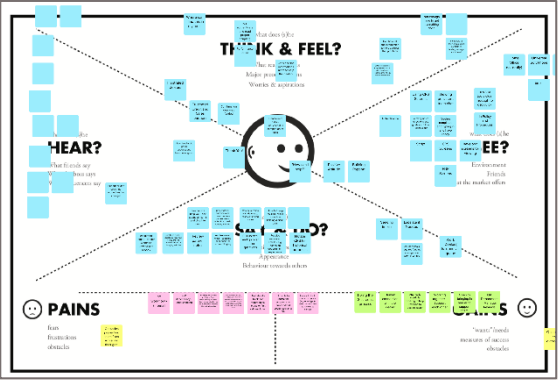
Problem Assumption Matrix



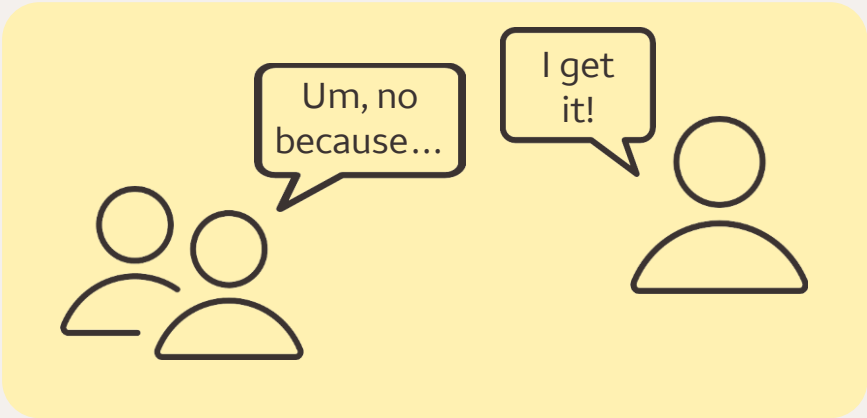
Interview Notes



Empathy Map

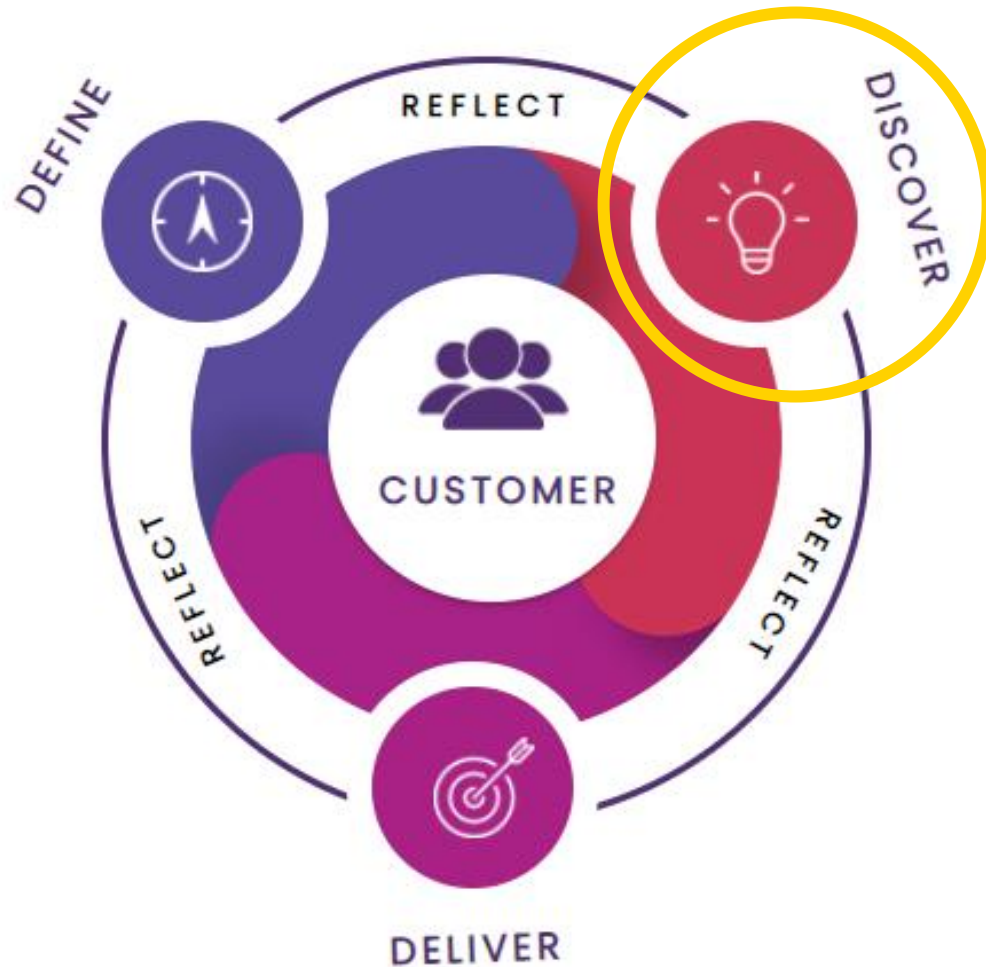


The Result:



Actual working materials with detail removed or modified

# The product management construct:



DEFINE

Creates a clear direction for the product or service

DISCOVER

Tests ideas quickly, reduces risk, and moves the best ideas forward

DELIVER

Brings products to life

REFLECT

Promotes continuous learning and adapting

# Real World Example: Let's just build it

## The Situation

---

- Product Management Team tasked with updating an internal system for employees who work in Loan Originations
- Project has been attempted seven times within the last 12 years but always fails to get to delivery
- Lots of different teams working together to build the product, but not including the users who would be working in this system

## The Design Approach

---

- Conducted **user research interviews** to understand the different ways users interact with the current system
- Created a **journey map** to map out the route a user could take while completing their tasks
- Collaborated with all teams to get feedback on prospective designs during the **design sprint**

### Key Design Activities

User Research Interviews  
Journey Mapping  
Design Sprint

# Real World Example: Let's just build it

## The Situation

- Update a Legacy Internal system for employees to a modern and interactive User Interface
- Project has been attempted seven times within the last 12 years but always fails to get to delivery
- Lots of different teams working together to build the product, but not including the users who would be working in this system

