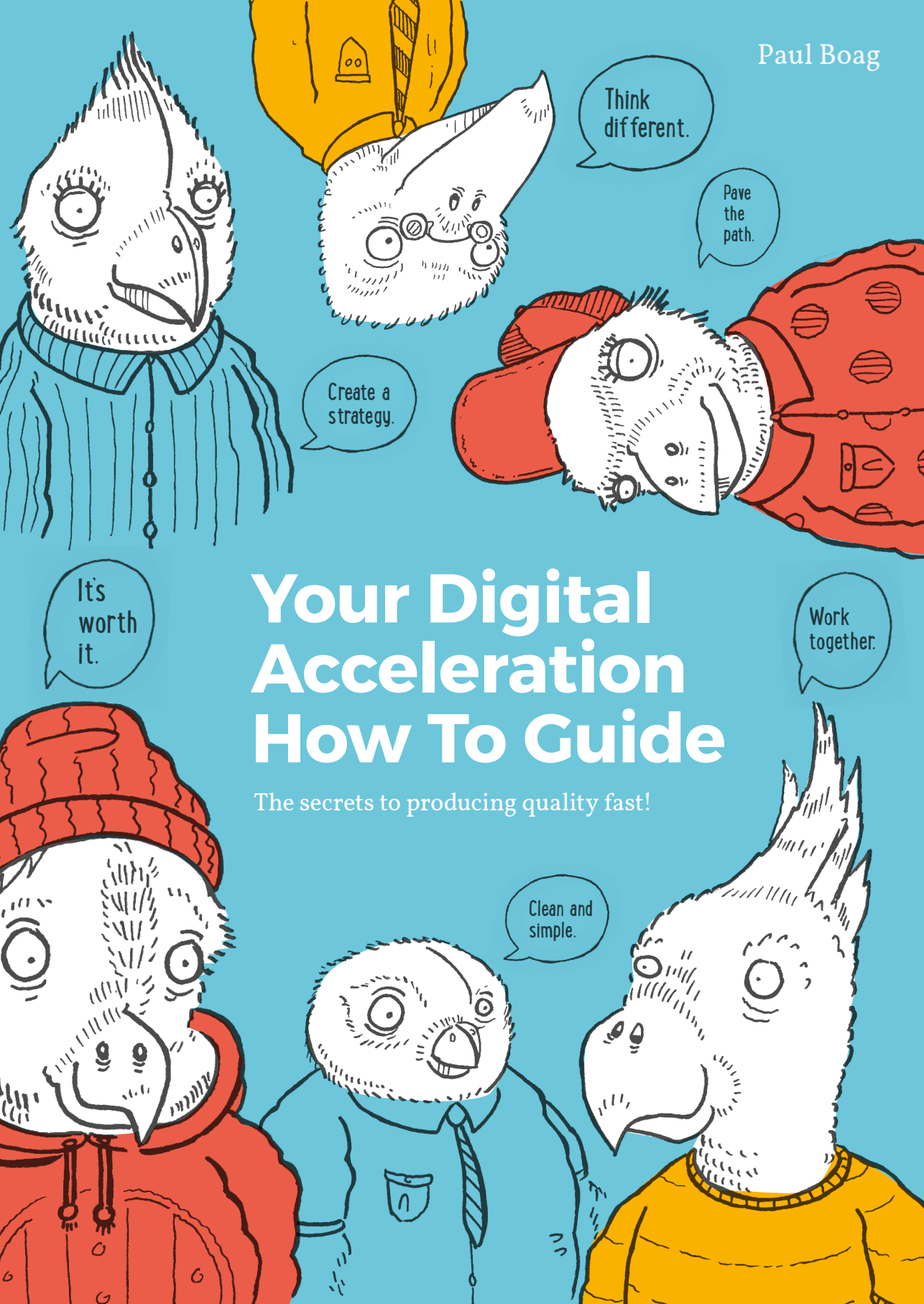
Paul Boag



Your Digital Acceleration How To Guide

The secrets to producing quality fast!

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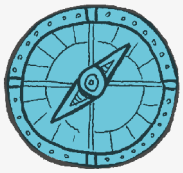

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Frontify®

The most scalable brand management software
for maximised brand consistency.

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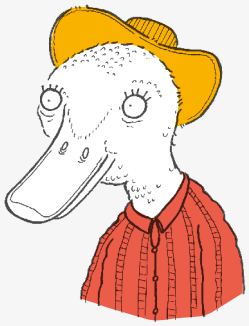


About The Author

Paul Boag is a leader in digital strategy and user experience design. He has been working with organisations such as The European Commission, Oxford University and Doctors Without Borders for over 23 years. Through consultancy and training he helps organisations make better use of digital technologies. He helps them meet the needs of today's connected consumers.

Paul is also a well respected expert in the digital sector. Author of five books including Digital Adaptation and User Experience Revolution. He also writes for industry publications including Smashing Magazine, Sitepoint and Net Magazine. Finally, Paul speaks around the world on user experience design and digital transformation. Alongside speaking he also hosts the award winning user experience podcast over at boagworld.com.

Chapter 1

Bring Order to Your Digital Chaos

If all your digital channels went offline right now, including your website, social media and apps, what would that do to your business? In the world we live in today, for the majority of companies, it would spell disaster. Digital has become business critical.

To make matters worse, both our prospective and existing customers have high expectations when it comes to the digital channels we offer. As Bridget van Kralingen, Senior Vice President of IBM Global Business Services said:

> *There's no longer any real distinction between business strategy and the design of the user experience. The last best experience that anyone has anywhere becomes the minimum expectation for the experience they want everywhere.*

In other words, customers are just as likely to be comparing your digital experience to Google or Facebook as they are your competition. That isn't fair, but that is the reality.

How then can companies support ever more demanding customers, on channels that have become business critical?

One solution is to throw more money at the problem. It is undoubtedly true that most companies significantly under-invest in their digital strategy (if they even have one), but more investment will not necessarily generate the kinds of returns management expect. That is because we also need to become more efficient in the way we run our digital channels.

The introduction of digital into business operations has been a gradual and evolutionary process. As new tools and channels emerged, we integrated them into our workflow with little consideration to any strategic approach.

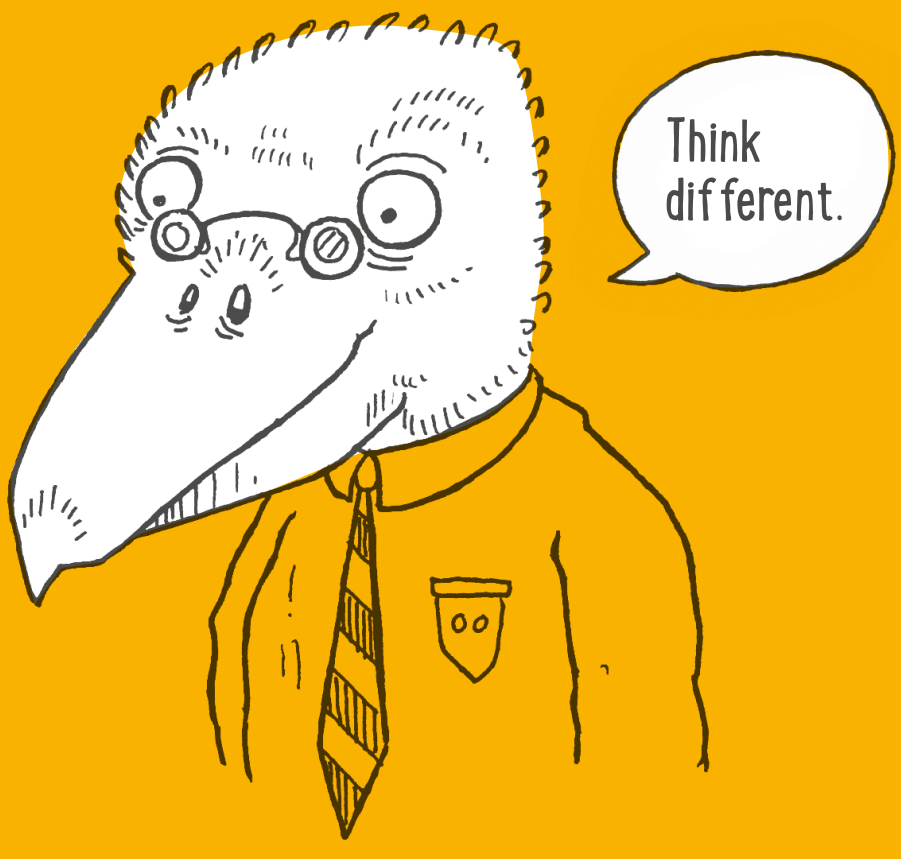
As the importance of digital grew, so did the demands placed on under- resourced digital teams. These teams exist in a constant state of fire-fighting with little opportunity to take stock and identify ways to work smarter. As a result, many organisations have a somewhat ad hoc approach to developing and managing their digital channels.

If that sounds like your organisation, then this book is for you. In it I seek to bring order to the chaos by looking at our working methodologies and identifying ways that we can start working more efficiently, enabling us to do more with less.

That journey begins by identifying where things are going wrong and why we need to be approaching digital differently if we want to increase the return from digital channels.

Chapter 2

Working to Kill Waste and Boost Your Returns



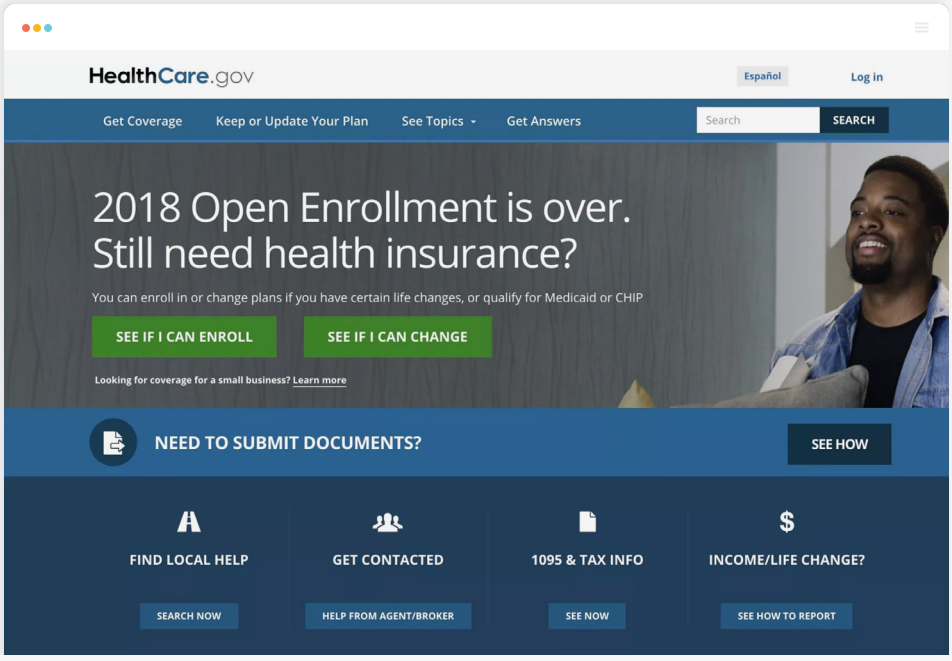
Most digital teams are all too aware of the fact that they do not work as efficiently as they could. However, not all of those shortcomings are down to them. Even if they had time to sit down and establish better working approaches, there are other factors at play which would hamper their efforts.

The problem is that on a fundamental level digital does not fit neatly into existing business processes. Digital projects are just not the same as other projects, and so companies need to handle them differently. That is why so many digital projects fail.

Why Digital Projects Are Different

2.1.

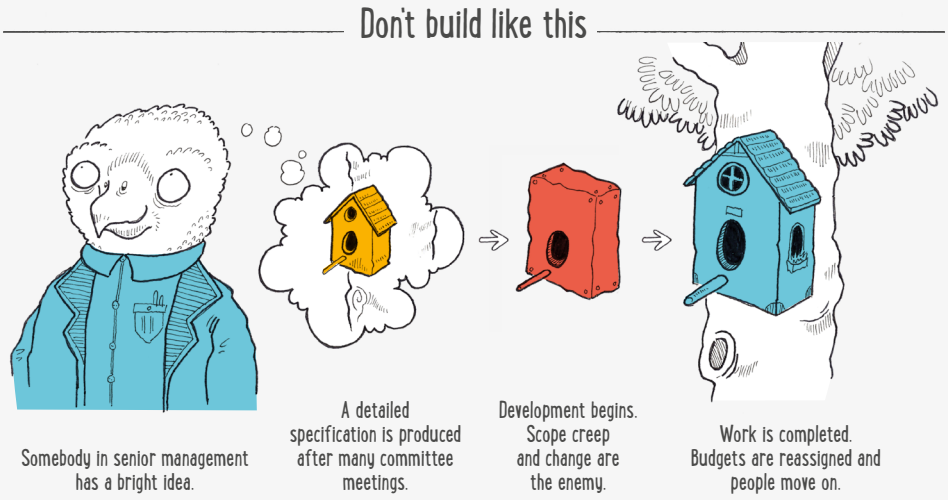
There is no shortage of high profile digital projects that have failed spectacularly. There is the failure of Healthcare.gov, which cost U.S. taxpayers almost $677 million, or the European Parliament who spent £3.4 million on their website, £36.40 per page. Too often digital projects are plagued with problems because organisations fail to realise they must handle them differently.



Healthcare.gov is an example of how running digital projects using traditional project management methodologies does not work.

Let's take a moment to consider a traditional project. Imagine that we are building a new factory. It is an expensive endeavour and has to be done right first time because the cost of getting things wrong are enormous.

After somebody in senior management decides to build the factory, a committee of stakeholders are often formed to determine the requirements. Those requirements become a request for proposal that goes out to tender. A supplier is then selected, and contract negotiations drag on as everybody endeavours to get all the details laid down. Plans are drawn up and signed off before work begins. At this point, there is no going back. Everybody is committed to the vision and scope creep becomes the enemy because the cost of changing things mid-build is too high.



Building digital projects are different from building physical projects (e.g., building a house).

Once the company has built its factory, the project is over, and everybody moves on to the next one. A small maintenance budget remains, but that is all.

This approach makes perfect sense for a factory. But digital projects are different in two fundamental ways:

- The raw materials of digital are free.
- Digital provides significant amounts of data.

Let's dive into those two characteristics in a little more detail.

Pixels Are Free

2.1.1.

The raw materials of a factory are hugely expensive, while the raw materials of digital projects (pixels) are free. Aside from some technology purchases, the only real cost is labour. We do not need to fear scope creep, in fact, we should embrace it. That is especially true in light of digitals second characteristic.

Provides Unparalleled Data

2.1.2.

When we launch a digital service, we get access to enormous amounts of data on how people are using it. We can see how long things are taking users, what they are doing and where they are going. We can even watch individual people move around our digital channels in real-time. Imagine you could do that with a factory. Also, imagine that the cost of moving walls and other elements of the factory was nothing more than the cost of labour. Wouldn't you run projects differently? Wouldn't you watch how efficient the factory was and then continually tweak and refine the layout of it to maximise capacity?

Also, would you place as much emphasis on getting agreement for the details of the build upfront? The chances are you would conclude that adapting on the fly might be better because the cost of change is relatively low.

Unfortunately, the way we run a project does not accommodate these characteristics of digital. We run digital projects in much the same way we build a factory with a detailed specification at the beginning and staff moving on when the digital service launches. That means organisations do not benefit from the flexibility and data provided by digital. But it also leads to an even bigger problem, a boom/bust cycle of periodic redesigns.

The Curse of Periodic Redesign

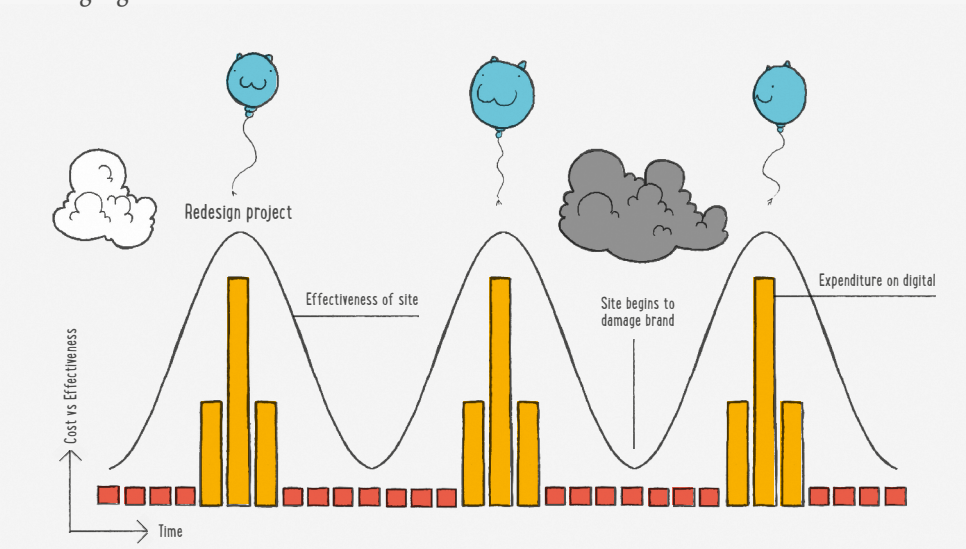
2.1.3.

