Future Sight in Design:

Using process and context to solve the right problems

Cheryl Platz

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@funnygodmother   @theCherylPlatz
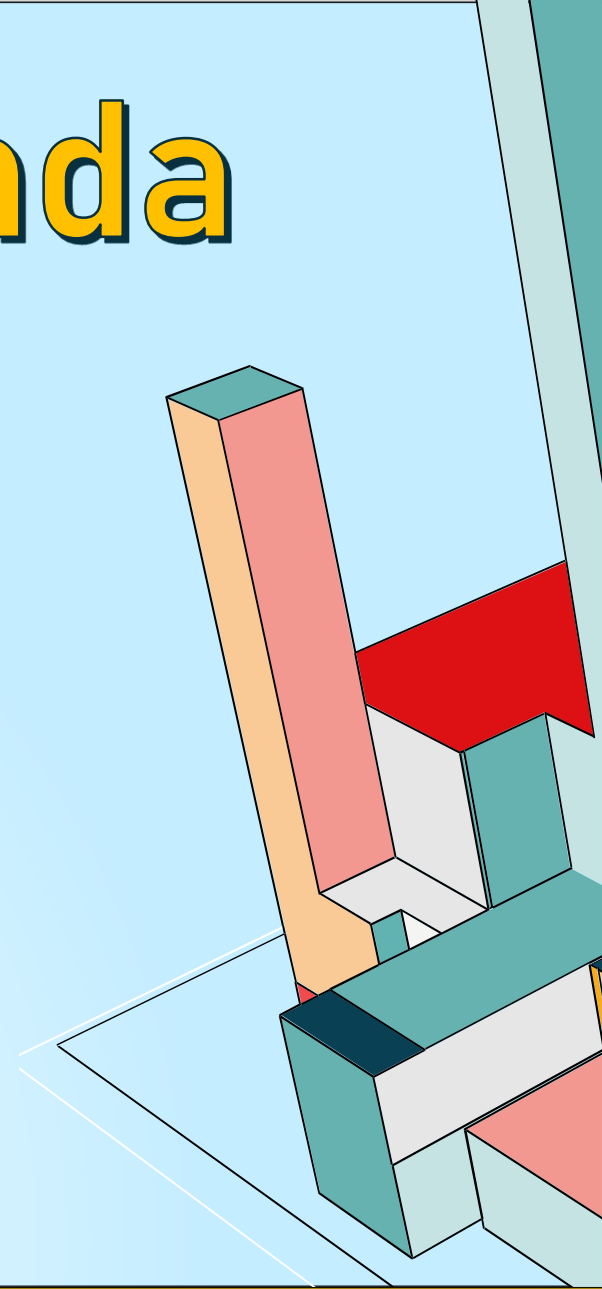
Looking ahead: Agenda
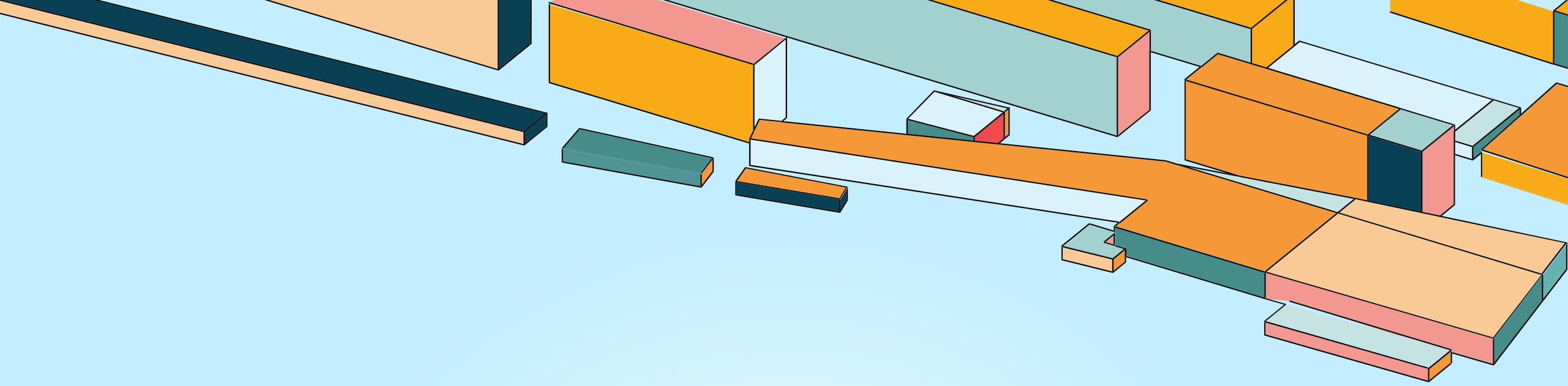
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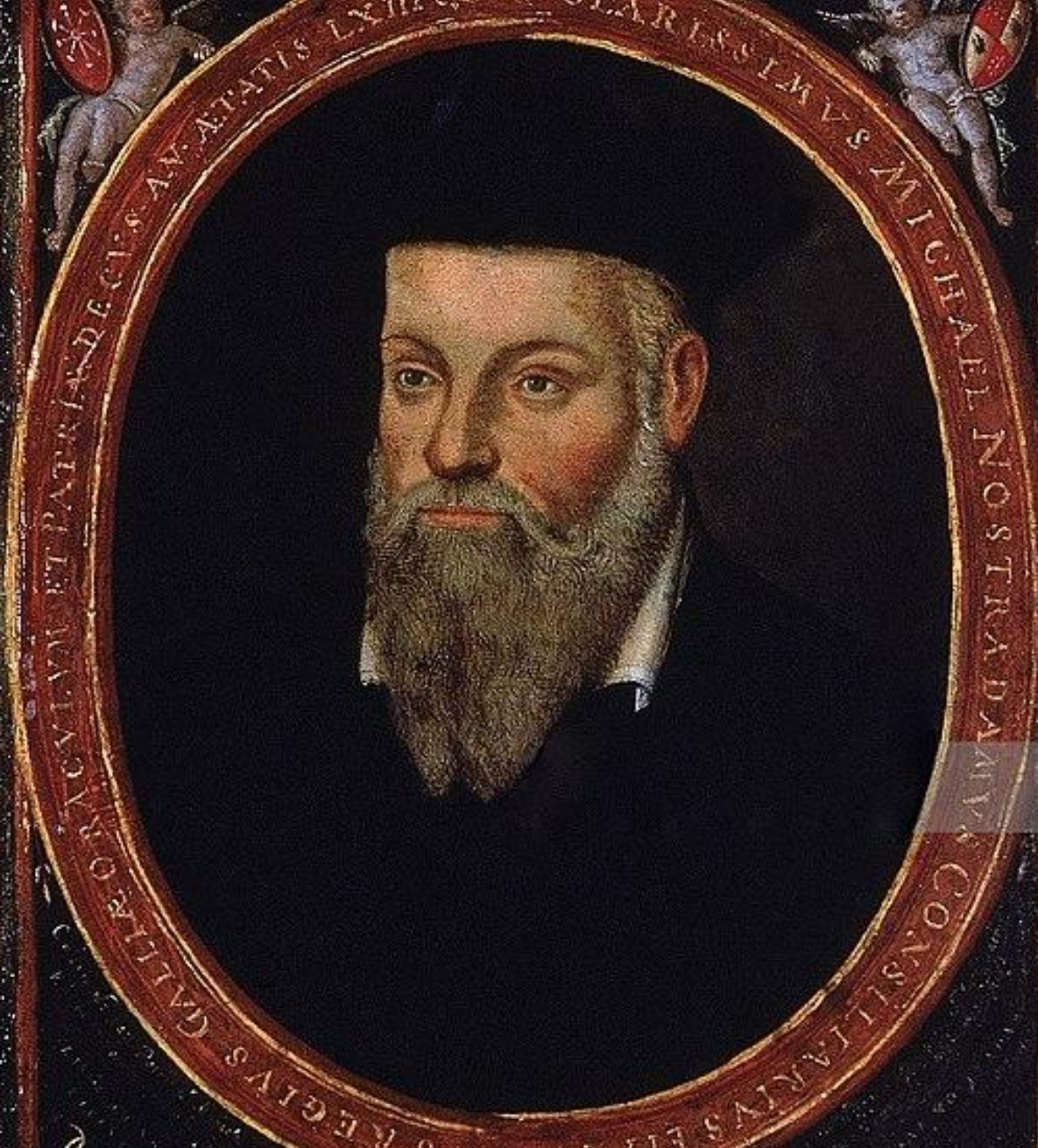
Problem Statement:
FINDING SPACE FOR DESIGN TO IMPACT SYSTEMS BEYOND VISUALS AT SCALE

