

Applying user-centered design and engaging stakeholders throughout transitions



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Housekeeping

Please Silence Cell Phones

Resources Available After the Conference

Water/Refreshments

Design services around the people who use them

Understand employee needs, test the process, and improve adoption.

4x

**more likely to achieve
change success**

Organizations that regularly adapt change plans based on employee responses.

Gartner, March 2026 | July 2025 survey of 313 senior-level respondents

Employee Journeys Reveal Process and Design Gaps

Illustrative example: employee onboarding.

Start with what people do today, before choosing a solution.

Ask about a recent task

- “Show me the last time you completed this process.”
- Where did you pause, repeat work, or need help?

Trace the full journey

- Map steps, systems, approvals, and handoffs.
- Note delays, workarounds, and exceptions.

Look for patterns

- Repeat contacts, rework, or delays
- Abandoned or redirected requests
- Unclear ownership or status
- Access gaps by role or location

Engage Stakeholders Throughout the Transition

Bring employees, decision makers, and support partners in at the points where their input can change the design.

Involve the right people

- Map who submits, approves, fulfills, and supports the service.
- Include frontline staff and decision makers.
- Bring in privacy, accessibility, labor, or policy partners when needed.

Engage throughout the change

- Bring stakeholders into backlog refinement and sprint reviews.
- Review working increments at each checkpoints.
- Record decisions, owners, and follow-up actions.
- Show stakeholders how their input shaped the change.

Build a usable process

- Clarify roles, entry points, approvals, and handoffs.
- Turn needs into user stories and acceptance criteria.
- Test normal requests and exceptions.
- Update guidance and knowledge articles before each launch/iteration.

Use Short Cycles to Learn Before Scaling

User-centered design clarifies what works for employees. Agile helps teams deliver and improve it in small steps.

BACKLOG

Prioritize user stories by user value, service risk, and effort.

SPRINT PLAN

Select a small change with clear acceptance criteria.

SPRINT REVIEW

Demonstrate the increment and test real tasks, exceptions, and handoffs with users.

NEXT ITERATION

Use feedback to refine the backlog, workflow, and guidance.

Test with the people who do the work, approve it, and support it.

Agile Releases and Service Improvement

Release usable increments, prepare support, and keep learning from stakeholder engagement.

Prepare each release

- Confirm service ownership, support routes, and escalation paths.
- Update role-based guidance and knowledge before release.
- Explain what changed and where users can get help.

Review and adapt

- After release, track task success, time, and errors.
- Review repeat contacts, rework, access needs, and confidence.
- Use feedback and service data to reprioritize the backlog.

Carry lessons into the next release.