Entry Time	User	Subject	Comment	Assigned	Due	Comp
10/19 9:40 AM	[REDACTED]	6/K	[REDACTED] has 1 paid [REDACTED] 2 dups 12/2020 decscor C1 alone..same employ \$4362, now \$4852 C1 - diff address/PO Box for C1.			
10/19 9:28 AM	System	!HouseExp	System changes Housing Expense from \$1.00 to \$570.00			
10/19 9:28 AM	crs-crdr	!CRDRATING	FIRST CUSTOMER RECORD NOT FOUND FOR SSN: [REDACTED]			
10/19 9:28 AM	crs-crdr	!CRDRATING	CREDIT RATING QUERY SUCCEEDED FOR SSN: [REDACTED]			
10/19 9:27 AM	crs-eds	!WFSECONN	Body Style: 2.5 SR Sedan			
10/19 9:27 AM	crs-eds	!DUPLICATE APPS	CoApplicant SS# matches existing CoApplicant SS# [REDACTED]			
10/19 9:27 AM	crs-eds	!VehicleUse	Intended Use: Personal			
10/19 9:27 AM	crs-eds	!DUPLICATE APPS	Applicant SS# matches existing Applicant SS# [REDACTED]			
10/19 9:27 AM	crs-eds	!Misc Notes	Dealer User Name : [REDACTED]			

[SWITCH] Toggle between all comments and open items [RECALL] Update Completion Date [CLEAR] Search by Subject

CreditRevue

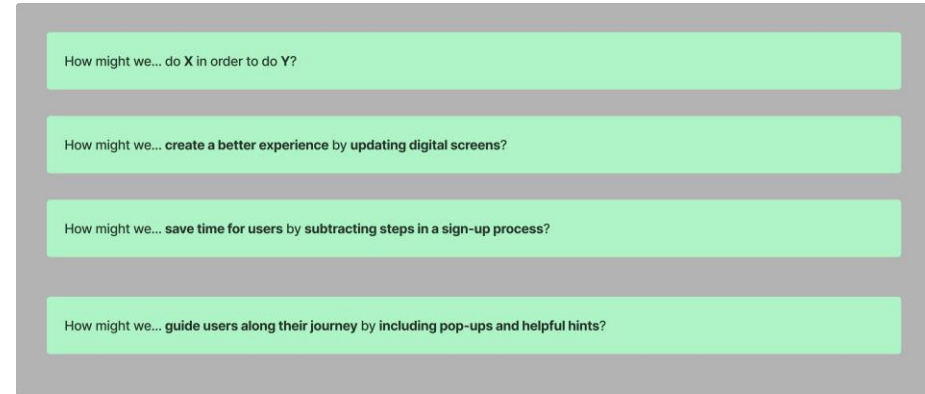


# Solutioning and Storyboarding

## HMW

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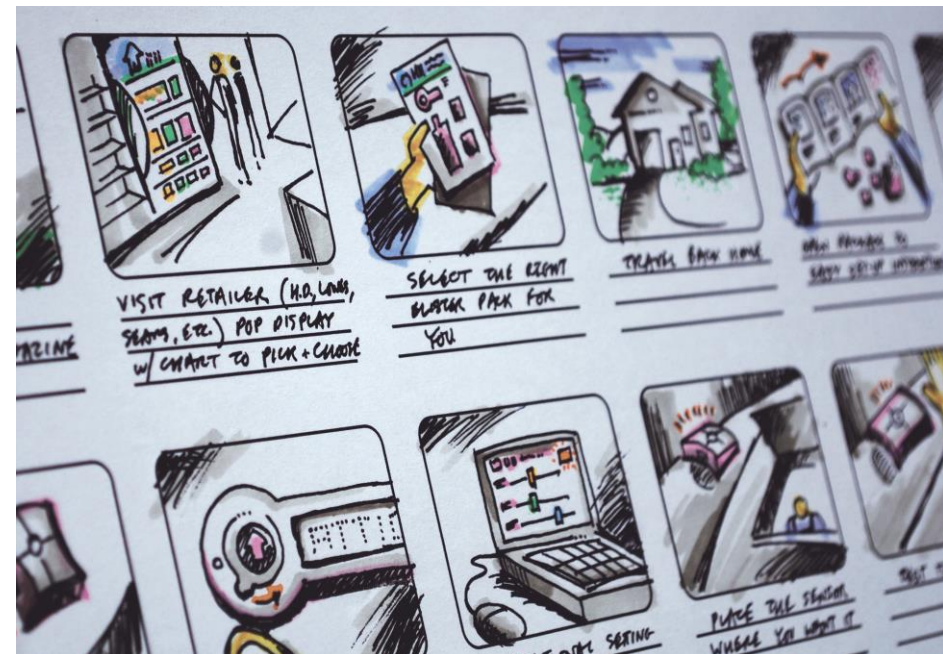
- HMW stands for “How Might We...”
- If you want the best solutions, start by asking the right questions.



## Storyboard

---

- Visually depict the flow and sequence of interactions within a digital product or service.
- Create a series of illustrated or annotated panels that represent key moments and user actions in a user's journey.
- Outline the narrative and structure of a user's interaction with a product or service.



3 Minutes

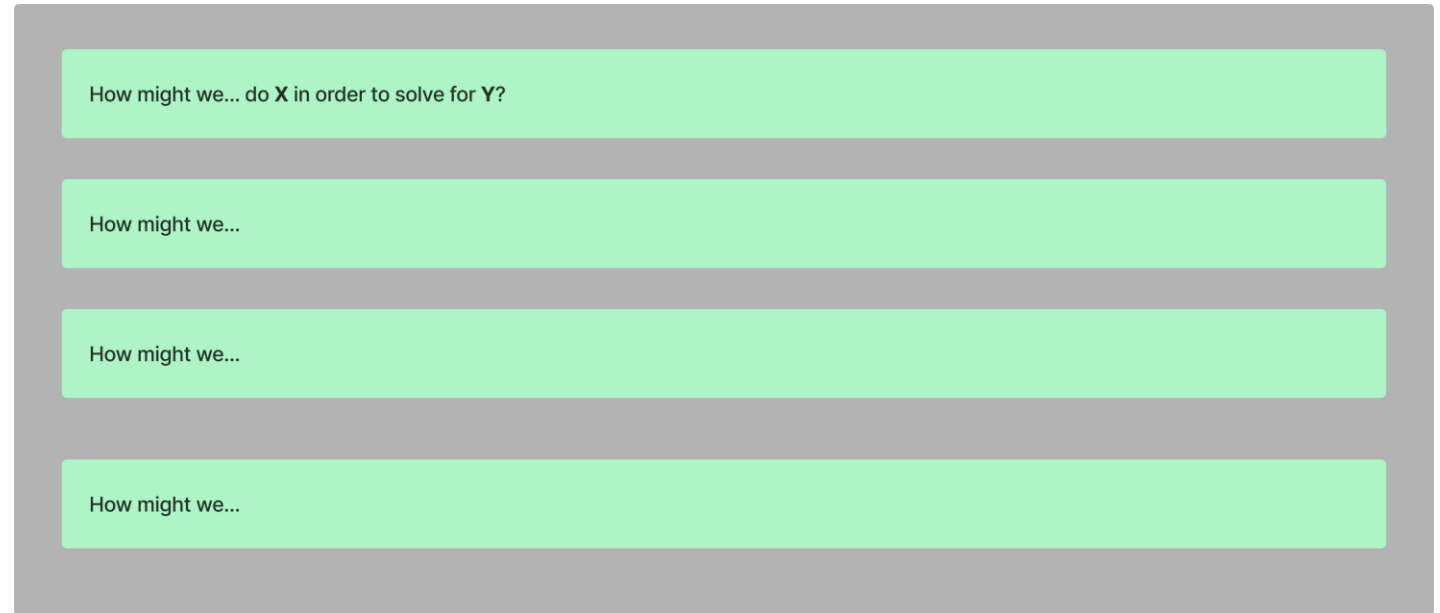
How Might We...