It is common to see an organisation undertake a massive redesign project to launch a new website, and for one shining moment, it is perfect. Then the money dries up, and people move on. Slowly over time, the neglect takes hold. Content becomes out of date, the design starts to look dated, and the underlying technology ceases to be fit for purpose.

Before long the site, alongside other digital channels, starts to become an embarrassment. Staff stop referring customers to it. Those users who do end up on one of

your digital channels are left with a negative impression and rarely return. Instead of being a lead generator and marketing tool, the digital channels become a drain on resources that do nothing but damage the brand. Eventually, things get so terrible that somebody in senior management intervenes and a redesign project is kicked off. After considerable investment and a lot of effort, the company throws out the old site and replaces it with the new one. Or even worse, they redesign the website, while just migrating the old content across.

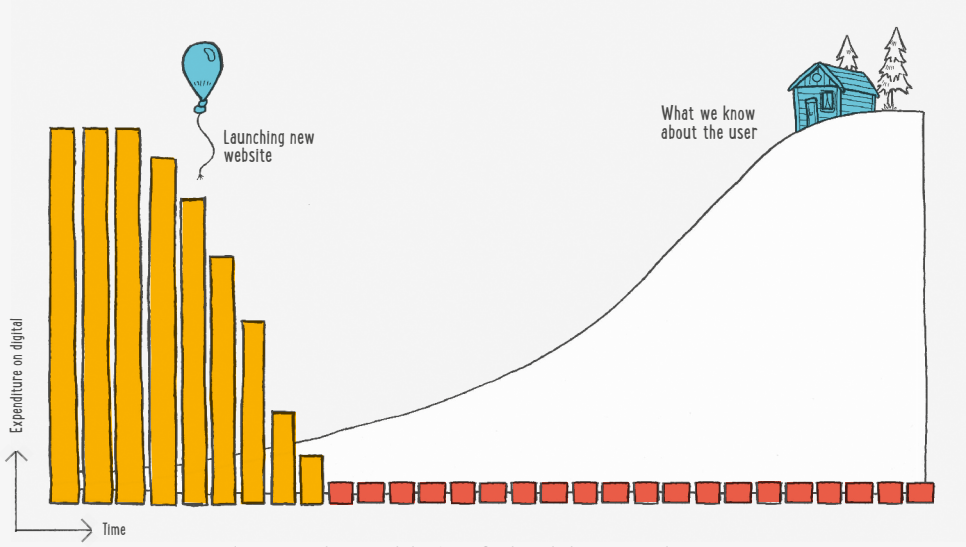
However, at this point, the process begins all over again as once again the money dries up and people move on to the next project. It is a vicious cycle that is incredibly damaging to the business.



Periodic Redesign - once the money dries up, people move on to the next project.

Many fail to realise just how damaging this redesign cycle is. Sure, it means that for a significant portion of their lifetime digital channels are not fit for purpose and are hurting the brand. But that is the tip of the iceberg. For a start, a redesign is an incredibly blunt instrument. It throws everything out and starts from scratch. No website is 100% terrible, yet we cast it all aside and begin again. That is incredibly wasteful and expensive.

Then there is just how little we understand about user needs during the redesign process. Maybe you do your user research and usability testing (although many do not). But even then you don't know how people will react in the real world. It is only once a digital chan nel goes live that you can learn how users will behave. Unfortunately, this is the very same moment that the resources disappear.



We learn more about user behaviour after launch than at any other stage. Unfortunately this is typically when the money dries up.

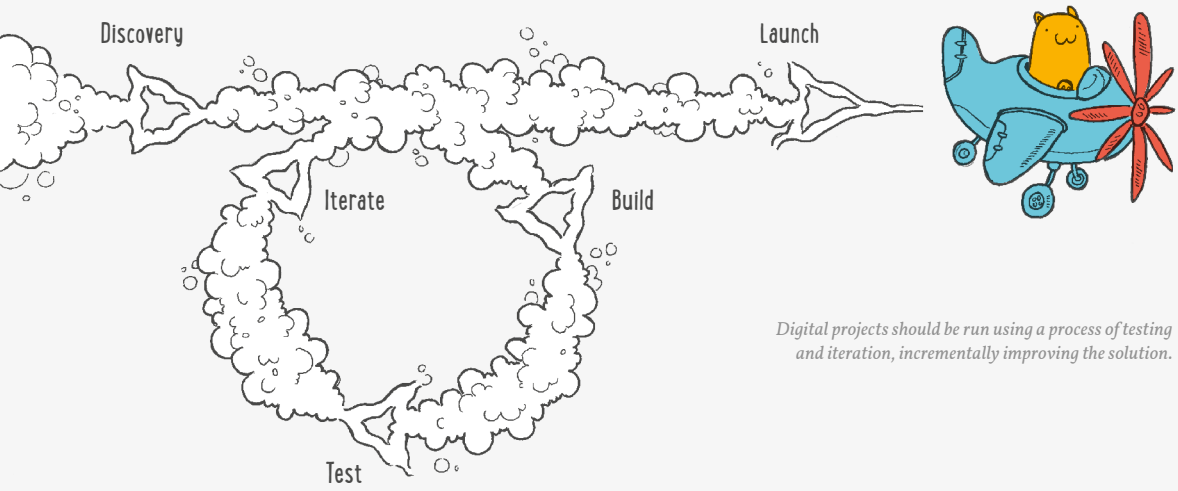
Some might try to argue that they can learn from the previous site. But if they are replacing that site wholesale, it's hard to be sure what changes they make are improving things. They are changing too much at once to be sure.

Finally, users don't like change. You only need to read the comments when Facebook or Twitter update their user interface to see that. The more significant a difference they see, the more likely loyal users are to abandon your digital channels. In short, we need to be rejecting redesigns in favour of an approach better suited to the unique nature of digital.

Working in a More Digitally Friendly Way 2.2.

The answer to how to work in a more digitally friendly way lies in the concept of iteration and testing. Concepts built around the nature of digital. We can iterate towards a better digital service, because the raw materials are free, and we can test easily because we have a lot of data and tools available to do so.

The result is that effectively building digital services is more akin to scientific research than traditional projects. The scientific approach begins with research. From that research they form a hypothesis, build a test and learn from that in order to evolve the hypothesis. Failure is not bad, but simply a way of refining the hypothesis to move towards the final answer.



Digital projects should be run using a process of testing and iteration, incrementally improving the solution.

When you apply that thinking to digital you begin by doing your research into user needs and allow that to define your initial vision of what the digital service might look like. You then build a prototype of that vision before testing it to see what works and what doesn't. You then refine the vision, update the prototype and test again. That cycle repeats, each step improving the service. Over time the prototype turns into an initial build. That in turn becomes a beta build and then eventually the service is launched. But even then it is not done. You continue to monitor the services performance and continue refining it based on what you learn. A digital service is never truly finished.

Knowing that a service isn't done when it is launched also allows you to launch earlier with a Minimum Viable Product. It doesn't need to be perfect or even have a full feature set. Instead you can launch early and expand the service over time.

2.2.1. Building a Minimum Viable Product

A Minimum Viable Product is not a codeword for an inferior service. I am not proposing launching something that is broken or poorly implemented.

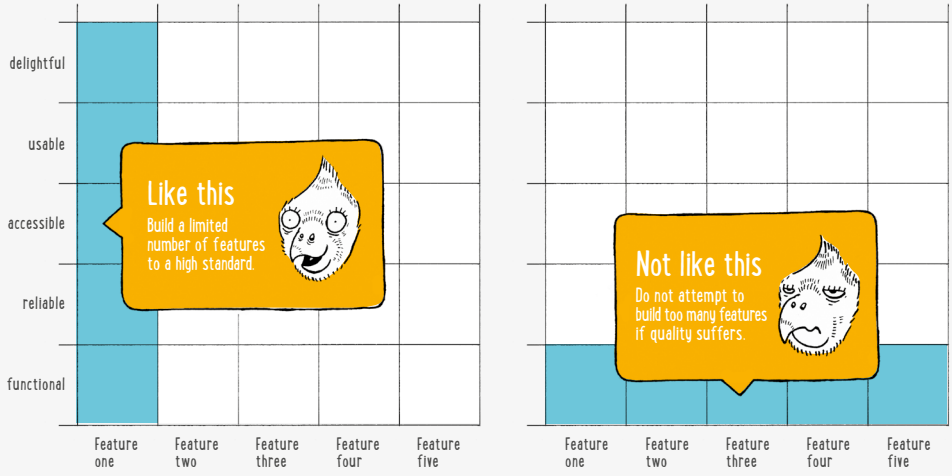
A Minimum Viable Product should be built to a high standard but can launch with a much more limited set of features. For example, where you might dream of digital channels with features such as personalisation or rich interactivity. However, that doesn't need to be in place on day one. Instead, those kinds of luxury features can be introduced later, once you have a better idea of whether they will generate a return for the business.

Too often digital project briefs turn into a wish list of 'nice to have features' with no evidence that they will bring value to either the business or the user. By launching a Minimum Viable Product, you can get feedback on what is missing.

Starting with a Minimum Viable Product provides some distinct advantages.

- **It lowers the cost of development** because you only build what people demand and not what you think they might like.
- **It is faster to market** because you can start with something simple and there is no need for an extended specification stage. That gives you a competitive advantage when it comes to grabbing market share.
- **It leads to a more desirable product.** That is because it gives people exactly what they need and they don't end up paying for features that just clutter the experience.
- That, in turn, leads to **increased customer satisfaction and word of mouth recommendations.**

This approach is in stark contrast to traditional projects that require the entire feature set and scope to be defined upfront. The downside of the reduced upfront planning is that there is a danger some business need gets missed during development. That is why a more collaborative approach to development is required.



A Minimum Viable Product has limited functionality, but it should still be of a high standard.

2.3. Embracing a More Collaborative Approach

Delivering great digital services is complicated. It involves a wide range of specialists working together. Designers, developers, copywriters, marketers, business analysts, the list could, and does, go on.

Add to that the fact that digital touches almost every part of the business, and the number of people who we have to consult skyrockets. Unfortunately, the way most organisations run projects makes it harder, rather than more straightforward, for people to work together.

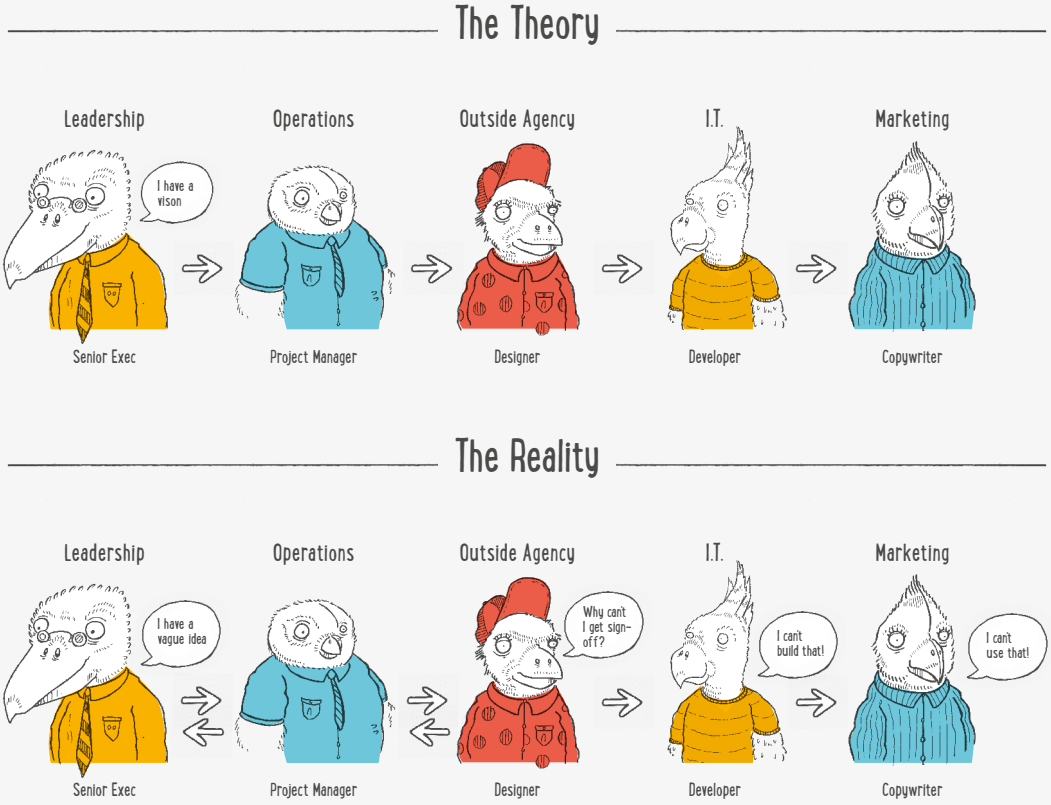
The problem is most organisations are strictly hierarchical with organisational operations carved up between business silos. This structure profoundly impacts how they manage projects. Departments are passing them down a production line from silo to silo.

2.3.1. The Problem With Silo Based Organisations

Take for example a typical website design project. The project may originate within the senior management team before being handed to a project manager in operations to run. That project manager has to work with designers, either internally or externally, to produce mockups. The designers then hand these mockups to a developer (who often sits in I.T.) to build before finally being passed across to marketing to add content.

That kind of factory line approach sounds okay in principle, but in practice often turns into a nightmare. For a start, there is often endless back and forth before a design gets signed off my senior management with the project manager caught between the designer and the person who commissioned the project.

When the design is finally signed off, the project manager shows it to developers who announce they cannot build it despite the fact it has gone through multiple iterations to be approved. Then when the design is finally built you discover it breaks when real content is added to it and anyway the marketing team hate using the content management system the developer chose!



A linear development process doesn't work in the real world.

In short, the lack of interaction between those involved in the project slows things down and leads to an inferior deliverable. Digital is too complicated for a factory line process.

The Failure of Committees

2.3.2.

The solution that most organisations come up with to address this problem is to form a committee. However, this solution rarely makes things better and leads to bizarre scenarios where the Head of I.T. is commenting on the design of the digital channels despite having no expertise in that area whatsoever.

Also, a committee does nothing to address the myriad of small decisions that need to be made every day during a digital project and the impact of a large number of stakeholders. That is because committees do not meet often enough to deal with these kinds of issues. It is too hard to coordinate everybody's calendars to meet that regularly and even if it was possible it would not be a good use of people's time. The problem is that when you hold a committee meeting, everybody is required to attend even if they might not have anything to contribute to that particular meeting. So if committees are not the answer, what is?

2.3.3. Form Cross-Disciplinary Working Groups

Instead of a committee, you need a cross-disciplinary working group. Instead of people discussing a specification in a committee, they need to sit down and build something together.

That starts with the core team working on the project at the same time and preferably in the same room. Nothing speeds up production more than a developer, designer and copywriter being able to work side by side and collaboratively.

But you shouldn't stop there. There will be other stakeholders who you should involve as much as possible. Ideally, key stakeholders such as the project owner should be in the room with the team too, even if they cannot spend all their time on the project. Just having them available to ask quick questions of and to show progress will make things much more straightforward.

Of course, in the real world, getting that kind of contact with the project owner is not always easy, so you should push for as much of their time as you can get. That might be a design sprint where the team prototypes a possible approach in a week, or a half-day workshop where you wireframe up some key pages.

The secret is to ensure everybody is involved in creating something tangible, rather than just discussing possibilities. Ideally, this will be some form of prototype. That is because prototypes create a shared understanding of where the project is going with a clarity a specification cannot provide. A specification can be interpreted in different ways by different people, while a prototype provides a shared vision. By working on the prototype together, everybody has a clear understanding of why the chosen direction was adopted, saving many hours of arguments over whether it is the right solution. You have educated them through the act of creation.

Also, working on the prototype gives people a sense of ownership, and so they are more likely to approve the final build and defend it to others. The more you involve people, the more committed they are to it.

Finally, by creating something tangible the team has something concrete to test. That provides evidence to support the chosen direction, resolving many arguments over the right way to go. Disagreements that delay decision making and often lead to costly changes later.