Modernization succeeds when stakeholders shape it

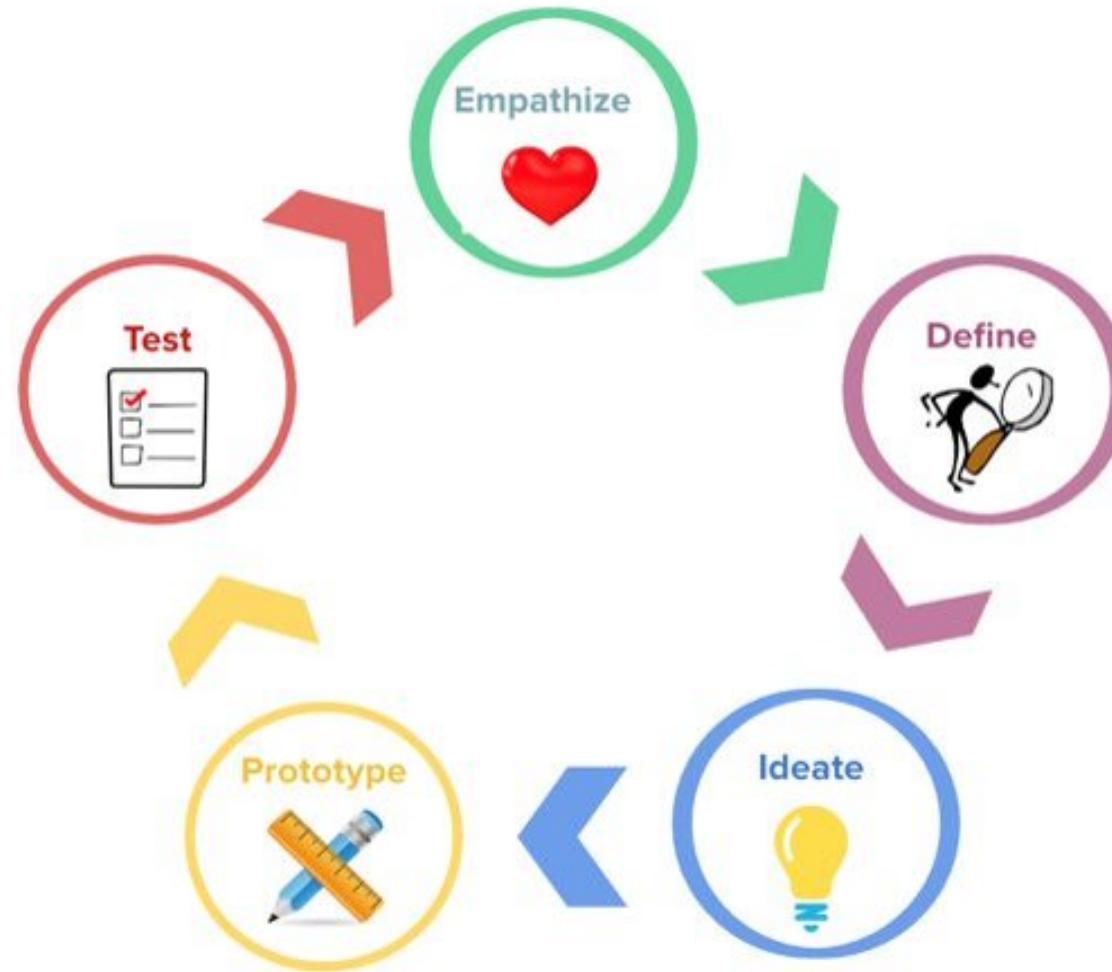
Keep stakeholders involved from discovery through design, testing, launch, and ongoing improvement.

Listen and act on their feedback at every stage. When people help shape the change, the result is more useful, more trusted, and more likely to be sustainable.

