

Team Management & Design Leadership

As VP of UX at Relay Network

The context

The company

[Relay Network](#) helps companies create more educated, loyal, and profitable customers, by delivering personalized experiences at the right points in your customers' journey.

My role

A player/coach, building and leading a small team of 3 UX designers and 1 UI designer responsible for visual design and our design system

Key challenges

- There had been no prior investment in user research or design when I joined
- Culture of opinion-based decision-making
- Visionary, founder CEO who felt his vision for the solution was not appreciated or understood by his team
- Many brand new C-Suite executives with conflicting opinions about company and product strategy
- An engineering organization resistant to involving design in their processes with limited experience with agile (Scrum)

Leadership style

Coaching

Coaching leadership emphasizes personalized support, constructive feedback, and empowerment to create a culture of collaboration and high performance within teams.

Benefits to the team

- Close connections
- Confidence building
- Support and feedback
- Empowerment



Personality traits

Myers Briggs

ENFP – Extroverted iNtuitive Feeling Perceiver. “ENFPs bring a unique blend of creativity, empathy, flexibility, and people skills to their professional endeavors.”

DiSC profile

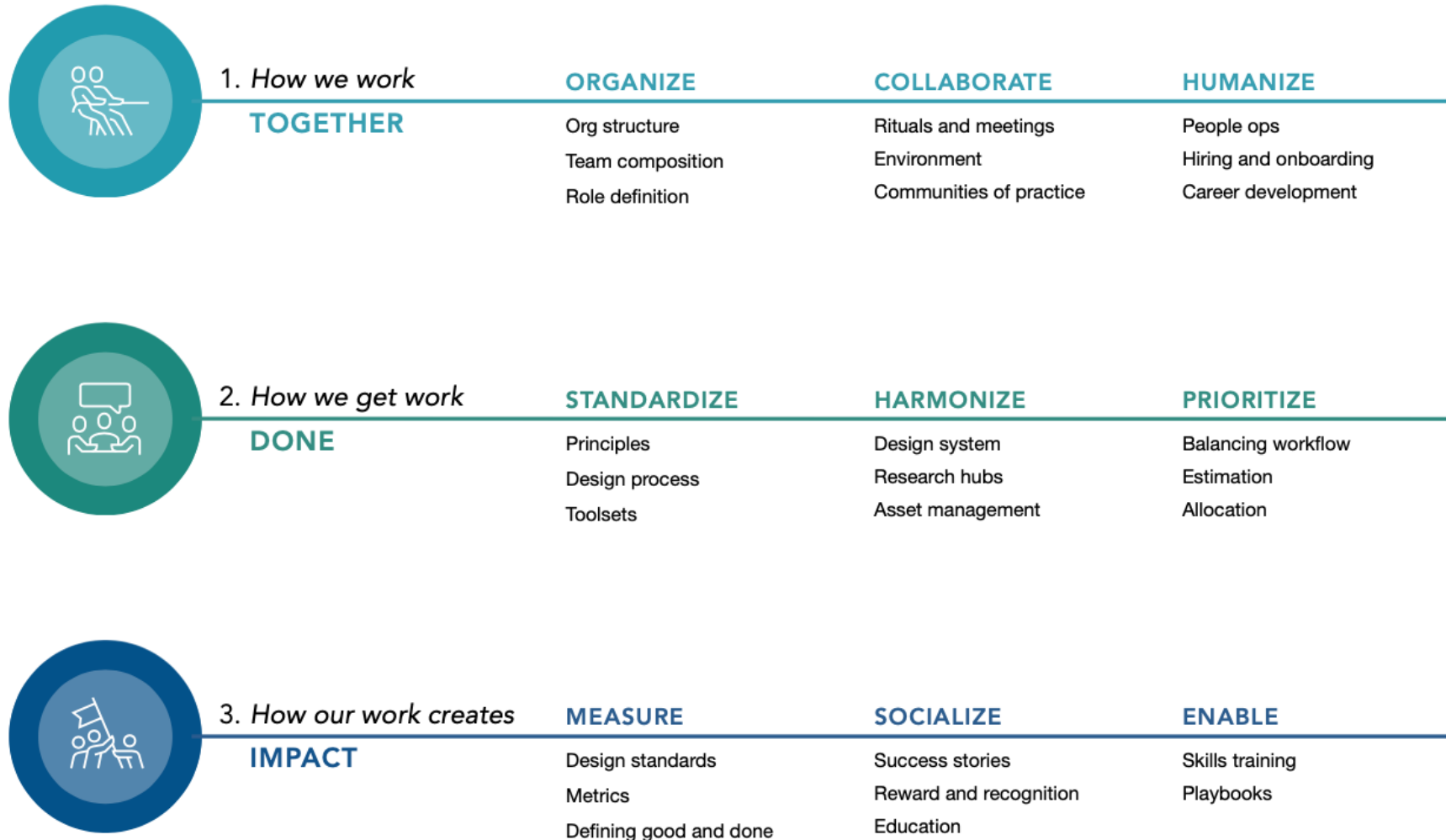
Strong “i” style. “Individuals with a strong ‘I’ personality are characterized by their social nature, optimism, assertiveness, leadership qualities, and perfectionist tendencies. They thrive in environments where they can interact with others, lead effectively, and pursue their goals with determination.”