Although it can feel more comfortable and quicker to work in isolation, in the long run, it can prove a costly mistake that undermines the efficiency with which the company can deliver a digital project. The only problem with including stakeholders so intimately in the creation of a digital service is that they will not necessarily be experienced, and so will tend to make some naive suggestions. That is where a set of design principles can help.

Chapter 3

Introducing Robust Design Principles to Improve Focus

Senior management is very good at establishing goals, but are much worse at clearly defining how the company will achieve those goals. Instead, staff fall back on personal experience or informal processes that have grown up within the organisation.

Generally speaking this approach works reasonably well. After all, people are hired for their experience and ability to deliver to their job description. However, in the case of digital things are not so straightforward. Because of the relatively new nature of digital, most organisations lack the culture and set of processes designed for digital. Also, many of those involved in the decision making relating to digital lack much experience in the field.

One of the solutions adopted by many organisations to address this problem is design principles. From Silicon Valley startups like Airbnb to multi-national companies like IBM, design principles are becoming adopted. But what exactly are design principles?

What Are Design Principles? 3.1.

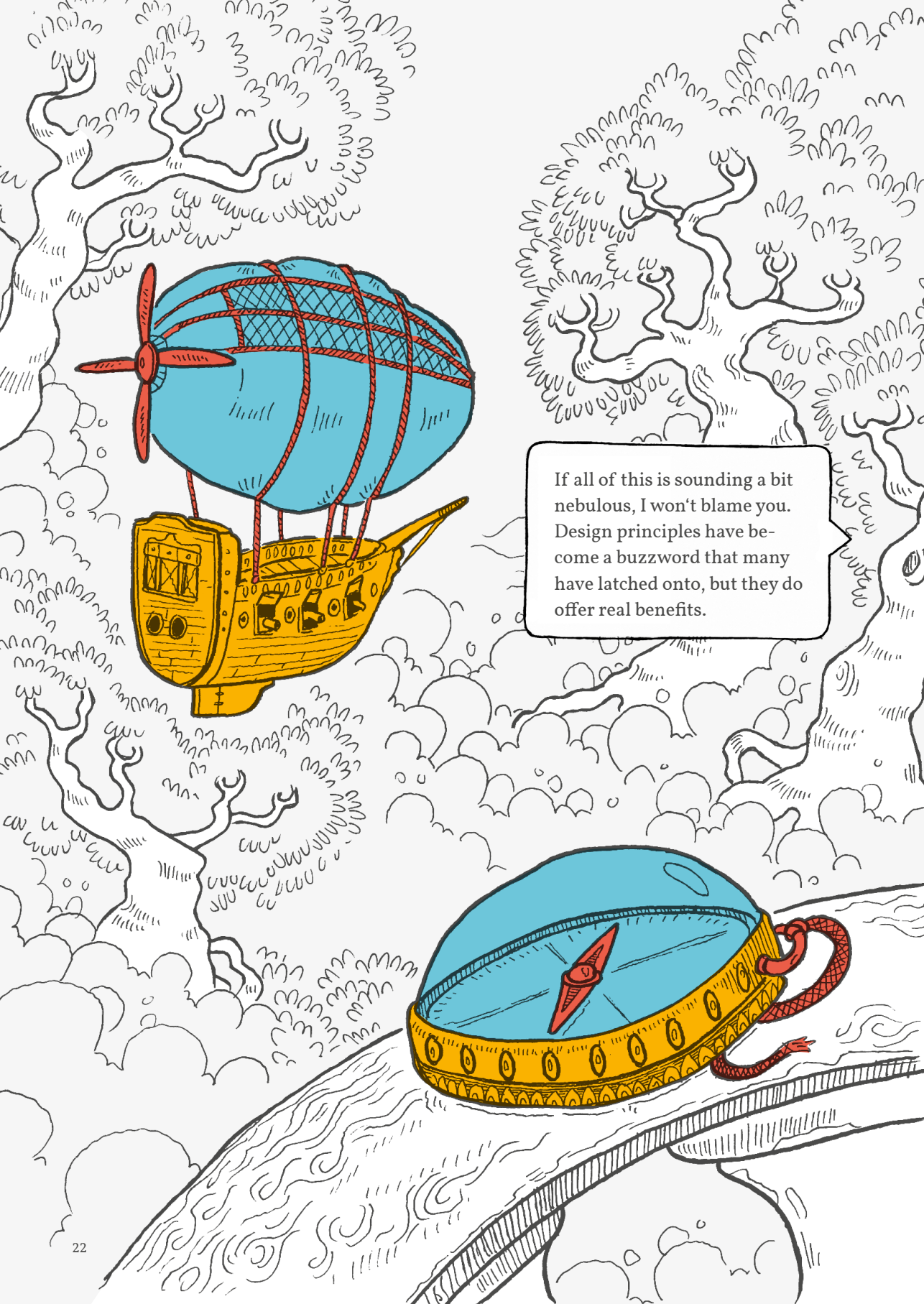
According to William Lidwell, Kristina Holden, and Jill Butler (authors of Universal Principles of Design):

> *Design principles are aimed at helping designers find ways to enhance usability, influence perception, increase appeal, teach users, and make sound design decisions during projects.*

Although this is true, I would argue that design principles have begun to take on an even broader role. In fact, calling them design principles might be slightly misleading. That is because these principles often provide guidance that extends well beyond most people's mental model of design.

I prefer to think of them as a set of principles for the delivery of digital services. A framework within which to operate. A structure made up of rules, guidelines and considerations that need to be taken into account when creating digital services.

Digital principles are not a definitive roadmap from A to B like you would find in a set of standard operating procedures. Instead, they work more like a compass, pointing in the right direction and providing guidance against which you can measure your decisions.


If all of this is sounding a bit nebulous, I won't blame you. Design principles have become a buzzword that many have latched onto, but they do offer real benefits.

3.2. Why You Should Establish Design Principles 3.2.

The value of design principles for improving your efficiency in delivering digital projects is not something you should underestimate.

Design Principles Educate 3.2.1.

For a start, design principles are a great way of educating stakeholders and ensuring that they make better decisions in the project. Better educated stakeholders lead to faster and more informed decision making.

Design principles help establish a framework for decision making, providing guidance about what a right decision would be, without the need to lecture or patronise the stakeholders. In fact, the act of establishing your principles can be an educational exercise. By looking at the design principles of others, you help gently show stakeholders what a better approach to a digital project is.

Equally, as you discuss the design principles, you have an opportunity to explain the thinking that lies behind them. Admittedly, educating stakeholders and establishing design principles takes time, but this is time that is worth you spending as it reduces problems further down the line. Issues such as disagreements over the best approach to take.

Design Principles Resolve Disagreements 3.2.2.

When a stakeholder makes an uninformed or damaging suggestion, you can use the design principles to realign their thinking without it turning into a confrontation. For example, imagine that a stakeholder wants to add additional fields to a form that users must complete during signup. Fields that exist only to give the company demographic information on users.

Instead of getting into an argument about the merits or otherwise of the idea, you can refer back to the design principles you established at the start of the project. Policies such as *“Always put the user‘s needs first”* or *“make the tough calls to keep things simple”*.

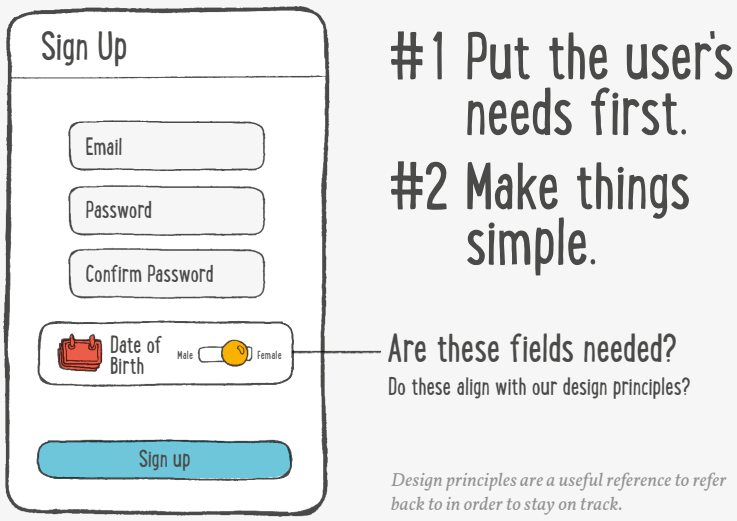
By referring to the design principles agreed early on you are not criticising the idea, you are just saying it does not fit with how everybody has decided to approach the project. It is about implementing the agreed principles, not about rejecting somebody’s idea.

That approach is even more useful when there are two opposing ideas, as design principles can often be used to break the deadlock. In short, design principles can reduce time wasted on disagreements over approach. But, they can also lead to faster and better decision making.

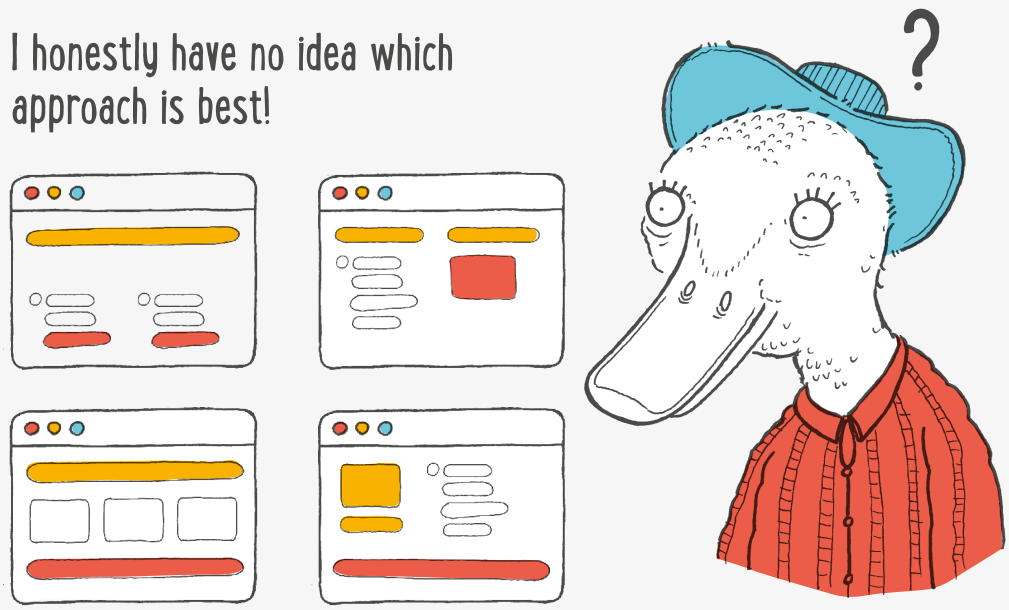
3.2.3. Design Principles Enable Better, Faster Decisions

Digital projects can feel overwhelming at times. Part of the problem is that there are so many different approaches that you could take, so many ways of achieving the desired goals or overcoming challenges.

That makes digital projects especially tricky in the early days when you are trying to establish the right direction. Making a mistake at this stage can mean many wasted hours further down the line. Traditionally this is where a specification would come in. But, creating a specification is time-consuming and often not particularly well informed. On the other hand, a set of design principles provide enough of a framework to help ensure the project moves in the right direction from day one. But design principles don't just help with decision making at the start of a project. They are also invaluable in the midst of a project when we start to lose our way.



Design principles are a useful reference to refer back to in order to stay on track.



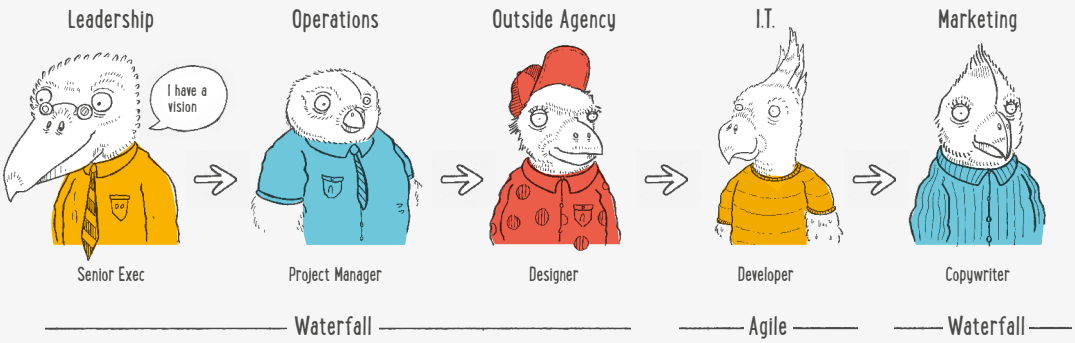
Design principles can help us make challenging decisions.

Working without a detailed specification and continually adjusting based on user feedback can be disorientating sometimes. You can feel lost in the myriad of possibilities and be overwhelmed by the amount of data. But, design principles don't just point you in the right direction. Used well; they can help to realign the entire company.

Design Principles Can Change Company Culture

3.2.4.

Your ability to deliver digital projects efficiently is going to be constrained by the broader business. Your digital team could work in the most efficient way possible, but if the rest of the company isn't approaching things in the same way, it will limit what is possible. Unfortunately, this problem is all too common. I often encounter digital teams who proudly tell me that they work in an agile way, yet in truth, they do not. Although their team has adopted some aspects of agile, they are trapped in a departmental production line.



To truly work in an agile way, the entire company will need to change. Design Principles will help with that.

Because digital projects require so many different parts of the organisation to work together, you can only really achieve digital efficiency when the entire organisation's culture starts to shift. Cultural change is hard, and no one approach is going to make it a reality. But design principles do have the potential to contribute.

The Government Digital Service here in the UK used their design principles as a critical component in a government-wide education program. They turned them into posters, included them in their service manual and referred to them often in meetings.

Design principles can become mantras that start to influence thinking. Almost like an earworm or meme, if you repeat them enough, they become embedded in an organisation's collective mindset. In fact, the very act of including people from across the organisation in their creation encourages people to consider new ways of thinking and working. That brings us on to the question of how you should establish your design principles.

3.3. How to Establish Your Design Principles

The key to the success of your digital principles is that they have near universal support. In other words, we need as many people as possible to agree that they are a good set of standards upon which to build the organisations digital future.

To achieve this, we need to collaborate widely in their creation. If people are not involved in their production they will feel that the principles are being forced upon them and so will resist them. Often a good starting point for this process is to run a workshop.

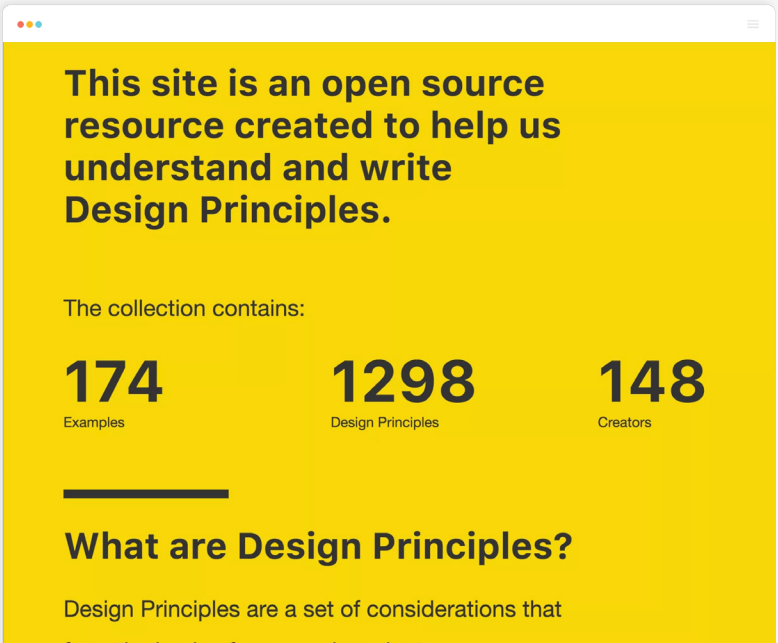
Running a Design Principles Workshop

3.3.1.

Like so many things in digital, there is no definitive way of running a workshop to establish design principles. However, I can share with you my approach. I tend to make the workshop open invite. In other words, I encourage anybody who wants to come, to attend. When I invite people, I make a point of emphasising that the workshop will lay the foundations for digital moving forward and so is a crucial moment in the companies future. That encourages as many people as possible to attend. However, I do ensure specific critical stakeholders can attend before setting the date. You want at least one senior executive in the room as well as a cross-section of your digital team.

In preparation for the workshop, I will research the design principles of other companies and make a collection of between 30 and 50 candidate principles to start the discussion. A site like Principles.design is an excellent source as is Design Principles FTW.

Principles.design is a great repository of design principles that you can use for inspiration.