## Individually:

- Using sticky notes: write up 2-3 “How Might We” statements
- HMW Do X in order to Y

## With your full table:

- Select one HMW for Storyboarding



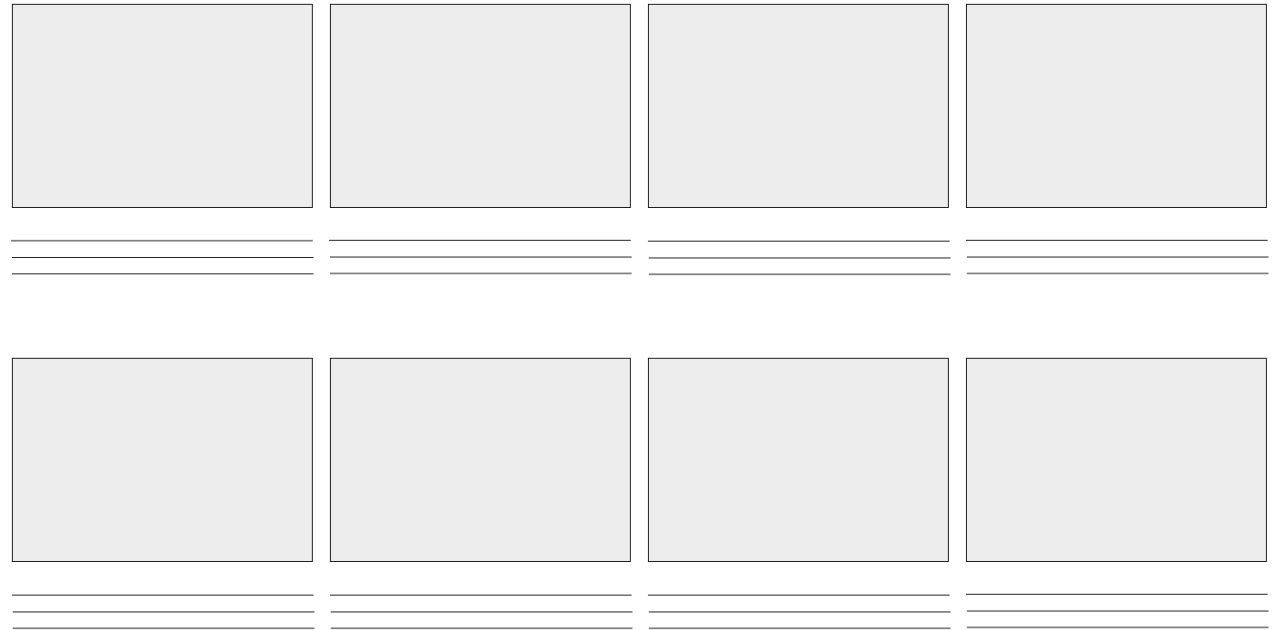
“How might we build a product that will allow users to send money to each other in an easy and efficient way?”

Time's Up!



## At Your Table:

1. Define the Objective and Target Audience
2. Gather Key Scenes and Content Collaboratively
3. Create a Storyboard
4. Sketch and Refine Scenes
5. Review and Iterate



SHARE

## Storyboarding

### Any observations?

- Does anyone have any key takeaways?
- Do you see how Design is both creative but strategic as well?
- Did you find that thinking about the relationship the user has with the product helped while developing?



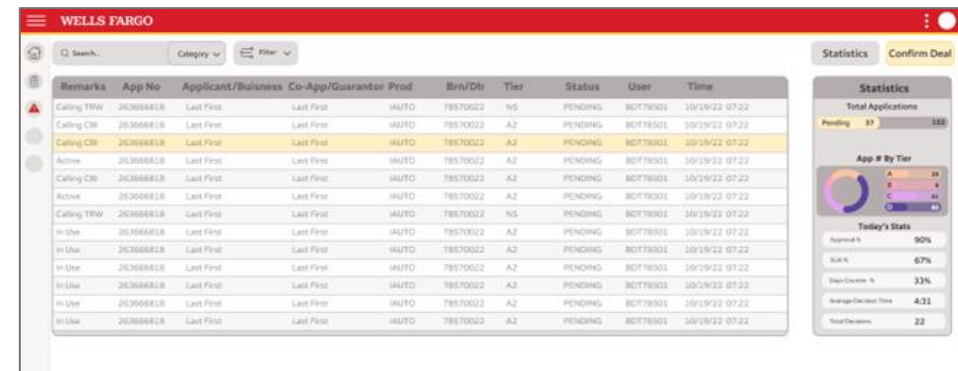


# Real World Example: Let's just build it

- Saves time by making sure the product will be valuable for the end users
- Company Business OKRs and KPIs will be obtained in a more efficient and effective way
- Retention is increased for technical positions
- Training needs are cut dramatically from 12-16 months to 4-8 weeks

