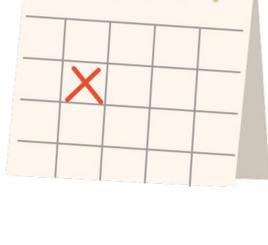


Case Study

# Workflow Optimization

Standardizing our workflow led to increased satisfaction, improved visibility, and enhanced efficiency across the board.



## Problem Statement

As a new team, we faced challenges due to the lack of a structured workflow and clearly defined roles. Team members were operating inconsistently, leading to confusion, inefficiencies, and missed opportunities for collaboration. New hires found it difficult to navigate the environment, as there was little documentation to guide them. Without clear accountability, tasks were often overlooked or incorrectly assumed to be someone else's responsibility, creating friction and delays in deliverables.

## Getting Started

To address these issues, I began by conducting **stakeholder interviews** to understand the team's existing knowledge, needs, and pain points. These discussions helped narrow the scope of the research and provided valuable data, such as current RACI documents, project roadmaps, and timelines.

With this foundation, I organized a **workflow design workshop**, engaging all six team members to ensure that every voice was heard. Given the team's small size, we could take a collaborative approach while still reaching consensus efficiently.

## Target Audience

- Current Team
- New Hires
- Internal Partners
- Business Partners



## The Approach

I led two one-hour workshops over two weeks, leveraging Miro as our collaboration platform.

1. Brainstorm Tasks
2. Process Mapping
3. Consensus Building
4. Visual Design

### 1. Overview

**The Ask**

A business partner approaches our team to create a single status dashboard with an Executive Summary and key drill-down views. They have already completed the initial form in collaboration with TPO who is assigned to the work.

We are kicking off the design phase with the team and need to surface the relevant steps in the process. To start we can focus on the page one and stage 1 supplemental pages in a Phase 2.

**Key goals and needs**

- Document steps in the process
- Flag blockers and dependencies
- Review critical areas on "next to next"

**Key pain and constraints**

- Each designer/TPOSP has a different style and approach
- Needs of the project can vary with broad or narrow scope
- Resources differ for each project

**Content**

- We will be leveraging this to create a standardized work flow for UI Review Design.

**Key activities and tasks**

1. Document all tasks in the workflow
2. Define steps in more detail including a. Document and share results, team, outputs, bring, and exceptions
3. Eng blockers and critical steps

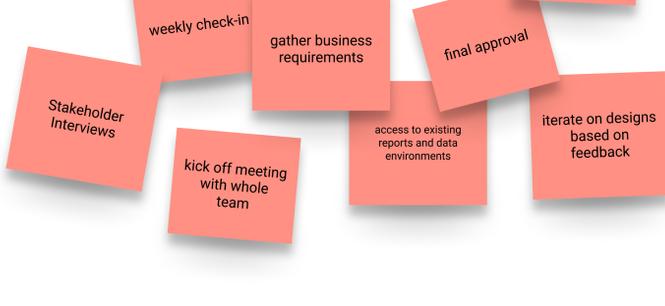
### 2. Outline Steps (1 Noted Step)

3. Define Sequential Order

4. Group by Theme (can be more or less than listed below)

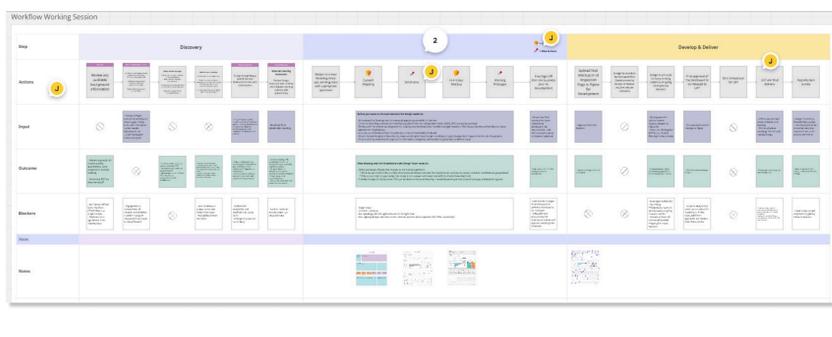
## Brainstorm Tasks

The team began by listing **every step** involved in the workflow, without worrying about the order or blockers.



