

# Maps & Markers

## The Moves Workbook

Here is a set of discrete “moves” you can make to push your team closer to achieving your vision. There are potential tactics you can employ to move work forward, build influence, and generate better outcomes.

### Focus Areas Cheatsheet:

Each move can be applied to “focus areas” across your Organization, your Team, your Projects, and your Self. You’ll find codes in the top right of each move that correspond to the specific focus areas.

- O1. I understand our organization's structure and our delivery processes
- O2. Executive champion(s) help our team achieve its goals when needed
- O3. Our team is supported by cross-functional partners and allies
- O4. Our entire organization understands the value of design
- O5. Our team is seen as a partner in major organizational decisions
  
- T1. We have a mission and goals that our whole team works toward
- T2. Our team has the right skills and structure to be successful
- T3. Our team has a culture of inclusion, collaboration, and learning
- T4. Our team excels at attracting, hiring, and retaining employees
- T5. Our team is known for expertise in customer needs and product value
  
- P1. Design decisions are consistently based on user insights
- P2. Project teams have a shared view of user models & journeys
- P3. Project teams use efficient processes to get things done
- P4. Project teams consistently ship high quality user experiences
- P5. Our team’s projects clearly support company priorities
  
- S1. I spend my time on top-priority work and delegate / defer other work
- S2. I am involved in and influence decisions that impact my team
- S3. I maintain strong relationships with other teams and stakeholders
- S4. I evangelize my team's work in individual and group settings
- S5. I keep my team engaged with the external design community

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## Reshape a customer information flow

O1, O3, O5, T5, P2

Reshape & and optimize how customer information moves through the organization. E.g., support ticket information, sales team feedback (esp. deals lost), consulting engagement reports. When you build new information pipelines that your team manages, you increase process efficiency and influence.

**Cost:** 1-3 months: investigation, developing, socializing, maintaining new approach.

**Duration:** Process-dependent—stable and healthy for 1-3 years depending on org. growth and change.

*E.g., your team identifies that customer feature requests aren't making it from the Support team to Product. Develop a new tagging system, and work with Data to help pipe Support data into dashboard tool that Product can use.*

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## Invite cross-functional leaders to your team meeting

O1, O2, O3, T3, S4

Everyone loves to be heard. Invite team leaders from other functions as "special guests" to your own team's meeting for short "Ask Me Anything" sessions. Help them get to know your team, see that you want to recognize them and understand their roles and work.

**Cost:** Initial ask + light coordination time. 30 minutes of your team meeting.

**Duration:** Monthly, pick 1-2 leaders to come to a team meeting. Repeat as long as team sees value.

*E.g., your team has low visibility into marketing team structure and process. Invite VP marketing to discuss layout of team & mission, then do a short AMA.*

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## Create a "new hire training" module

O3, O4, T3, T5, S2, S4

Set the norms for your organization by shaping the experience of everyone coming into the company. Build a new hire training module that supports your team's purpose and your point of view, share your team's process and user-expertise.

**Cost:** 1-3 months setup, socialization, pilot. 2-6 hours per new hire batch to prep, deliver, debrief.

**Duration:** Stable and healthy for 1-3 years depending on org. growth and change.

*E.g., your team sets up a "user roles and key scenarios" 1-hr training module so all new hires learn key user needs and scenarios. This may mean reviewing personas, JTBD work, evidence from ethnographic research, and more.*

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## Bring in an external evangelist to speak

O4, T5, S5

An appeal to authority can help establish real credibility. Find a well-respected and established professional in the industry to give a talk on their work and point of view, then take a good bit of Q&A from the team at large.

**Cost:** 1-4 hours to set up logistics with office manager. Plus friend-debt or speaker fee.

**Duration:** 1 hour.

*E.g., your team brings in an expert on accessibility to tell a war story and explain how design + accessibility work together at scale.*

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## Democratize user exposure

O3, O4, T5, S3, S4

Set up a program to increase "user exposure" across the entire organization—increase alignment and add meaning to everyone's work. Jared Spool recommends 2 hours per person, every 6 weeks.