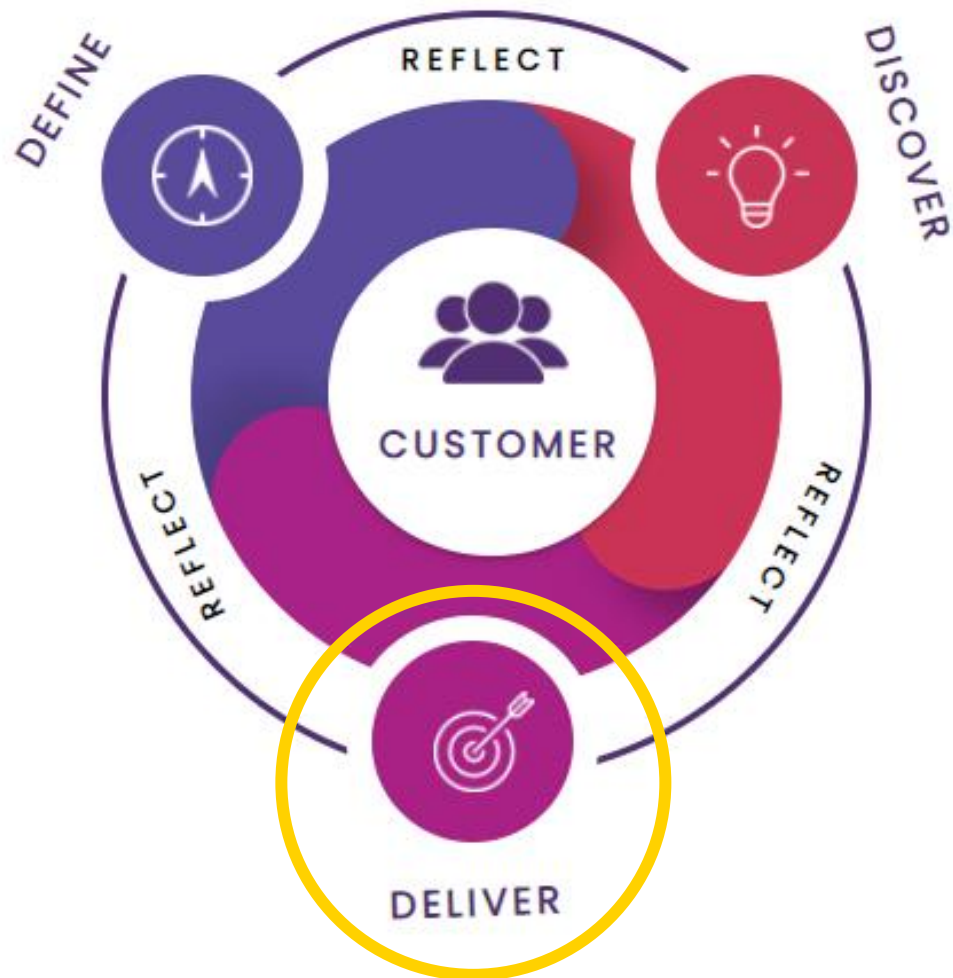


A screenshot of a data table with a red header bar. The table has several columns, including 'App No', 'Applicant/Business', 'Co-App/Guarantor', 'Prod', 'Bsn/Dtr', 'Tier', 'Status', 'User', and 'Time'. The rows contain various data points, with some cells highlighted in yellow.



A screenshot of the Wells Fargo application management interface. The main area displays a table with columns: Remarks, App No, Applicant/Business, Co-App/Guarantor, Prod, Bsn/Dtr, Tier, Status, User, and Time. The table contains multiple rows of application data. On the right side, there is a 'Statistics' sidebar with a 'Confirm Deal' button. The statistics include: Total Applications (Pending: 37, Total: 188), App # By Tier (A: 28, B: 15, C: 44), Today's Stats (Approved %: 90%, SQA %: 87%, Paper Closure %: 33%, Average Decision Time: 4.31, Total Decisions: 22).

# The product management construct:



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# Real World Example: “I’ve prioritized your work for you”

## The Situation

---

- Team provided with 29 features in priority order
- Missing data-driven reasons for priorities
- Team not sure priorities are correct, but missing information to justify any recommended changes

## The Design Approach

---

- Solidified understanding of organizational strategies and objectives
- Completed **customer & employee interviews**
- Defined **value exchange** and effort criteria based on strategies and objectives
- Completed an **Opportunity Assessment**, to triage the priorities and validate they were being addressed at the right level

Key Design Activities  
Importance/Difficulty Matrix

3 Minutes

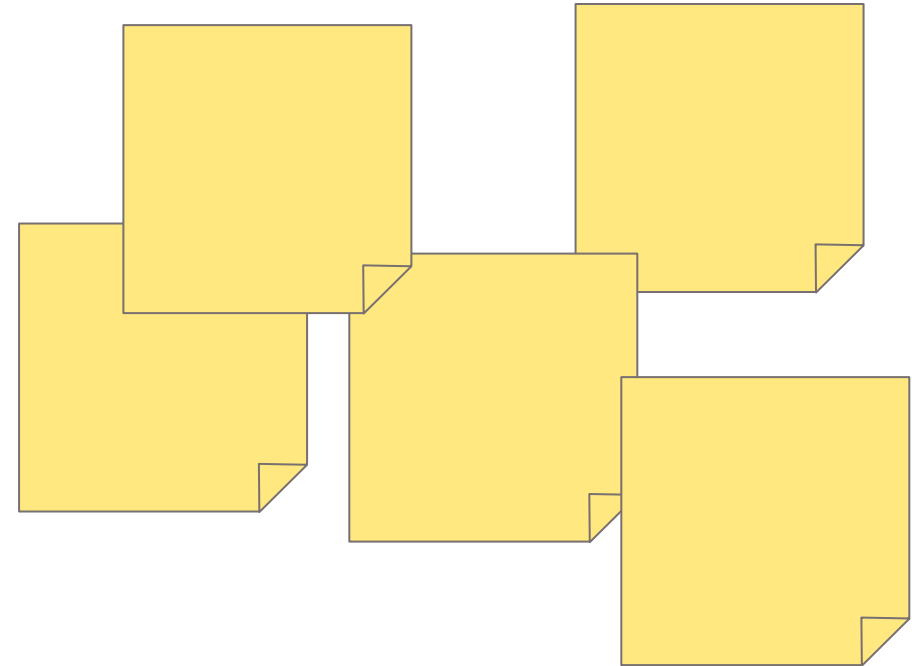
## Identify Features

### Individually:

- Using sticky notes:  
write up at least one feature  
from story boarding

### With your full table:

- Eliminate duplicates



Time's Up!

## With your full table:

- Using importance criteria, rank all features
- Place one on a left/right scale
  - Least important to left
  - Most important to right
- Repeat with each feature, no feature being same importance

- Customer satisfaction (ease of use)
- Risk mitigation
- Profitability
- Increased transaction volume





3 Minutes

## Force Rank Difficulty

### With your full table:

- Using Difficulty criteria, rank all features
- Place one on bottom/top scale
  - Least difficult at bottom
  - Most difficult at top
- Repeat with each feature, no feature being same difficulty