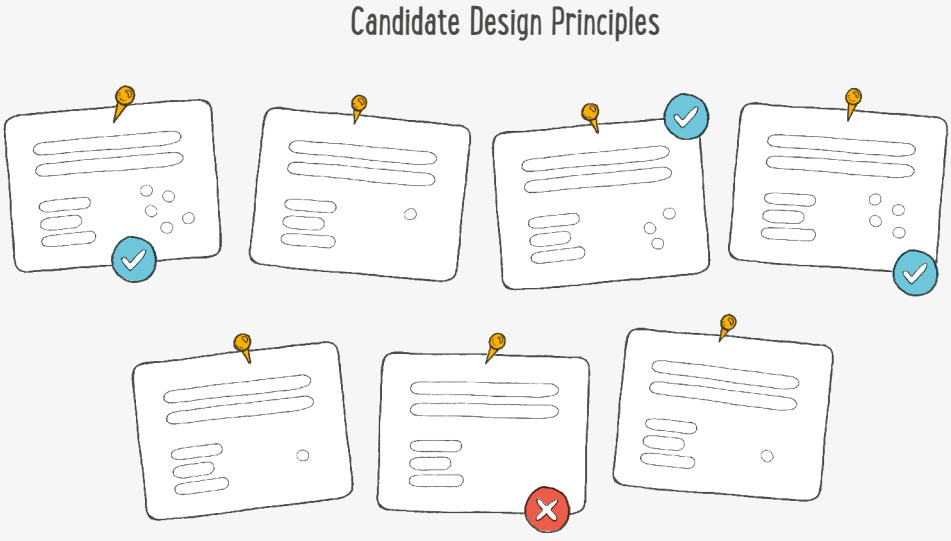


It is always good to give people a starting point, as coming up with principles from scratch can be hard if you have never done it before.

Print each principle you have found on a separate card, and have enough sets of cards to allow for multiple groups in the workshop. Once your workshop starts, split attendees down into groups. Pairs are okay if the group is small, but never have more than about six people in a group as quiet attendees will end up feeling that others have not heard their opinion.

Give each group a stack of cards and ask them to narrow the options by discarding cards they do not consider a good fit with the company. They should also feel free to create cards if they come up with an idea not listed. However, by the end, they should be left with no more than ten cards. Once that is done, bring the groups back together and compare cards. Group duplicates together as this will enable you to see which cards proved more popular. Lay out all of the options on a table for everybody to see.

At this point, you probably have more than ten cards, unless all the groups completely agreed. You reduce the list through dot voting. Dot voting is a technique for avoiding endless discussion in all kinds of areas. Each person is given three votes in the form of self-adhesive dots. They can stick these dots on a card that they think should be included in the final list. They can either place all three dots on one principle or spread their votes across several cards.



Dot Voting can be a useful way for narrowing the list of potential principles.

If you have more senior stakeholders in the room, you could choose to give them more dots. That will reduce the chances of them overruling any decision later. Once the group has voted, you will be able to see which cards don't have much support. You should remove these cards until you have less than ten remaining. At this point, it is worth discussing the remaining cards. In particular, ask the group what the cost of implementing the card would be. In other words, if we adopted the approach outlined on the card, what would the company have to do differently.

Being Clear About the Cost of Your Design Principles

3.3.2.

For design principles to have any value, they must encourage the organisation to work in new ways, and that will inevitably come at a cost. It is essential that everybody is clear about that cost going in otherwise the design principles will quickly become nothing more than hollow words. That is why, in my design principles workshops, I encourage attendees to think through the consequences of the design principles they have selected.

Split your attendees down into small groups and give each group one or more principle to discuss. Ask them to write down one or two sentences outlining how the company would need to change the way it works if they implemented the chosen principle.

For example, if your principle was:
We prioritise user needs above all else.

The supporting statement might read.
For example, we will focus our digital channels on addressing user questions rather than pushing our agenda through marketing campaigns.

This discussion is not always comfortable. When attendees start to consider the cost of the principles, they may wish to revise them. That is okay and may be necessary. But it is better to have this discussion now, rather than in the midst of a project. But be careful. Do not allow your design principles to become so watered-down that they are virtually meaningless. Not all design principles have value.

3.4. What Makes a Good Design Principle

A good design principle should stand for something. In other words, it should come at a cost. By implementing your principle, it should mean stopping doing something else as I outlined in the example above. But there is more to a good design principle than that.

3.4.1. A Good Principle Differentiates

A good design principle should also differentiate you from the competition. One way of knowing whether your principle differentiates you is to look at its opposite. For example, if your principle is *"we put customers first"*, the opposite would be *"we never put the customer first"*. There is no way a company would ever take that position if they wanted to stay in business. That is a sign that your principle fails to differentiate and so needs work. But a principle such as *"we build for everyone"* does work because the opposite, *"we focus on a specific audience"*, is a legitimate position a company may choose to take. Not that all of your principles need to be like this.

3.4.2. A Good Principle Is a Counterbalance

Some of your principles will need to exist to counterbalance an inherent, and often unspoken, bias in company culture. For example, if decision making tends to be driven by the gut instinct of the most senior person in the room, a principle such as "we make decisions with data" may be required. But, although some principles need to encourage new behaviour, others can also reassure.

3.4.3. A Good Principle Reassures

Digital working practices often clash with existing culture, and that can make people nervous. That nervousness can lead to resistance, which we want to avoid if we are to make our projects as efficient as possible.

To avoid this problem, we can use some of our design principles to reassure. For example, imagine your company is risk adverse and tends to rely heavily on specifications and committees to mitigate those risks. That would be the behaviour you would want to change for digital projects. If you try to ditch the committees and specifications, you will meet resistance. But if you can replace it with appropriate design principles focused on reducing risk, this will make the removal of committees and specifications easier to swallow. For example, you could have a principle that reads:

> *We validate ideas through continual testing.*

That would not only reassure; it would also educate colleagues about best practice in digital.

A Good Principle Should Educate

3.4.4.

One of the most significant benefits of design principles is their ability to change the culture. They do this by showing a different way of working. The result is a good design principle should educate people. That means they will probably need a degree of explanation. It is not enough to write:

> *Design with data*

You need to go on to explain why. For example, the UK Government Digital Service who use "design with data" as one of their principles goes on to write:

> *Let data drive decision-making, not hunches or guesswork. Keep doing that after taking your service live, prototyping and testing with users then iterating in response. Analytics should be built-in, always on and easy to read. They're an essential tool.*

They also link to more detailed information on why this is the right approach. Without this context, the principle may well make little sense to those outside of the digital field. That brings us to the question of how we should be using our design principles.

3.5. How to Use Your Design Principles

The worst thing that can happen to a set of design principles is that they end up in a drawer somewhere and nobody looks at them. Often being consigned to an intranet page is an equally unfortunate fate.

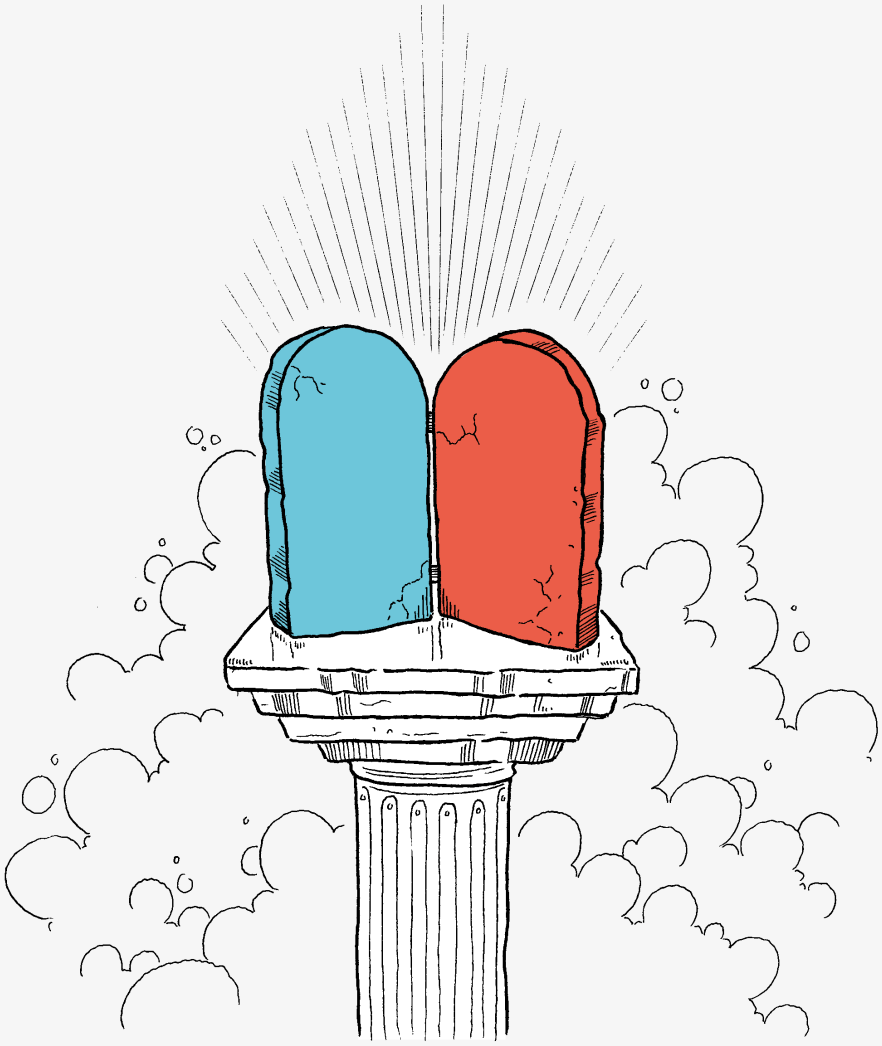
For design principles to be useful they have to be visible. Only then can they start to change people's thinking and shift company culture. Shift it in a way that breaks down departmental barriers, linear project management processes and other business practices that undermine the efficiency of delivering outstanding digital services.

Achieving this will involve tapping into your inner marketer. You need to come up with creative ways of making sure your design principles are in front of people all of the time. At the most basic level, this will involve merely referring to them a lot. I once worked with a client who had no culture of testing but instead relied solely on endless debates to make decisions. Unfortunately, the digital team had no authority to change anything.

My suggestion was that they just started saying *"let's test that"* every time there was disagreement or a decision to be made. I knew that others would reject the idea initially, but I encouraged the group just to keep saying the same words every time an opportunity arose - "let's test that".

By repeating the same phrase, again and again, it eventually started to stick in people's heads. Finally, in one particularly heated debate, the senior manager in the room just got so frustrated that she said: *"let's test that and see"*. Before long it became a mantra in the company and culture began to shift.

But endlessly repeating your design principles won't get the job done alone. That is where you need to get creative. Turn your principles into posters, add them to mouse mats, replace everybody's default screensavers.



Take a leaf out of the Government Digital Service and make your design principles visible for everyone.

Don't wait for permission, just do it. Sneak into the office at night and replace all those framed pictures of executives accepting awards with posters of your design principles. If nothing else it will get people talking!

Hold lunchtime sessions which explain the principles, and bribe people to come with food. Start wearing t-shirts with the principles printed on them. Hand out postcards with the principles on at the start of every project. Do whatever it takes to ensure people can't ignore them. Only then will they start to make a difference.

Admittedly this sounds like a lot of work. But it is worth it because if you can embed these principles in organisational thinking your digital projects will become considerably more efficient and you will save a lot of time and money. But, design principles do not live in isolation. They exist alongside other tools. Tools that are collectively known as a design system.

Chapter 4

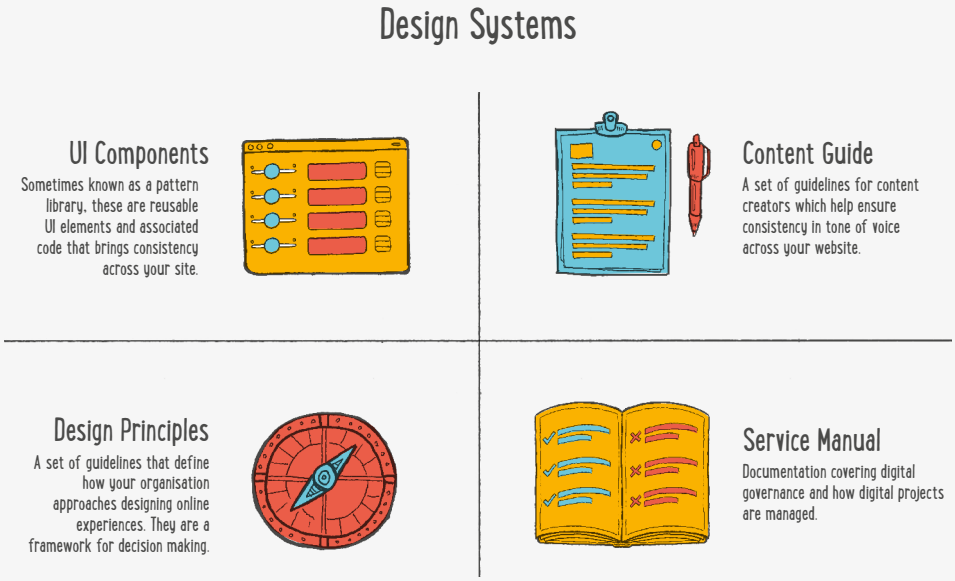
Design Systems and Building With Reusability in Mind

As we discussed in the introduction, most websites and digital channels have grown organically. Like a poorly tended garden, they have become out of control and wild. Design systems are an attempt to bring order to that chaos, and in the process, improve the efficiency with which you can manage digital.

An Introduction to Design Systems 4.1.

A design system is made up of various techniques that work together to unite product teams around an agreed approach. They aim to reduce the impact of digital legacy and as a result, accelerates the design process. As has already been said, design principles are one of the techniques included in design systems. But they are not the only one.

Design systems also often include service manuals, which we will discuss in the next chapter, and content style guides that are used to standardise the tone of voice across all digital channels.



However, probably the most potent technique within a design system is the pattern library.

4.2. The Reusability of a Pattern Library

A pattern library (also sometimes known as a component library) is a collection of user interface design elements supported by some general rules relating to design. At most basic level, a pattern library is a collection of design elements that appear multiple times on your digital channels. Typical examples might include:

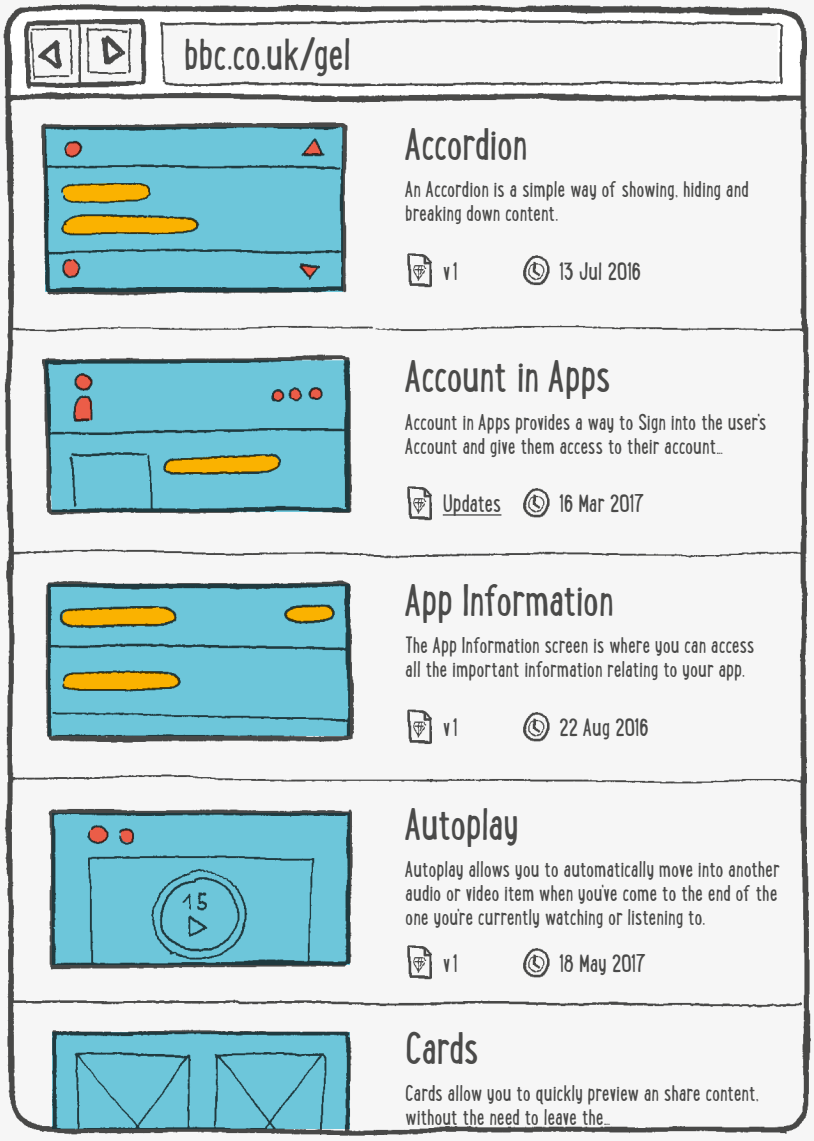
- Slideshows
- Navigation
- Social media features
- News Listings
- Related links
- Carousels

The list could and does go on.

