The New Direction in Staffing Interface Project Playbook

The New Direction in Staffing Interface (NDSi) project team engaged directly with users; job seekers, hiring managers, and human resources (HR) professionals to co-create potential improvements to Government of Canada (GC) staffing processes and tools using a design-thinking approach. These engagement activities resulted in tested and validated business requirements which will help modernize GC staffing and recruitment. In order to accomplish this, the Public Service Commission gave the NDSi project team the freedom to pilot different approaches, strategies, processes, and tools. There is a wealth of information available to assist with the planning and management of a design-thinking project. This playbook is designed to highlight some approaches that were implemented during the New Direction in Staffing Interface (NDSi) Project that could complement these guides.

The plays:

**Get, and Keep, Your Team Aligned**

**Set the Pace**

**Design Thinking – Use Pictures to Explore Ideas**

**Engage with Actual Users**

**Use the Results**

**Get, and Keep, Your Team Aligned**

1. Create a clear vision statement.
	* Make sure you accurately capture the sponsor’s vision.
	* Describe your goals clearly and concisely.
	* Ensure that your entire team knows and understands what you are trying to accomplish.

NDSi Tip: Write the vision statement *with* the project sponsor, not *for* the project sponsor. They have to be involved in the creation of the vision statement to ensure that it is an accurate portrayal of their objective.

1. Kick off the project with a core team project alignment meeting.
	* Ensure that every member of the project team knows and understands their role at the beginning of the project; they need to have a common understanding of what the project team is trying to accomplish and how they are expected to help the team get there.
	* Discuss the key project outputs, which team members are accountable and responsible for their delivery, and how the other members of them must contribute to their success
	* Describe the project management plan that will be adhered to during the project, as well as any specific vocabulary or concepts that will be used so that the team starts the project on the same page.

NDSi Tip: Have the team member responsible for the specific project output educate the rest of the team about the deliverable. Introduce the artifact, its use, the process that leads to its creation, the associated vocabulary, and any other relevant information so that the entire team can start the project in alignment.

NDSi Tip: The creation and maintenance of key documents/organization tools should be limited; single versions should be created are managed by specific role(s) in order to reduce errors, improve consistency, and enable provision of real-time accurate information as required.

1. Establish a project onboarding process.
	* When a new member joins the project team, have a process to get them up to speed as quickly as possible. As above, make sure that they too understand how the project is being managed, what the team is trying to accomplish, what the key outputs are, how the outputs will be used, and how they are expected to help the team get there.

NDSi Tip: Make sure new team members understand the project before they jump to work; perform desk checks to ensure that (new) artifact creators understand the concepts and ideas that they are exploring prior to creating deliverables.

1. Establish a diverse and representative team.
	* Your project team should have differing backgrounds, points of view, and specializations to improve the chances of having different ways of interpreting and dealing with problems.

1. Establish access to a strong project lead.
	* Your project team requires easy access to a product owner or a strong proxy in order to regularly ensure that the project’s vision is being respected and to make decisions under tight timelines.

**Set the Pace**

1. Establish a repeatable schedule.
	* The use of a standard, repeatable, predictable process greatly aids the planning of research, design, user engagement, and testing.
	* You shouldn’t go too fast at the start of the project. Learn what your team can do in a set amount of time and then work to improve upon it.

NDSi Tip: Honestly evaluate what the project team accomplished in the time allotted to the repeatable process and if something is not working, come up with a new plan; propose a change the cycle time or the planned number of outputs accordingly and then propose it to established governance for approval.

NDSi Tip: Schedule meetings first and determine who can attend after; you cannot please all of the people all of the time – this includes internal team meetings.

NDSi Tip: Make meetings virtual; if an attendee can’t make it in person, perhaps they can still attend remotely. Having a virtual meeting option for all sessions can also help promote and sustain remote and regional representation and participation.

1. Plan work/outputs for the function, not for a specific team member.
	* A new team member may replace an established veteran mid-project. Set the new recruit up for success by having the work that they inherit make sense based on their role and function within the team.

1. Maintain access to a strong project lead.
	* Have your product owner (or a strong proxy) meet with the team regularly to track progress and alignment with the project’s vision.

**Design Thinking**

1. Make your ideas visible.
	* A picture really IS worth a thousand words; the use of pictures (i.e. UI flows, wireframes, mock-ups, and interactive prototypes) greatly improved the communication and understanding of project concepts and ideas that the project team wanted to explore with users.
2. Design images and/or concepts with the product owner in the room.
* Having the product owner or a strong proxy present at the artifact research or creation sessions allows for real time alignment with the highest of the team’s visions.