Most  
Difficult

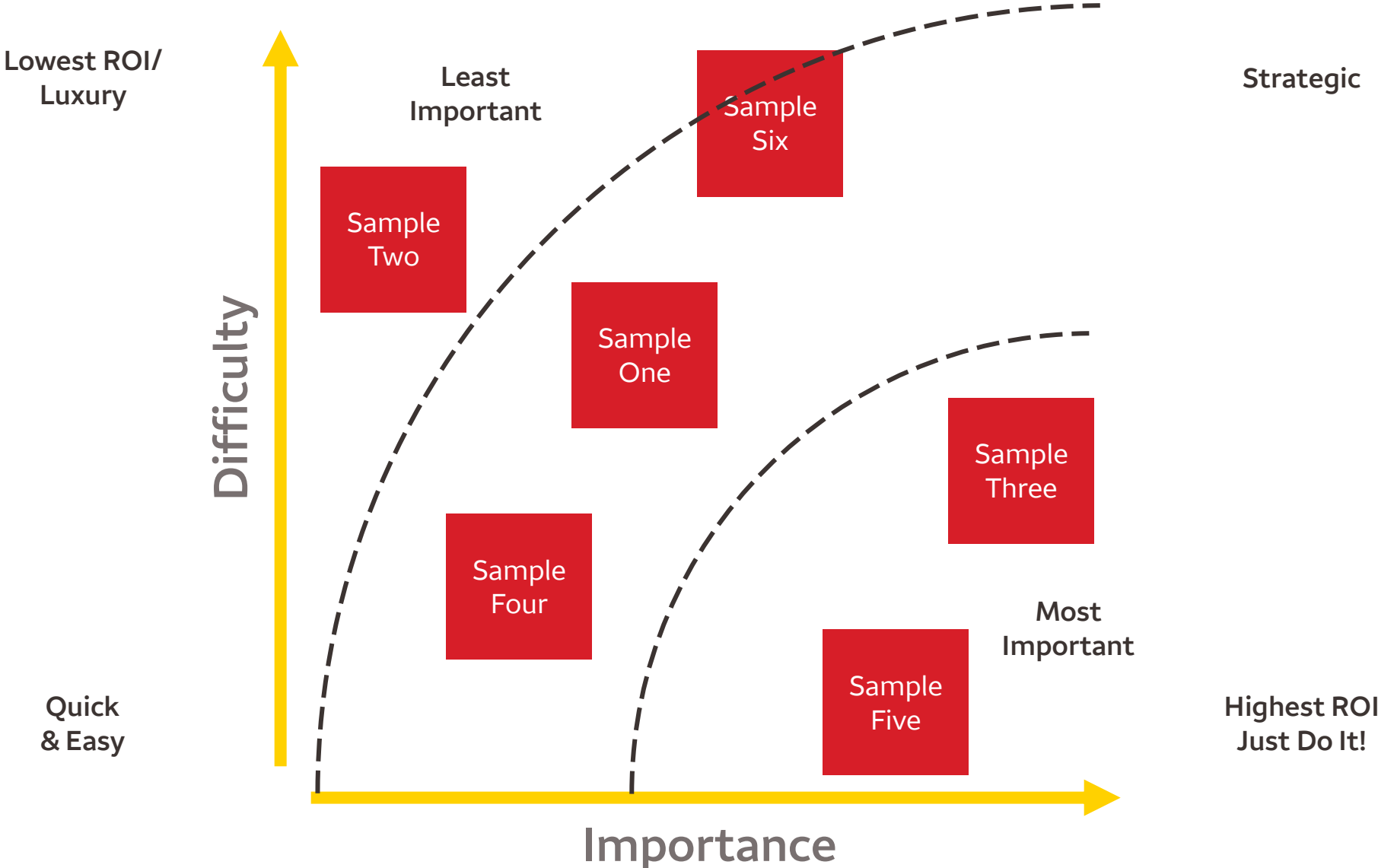


Least  
Difficult

- Political
- Operational
- Environmental
- Technical

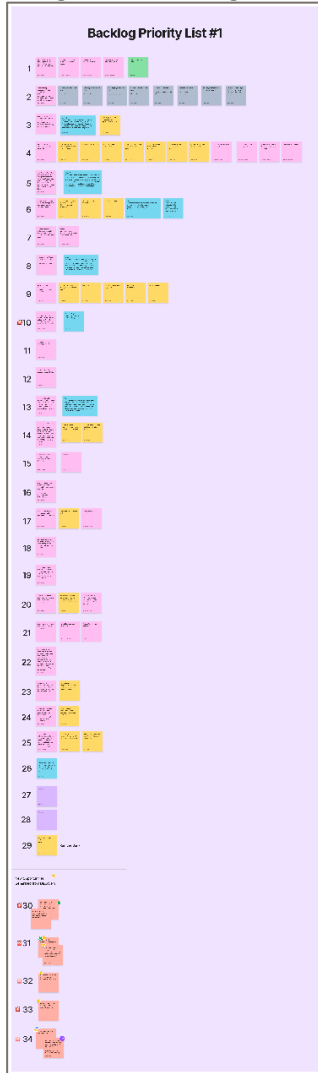
Time's Up!