These components work alongside more general guidelines in areas such as:

- Layout - Your underlying grid system.
- Colour.
- Typography - Including font choice, leading and sizing.
- Spacing - Margins, padding, borders and positioning.
- Imagery - Icons, illustrations and photography.
- Animation.
- Visual styling - Such as rounded-corners, shadows and texture.

A pattern library, documents all of these guidelines and 'components'. It defines how the components behave, what they look like and how they are coded.



A pattern library is a collection of design elements that you can reuse across all your digital channels.

Of course, pattern libraries do not spontaneously appear, they need creating, and that takes effort. An effort that you may feel reduces, rather than increases, your efficiency. Why then is it worth your time to create a pattern library?

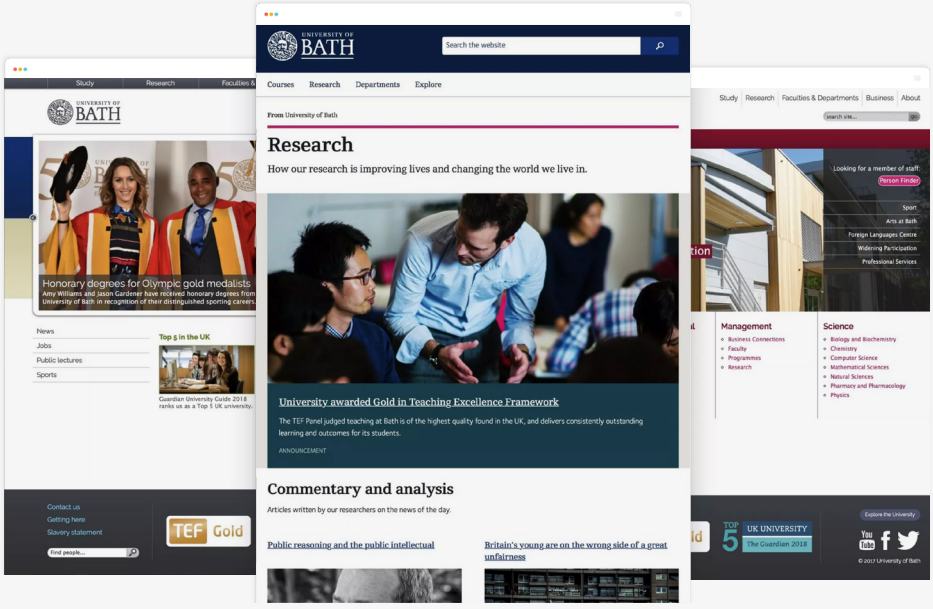
4.2.1. The Benefits of a Pattern Library?

Once your digital channels reach a certain size and complexity (especially if many sub-sites are involved) the arguments for a pattern library are overwhelming. Pattern libraries provide three benefits:

4.2.1.1. A Pattern Library Ensure Consistency

Big sites are developed by different people over a prolonged period and revised regularly. That almost always leads to a fragmented user interface unless there is something in place to ensure consistency.

You only need to visit any large site to see examples of this. Navigation shifts position, form elements are formatted differently and even typography changes. That happens because it is easier to guess how a button might look than find out how somebody styled it previously. A pattern library changes this by offering a straightforward way to duplicate existing design and functionality across all your digital channels. That improves usability but also helps to improve accessibility. That is because you can build components with inclusivity in mind. Every time you add a component to a page all those accessibility features will be automatically included.



On larger sites it is easy for inconsistencies to creep in when there isn't a pattern library to set standards.

For a long time Google struggled to ensure consistency across their many products, because they were built by separate teams. Introducing a pattern library helped to address this problem.

Pattern Library Facilitates Reusability

4.2.1.2.

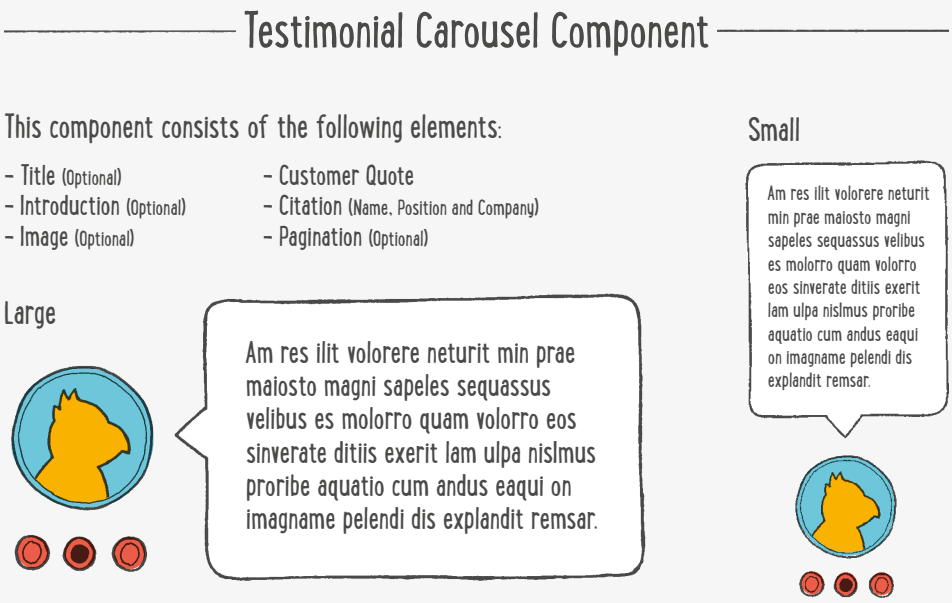
Large organisations often have multiple web teams working across the company reporting into different departments. Often these teams work in isolation and so end up reinventing the wheel at considerable cost. Having a central pattern library developed in collaboration between all of these web professionals helps the organisation to reuse functionality and design, so keeping costs down. If one web developer creates a new pattern for a particular requirement in their area of responsibility, this can be shared with the whole group and is also permanently available for future projects.

Once the majority of patterns are in place, creating a new site, subsection or channel becomes a mere matter of combining these patterns, in much the same way you build something out of existing Lego bricks. That significantly speeds up both prototyping and the ability to iterate towards a final digital service.

A Pattern Library Makes Maintenance Easier

4.2.1.3.

Having a consistent pattern library that everybody works from makes maintenance easier too. When everybody creates elements consistently, it is much easier for a developer to work on somebody else's code. Also when a new developer comes in, they can get up to speed much quicker by looking at the pattern library. Hopefully, you can now see the value of building a pattern library. The final question, therefore, becomes – how do you create one?



A pattern library does not require final code and design.
Instead start it early when you have nothing but a few wireframes to work with.

4.2.2. Advice for Creating a Pattern Library

The creation of a pattern library is time-consuming, but it is not particularly difficult. With some planning and a methodical mindset, creating a pattern library is relatively straightforward. That is especially true if you have the luxury of planning your pattern library from day one.

4.2.2.1. Think About Your Pattern Library From the Start

The temptation is only to document a pattern library once you have built the digital channels. However, this somewhat undermines the point of having a pattern library.

When working on a pattern library, put a skeleton of the library together before anybody writes a line of code. In fact, it is often helpful to start producing wireframes for your patterns in the prototyping phase and defining their functionality in more detail. That helps designers prototype faster and begins to outline features the developer will need to build.

As the developer starts writing code these patterns can then get fleshed out with the final design and associated code. This approach is considerably more straight-

forward than putting everything together at the end and also allows you to reuse patterns as you build the your channels.

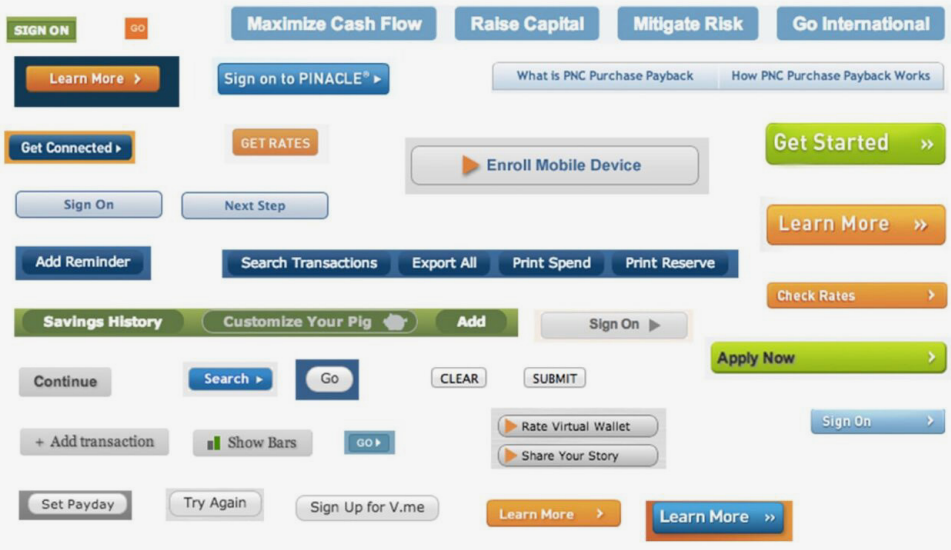
Of course, many of us do not have the luxury of starting from scratch with a pattern library. That is where an audit is helpful.

Carry Out a Pattern Library Audit

4.2.2.2.

If you are trying to create a pattern library for existing channels, the first step will be to carry out an audit of your current digital channels. Carrying out an audit involves reviewing your digital channels and capturing every UI component or element that you can find.

An element will be something like a heading or button, while a component consists of multiple parts that work together, such as a search form or news story listing. You will also need to document every different version of these components and elements. For example, you could well have multiple styles of buttons or news story listing. That is because people have started to introduce discrepancies over time. You will also need to document non-component elements such as layout, typography and use of colour.



A UI audit is time consuming, but it demonstrates the discrepancies that have crept into a website over time.

That can prove a frustratingly time-consuming process, but it is essential to highlight the organisation's design debt. It demonstrates to management the problem and explains to them that a pattern library is necessary.

Carrying out an audit of this nature also shows you what components are required to standardise your digital channels, and the scope of the work to be done.

Once you have completed your audit, you will be able to start designing individual components. The first step in this is to define the elements that make up these components.

4.2.2.3. Define the Elements Within a Component.

Most patterns can be made up of multiple components. For example, a news listing could include:

– A title
- A description
- A thumbnail
- The date
- The author

When defining a component, it is important to list these elements and also whether they are required or not. For example, do you need a description of an article listing? If not, what happens to the design if that description is not present? Careful consideration needs to be given to these various permutations as they can become quite complicated if not thought about carefully. You also need to consider how the components function.

4.2.2.4. Describe How Your Component Will Function

If a pattern library is also going to act as a functional specification for developers, you need to put a lot of thought into how the pattern will work. Where is the data coming from to populate fields? What happens when the user clicks a button or link? How does a carousel operate on a mobile device?

These kinds of practical questions are essential when it comes to implementing a component. Answering these issues also forces the designer and developer to work closely together to agree on an approach, and prevents the designer from just throwing a design over the wall. One area of functionality worth a specific mention is accessibility.

Testimonial Carousel Component

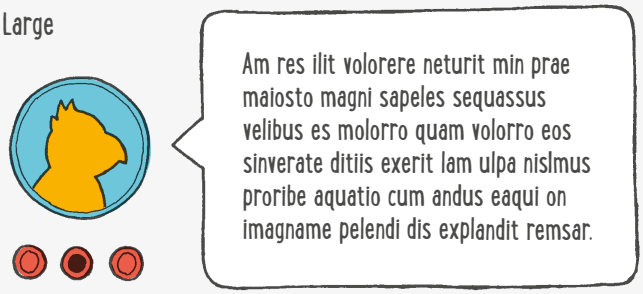
This component consists of the following elements:

- Title (Optional)
- Introduction Copy (Optional)
- Image (Optional)
- Customer Quote
- Citation (Name. Position and Company)
- Pagination (Optional)

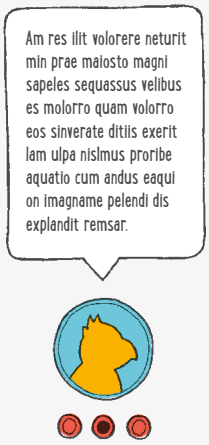
Functional considerations:

- Pagination it must be swipeable on touch devices.
- Pagination must be keyboard accessible.
- Image needs appropriate alt tag.

Large



Small



Component descriptions should include notes on functionality and accessibility.

Ensure Your Patterns Are Accessible

4.2.2.5.

In this era of web applications, it is easy to forget about accessibility. That is why you should always include accessibility considerations in a pattern library. Make sure your patterns will work in the most inclusive way possible, paying particular attention to keyboard accessibility and screen reader support. But accessibility should also encompass broader inclusivity concerns such as browser and device support. With that in mind, do not forget to consider the responsiveness of components.

Make Sure Your Components Are Responsive

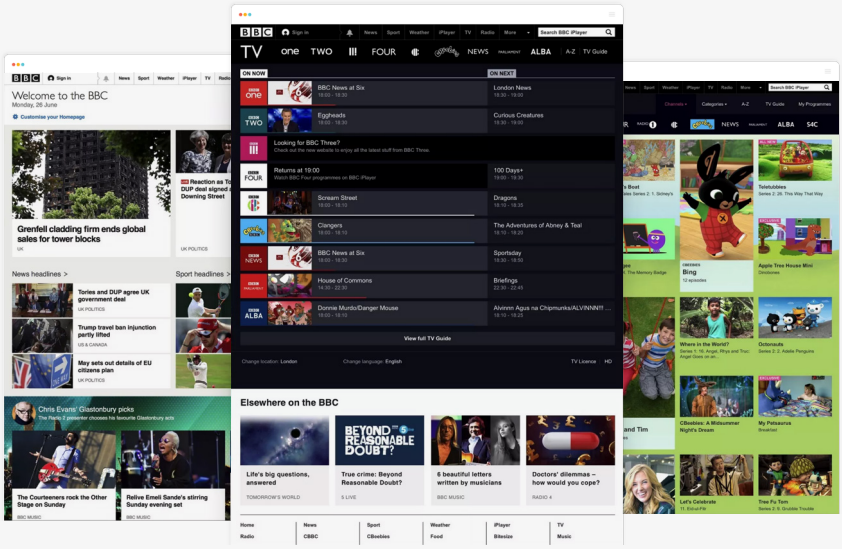
4.2.2.6.

It should go without saying these days, but put careful consideration into how your pattern library will respond across multiple devices. When showing the visual appearance of a component, make sure you demonstrate how it responds at different sizes.

That is not just useful for mobile devices, but also for when you use the component in various contexts. For example, a news listing may include a thumbnail when being displayed in the main body of a page but drops the thumbnail when being shown in a narrower side column. Your components will also need to be responsive in another way too. They will need to be able to adapt based on varying business requirements.

4.2.2.7. Components Will Need to Adapt to Business Requirements

Often, as a business grows, its offerings become more complicated. It ends up with many products and services aimed at a variety of differ ent audiences. That can prove challenging when seeking to enforce design consistency through a pattern library. It is therefore essential to decide how much customisation you will allow of your components and pattern library. That is a decision that will depend on how your brand operates. Some companies (such as Apple) have a consistent visual identity across all products, while others (like the Nestle) have radically different brands.



Although the BBC has a single pattern library those patterns look different between across their different brands.

If you have a single consistent brand, then you probably want to offer very little in the way of customisation. However, if like the BBC you run multiple brands, then it will be critical that the appearance of patterns can be customised to match the different aesthetics. Finally, you also need to consider how you will manage your pattern library.

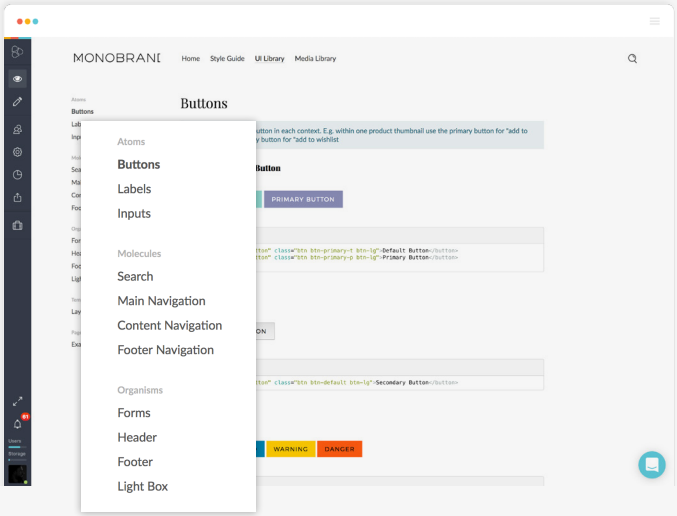
How to Store and Manage Your Pattern Library

4.2.2.8.

