UX-R on UX Programs: Contextual Infographic and Learning Event on the UX Programs at Salesforce

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Transcript

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Hi, I'm Shaundra Toy, and I'm happy to present my capstone project to you today: "User Experience Research on User Experience Programs." As a student at Boise State University, and also an employee at SalesForce, I was curious, how many different user experience programs did they have?

My capstone project researched a number of the complex UX-related programs in my workplace and distilled them into a digestible format, organized with a high-level infographic that helps internal audiences understand and select the appropriate program at the right time in the sales cycle.

The results of the project showed a 32% improved understanding for the direct team I presented the material to. In addition, the material has been circulated and requested more broadly, having an impact for broader teams, the accounts that those teams work with, and the customers that those accounts serve. So, let's dive in.

How might we gain an understanding and strategic application of the applied UX offerings at SalesForce for use in the pre-sales process? That was the question to answer, and I began by doing a lot of digging.

There were a number of different programs that were out there, and the best analogy I can bring to mind is, imagine a very thick book with no table of contents. It makes it very difficult to find what you're looking for, and understand its context, without that.

Mark Twain once said, "I didn't have time to write you a short letter, so I wrote you a long one," and I underscore the importance of this, being succinct to provide clarity. Previous attempts to organize these programs actually became a bit prescriptive, or required you to wade through a lot of material.

So, examining the nature of these previous attempts, with respect, was the first step. I did a lot of reading, a lot of watching the videos, interviewed 10 to 20 different people after that, as well. We questioned assumptions along the way and really tried to focus in on one core thing: what's the job to be done?

Looking at this through the lens of emotional intelligence, with regard to awareness of self and others, that's always a little tricky, because it's kind of like shining a light around in a dark room that you're unfamiliar with. And how do you avoid tripping? You keep shining that light.

So, we had to really try to stay curious and open. With change efforts, you always want to respect what came before, and as a double-certified change manager, that was important to me. I understand how much work went into some of the previous projects. The other thing we did is, we really had to focus in on this job to be done while staying open.

So, after doing quite a bit of digging, and being very respectful of what had come before, then we moved on to creative thinking. Now, according to the 2012 “Harvard Business Review” article, authored by Tom and David Kelley, being creative is really about flexing creative muscle, and overcoming the fear, to build that confidence in our creative ability.

I was very lucky, in that regard, to have a lot of past experiences and tools to fall back on. I’d previously done kaizens, and understand prioritizing different requirements based on Paretos. I also looked at value-stream mapping of processes, and throughput, and where things could bottleneck.

But here, I was very fortunate in being able to incorporate a lot of the new tools that I had gained throughout my degree: user experience research with informal interviews and elicitation techniques, integrative thinking, which came directly from my MDS program, iterative design thinking, and communicating UX research findings.

In the end, the solution that we came up with focused on this job to be done. It wasn't about being prescriptive. It was really about having context, and understanding just enough to know where to go, sort of like a sign-post that points you in this direction or that direction depending on where you need to head.

After 20 to 30 interviews of numerous people around different programs, we settled in on about 10 key questions to answer for each of those programs. What resulted was an infographic that we overlaid on top of our existing, very well-known “customer 360” approach. Looking at this sales cycle diagram, we then overlaid the different programs: Heroes, Inspires, Ignites, Illuminates, to name a few.

And then, for each of those programs, they became color-coded and got an individual slide that answered the remaining questions of why should we engage, who should we engage, what does it deliver, when does it deliver it, how long does it take, how do I engage with this program, where can I find more information?

Then we delivered an entire learning event, measuring before and after results of understanding. The results showed a 32% increase in understanding, 48% before the event and 80% after the learning event. There's also a ripple effect that I found especially encouraging. Specifically, the learning event was only delivered to our core team, in the service cloud arena.

But the account teams are much, much broader. At SalesForce, we have marketing clouds, we have sales clouds, we have sustainability clouds, health clouds, we have other products like Slack, Mulesoft. This broader core account team was brought into the mix in a number of requests, and that's going to have lasting impact for the accounts that those teams are attached to.

Not only that, but as they're able to adopt things more quicker, looking at it from a user experience perspective also means there's end-user impact. So, this ripple effect is the part I am most proud of.

And it's very difficult to measure, so, we'll have to see how that goes. But so far, we've received a number of requests. So, I'm very encouraged by the much broader impact that we were able to see thus far.

In conclusion, this capstone project allowed me to put new skills into practice with user experience research and elicitation techniques, integrative thinking, design thinking, the real impact to my orientation in a new role, and networking.

There's also been a real impact for our team. The broader account team, there will be for the account, and also their customers, too. Throughout this project, I've referenced a number of different resources. There's a few to name here, and here's additional contact information if you want to reach out and learn more. Thank you.

END OF TRANSCRIPT.