# Interpreting The Importance/Difficulty Matrix

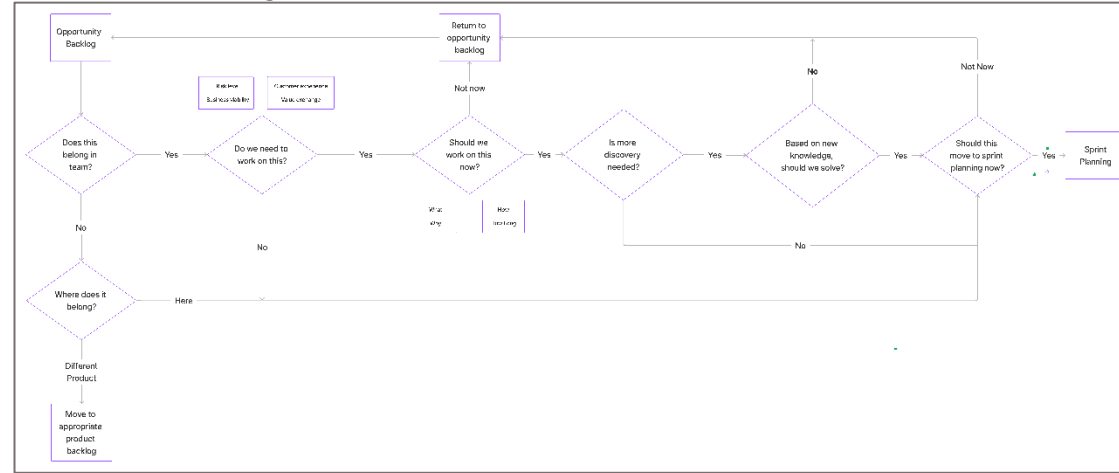


# Real World Example: "I've prioritized your work for you"

## Original Backlog



## Epic/Feature Triage



## Value/Risk-Effort Matrix



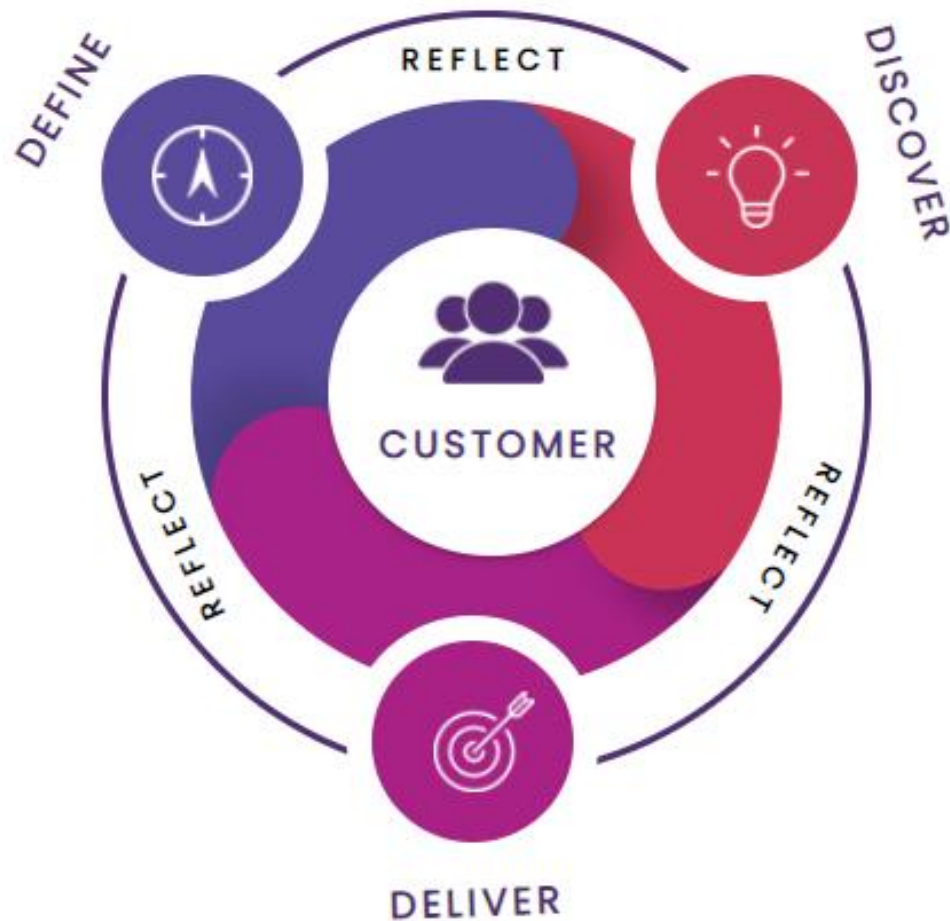
## Final 12



## The Result:



# The product management construct:



DEFINE

Creates a clear direction for the product or service

DISCOVER

Tests ideas quickly, reduces risk, and moves the best ideas forward

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Brings products to life

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SHARE

## Design with a Capital “D”

### Any observations?

- What worked for you today?
- What changes have you made to your definition of Design?
- What will you bring back to your teams?



