

# Adopting Design Thinking to **Redefine Learning**

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- Small Business and Self-Employed Customer Success

# Overview

- **Intuit and Core Capabilities**
- **User Experience Design**
- **ISD - A Missing Element, LXD**
- **Learner-Driven Innovation**
- **Application of Design Thinking**

# Who we serve:

**Consumers**



**Small Businesses**



**Self-Employed**



**intuit.**

 turbo**tax**

 quick**books**

 pro**connect**

 **mint**



# Powering Prosperity Around the World

# Who we are:

1983

Founded



1993

IPO



7,900

Employees



24

Locations



\$4.7B

Revenue



42M

Customers



# Recognized as one of the world's leading companies:

## MOST ADMIRED: SOFTWARE INDUSTRY

14 Years in a Row



## MOST INNOVATIVE COMPANIES

intuit.

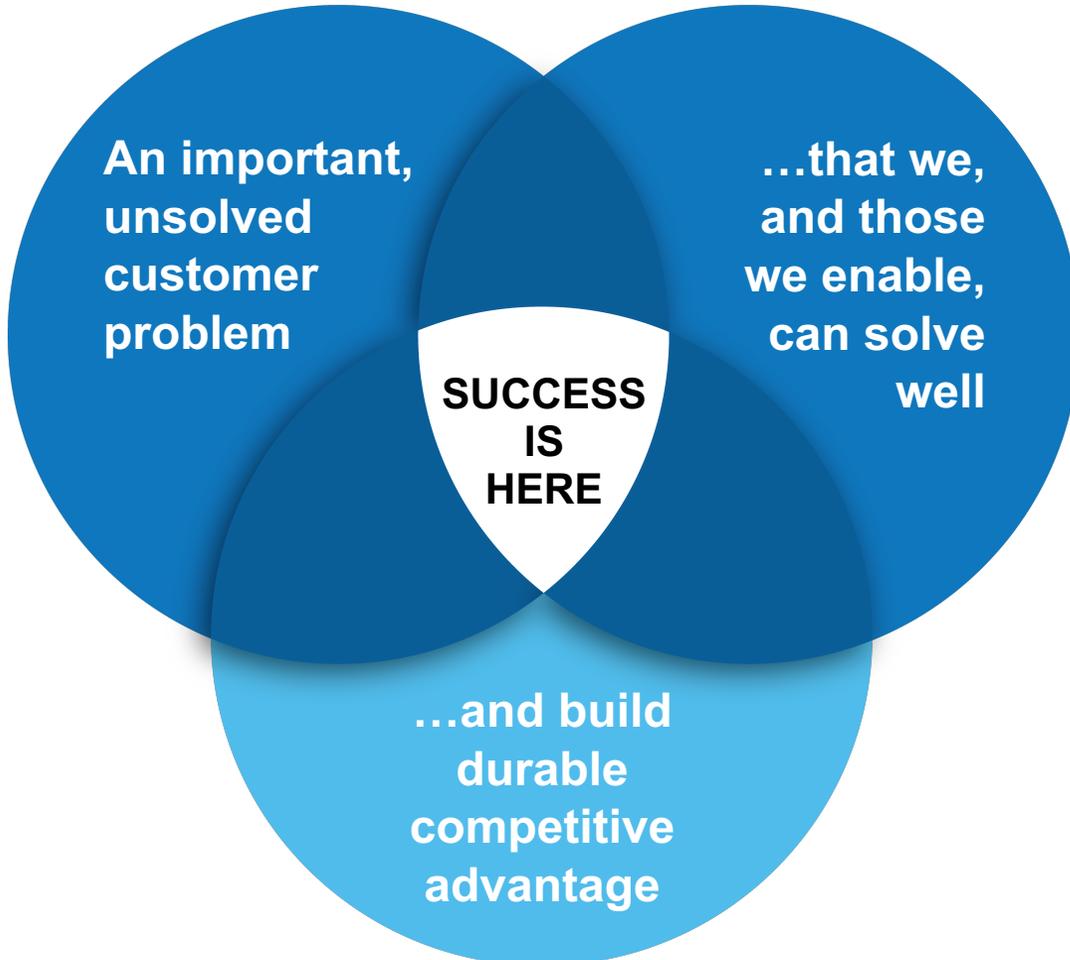


## FORTUNE 100 BEST COMPANIES TO WORK FOR - 16 Years in a Row

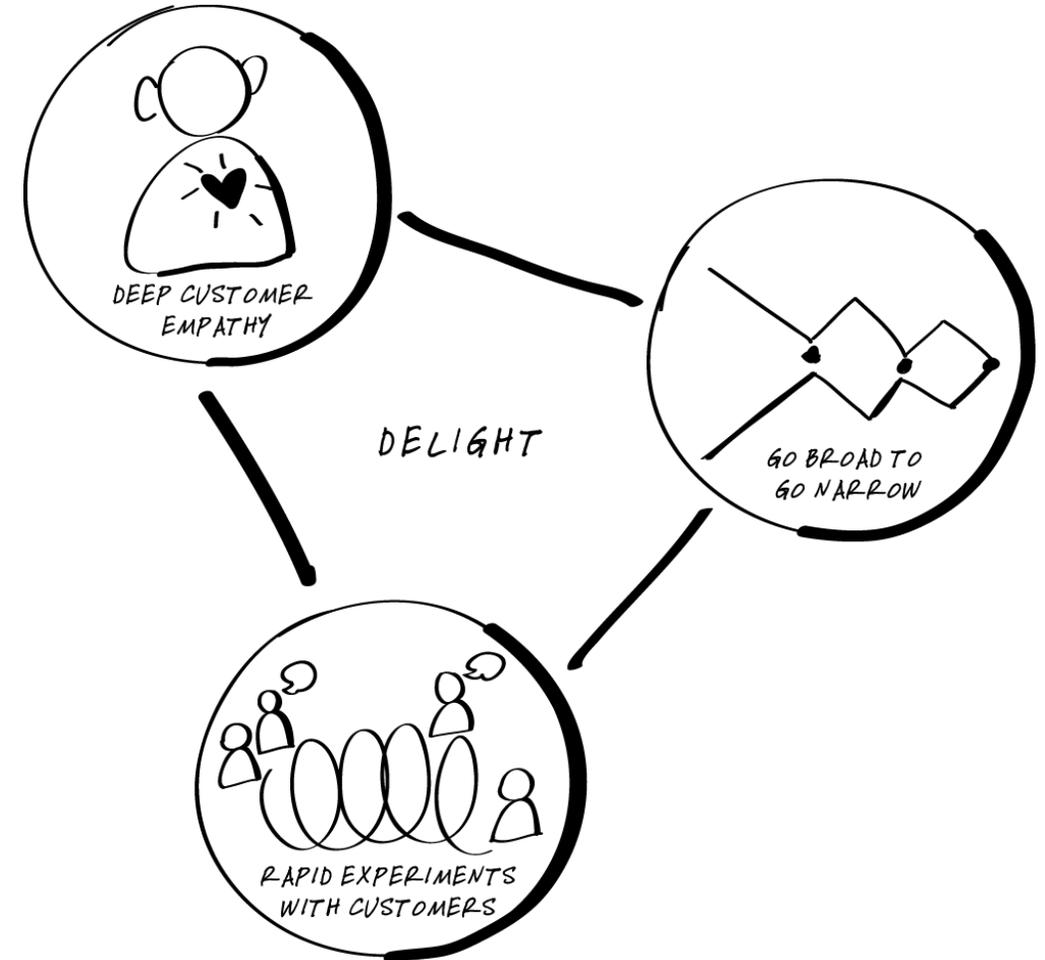


# Core capabilities:

## Customer Driven Innovation



## Design for Delight



# Experience Design

**User experience design** (UXD) is the process of enhancing customer satisfaction and loyalty by improving the usability, ease of use, and pleasure provided in the interaction between the customer and the product.