Predictive index

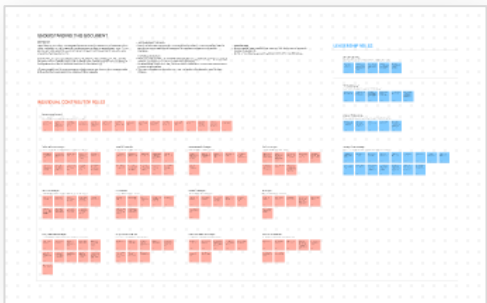
Venturer. “Once Venturers identify an opportunity to push the organization forward, it becomes an irresistible magnet. Venturers are always exploring and moving past boundaries. They're strong-willed, goal-oriented, and focused on making an impact at work. Expect them to be self-starters and innovators who tackle new problems with enthusiasm.”

DesignOps

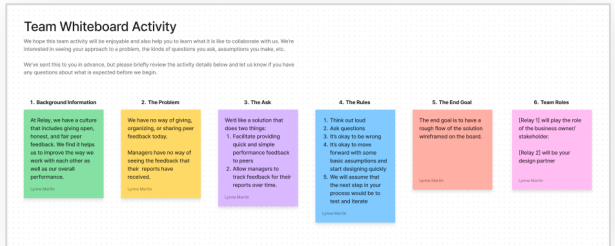
Most recent training NN/g Nielsen Norman Group: [DesignOps: Scaling UX Design and User Research](#)



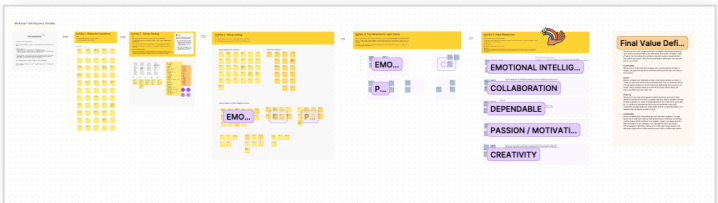
Sample artifacts: How we work together



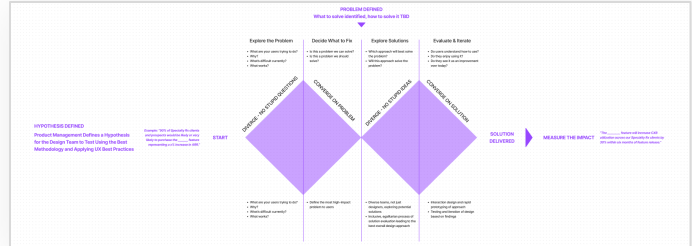
Career ladder



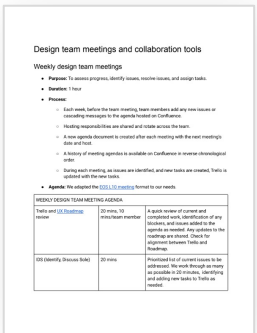
Recruiting whiteboard activity



Team values whiteboard activity

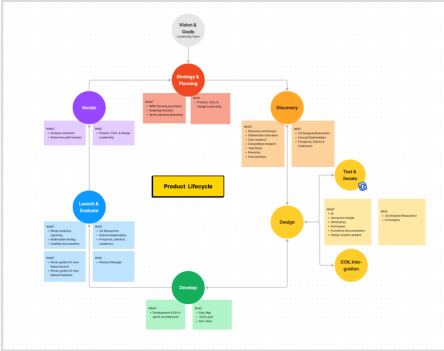


Design alignment to product management process



Team meetings & collaboration tools

Sample artifacts: How we get work done



Design lifecycle

CSM Stacy
Client Success Manager

ABOUT
Stacy has a close relationship with all of the clients she partners with. She assists them with anything they could need while working with Relay. This includes technical support, content strategy, and advocating for the needs of her clients.

MOTIVATIONS

- To support their client in accomplishing all the tasks they need to do while using Relay's solution.
- To assist clients in creating a useful and engaging experiences for their customers.

NEEDS

- Be equipped to fully and quickly support client needs.
- Faster and more streamlined onboarding and product education.
- More self service tools for the client.
- More bandwidth to create strategic content solutions.

CHALLENGES

- Spends more time doing technical support than crafting strategic solutions for clients.
- The process of getting a client onboarded and ready to build experiences is long and tedious.
- Too much handholding with clients which is frustrating for both parties. A more streamlined solution would solve most problems, not more support.