# Product Management & A Design Mindset Working Together

Reflection

Design  
Mindset

Continuous  
Discovery

Problem  
Solving

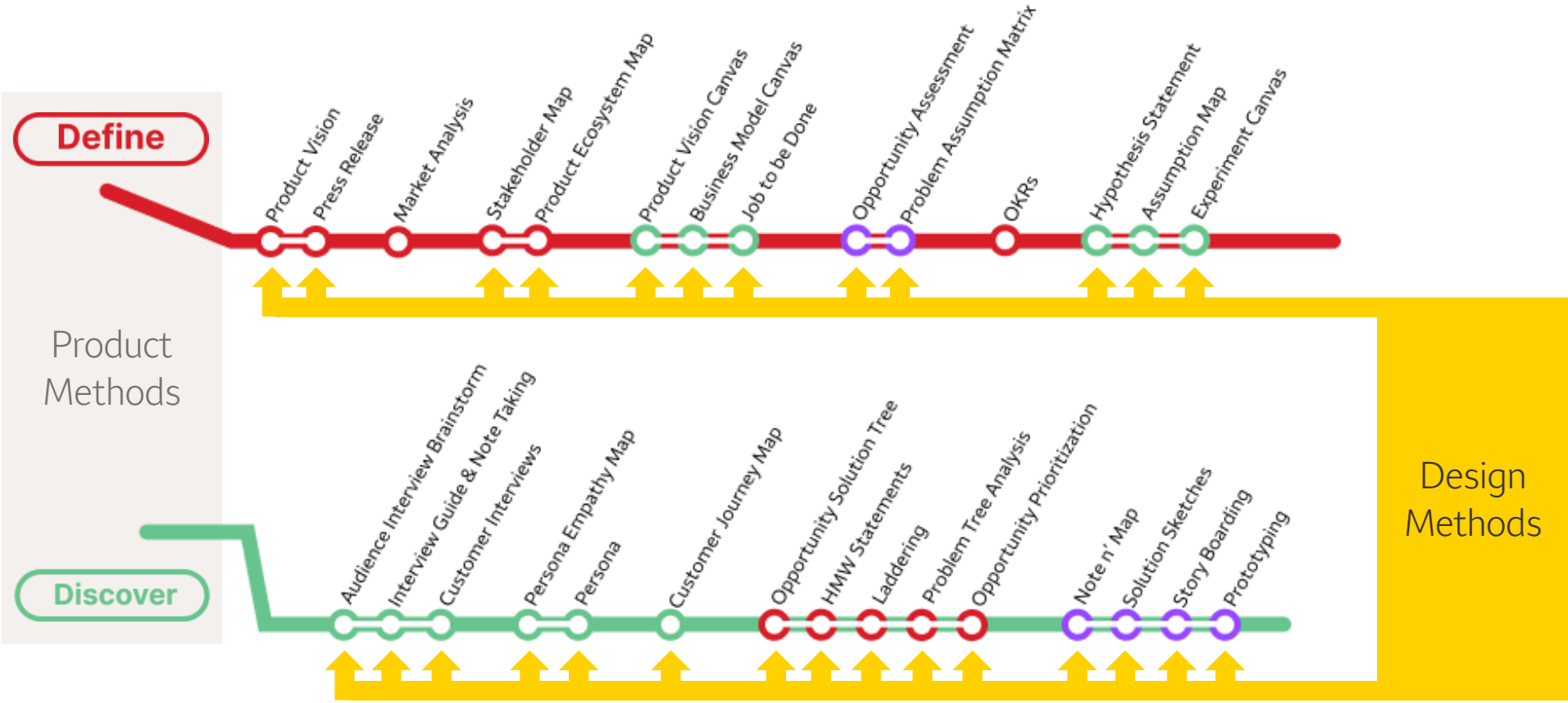
Feedback  
Loop

Empathy

Limited  
Time Boxing

Iteration

# Product Management & A Design Mindset Working Together





Thank you

**Spencer Putney**

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PRESENTS

# Agile ORLANDO 2023

JULY 24-28

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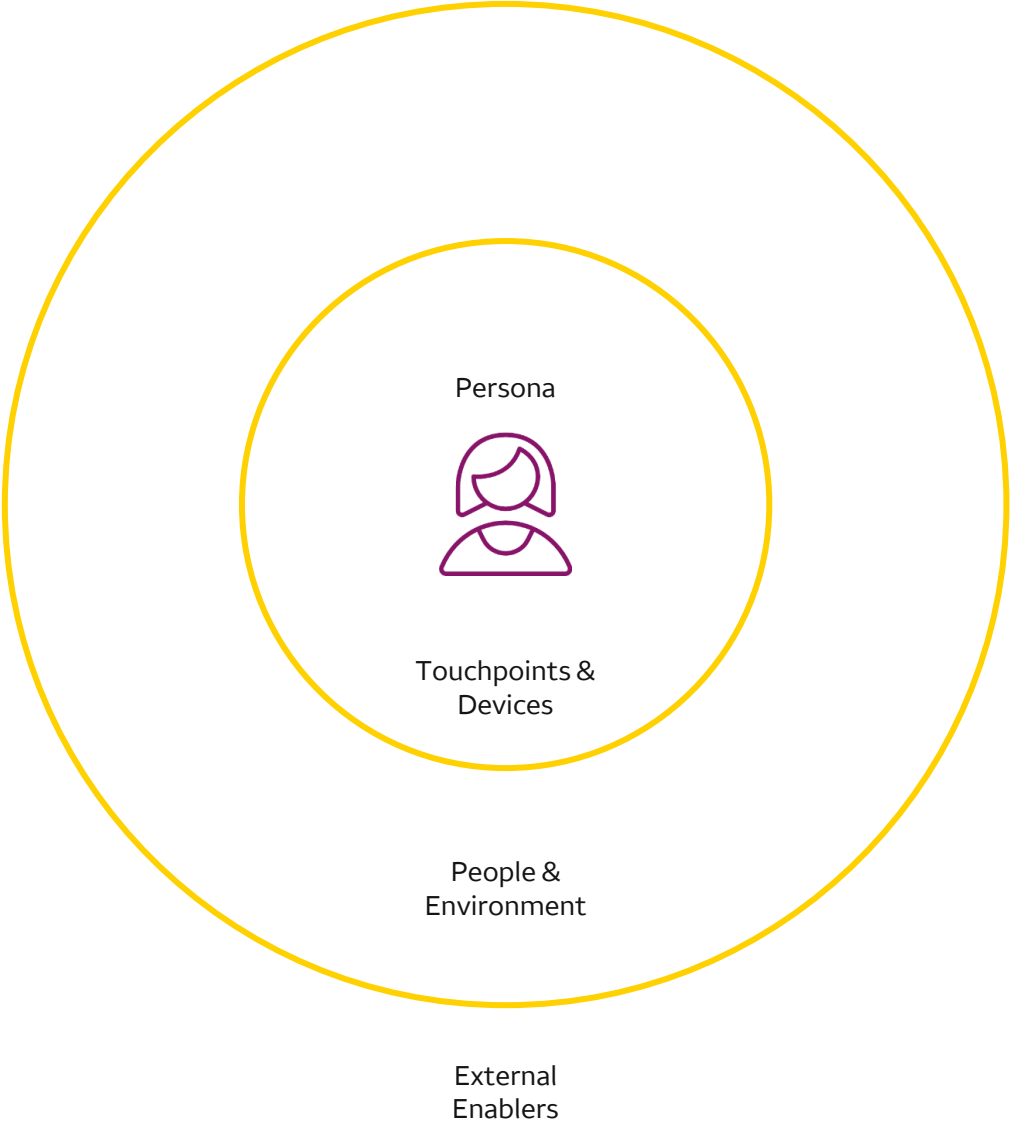
#AGILE2023

# Appendix – Handouts

# The Interview, Step One: Persona

## Ecosystem

Interview Notes



### Persona Actions

What are they doing?  
What contribution are they making to the outcome?

### Thoughts & Feelings

What is the persona thinking & feeling during each step?  
Does the persona experience positive and/or negative feelings?

### Other People's Actions

What are other people doing?  
How are they impacting the outcome?

# The Interview, Step One: Persona

## Ecosystem

Interview Notes



### Persona Actions

What are they doing?  
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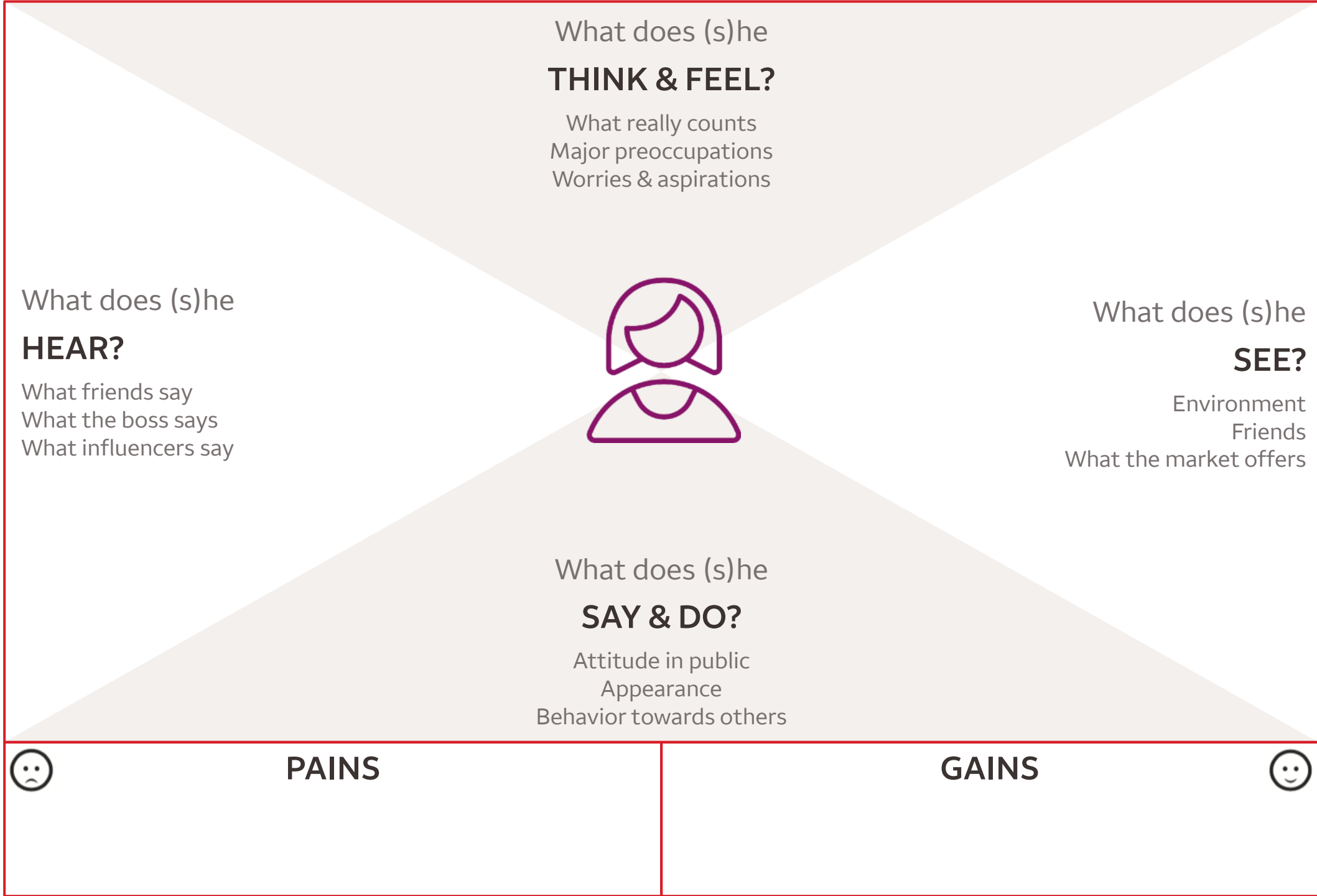
### Other People's Actions