NDSi Tip: Creating mock-ups in the room with the product owner and the core team greatly reduced the time it took to deliver an approved artifact; back and forth and misdirection were minimized.

1. Don’t be too precious with images
	* The important thing is engaging and exploring with users, not the refinement of the presentation material.
2. Engage with users early and often
	* Discuss the users’ needs, show them what you have, gather feedback, adjust your concepts and the associated designs, and get back in front of them to collect more feedback – the designs and presentation material does not have to be perfect.

NDSi Tip: Measure the return on investment and potential value of design-thinking artifacts (wireframes, mock-ups, and prototypes) prior to their use. Wireframes can be created in real time with users using paper and pens or with an online tool. Wireframes are cheap, interactive, and immediately capture user requirements. Mock-ups are more refined and allow for a more “show and tell” discussion and feedback elicitation, as well as being a good tool for usability testing in a moderated setting and online. Mock-ups take longer to produce and definitely make users think more of an actual ‘system’ than idea. Interactive prototypes are time-consuming and costly and often do not provide much more value than mock-ups. Interactive prototypes should only be used if they introduce value to the project (e.g. measurable performance results, proof of concept validation, etc.)

**Engage with Actual Users**

1. Avoid the use of proxies and go straight to actual users whenever possible.

1. Begin the creation of a (user engagement) participant list as early as possible and use it to increase your possible participants. You can never have too many interested participants.
2. Keep your list of users informed and updated about the project’s status. These participants can be primary spokespeople for your project within their organization(s).

NDSi Tip: The development and posting of GCPedia information/presence (including project FAQs) is important; this saved the NDSi team much time and effort as it related to answering questions. Many back and forth interactions were avoided because we could share our GCPedia page.

1. Establish a strong user engagement administrative team.
	* Ensure that the administrative team is sufficiently equipped to manage the master participants list.
	* Ensure that the administrative team is sufficiently equipped for the scheduling, coordination, and set-up for all elicitation sessions. This would include technology set-up and testing.
2. Establish a strong presentation team.
	* Ensure that presenters understand the concepts and ideas that they are exploring prior to presentations

NDSi Tip: You can’t have too many presenters. In fact, ideally any team member could be called upon to present NDSi or host an engagement session at any time.

1. Establish specific, achievable goals for your engagement sessions.
	* Determine what you are trying to get out of a user group and why prior to hosting an engagement session.
	* Think carefully about what the project team is going to do with the results and how they are going to use them.
	* Draft a tight agenda that clearly identifies the goal of the meeting, the expected outputs, and a strict schedule to accomplish this.

NDSi Tip: Clearly explain the scope of the project at the beginning of each engagement session and reiterate it as necessary throughout. In fact, providing this to participants ahead of time can support a more targeted discussion and help keep the engagement session on-track.

NDSi Tip: Having the product owner or a strong proxy present at the engagement sessions ensures that the project’s vision is respected.

1. Respect the scope of the project when engaging with participants.
	* Stay on track as best as possible.
	* Have the strength (or better yet, ask for attendee permission) to park items if they are taking the room away from the intended focus of the conversation.

NDSi Tip: Establishing a ‘parking lot’ or other mechanisms to capture ideas about items that are out of scope may be helpful. If there seems to be a strong desire to discuss out-of-scope elements, perhaps some time could be set aside for that once the in-scope issues have been addressed.

1. Have a dedicated resource take notes during engagement sessions.

NDSi Tip: If you need a user to elaborate upon their feedback, ask them to do so then and there. It’s better to ensure that the user was heard, understood, and recorded accurately than to have cryptic notes that take time and effort to interpret and categorize, yet may not be an accurate reflection of the user’s feedback.

**Use the Results**

1. Determine at the onset of the project who owns the user feedback.
	* Have the owner(s) of the feedback provide training or information sessions to all members of the team to ensure that there is a common understanding of how the feedback management process will work.
2. Establish feedback collection and management guidelines and structures.
	* At the beginning of the project identify feedback collection roles, responsibilities, the different types of feedback to capture and its purpose, etc.
3. Take the time to assess the results and ensure that feedback is addressed in a timely manner.

NDSi Lesson Learned: Plan for and take the time required to analyze the feedback early and often.

1. Keep the analysis simple.
	* Align the feedback to a simple feedback information architecture.
	* Ensure that all team members understand the analysis criteria.

NDSi Tip: If the information architecture is deemed insufficient, it can be elaborated upon as required and prior feedback can be reviewed. This is easier to do if you have the fundamentals down. Starting with too complicated an analysis architecture can lead to a lack of understanding of the analysis criteria and a degree of analysis paralysis.

1. Create an analysis ‘output’, with recommendations and next steps, to present to project governance for approval on a regular basis.