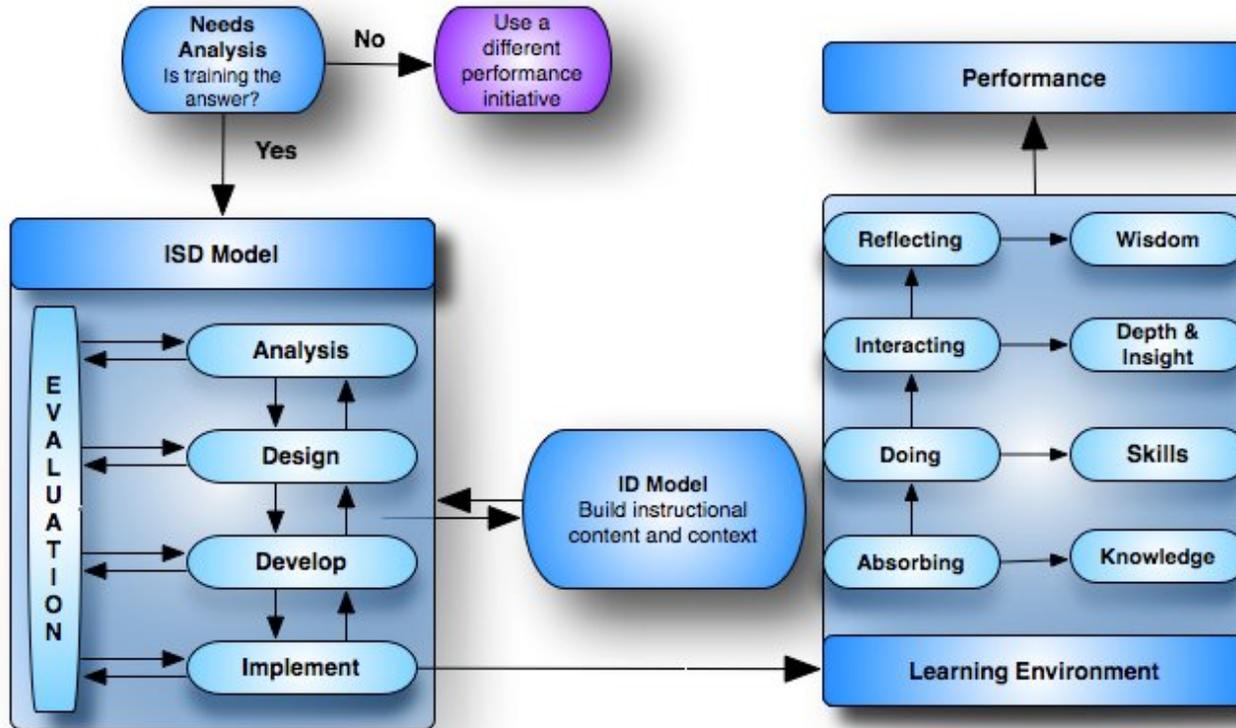


**Learning experience design** (LXD) is the process of enhancing performance by improving the usability, ease of use, and pleasure provided in the interaction between the learner and the curriculum.

# Benefits of Adopting Design Thinking for Learning

- The Learner/Customer is at the focus of all decisions
- Ability to get closer to ideal state faster
- Dovetailing ISD (the what) with LXD (the how)
- Proactively identifying pain and opportunities

# Traditional Instructional Design Model



**The "What"**



## LXD - Learning Experience Design

- **Guiding Principles**
- **Design Framework**
- **End-to-End (E2E)**

**The "How"**

# LXD Guiding Principles

## Operating Principles

- Change management and stakeholder partnership is paramount
- Engage work streams and customers in Learning Experience Design
- Think Ecosystem – end-to-end
- Think BIG (don't stop short of AWESOME!)

## Learning Environment

- Skills Observed/Measured
- Diligent Practice
- Multi-Modal
- Mentored / Social
- The Right Delivery Methods
- Gamification
- Performing / Hands-on Fast
- Criterion-Referenced
- MILT Delivery (deliver as designed)
- Performance-based Nesting
- Individualized learning plans
- Competency Assessments and Plans