What are other people doing?  
How are they impacting the outcome?

The Interview, Step Two: Empathy Map



# The Interview, Step Two: Empathy Map



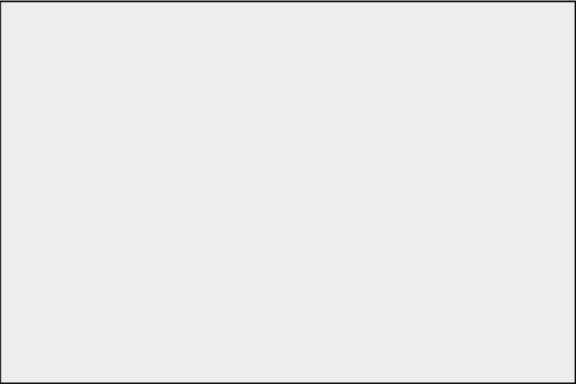
# Storyboarding



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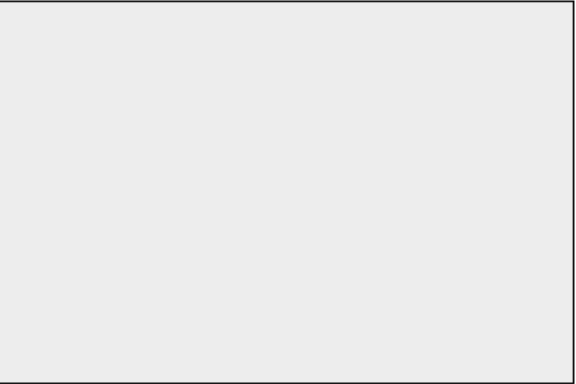
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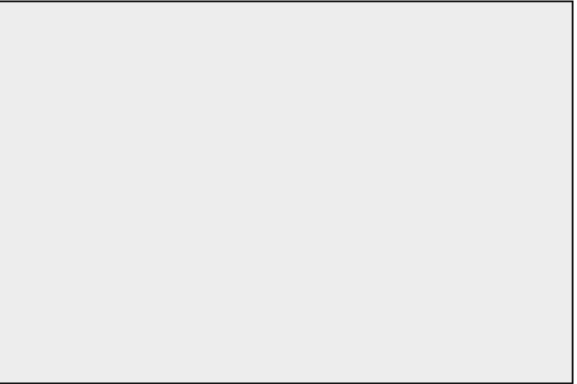
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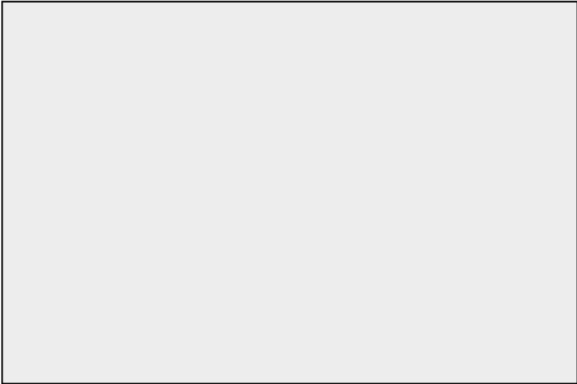
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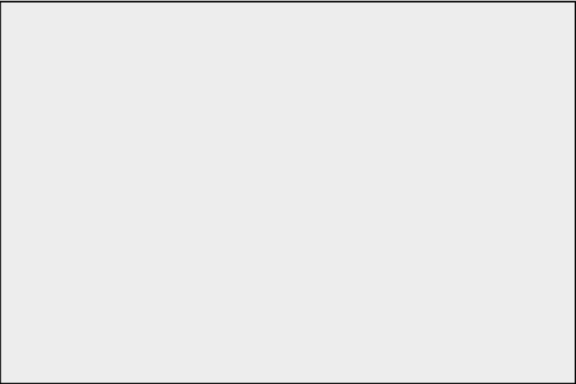
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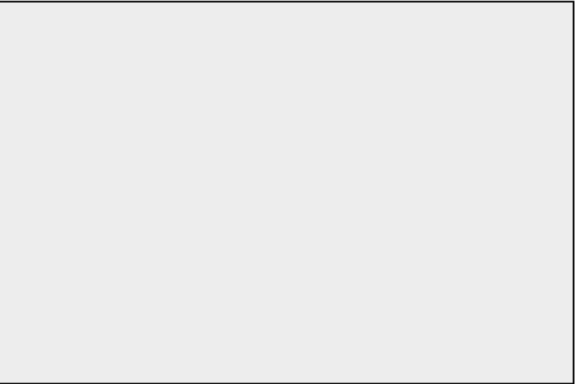
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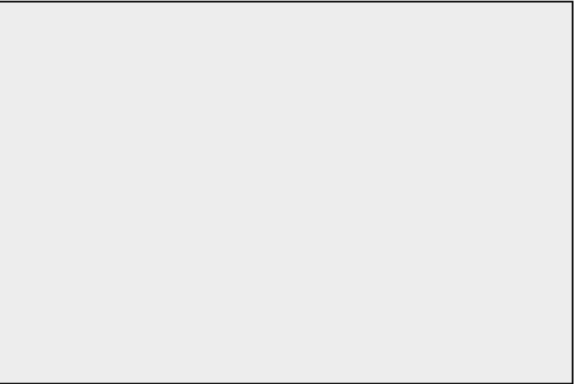
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# Importance/Difficulty Matrix

- Impacted systems
- Number of stakeholders
- Organizational culture

Difficulty



Importance



- Risk mitigation
- Value exchange
- Competitive impact