Most companies document their pattern library on a website somewhere. But that is only part of the story. For a pattern library to be useful, it must be a tool that designers and developers can use on a daily basis. That means it needs to be readily accessible to them.

For designers, this is relatively straightforward. It means components being available in their design tool of choice. For example, Sketch provides a variety of features to make managing components easy, including its symbols tool. When it comes to the code that developers will be using we need to be careful. It is crucial to ensure we have a single repository of code that is always kept up to date and is managed by source control. If we do not, we will find maintenance a challenge, and somebody could end up using out of date code.

A tool like Frontify is the answer to this challenge. It still allows you to maintain a website that visually presents your pattern library while at the same time syncing the code with your source repository via the Frontify API.



A tool like Frontify allows you to to create attractive pattern libraries, while syncing the code with your source repository via the Frontify API.

However you ultimately decide to solve this problem, make sure there is a single definitive source of code for each pattern and keep it upto-date. The differing requirements of different roles from a pattern library, raises an interesting question – who should create and own the pattern library?

4.2.3. The Creation and Ownership of a Pattern Library?

As should already be apparent by this point, it takes more than a designer to create a pattern library. So who should be involved in its creation?

4.2.3.1. Who Should Be Consulted When Creating a Pattern Library?

I have already explained that a **front-end developer** needs to be involved as they are ultimately going to be responsible for maintaining the components code.We will also need **server-side developers** to aid with the integration of components to datasets and backend systems. But even that is just the tip of the iceberg.You will also need to consult with **accessibility specialists** to ensure that components are inclusive. Then there will be **performance experts** who can help make components as fast as possible.

Next, you will need to speak to user researchers and user experience experts to ensure the components match the mental model of users and the tasks they are trying to complete. Finally, there will be product owners and executives who will need to be consulted to ensure components meet organisational needs and have the flexibility required by the various brands. Depending on your organisation, each of these roles may be separate people, or a single person might be responsible for multiple areas. Whatever the case we should consult them when creating the pattern library. But, once your pattern library has been created, who should manage it and evolve it?

4.2.3.2. Who Should Manage Your Pattern Library?

A pattern library is a living entity. You will need to add new components and revise existing ones periodically. But the danger of this is that if not managed correctly this could fragment the user interface once again.

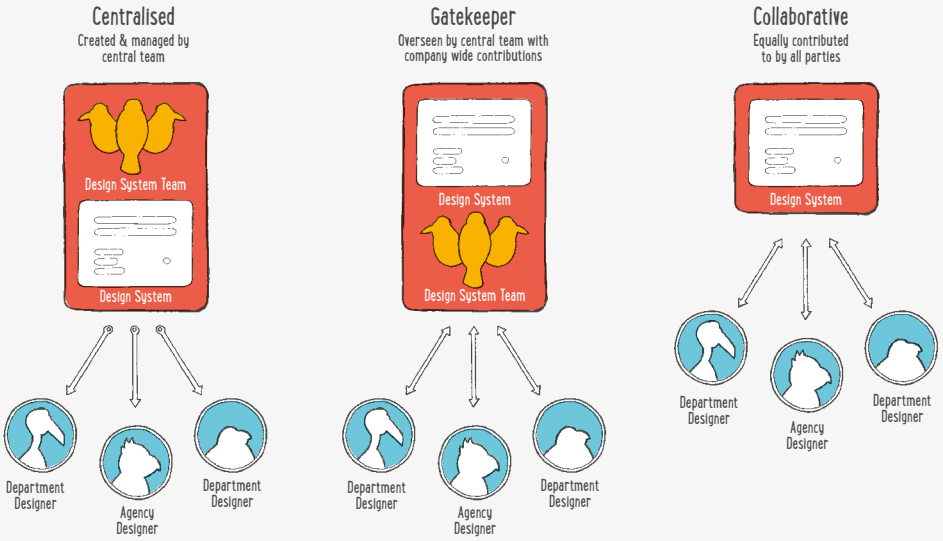
To avoid this problem, you need to establish a precise management procedure for the pattern library. There are three different ways you can handle this.

One option is to use what I call the **centralised model**. Under the model, one individual or small team has ownership over the pattern library. They run the pattern library like a product in its own right. They manage and evolve it, publishing that others across the organisation.

It is down to this team to identify how the pattern library needs to be evolved based on feedback from their 'users', and then adapt it based on the feedback.

The second option is the **gatekeeper model**. This model allows anybody across the organisation to propose new components or updates to existing components. However, ultimately a small team or individual still owns the pattern library and has the final say over whether the proposed changes are rolled out.

Finally, you could adopt a more **collaborative model**. It allows anybody to create new components or propose amendments to existing components. These are circulated to the entire user base on the pattern library before they are officially released. Presuming there are no objections you can roll these updates into the pattern library.



There are multiple ways of managing a design system and component library.

Each approach has its pros and cons. The final decision will be mostly reliant on the culture of the organisation and the level of experience of those using the pattern library.

Whichever option you pick, a pattern library will bring significant efficiency gains once established. It will save time from the initial prototyping stages all the way to deployment and beyond.

The ability to reuse code across digital channels creates an enormous opportunity. But reusing design and code elements is not the opportunity for time savings. There are also opportunities to reuse content.

4.3. Building Reusability into Content

As I have already said, a design system does not just address visuals. It also covers the content. In particular, it uses a content style guide to ensure the consistency of the copy the organisation is publishing.

Of course, although consistency is valuable, it does not necessarily help us in our efforts to become more efficient. But there are ways you can make your content reusable, in a similar way that pattern libraries provide reusable components. That is particularly true when you consider content marketing.

For many businesses, content marketing has become a crucial component of their online strategy. They understand that creating shareable online material that provides real value to people proves a powerful marketing tool. It encourages people to follow your company and helps build the companies reputation as a leader in the field.

That content could be a podcast, series of videos, e-book, blog or social media updates. In fact, to be successful, it has to be a combination of all the above. That is time-consuming and can be a real drain on company resources.

4.3.1. Content Marketing is Demanding

Content marketing means consistently producing quality content on a regular basis, across multiple channels. Material to continually keep your audience engaged. It is not enough for people to hear from you once, they have to see quality from you regularly.

That is a laborious process without guaranteed results. Not every article, social media update or video you create will be well received. It will often feel like you are wasting your time. It is not surprising therefore that many give up, while others continue to plod on without seeing measurable results. However, it is possible to lighten the load of producing content while at the same time increasing the chance that the material will provide results.

Content Reuse Improves Efficiency

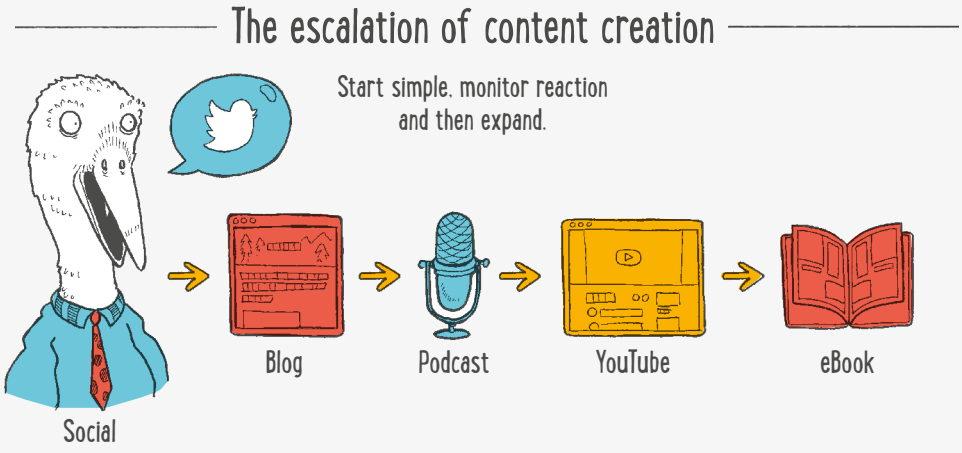
4.3.2.

The key to success with content marketing is the realisation you can reuse the same content across different channels. The fact that different people use various channels, and the need to expose people to your content multiple times, makes recycling content across channels a sensible approach.

How to Recycle Content

4.3.2.1.

For example, an idea may start as a tweet that you expand upon on Facebook. You could extend that further as a short blog post that could then become the inspiration for a podcast episode. You might also want to take multiple blog posts and combine them into an ebook. You could then turn that e-book into a self-learning course on a platform like Skillshare or Udemy. But this process can also work the other way round. You can begin with a long-form piece like an e-book and break it down into a series of blog posts. Equally, you can take an individual blog post an extract critical points to share via social media or in short YouTube videos.



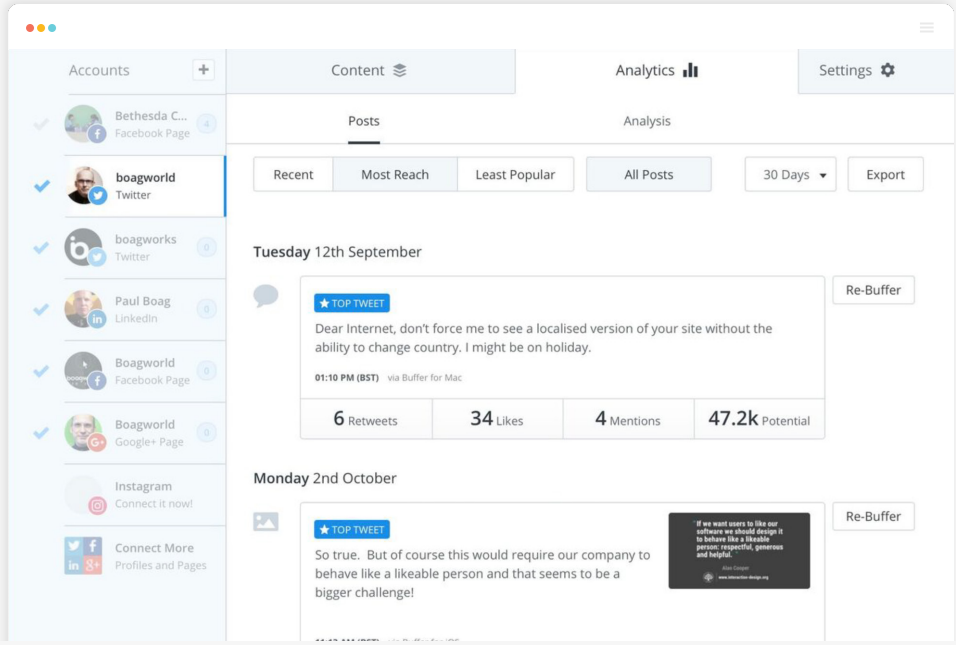
Do not invest time and energy into a large-scale content marketing campaign until you have trialled it at a smaller scale.

Taking this approach of recycling content can save significant time and effort in creating it. However, it does not guarantee that the content you produce will be successful. For that, you need to apply just a pinch of scientific rigour!

4.3.2.2. How to Test Your Content Marketing Ideas

Let's say for a moment you have an excellent idea for an e-book. However, creating an e-book is a significant time investment. How do you know whether it will be a success and resonate with your target audience? The answer lies in our recycling approach. We start by testing the idea with something a lot less time-consuming.

For example, you could take some of the fundamental principles that you hope to cover in the book and turned them into a series of social media updates. If you discover that people share these updates more than your average post, then you know that you might be onto something. The next step would be to cover some of the topics you intend to include in your e-book through a series of blog posts. Not only can you reuse the content from these articles in the final e-book but you can also gauge the level of interest that these posts generate.



Tools like Buffer provide valuable insights into what subjects resonate with your audience.

This principle of reusing and measuring content marketing material will make an enormous difference. This book, for example, will also generate many social media updates and a number of blog posts as well.

However, there is more that we can do with this recycling approach to make it as efficient as possible.

How to Recycle Efficiently

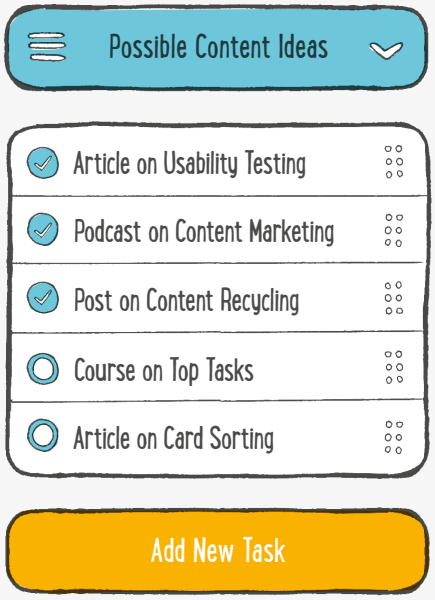
4.3.2.3.

Because content marketing is often a secondary part of our job, we fail to give it the attention it deserves. For example, we don't take the time to set ourselves up correctly to produce content in the most efficient way possible.

Sometimes we are our own worst enemy. Instead of continually collecting inspiration for blog posts, social media updates and other forms of content marketing, we sit down to create something and are left staring at a flashing cursor.

Make your life easier by always being on the lookout for great ideas. When you see them add them to a list that you can return to later. Even this handbook has been sitting in my inspiration list for at least the last year waiting for the right moment to write it.

Finally, make sure you have a tool to keep you organised when it comes to your content marketing schedule. Something that ensures you know what is coming up and what gaps you have to fill. That could be something as simple as an Excel spreadsheet, or a tool like Coschedule, as it will not only allow you to manage your editorial calendar, it will also let you schedule updates.



Keep a list of content marketing ideas so that you are ready to go when it comes time to create content.

In short, we need to become more organised when it comes to content creation. Many organisations seem to have little in the way of governance or tools for content. Instead, they appear to manage things on an ad-hoc basis.

We need style guides to help ensure consistency in how we write, but we also need processes in place for the production of quality content, especially in the realm of content marketing. If we do not, the result is that we end up posting press releases and sharing low-quality news stories.

The need for robust policies, governance and tools become particularly important the larger the company. It is so important to consider how you are going to optimise and scale your digital offering as the business grows or becomes more reliant on digital channels.

4

Design Systems and Building With Reusability in Mind

Chapter 5

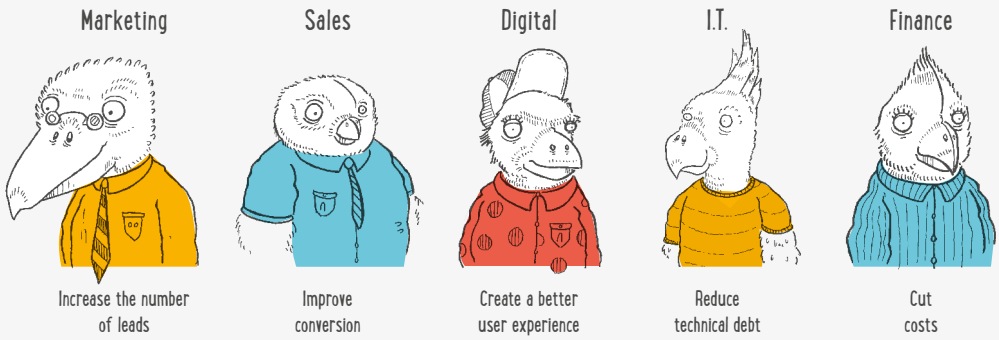
How to Organise and Scale Your Digital Offering

The bigger a company, the more complexity. For digital, this means more stakeholders, more considerations, and more projects running simultaneously. Organisations deal with this complexity by dividing responsibilities across business silos. But as I have already written, these silos can be a barrier to the delivery of digital projects that typically span departmental responsibilities.

Different silos have different working practices that often clash, and it is not unusual for there to be tension between these groups. Without a doubt internal politics can put a strain on the delivery of digital projects.

That all results in slower progress and a lot of wasted energy. Valuable time and resources are squandered in disagreements over approach or reinventing the wheel across silos. How then can we deliver digital in an efficient manner in such an environment?

We have already established that cross-functional teams are an essential factor in digital delivery. However, these can be challenging because they lack standard working practices and even a shared objective. Each team member brings the agenda of their department and associated mindset. Each will want to approach digital delivery in a slightly different way.



Different departments often have competing prioritises.

To resolve this problem a common language and framework need to be created. A shared set of goals and working practices that define how the organisation is approaching the integration of digital into its operation. That means introducing some new standard operating procedures.