PERSONALITY

- Team Player
- Strategic
- Analytical
- Empathetic
- Detail Oriented

SKILLS

- Technical Support
- Customer Strategy
- Customer Service
- Product Knowledge

Quote: "I think of us like the quarterbacks...working on the field with many different teams and different players, both on the client side and on (Relay Networks) side as well."

Persona template

The Customer: A Healthcare Patient

Goals

- Save the time and stress of going to appointments
- Sign up to the pharmacy
- Get medication they need quickly and conveniently

Expectations

- The experience should be a walk-through one
- The medication should arrive fast
- The experience should be professional and confident

ENDORSEMENT & ONBOARDING

Make an appointment through Relay's service from an on-call doctor.

Sign up for service directly through Relay.

They are very unfamiliar to the service and need onboarding and education to get started.

Some confusion of all right forms for their personal records.

PROCESSING

Relay's confirmation of appointment and service information to provide their doctor.

How to send prescriptions through Relay.

Relay will confirm the prescription is being processed.

Relay will confirm the prescription for pickup and access to tracking.

DELIVERY

Prescription arrives directly to their home via Relay's service.

They are unsure if they received the medication and need to confirm receipt of service.

Confirm receipt and sign document directly through Relay.

Send copy of document for personal records.

SUPPORT

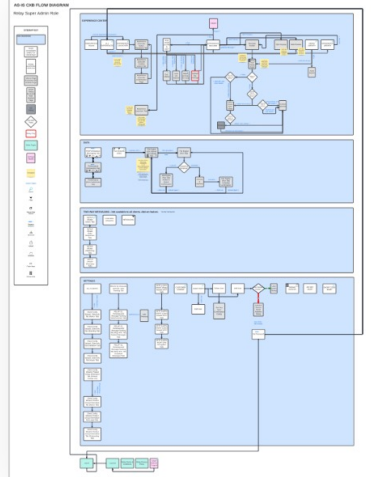
Will be notified via text when the prescription is ready for pickup and can order more directly.

Can receive signed documents for the medication.

Can receive support if package does not arrive.

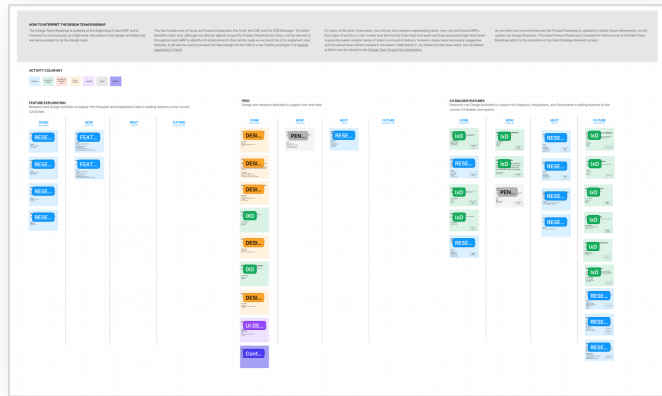
*Since we did not interview customers, this journey is assumed based on accounts from clients

Journey map template



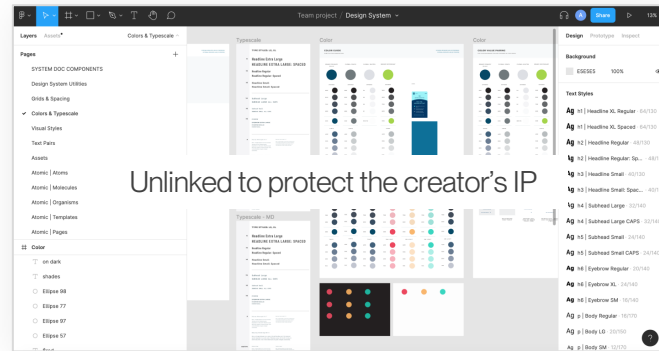
Application workflow documentation

Sample artifacts: How our work creates impact



Design roadmap

- Aligned to product roadmap and engineering schedule
- Answers questions for product management
- Increased product quality
- Increased customer satisfaction and retention



Design system

- Increased engineering efficiency
- Increased UI consistency
- Increased product quality
- Increased customer satisfaction and retention



Shared research repository

- A searchable repository of all research findings available to the entire organization
- Increased customer understanding across all internal teams results in increased ability to meet customer needs, increasing customer satisfaction and retention

Goals, performance evaluations & meetings

Goal setting

June and December. We documented our [SMART](#) goals at the beginning of each period and compared our results at the end. Professional development goals were required.

Performance evaluations

June and December with continuous feedback in weekly one-on-one meetings. Self assessment followed by manager feedback and discussion.

Recurring design team meetings

Weekly one-on-ones at the discretion of the team member. No agenda. It was their time to spend with me as they wanted it.

Weekly team meetings ([EOS Traction L10 style](#)) to identify and solve issues, share information, and update on project progress (documented in Trello)

Design review meeting placeholder for team members to sign up for presenting work in progress and obtaining feedback

Thank you

for your time and consideration