## Design Principles

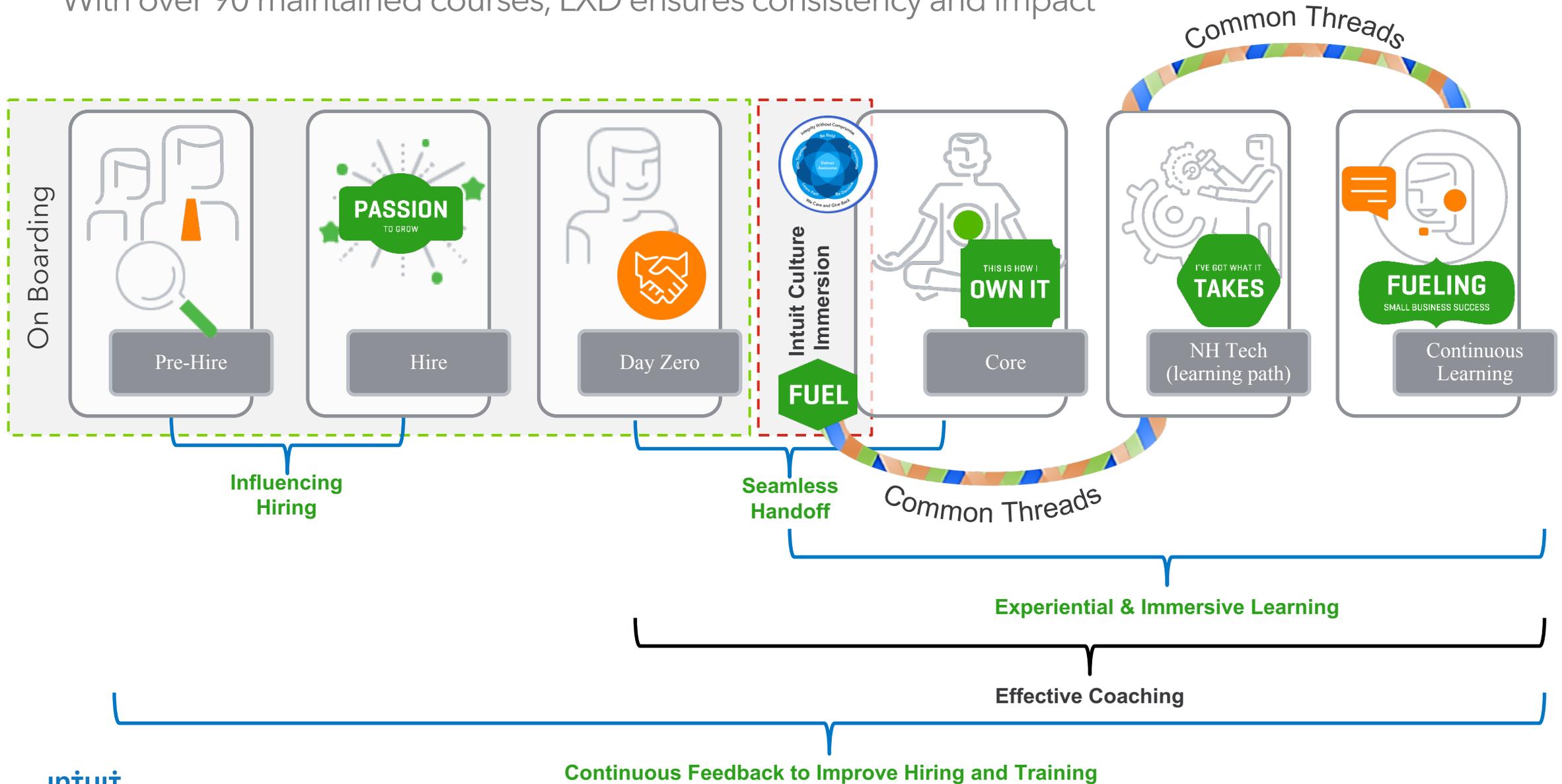
- Re-use (micro, right size)
- Think eco-system
- Verifiable results
- Data-driven decisions
- Learner accountability
- Speed to proficiency (don't hold learner hostage, can test out)
- Performance-based
- Learner-centric
- Lecture as a Last Resort (LLR)
- Immersive learner in Real World scenarios
- Customer first, business & product second
- Design for translation, accessibility
- Designed with portability in mind (on-demand, accessible anywhere)
- Common Threads (ever-present)

# LXD Design Framework

Outcome	Designer self-assessment	Guidance for the Designer	What the Learner would say...	
			Most effective	Least effective
Immersive/ Hands on	How well do we validate the learner proficiency. Do the <b>practice and skill checks</b> reflect the “real world” job of an agent?	<ul style="list-style-type: none"> <li>• Performance-based</li> <li>• Practice is close to the work</li> <li>• Enable speed to proficiency (don’t hold learner hostage)</li> <li>• Verifiable results</li> </ul>	<p><b>My practice or skill check is in a live environ (prod or sim)</b></p> <p><b>I can demonstrate mastery early or test out</b></p>	<p><b>My practice or skill check is in screen shots or via text</b></p> <p><b>I’m forced into content that I don’t need or isn’t training</b></p>
Learner-focused	Does the <b>learning approach</b> liberate the learner to accelerate their own learning through discovery?	<ul style="list-style-type: none"> <li>• Learner accountability. Is learner-centric.</li> <li>• Active vs Passive.</li> <li>• Lecture as a last resort.</li> <li>• Written at appropriate level for audience</li> </ul>	<p><b>My learning experience is collaborative or interdependent with others</b></p>	<p><b>My learning experience is a linear, restrictive path that is facilitator-focused (“sage on the stage”)</b></p>
Customer-back	Do the <b>learning activities</b> give the agent an immersive experience designed to promote deeper empathy for the customer? (customer life cycle; what are they trying to accomplish?)	<ul style="list-style-type: none"> <li>• Customer first, business/product second.</li> <li>• Feel the same experiences as the customer</li> <li>• Customer context.</li> <li>• <b>Immersive experience - real world</b></li> </ul>	<p><b>I experience the customer situation and can feel the customer benefit</b></p>	<p><b>There’s no mention of customer benefit in this learning. The focus is on product “how to”</b></p>
Right-sized	Does the <b>amount of content</b> align with the minimum viable level of information required for a NH to perform effectively?	<ul style="list-style-type: none"> <li>• Lean content: Why can’t they practice or perform now?</li> <li>• shorter intervals between time-on-floor opportunities</li> <li>• Light retention/memory load</li> </ul>	<p><b>I get to perform after receiving minimal content</b></p> <p><b>The content leverages tools accessible to me on the job</b></p>	<p><b>I must wait before I can apply</b></p> <p><b>I will have to remember everything back on the job!</b></p>
Agile	Is the content <b>reusable</b> beyond new-hire at multiple points of need, throughout the E2E learning journey?	<ul style="list-style-type: none"> <li>• Geo agnostic</li> <li>• Accessible on-demand for ongoing development and coaching</li> <li>• Assumes micro learning (&lt;10 mins) unless meets criteria for mid-size, or full</li> <li>• Enable easy translation (Vocab selection)</li> </ul>	<p><b>Distinct performance objectives are built as distinct modules, to be easily updated</b></p> <p><b>The module is designed for re-use in other geos or to be delivered at the Point-of-Need</b></p>	<p><b>The training is too bulky and broad in its construction to revisit later on</b></p> <p><b>The module is narrowly branded for one area unnecessarily</b></p>