Human-Centered Design in Action

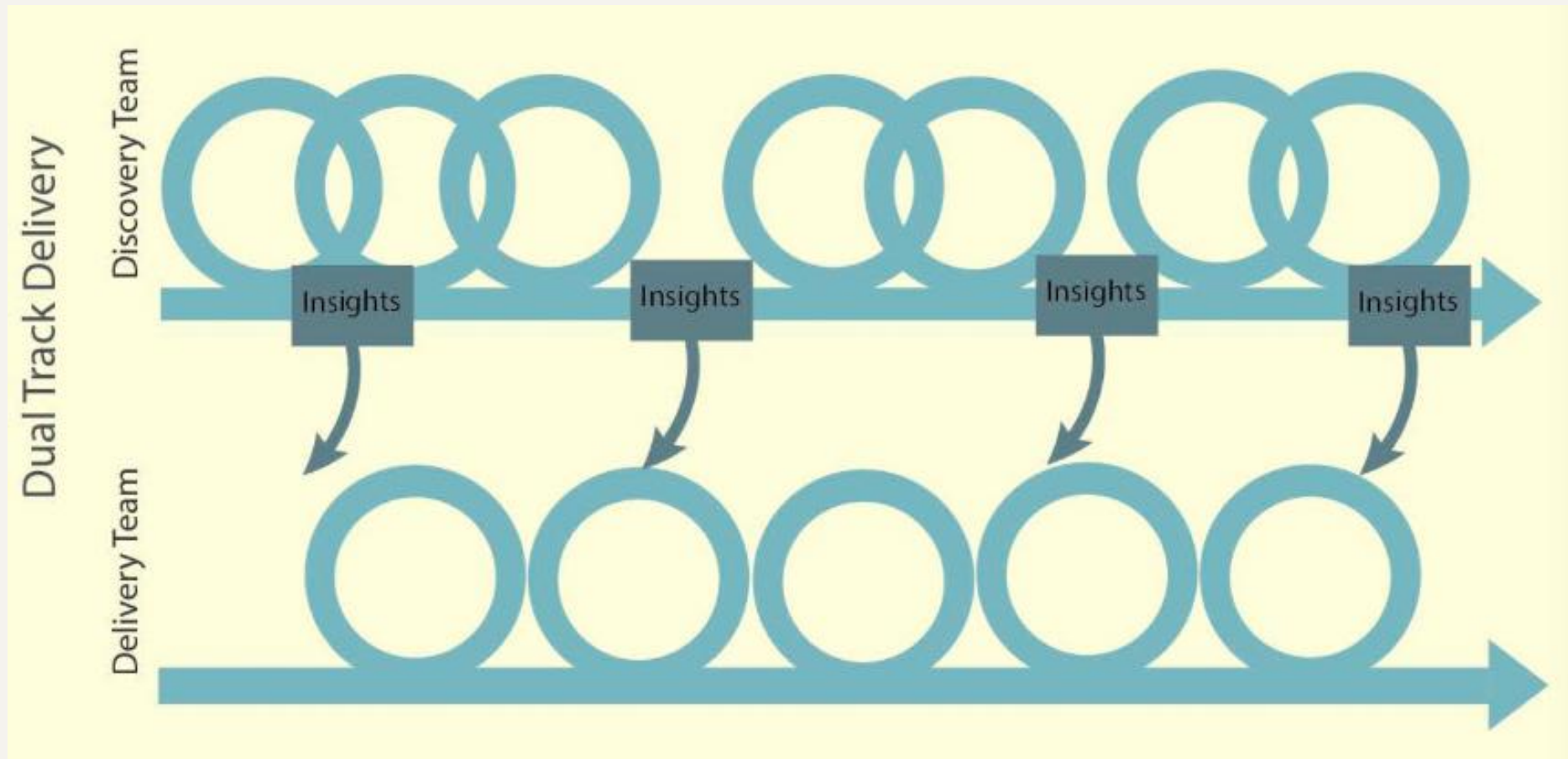


Human-Centered Design



Human-Centered Design is Agile!

It's not "big design up front" - UX research and design is built into each agile sprint



Use Case: Office of Tax Appeals Launch

Organizational Challenge: Launch a **new office** from **1 FTE** to **80** in **2 months**

Technology Challenge: Build a case management system to support legacy data stores and new workflows in 10 weeks and less than 500,000k

We Did It! - 2 weeks early and 200k UNDER Budget

How?

EMPATHIZE

Understand needs, vision, goals, strategy of the Chief Council

DEFINE

Gathered AS-IS view of the process; gather market research

IDEATE

Revise into TO-BE map; write tasks as functional, informational, and behavioral items;

PROTOTYPE

Tasks as Jobs to be Done; build "complexity matrix";

TEST

Demos; Scoring; Selection – demo stories becomes initial backlog

Methods You Can Try!



Method: Use Metrics to Sustain Progress

From Jared Spool

Choose metrics that help keep the team on the path to improvements

UX Success Metrics

- UX debt is technical debt
- Outcome of UX must match the mission goals

UX Progress Metrics

- Milestones towards goals
- i.e. number of pages made accessible

UX Problem Value Metrics

- What is the cost of the problem versus the cost of the solution?