5.1. Why Have Policies and Procedures

Many digital teams resist putting in place policies and procedures. Part of the reason is that the team doesn‘t feel like it has the time to create them, but also partly because they are worried the policies will be too restrictive.

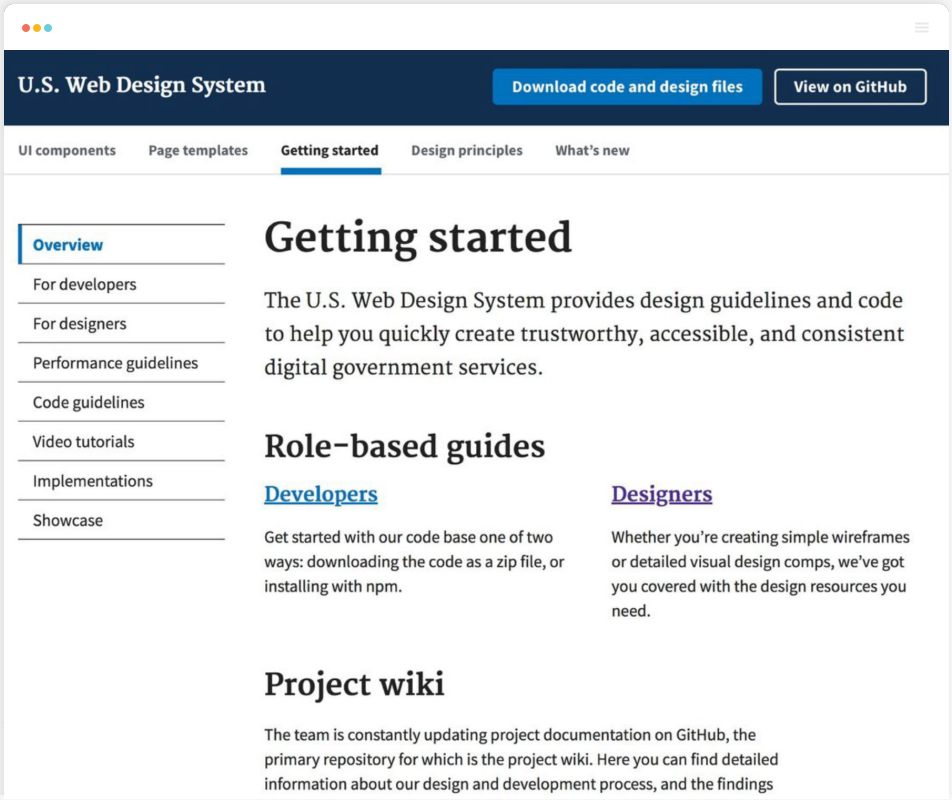
Sure enough, there is a balance to be found. Policies and procedures can become too restrictive, but it is equally dangerous for them to be too lax. Done right, they can be an invaluable tool in the efficient implementation of digital strategy.

5.1.1. Policies Should Empower

The key is to remember that policies and procedures outlining the implementation and creation of digital services exist to empower people and not restrict them. They should help people feel confident and informed about the best approach.

For a start, **they can help to clarify what that strategy is**! Often organisational objectives for digital are vague, leaving staff unsure about what they should be trying to achieve. That results in time wasted on projects that don’t move the organisation towards its goals, and conflict over the correct approach.

An agreed policy on objectives instantly provides everybody with a shared goal to work towards, removing a lot of uncertainty. Second, policies and procedures should provide staff with **guidance about the best way to approach the delivery of digital services**.



The U.S. Government provide advice about how digital projects should be run.

For those less experienced in digital, this will educate them about best practice. Equally, for more experienced staff it should bring clarity to the organisations chosen approach to ensure everybody is working in the same way.

For example, you may establish policies around the retirement of out of date content. There is no single definitive approach to this issues, but those involved in the creation of content need to all be aware in advance of how that will be managed to ensure consistency in approach.

Considering many of those involved in digital decision making and delivery, lack experience in the area, **policies can be very reassuring too**. They can be confident that if they just follow the guidelines, they aren't going to get in trouble or make significant mistakes.

For example, policies around the use of social media are particularly important in this regards. Many people are afraid to post work-related content for fear of making a mistake. It is the same reason employees are often reluctant to blog on the corporate site. Policies can reassure, educate and empower in such situations. But policies and procedures bring a secondary benefit beyond empowering staff. They also help to deal with the politics.

5.1.2. Policies Defuse Disagreement

Because of the cross-functional nature of digital, it can often prove divisive, bringing different agendas into conflict. Different disciplines and departmental viewpoints come into conflict resulting in prolonged disputes that slow delivery.

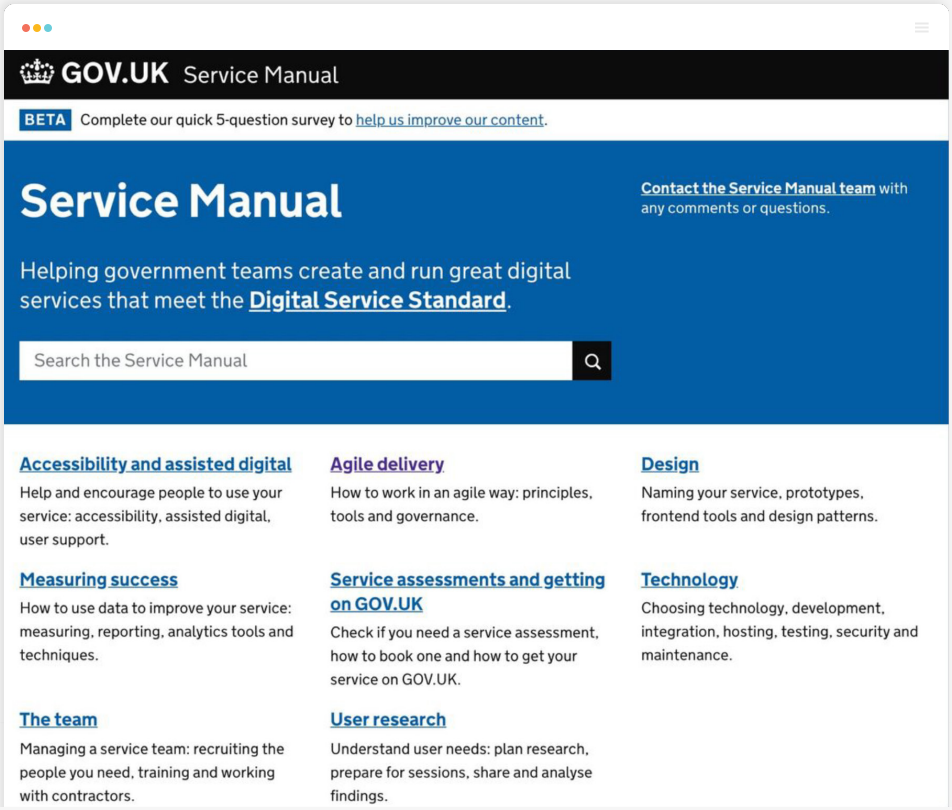
Policies can cut through a lot of this because they are not personal. Policies are implemented equally for all with dispassion. For example, imagine that somebody suggests a poorly considered idea. Without a clear framework within which to assess the suggestion, you end up debating personal opinion, which inevitably gets heated.

However, if you can demonstrate that it fails to deliver on an organisational goal or clashes with design principles, then it is a different story. You are not suggesting the idea is wrong, just that it is not inline with agreed organisational objectives.

Another example would be homepage placement. In organisations with a large number of competing products, getting homepage space can be critical to product owners. It often leads to conflict or homepages so overstuffed with content that they become unusable.

When one product owner is denied homepage space, while another receives it, this results in conflict. But if there is a policy that defines the criteria by which the business selects content, then that is less personal. Maybe you select homepage content based on value to the company, number of clicks, or any one of numerous other criteria. By laying out this policy in advance and getting buy-in, it prevents ongoing debates about who gets to be featured and who doesn't.

Policies may take time to agree, but once the company establishes them, it will save considerable time further down the line. At least they will if everybody is aware of them. For that, you need a service manual.



The UK Government has published the most comprehensive service manual publically available.

5.2. Introducing Service Manuals

Think of it like this. The business sets goals for digital that you are aiming to reach. Your design principles are the framework within which you will achieve those goals, while the service manual is the specifics of how that framework will operate in practice.

In essence, a service manual is a collection of policies, procedures and guidelines designed to help staff and partners implement a consistent approach to digital. It is a one-stop-shop for everything somebody needs to know about how your company approaches digital.

That will include, but is not limited to:

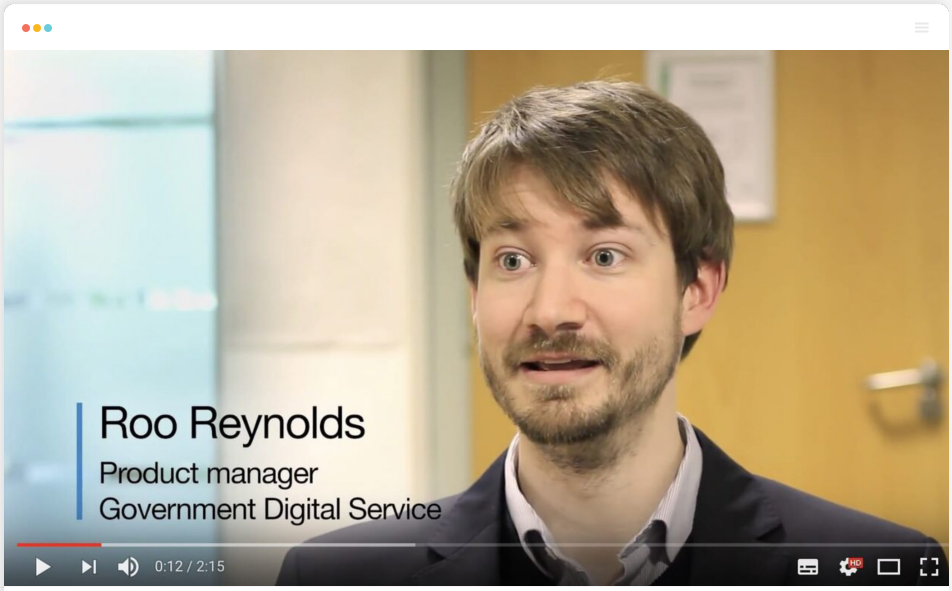
- A content style guide.
- Social media policy.
- Accessibility policy.
- Development process.
- Role definitions and team structures.
- Measurements of success.
- Approaches to user research.
- Technology standards.
- Target audiences.

It will even include the company goals for digital and your design principles. A service manual educates people about best practice, provides the security of a framework within which to operate and ensures consistency in approach.

Typically a service manual exists as a website. That means it is easily accessible, but also allows linking to other online resources that might be relevant in educating people. It also allows for the use of imagery, video and even audio to create a more engaging learning experience. After all, the aim of the service manual should be to articulate the companies approach clearly.

All of this probably sounds like a lot of work, and when you look at example service manuals out there, they can look pretty intimidating because of the sheer amount of information they contain.

Then there is the fact that some of the information found in a service manual could prove controversial or lies outside of your area of responsibility. For example, you might not feel you are in a position to dictate how the entire company uses social media. How then can you get started?



A service manual should be educational and engaging. That means using text, imagery, video and even audio to communicate your message.

5.3.

How to Start Creating Your Service Manual

The first thing to say about a service manual is that you don't need to create an entirely fleshed out version on day one. A service manual should be a living, breathing document that evolves. You should always present it as a working document that will change often.

Second, you should not present a service manual as a rulebook that everybody must follow. Instead, it can be 'sold' as a resource to help people make more informed decisions. That will avoid its creation getting bogged down in too much politics. When creating your initial draft, I recommend focusing on three areas:

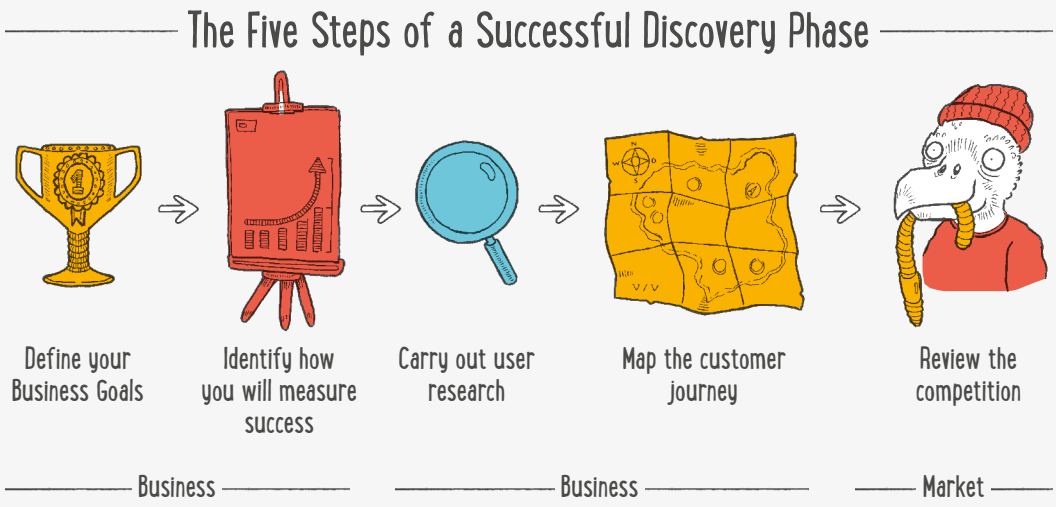
– Your working practices.
– Your assumptions.
– Educational material.

Let us explore each in a little more depth.

5.3.1. Your Working Practices

A safe place to start is by outlining how your team operates. That is because these will rarely need outside approval. Most organisations accept that a department can define its working methodologies.

That gives you an opportunity to establish some best practice regarding how you work that will improve overall efficiency and ability to deliver. For example, you could establish working policies around the need for a discovery phase at project outset, or insist that usability testing is a part of your process.



Some basic working practices around things like a discovery phase starts to formalise your approach to digital.

Another good working policy to document is how you prioritise incoming work. Too many digital teams spend their lives dealing with one urgent request after another. Instead put in place a triage system for assessing incoming work and assigning it a place in a queue of work to be done. What working practices you establish is entirely up to you. But by documenting them, you give them weight and the impression that they are more formalised. You can also set expectations at the beginning of a project by pointing stakeholders at your service manual with your working practices.

But you don't need to stop at outlining your practices. You can also document assumptions you are making about the companies approach to digital.

Your Assumptions

5.3.2.

Your service manual will need to contain more than how your team chooses to work. It will also need to include policies on more strategic areas such as objectives, audiences or even legal requirements.

It will not usually be within your teams remit to make decisions about these areas arbitrarily. Instead, you will need to consult with others. Of course, as soon as you start consulting, this is going to slow progress significantly and can lead to endless debate.

To avoid this problem, start the consultation process by documenting your assumptions about these more strategic areas. That will provide stakeholders something to respond to and give you something to work with while the final policies are approved.

By documenting your assumptions, you establish a baseline for discussion. Yes, once other stakeholders have their say, these assumptions will change. But they will still be nearer to your ideal than they would have been if you started from a blank canvas. You will also reach agreement faster. So, what assumptions should you document?

Your Strategic Objectives

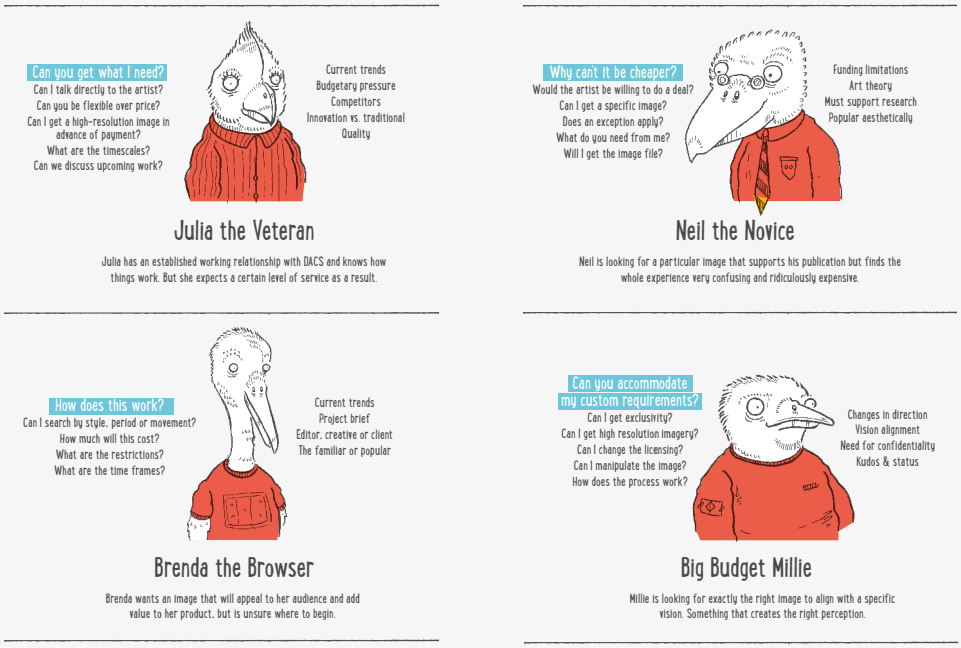
5.3.2.1.