# E2E Learning Experience Design (LXD)

With over 90 maintained courses, LXD ensures consistency and impact



# E2E Learning Experience Design (LXD)

Learning experience is much broader than New Hire training



Intuit and Partner alignment on culture, values, and environment hiring profile, hiring practices,



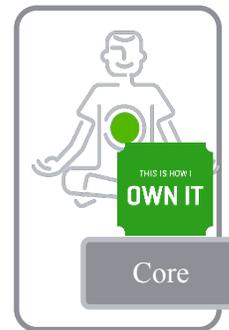
Determine fit for Intuit's Customer Success Experience and Values



Seamless Experience between partner and Intuit cultures to begin learning and setting the stage for what is to come



**Experiences the Small Business Environment - Learner feels part of the Intuit Team, and is Fueled up to empathize with customers, take ownership, be positive, and confident**



Provide agents with a clear set of expectations, a training roadmap and relationships with peers, SMEs, Coach, facilitator, etc.



Apply concepts and skills to master real-life scenarios for customer contacts for their product



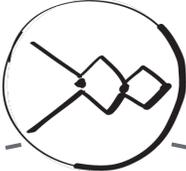
Participate in experiential challenges as part of continuous growth

# Customer-Driven Innovation

**GO BROAD** \ **GO NARROW**  
 Get Many Ideas \ Get Uncomfortably Narrow

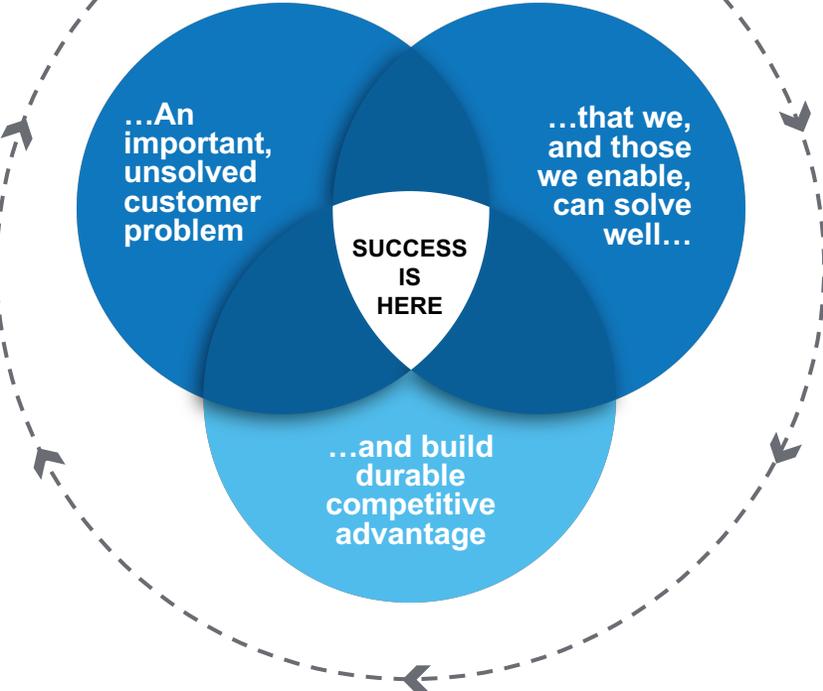
**DEEP CUSTOMER EMPATHY**

Observe Customers  
 Savor Surprises and  
 Understand Why



**RAPID EXPERIMENTS WITH CUSTOMERS**

Define Leap of Faith Assumptions  
 Be Fast and Frugal  
 Learn and Decide



**IDEAL STATE**  
 What does "truly awesome" look like  
 for this customer benefit



**CUSTOMER BENEFITS**  
 The improvement in the customer's life in what matters most to customers when choosing this product