**Cost:** 1-3 months socialization and setup. 2-4 days per month scheduling, communication, upkeep.

**Duration:** Ongoing: useful 1-3 years, depending on org. growth and culture change.

*E.g., you realize engineers never hear/see customers. You start tracking exposure hours and offer opportunities: user interview sit-ins, support-team shadowing, etc.*

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## Build trojan horse learning tools

O4, O5, P2, S2

Set up tools that other teams will actively use: customer archetypes [e.g., personas or JTBDs], scenario models. Offer them to other teams to get "hooks" into their process.

**Cost:** 2-4 months research, synthesis, design and rollout. 1-4 hours per week socialization, upkeep.

**Duration:** Durable as long as artifacts are relevant to larger company goals, and maintained.

*E.g., your team develops personas and the sales team wants to use them for training. As you work together, you simultaneously re-shape their team's language to focus more tightly on real scenarios of use.*

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## Set clear team vision and goals

T1, T3, T5, P4, S2

A larger mission helps provide context and motivation, while helping the team make sense of where they're going, how their work fits into a larger picture.

**Cost:** 1-3 months; series of workshops and specific task-force work

**Duration:** Relevant and durable for 1-3 years, depending on the pace of change in the organization

*E.g., you frame your team's mission around delivering seamless experiences to your customers, and run a workshop with the team to clarify values, measures, and feedback loops. When reviewing work, you always highlight how what the team is doing rolls up to this larger frame.*

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## Build a cross-functional hiring council

T3, T4, T5, O4, S2

Set new team members up for success: have the teams they will work with buy into their role & understand the work they will do. Stakeholder participation before the process starts generates strong alignment.

**Cost:** 2 hours initial planning; async review of job description; 30 minute council kickoff meeting

**Duration:** Stable as long as the job req. remains unfilled and unchanged

*E.g., when you're faced with hiring a design or researcher to a team that hasn't worked with design/research yet. Invite cross-functional members of your team to the "hiring council" to help shape the role expectations and hiring process.*

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## Run a lunch-and-learn talk series

T3, T5, O4

What knowledge is stored within your team that the larger org doesn't know about? How might you give everyone a chance to speak, share what they know, promote a culture of learning in the larger organization?

**Cost:** 2-4 hours socialize & plan first sessions, coordinate logistics. 45 mins-2 hours talks / month.

**Duration:** Ongoing—target 3-6 talks over 3-months. Evaluate and invite other teams as appropriate.

*E.g., some of your designers aren't well connected to the larger org. You set up a series of talks starting with "UX 101", "How We Interview Customers", and "Designer's Retrospective: Project XYZ"*

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## Set up blueprint for new hires

T1, T3, T5, S2

The first 3 months in an organization can set the tone for the next 3 years. If the team is growing, ensure there's a clear pathway for your new members to get up to speed and deliver confidently.

**Cost:** 2-4 hours setup time; weekly check-ins

**Duration:** 30-60 days of active value if working. Early termination / corrective action if things are not.

*Epecially important if you see new hires taking longer than expected to get up to speed. See also: <http://www.alissabriggs.com/new-hire-blueprint/>*

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## Accelerate projects, level up team, with expert contractors

T2, T3, P4, S5

Find best-in-class contractors to take on project work, model strong behaviors for the team, and prove functional value to the rest of the organization.

**Cost:** \$100-\$250/hr, in the SF Bay Area

**Duration:** Choose a 2-3 month project scope so your team gets to know and learns from the expert.

*E.g., you realize your product design team's are UI and visual-element heavy. You bring on a deeply skilled UX/IA freelancer to support a project, teach your team skills, prove value to open a new headcount.*

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## Employ management best practices

T3, T4, S1

Establish weekly 1:1 with your team, give clear and direct feedback, coach on projects, and always keep an eye on their larger career arc and aspirations.

**Cost:** 30-60 minutes per week for 1:1.

**Duration:** For as long as any team member is a direct report.

*E.g., you feel like you don't have a solid framework for working with your reports, and want to level up your management skills. See also: <https://www.manager-tools.com/all-podcasts>*

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## Start a research / strategy team

T2, T5, P1, P2, P4, S1, S2

Break out of known practices and silos by building a new research team with a mandate larger than just design (think product, strategy, internal awareness), or re-envisioning your existing research team.