## Process Mapping

We organized tasks into **sequential order**, uncovering **inefficiencies, blockers, and inconsistencies**. Team members shared insights, learning from each other's approaches and identifying missed details.

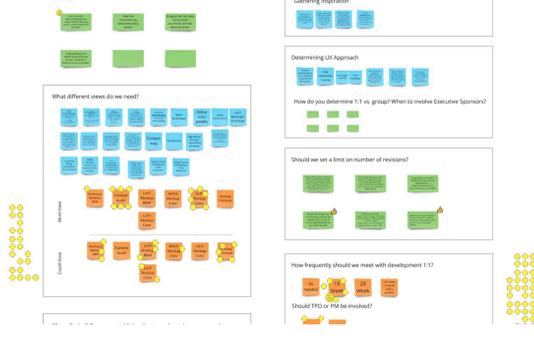


## Key Insight Derived

The team embraced this **collaborative** process, which was a welcome change from their usual silo'd approach to individual projects. It provided an **opportunity** to learn from one another, with team members identifying **best practices** to incorporate into their own workflows. Additionally, the experience fostered **empathy** within the group, as they gained a deeper understanding of the varying levels of support from business partners, developers, and product teams.

## Consensus Building

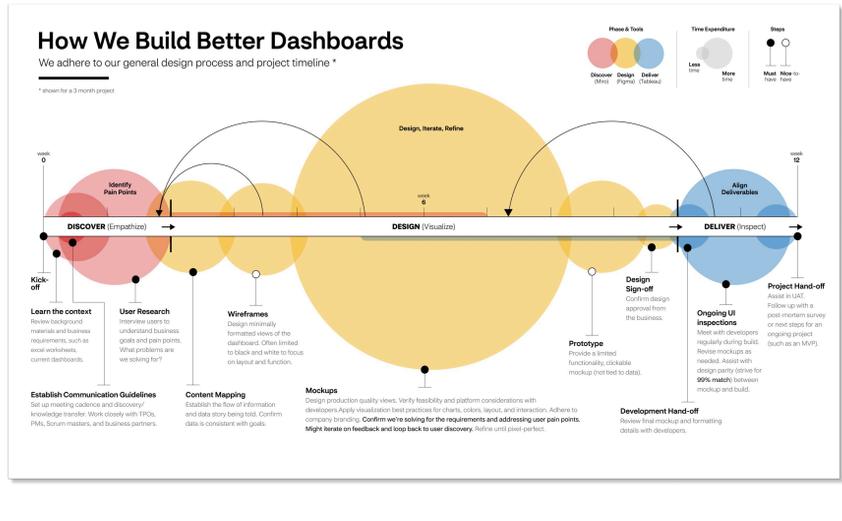
We used **dot voting** to resolve conflicting workflows and align on key points, such as task ownership, timelines, and tools. Each step was further defined with action items, inputs, outputs, and blockers.



## Visual Design

After finalizing the workflow, we sought feedback from external stakeholders and made iterative adjustments. To simplify the internal process for external stakeholders, a designer created a **one-page visual** summarizing our workflow. This visual proved instrumental in onboarding new business partners and showcasing our team's **value**.

Design Credit: K. Bevis



## Outcomes

### Efficiency

The team spends less time discussing what needs to be done and **more time executing**. It has been shared with other product teams, **streamlining** cross-team collaboration

### Clarity

Team members have a clearer understanding of their responsibilities, boosting **confidence** and **accountability**. It has become a powerful tool in **securing new projects** and establishing our team's **credibility**.

### Satisfaction

Our annual internal survey revealed marked **role clarity** and **team satisfaction**.



Design workflows are the **backbone** of an **efficient, collaborative, and productive team**. A well-structured workflow **clarifies tasks, dependencies, and deadlines**, ensuring consistency and accountability while reducing confusion.

thank you.