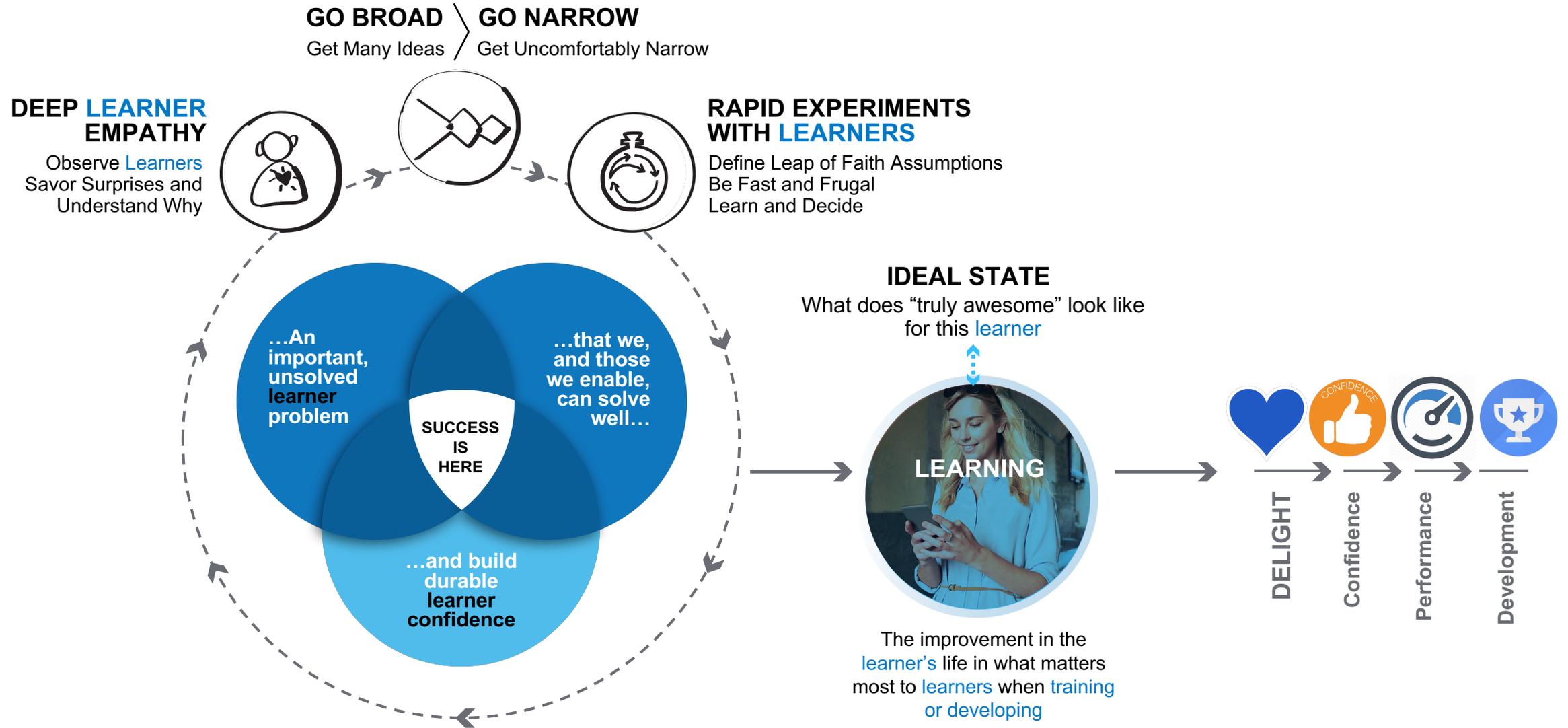
DELIGHT

Word of Mouth

Customers

Revenue

# Learner-Driven Innovation



# Learning Experience Design (LXD) - Learners are your Customers

- **Build Deep Empathy for Learners**
  - *“Follow-Me-Homes”* - observations; involve learners in discovery and design
- **Identify Learner Pain and Problems**
  - Use data to gain insights and zero in; talk to your learning “promoters AND detractors”
- **Develop Leap of Faith Assumptions**
  - Use to “break the mold” of traditional ISD - enhance effectiveness of ISD
- **Use Rapid Prototyping to Test Assumptions**
  - Be scrappy and frugal; Fail fast; Savor the surprises

# Why do follow-me-homes?

- Motivation
- Shared understanding
- Insights

## Which results in:

- Alignment
- Speed
- Awesome, winning products



# Application

**Let's take a look at two examples where Design Thinking was adopted to redefine learning**

1. Solving customer pain through experiential learning
2. Redefining the learner user experience and interface

# LXD Pain: Small Business Immersion - Problem

Providing a consistent care experience for all customers

## PAIN

- 54% of escalations driven by the customer's dissatisfaction with their care experience
- Customers perceived 78% of these care escalations as 'agent caused'
- "...I get no empathy...I don't think they understand what it is like to be small business owner."

## PROBLEM

I am a new agent working in Small Business Customer Success and I'm trying to help customers in a caring manner, but I'm not sure I get them because I'm not sure what it's like to be a small business owner. And that makes me feel disconnected and worried that I cannot do this job.