**Cost:** Internal work to create a job opening, hiring process, coaching work.

**Duration:** If first researcher is strong & can model good behavior and provide clear value... indefinitely.

*E.g., your team has grown to 3+ designers and it's hard to centralize user insight and find time for discovery or testing. You open a research headcount and bring in a seasoned specialist to help supercharge your team.*

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## Mirror team structure to product/engineering

T2, O5, S3

In order to get that "seat at the table," other teams need to recognize and understand how you design team is organized. You can help ease the transition by setting up your team structure to fit into the organization's existing ways of working.

**Cost:** 4 hours restructuring, 3-5 weeks socializing with peers & team, iterating. 2 hours final plan.

**Duration:** Durable for as long as the organization's larger organizing principle is stable.

*E.g., you realize engineering and project management have a Lead for each product area, but your team is more of a service. You restructure your team to have Design Leads in each product area.*

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## Run a conceptual / modeling project that connects silos

P4, O3, T3, T5, S3

Help your team deliver work on alignment-generating "deep modeling" projects, such as site maps, IA models, concept models that will require the team to bridge silos and think about the broader system.

**Cost:** 2-4 hours coaching work to draft plan, 1 week to socialize & kick off, 4-24 hours per week.

**Duration:** 2-4 weeks to develop deep understanding and collaborate with cross-functional stakeholders.

*E.g., you task a new designer to review your the product and document a visual concept model. The work requires deep collaboration with back-end engineers. The real output is shared understanding, engineering allies, and product expertise.*

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## Establish formal program for critique of work

P1, P3, P4, P5, T3, S1

Honest, constructive, and critical feedback from trusted peers helps drive alignment and rapidly increase the clarity and quality of design work. It takes time, space, and real effort, but good critique is extremely rewarding.

**Cost:** 2-4 hours planning 1st and cadence; 1-3 hours / week critique; retrospective + iterations.

**Duration:** 2-4 critiques to hit a good groove. Durable for 1-3 years depending on rate of growth of team.

*E.g., you realize that individuals on your team don't have a great sense of how their work fits in with others', and aren't naturally reaching out for peer feedback. So you set up critique. See also: <http://www.discussingdesign.com/>*

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## Protect team's time with weekly Design Studio

P3, P4, S1

Your team can get distracted and not create time for work that is important-but-not-urgent. Create a safe and useful time for them to approach this work.

**Cost:** 2 weeks socialization, plan iteration. 1 week trial run. 2-4 hours Studio / week, + preplanning.

**Duration:** 6 months to 2 years, depending on rate of growth of the team.

*E.g., important but not-urgent projects are slipping through the cracks. You carve out weekly time (and maybe even a physical space) for the team to work on those projects together.*

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## Run a 1:1 deep-dive working session with your report

P1, P4, P5, S1, S2

If your teammate is getting stuck, take real time to dive deep and help them push work forward. Structure time to have them walk you through the project, the major challenge, and how they're addressing it.

**Cost:** 10 minutes to set up. 1 hour to chart out the project.

**Duration:** 1 hour: repeat as appropriate.

*E.g., a designer's project work is unsatisfactory. Ask them to set up time so you can "learn about the problem" and walk you through their process. You ask non-leading questions and offer suggestions about addressing the core problem before discussing their solutions.*

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## Build real discovery & testing into project timelines

P1, P3, P5, S1

Set the expectation that projects will begin with discovery and testing by baking it into the project schedule. Work with your Project Manager / Product Manager partners, or build it into your planning artifacts.

**Cost:** Influencing partners to trial these activities on one project. May mean adding 1-3 weeks.

**Duration:** Once in place on one project, work to push these activities to all key projects—forever.

*If you aren't designing based on real user insight, your team will struggle clarifying the problem and generating meaningful solutions. If you can't test concepts or products before launch, your learning comes from real-world failure.*

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## Run cross-functional workshops to build alignment

P2, P4, P5, O4, T3, T5, S3

When projects get bogged down, find key decision points for a design studio workshop to generate cross-functional alignment. Frame the problem, discuss, use design methods for ideation, and critique as a group.