Start by looking at overall strategy. What is your understanding of the company's business objectives as they apply to digital? Document these objectives and, most importantly, attempt to prioritise them. A lack of prioritisation is often the critical factor in the failure of digital teams to deliver. This lack of focus slows down delivery by forcing the digital team to take on too many projects simultaneously. A prioritised list of objectives will also help prioritise incoming work. But remember, these are just your assumptions, expect them to change following consultation.

Your Audiences

5.3.2.2.

You should also document your assumptions about the target audience. Who are your users and which audiences provide the most business benefit? Once again the prioritisation is vital. Equally treating all audiences will overstretch limited resources and does not make business sense.



Having a prioritised list of audiences clearly defined will help shape the direction of digital projects.

You will find that having a list of prioritised audiences will help resolve many issues as you build digital services, situations where audience needs may clash.

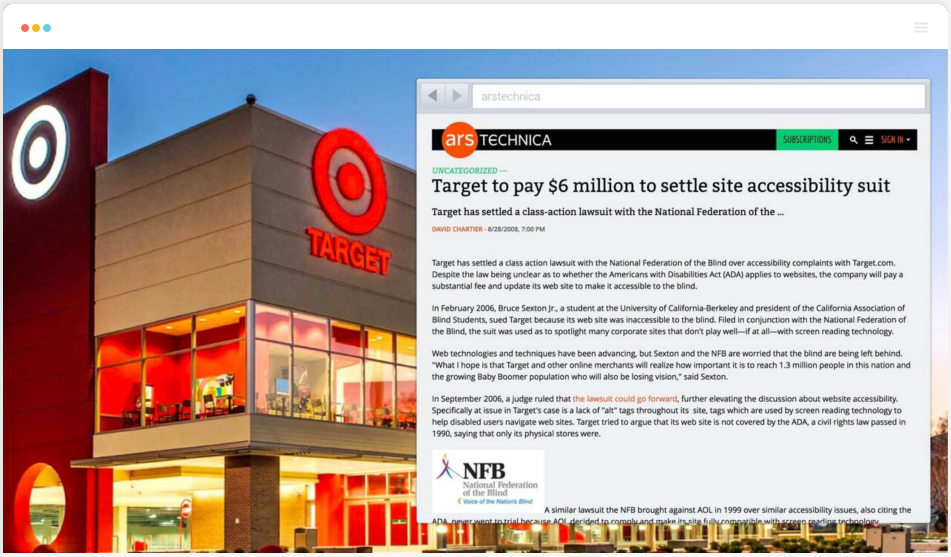
5.3.2.3. Your Legal Obligations

Most organisations have certain legal obligations when it comes to their digital channels. The exact nature of these obligations varies depending on the country in which they operate. Having a policy in place around these legal issues ensures that a) you meet your legal requirements and b) somebody is responsible for handling any problems arising in this area. Take for example the issue of privacy. Most organisations have legal obligations surrounding how data is held and used. Also in the European Union, companies have requirements surrounding how they monitor users, especially in the use of cookies.

Your privacy policy is not just a statement on the website. It should also include who is responsible for ensuring privacy, what is acceptable and how the company addresses related legislation. Finally, it should also have a well-defined procedure for handling complaints. Handling complaints is crucial when it comes to accessibility. Over recent years there have been high profile cases of companies prosecuted for accessibility failures.

These companies primary failure was in how they handled complaints about the in-accessibility of their digital channels. Instead of address ing the issue, they mostly ignored it. There was no policy for dealing with it, and so it fell between the gaps.

Of course, the best way of dealing with a complaint is to pre-empt it by making sure your digital channels are accessible in the first place. However, what does that mean? That will vary from channel to channel and so you need an accessibility policy to define that and how you intend to maintain it.



Target's lack of policy around accessibility is estimated to cost the company $6 million.

Another privacy-related issue is that of email. For example, what is your policy on passing email addresses to third parties? How do you ensure this and other private data is secure? But the policy issues surrounding email don't stop there. You also need to consider how often it is acceptable to contact people. Did you tell users you would only contact them once a week? If so, how are you going to ensure that happens? Also, did they opt-in, and what is your policy on them unsubscribing?

Once again, drafting an initial position on these various issues will be vastly more efficient than forming a committee to discuss them from a blank sheet of paper. The same is true for your managerial policies.

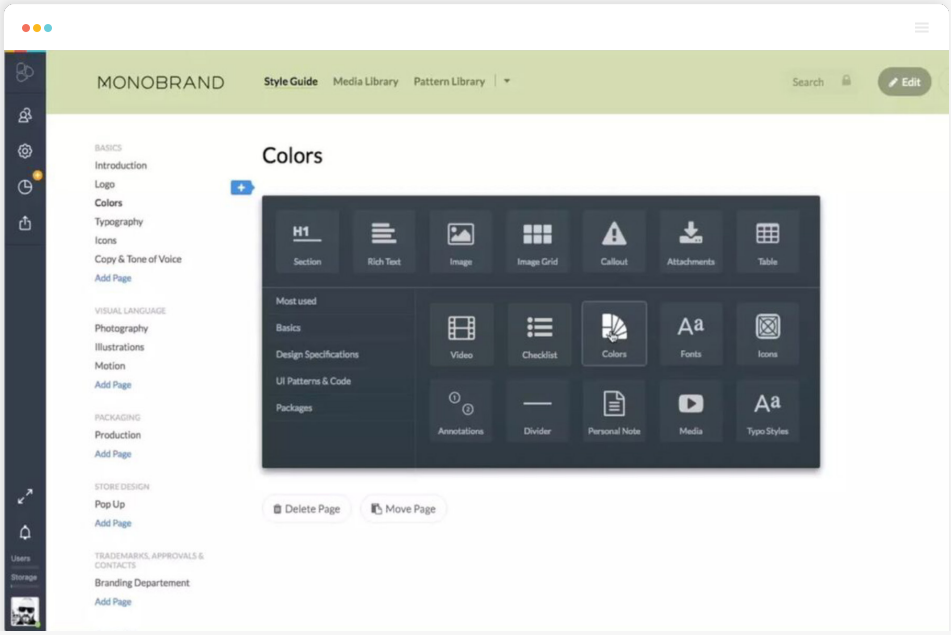
5.3.2.4. Your Managerial Policies

Managerial policies relate to day-to-day practicalities of running an online presence. Just some of the issues they might cover include:

- **Social Media** – What is your policy on employees using social networks? How are complaints handled? What guidelines exist surrounding what employees can and cannot say on social networks? How are you going to deal with libellous and incorrect statements made by others about your brand?
- **Technical** – What policies are in place to ensure uptime of your digital channels? How are analytics collected and processed? What is your backup procedure in case of data loss? What are your security measures to prevent hacking? What browsers do you support? What is your search engine strategy?
- **Branding** – What guidelines are in place over the use of your logo? What colour palette do you associate with the company brand? How should images be sourced and used? What tone of voice should writing use?
- **Content management** – Who can update copy on your digital channels? What procedures are there for removing content? What is your approval process for any new text?

The last area is one that especially benefits from having policies in place. Many digital channels suffer from content bloat, making it hard for users to find the content they want.

That is often due to the distributed nature of content creation. Many individuals across the organisation are uploading content but rarely remove it. It is beneficial to have a policy in place to address the removal of out of date or unused content.



Using a tool like Frontify you can formalise policies around brand and other areas.

Often people become very protective of "their" area of the site or other channel and are wary of outside interference. It is therefore beneficial to have a policy in place to address the removal of out of date or unused content. That prevents every attempt at removing any copy from being a battle and instead turns it into implementing an agreed policy.

The Role of the Digital Team

5.3.2.5.

Finally, it is worth documenting your assumptions about the role of your team. It is rare in my experience to encounter a digital department who have a clear mandate. Instead, there are various unwritten expectations placed upon them. Expectations that the team themselves do not necessarily share.

For example, many perceive a digital team as a service department, much like I.T. They consider it the team's job to execute the ideas of others. If marketing wants a mobile app, it falls to the digital team to build it, whether the app is a good idea or not.

However, in truth, most digital teams should be providing digital leadership, not just implement the ideas of others. After all, they tend to be the most knowledgeable in the company about what digital is capable of delivering.

A service manual is an opportunity to realign people's perception of the team and establish your team as the owner of digital, rather than merely its implementor. Part of achieving this is educating colleagues about just how much they do not know. That is why a service manual should also have a strong educational remit.

5.3.3. Educational Material

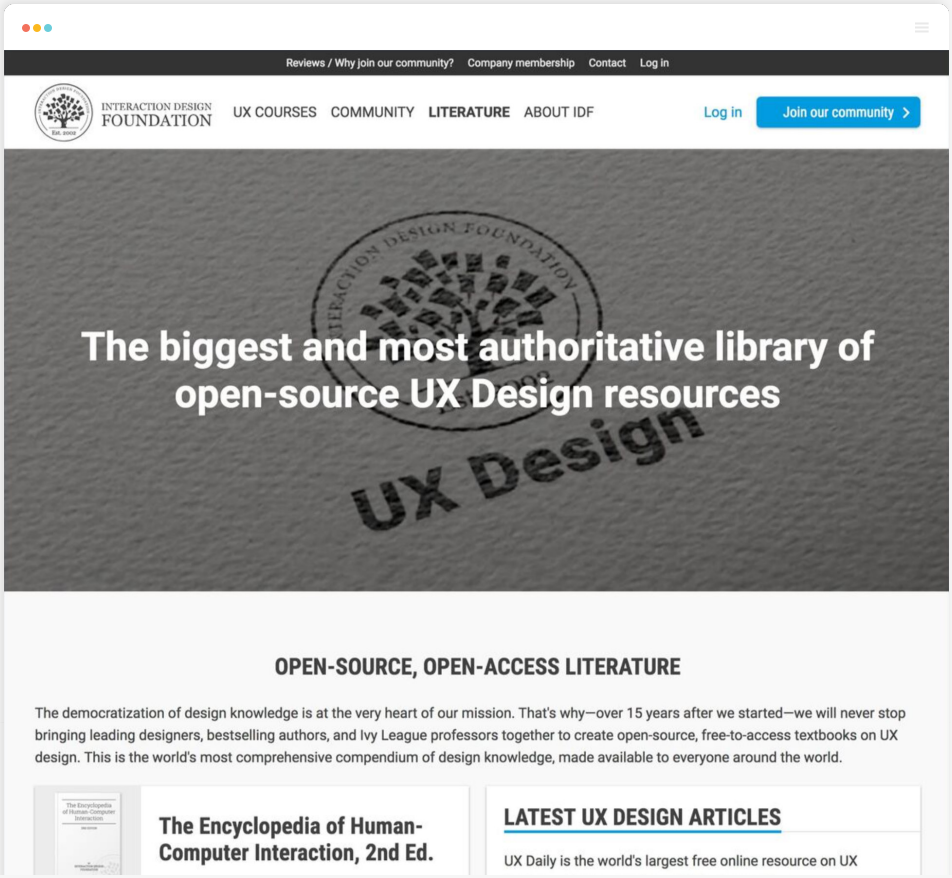
A service manual should not just be about establishing new working practices. It should also help train those across the organisation and ensure they have a sufficient understanding of digital to integrate it with their role.

Regarding what education material you include, that depends on how people across the organisation are using digital in their jobs. Often some guidance on writing for the web is worth including, as the chances are you have many individuals across the organisation producing online content in various forms.

Alongside that, some advice about the use of social media can be beneficial. Many staff find this kind of guidance reassuring, and it also limits the possibility of potential negative publicity. In organisations who have adopted a more decentralised approach to digital management, it may also be necessary to provide advice on running digital projects. That would cover areas such as:

- Defining and researching projects.
- Agile and iterative development.
- How to test using both quantitive and qualitative techniques.
- How to work with outside suppliers.

Not that all of your educational content needs to be created from scratch or even included directly in the service manual. For more general subject matter such as writing for the web or an introduction to the iterative development process, you can just link to external sources. It is only where the content is specific to your organisation that it needs to be written by your team.



The Interaction Design Foundation is an excellent resource of educational content you can link to.

Finally, give careful consideration to the tone of voice you adopt. It is easy for educational content to come across as both patronising and dictatorial. Although it is sometimes necessary to enforce rules, it is often better to take a more supportive tone. People tend to react against restrictions while appreciating material aimed to help them do their jobs.

Another aspect of tone to consider is how engaging your content is. It is essential that people both read your educational material and remember it. You will best achieve that by writing in a personal style with heavy use of imagery and video where possible.

But remember, all of this content doesn't need to be in place from day one. It is something that you can add to over time.

5.4. Growing and Enforcing Your Service Manual

For your service manual to succeed, it needs to evolve and grow steadily. It will need to adapt to changing business requirements and improve to formalise new working practices as they emerge. That means **your service manual will need an owner**. Somebody who is responsible ensuring it is up-to-date and relevant to company needs. This might even become a full-time job in some organisations.

This role is not an easy one. For a start, the company will task this person with getting consensus on the assumptions section of the service manual, so turning them into organisation-wide policies. That will take a good deal of negotiation and collaboration with stakeholders across the organisation.

Then this person will also need to be responsible for dealing with situations when a policy is overruled or ignored. Unfortunately, that will happen more than you would like. It typically involves a senior member of staff choosing to demand that everybody adopts their approach despite what the company lays out in the service manual.

In such circumstances, the person owning the service manual will need a degree of subtlety. In most cases refusing a senior manager or confronting her will get you nowhere. Typically the best approach is to point out the discrepancy between the service manual and what the senior manager is asking. However, instead of trying to enforce the service manual, ask how it would need to be changed to meet the requirements of management.

After all, ultimately senior management is responsible for setting the direction of the company. The service manual exists to outline an approach that will deliver that direction. If the service manual is not facilitating that agreed direction, then it needs changing.

In truth, not all of management‘s demands have much consideration behind them. Instead, they are often reactionary. By asking them to clarify what needs to change in the service manual you gently draw attention to this fact and avoid a confrontation. In many cases managers conclude that the service manual doesn’t need to change. Instead, their request does.

If the manager does suggest changes that impact their peers elsewhere in the organisation you can raise that as an issue and recommend bringing them in on the conversation. Often this will be enough of a deterrent to prevent the fast-tracking of less considered ideas.

5

How to Organise and Scale Your Digital Offering

Chapter 6

Slow Down to Speed Up

For a book that is supposedly about digital acceleration and improved efficiency, all of this talk of manuals, policies and principles might seem somewhat counter-intuitive.

Without a doubt putting this kind of framework in place can be timeconsuming and maybe even feels unnecessary. After all, those scrappy startups from the Silicon Valley who everybody aspires to be, do not have this kind of infrastructure. Also, you have probably survived without this kind of governance so far.

The problem is that you are not a scrappy startup. These companies have digital thinking built into their DNA. They do these things instinctively. But the chances are most of the staff at your company couldn't even clearly define what digital is, let alone how it should be influencing the way they work.

However, digital is becoming business critical to most organisations, which means the somewhat ad-hoc approach adopted to date is becoming increasingly risky. It opens up the company to expensive mistakes and doesn't scale to the increasing demands your company is making of digital.

All of this leads us to one inevitable conclusion; **we need to slow down to speed up**. Before we can improve the efficiency of our delivery of digital projects we first need strong governance in place to support that. Yes, that will take time to put in place. Yes, it will always feel like a secondary consideration compared to the daily firefighting. But the fact that you are firefighting in the first place is a sign that something has gone wrong.

It is time to step back and put proper governance and systems in place. If we do not, we will pay the price over the long term.

Slow Down to Speed Up

As digital becomes increasingly business critical, organisations are struggling to keep up with the rate of change. There is so much that they need to achieve online, but resources are limited. It is time to start working smarter.

In this pocket guide, digital expert Paul Boag, in conjunction with Frontify, teaches you to achieve more with less. But more than that, he explores ways to scale your digital services efficiently and sustainably.

1. *Bring Order to Your Digital Chaos*
2. *Working to Kill Waste and Boost Your Returns*
3. *Introducing Robust Design Principles to Improve Focus*
4. *Design Systems and Building With Reusability in Mind, e.g. Pattern Libraries*
5. *How to Organise and Scale Your Digital Offering*