## SOLUTION

Provide a fully immersive learning experience that has the new agent experiencing what it means to run a small business, be self-employed, and own an accountant practice that builds empathy and care for our customers.

- Understand customer issues or concerns and communicate them in a manner that eases their mind – agent operates with confidence
- Care about them and own solving their problems, acting as their advocates, wildly exceeding their expectations

## LOFA

- Exposing and Immersing our experts to the Small Business environment will build deep customer empathy in order to care for and delight our customers

# LXD Pain: Small Business Immersion - Solution

## Small Business Customer Safari



"I realized that owning a business is not easy, and that they are constantly evolving and seeking new solutions to either make the business grow or function to its full potential."

"I now realize how much my job matters and the ability to help make a difference for these business owners to get back to what they love – running their business"

## RYOB – Run Your Own Business



"Accounting terms are not longer 'jargon' – I understand the choices, implications, and stress of running your own business"

"This totally changed how I connect with our Small Business customers – I now 'get it' and truly have empathy and am helping them in a totally different way"

# LXD Pain: Learning Environment - Problem

## Discovering learner pain

- “...the e-learning felt about as enjoyable as sawing off my own leg...”
- “...I don’t feel confident knowing where to go to find the answers I need, when I need them...”
- “...facilitator is great, but I want to get moving and get my hands dirty NOW – let me explore...”

### Problem Statement

**I am an** SBSEG Tier 1, Care Agent, in my first year on the job  
**I am trying to** learn new things to do my job well  
**but** I can’t learn in the way I like to learn best  
**because** the learning experience is not tailored to me  
**which** make me feel not ready, disconnected, alone, and frustrated.