**Cost:** 1-3 hours pre-interviewing and socializing. 2-4 hours setup/prep. 2-4 hour workshop session.

**Duration:** Pilot on one project—tweak, adjust, keep using design-oriented activities to build alignment.

*E.g., engineers aren't comfortable with the decisions designers are making. You invite designers, engineers, and product to join you in a workshop. Everyone draws ideas in rounds of Crazy 8's, and through discussion, learns the cross-functional constraints at play.*

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## **Build relationships & personal process to improve hiring pipeline** S1, S3, S5, T4

Keep connected with the community. Develop relationships with other managers, peers to keep a pulse on the industry local pool. Build a system for tracking all the candidates you speak with. If you find a great candidate who isn't a fit for your team, offer to connect them with other opportunities.

**Cost:** 1-2 hours data org., 1-4 hours / month work to keep up w/ network and and maintain records.

**Duration:** Ongoing, as long you're involved in hiring, Always look to help others, ask if they can help you.

*E.g., you set up an Evernote folder to record all of the candidates you speak with, what they're looking for, and where they're at in their career. You offer to connect them with your peers as they're looking for help, or reach out as you open up new roles.*

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## **Save horrible meetings: model good behavior** S2, S4, O5, T3, P3

Meetings can go off the rails, in circles, and everyone is looking for a savior. Use your facilitation skills to reshape the meeting. Build a reputation as a listener, and a leader who can move groups from confusion to action. Send action items, highlights, and a whiteboard photo to everyone who attends.

**Cost:** Active listening & facilitation in meetings, note-taking, sending a summary.

**Duration:** As necessary: until meetings run well, and you're sought out for others... or you delegate duties.

*E.g., you find circularity of discussion, a lack of goals or clarity, or failure to make good decisions. You grab the marker to facilitate, start by modeling your understanding and reflecting it back, and focus on action & decisions.*

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## **Build personal relationships with enablers** S2, S3, O1, O5, T3

Build strong good with teams who can help you get things done: finance, office management, and executive assistants. Good ideas don't always survive on merit alone, and necessary work for your team may not fall into standard pathways of approval.

**Cost:** 1 hour total/mo. to catch up, hear POV, share yours; 1 hour/mo. to do meaningful work for them.

**Duration:** Forever—if you'd like your team to feel special and occasionally go around the rules...

*E.g., you get to know the Office Manager and offer to help when she needs to update the office map. Later, when the office expands and you're moving spaces, your OM helps you get a prime location with extra wall space, and orders new rolling whiteboards + a shared work table for your team. (And she throws in a nice mini-fridge, too!)*

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## **Build alliance with customer-facing teams** S2, S4, O1, O3, O5, T5

Become the champion for all teams that directly support your users, and their insights: Customer Support, Sales, Consulting, etc. Help them reframe their roles in terms of how they contribute to research and service design. Empower them to work with your team and cheer them on as they improve the end user experience.

**Cost:** 30min / week to catch up, hear POV, share yours; 1 hour/mo. to do meaningful work for them.

**Duration:** As long as you don't see users 1st-hand. Necessary (not sufficient) proxy for user exposure.

*E.g., you ask the head of your Support team where they find the most frustration, and ask to see it first hand (ticket review, shadows, short meetings with support agents.) Weave solutions to these problems into your team's work, and support will go to bat for you.*

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## Find the org.'s pulse: make time for casual conversation

S3, S4, S5, O1, O3, T3

Organizational awareness will make your team more efficient, as you guide them around operational and personality constraints. Make meaningful time to understand overall organizational structure and sentiment with casual lunches and social interactions.

**Cost:** 1-4 hours every 2-weeks to connect with ICs in engineering, support, product, sales, etc.

**Duration:** For as long as you'd like to have a "real" pulse on the feelings 'at large' in the organization.

*E.g., you feel like you don't have a good read on a major project, so you make a concentrated effort to sit with an engineer at lunch, invite the product lead on a coffee walk, and check in with the project manager during the next happy hour.*

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## Defer and delegate to protect time for good work

S1

It's natural to want to help everyone—but it's not always feasible. Build a clear list of priorities, plan key deliverables for the day, do the work (with some slack time built in), and monitor your own energy levels. Practice saying “no,” delegating, and deferring.

**Cost:** 1 hour weekly self-planning and reflection. 2-4 weeks to build habit.

**Duration:** For as long as you'd like to feel productive, sane, and not-overextended.

*E.g., you realize it's been hard to move the big rocks because you get caught up in requests and one-offs all day. You create a calendar invite every Monday morning for you to run through your priorities and goals for the week, and a short block on Friday afternoon to reflect on the week's work.*