Method: Story Harvesting

A method to collect multiple experiences from a single interaction

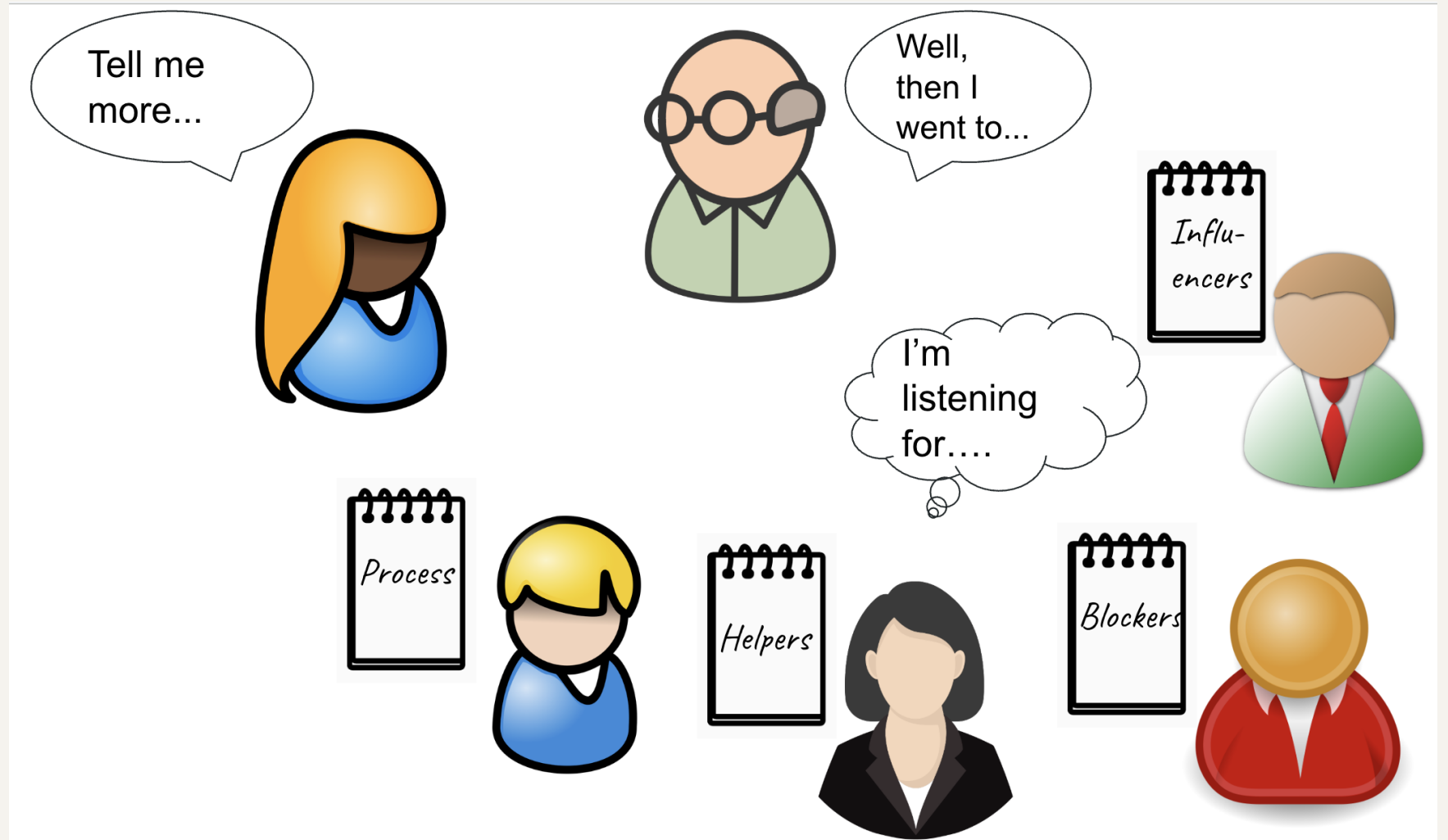
1 session

1 storyteller, 1 Interviewer,
and 4-5 Note Takers

Listening for themes:

- Narrative
- Process
- Pivotal Moments
- Principles
- Synchronicity and Magic
- Barriers
- Questions
- Relationships

Story Harvesting



Method: Journey Mapping



A walk thru of a person's lived experience

Journey Mapping Swim Lanes

Process Steps

Pain Points

Opportunities

Extended Methods into Next Steps

Use the insights from this process to drive user stories and areas for deeper inquiry

Journey map steps become process flows

- Happy path
- Error/exception path
- Mapping human, technology, and data intersections in each step of the path

Story Harvesting

- Trades statistical significance for depth of insights
- You can't interview millions of people, but you can understand a key persona in detail which will help serve similar cases