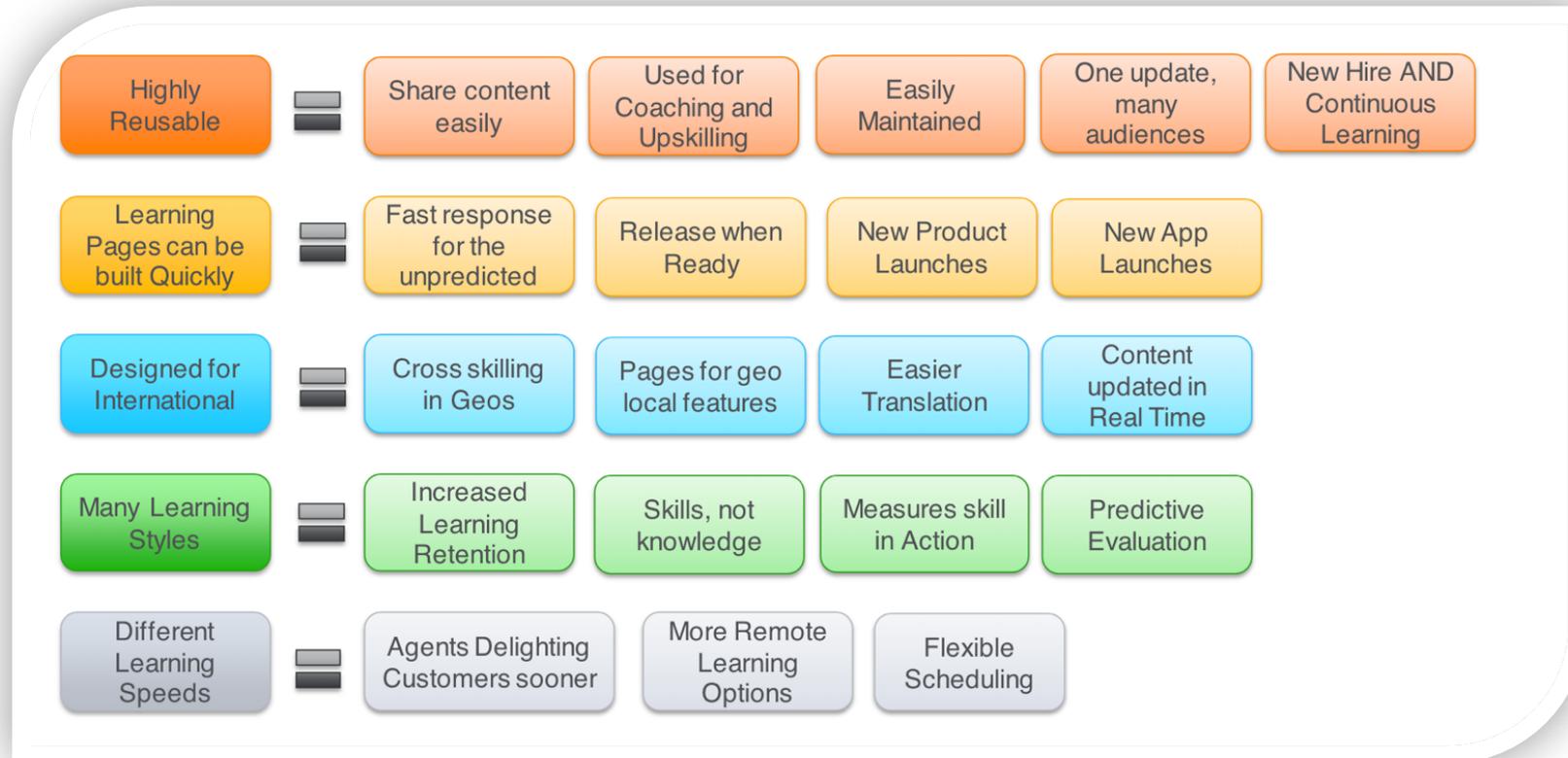


### Ideal State:

*“I Have everything that I need to learn new things the way I prefer to learn, so I can support my Customer.”*

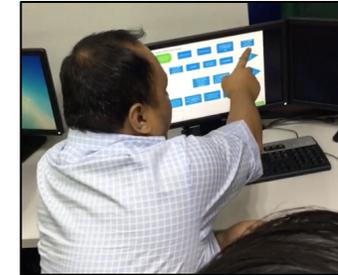
# LXD Pain: Learning Environment - Prototyping

## Assumed Learning Prototype Benefits



# LXD Pain: Learning Environment

Prototyping – gain insights; persevere or pivot; quick and frugal; learn and iterate



**Learning Guide:**  
Here is the recommended path to learn the content for this topic. Each bolded word is a clickable link on the Home Page.

1. Read the **Overview**.
2. Review **Why do I need to know this**.
3. Go over the **Objective**.
4. Watch the **Show Me Video**.
5. Review the **Customer Scenarios**.
6. Try the **Simulation**.
7. Utilize the **Step-by-Step** workflows to complete the **Practice Activities**.
8. Follow the **Step-by-Step** workflows to complete the **Skill Check**.
9. Share your Skill Check results with your facilitator, SME or manager.

[Home](#)

intuit.

## Create Purchase Order

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INTRODUCTION & BACKGROUND

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[Learning Guide](#)

[Overview](#)

[Why do I need to know this?](#)

[Objective](#)

[Step-by-Step](#)

[KB Article\(s\)](#)

[FAQs](#)

[Related Tasks](#)

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APPLICATION

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[Customer Scenarios](#)

[Practice Activities](#)

[Show Me \(video\)](#)

[Try it \(simulation\)](#)

[Listen to Calls](#)

[Score a Call](#)

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EXPERT HELP & EVALUATION

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[Test Your Knowledge](#)

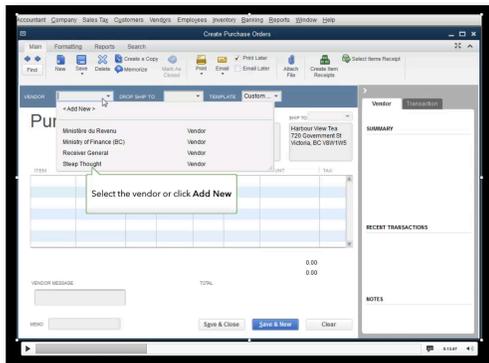
[Attend a Training Session](#)

[Tips & Tricks \(video\)](#)

[Chat with a SME](#)

[Peer Discussion](#)

[Give Feedback](#)



**Listen to a call**

Click to listen to a customer call on the this topic.

Call #1: Create a purchase order to track an inventory item.

[Practice scoring Call #1.](#)

[Quality Check: Compare your score to the quality experts.](#)

Call #2: Create a purchase order for a drop ship item.

[Practice scoring Call #2.](#)

[Quality Check: Compare your score to the quality experts.](#)

**Ask an Expert**

Click a name below to chat with an expert on this topic:

Name: Jane Smith  
Email: Jane\_Smith007@intuit.com  
Role: Subject Matter Expert  
Location: Edmonton, AB  
Schedule: 7:00 AM - 4:00 PM Tuesday-Saturday

Name: George Glass  
Email: George\_Glass123@intuit.com  
Role: Supportability  
Location: Tucson, AZ  
Schedule: 9:00 AM - 5:00 PM ET Monday-Friday

# Summary & Results

+15%

FY17 tNPS improvement  
for New Hires

300%

Learning Curve reduction  
90d (fy15) to  $\leq$ 30d (fy17)

- Increased learner performance
- Increased learner Net Promoter Score
- Increased speed to proficiency

***Building a culture of Deep Customer/Learner Empathy***