HOW CAN WE DESIGN AT SPEED SAFELY?

CAN DESIGNERS REALLY "SLOW DOWN TO SPEED UP"?

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WHY DOES IT SEEM LIKE SOME DESIGNERS CAN PREDICT THE FUTURE?

The Apples of the world – how can they release products time and time again and get it right?

And if you can see the future, how can you convince others you're right?

I CONVINCED THE **GATES FOUNDATION** TO UPGRADE THEIR GLOBAL TELECONFERENCING SYSTEMS AND SERVICE DESIGN...

WHICH LAUNCHED FULLY **JUST 2 WEEKS BEFORE THE COVID-19 CLOSURES.**

BMGF IT: Teams Room Upgrade Program

Teams Meetings are here!
Find out how switching to Teams meetings can help your daily work.

What's better about Teams Meetings?

New, more reliable dial-in participant experience
Better performance on low-bandwidth connections
Smoother, more immersive video sharing
Record any meeting and share any app

At the airport? On the bus? No problem. Install the Teams app on your favorite mobile device and participate fully in meetings while on the move. You can even share your screen!

Try the all-new mobile app

External participants rejoice!

Non-foundation employees face fewer steps to join your meeting. Connecting to a Teams Meeting with a laptop or desktop browser requires no browser add-ins. On mobile, just install the Teams app.

Q: **When should I switch to Teams Meetings?**

Try Teams now for any fully remote or
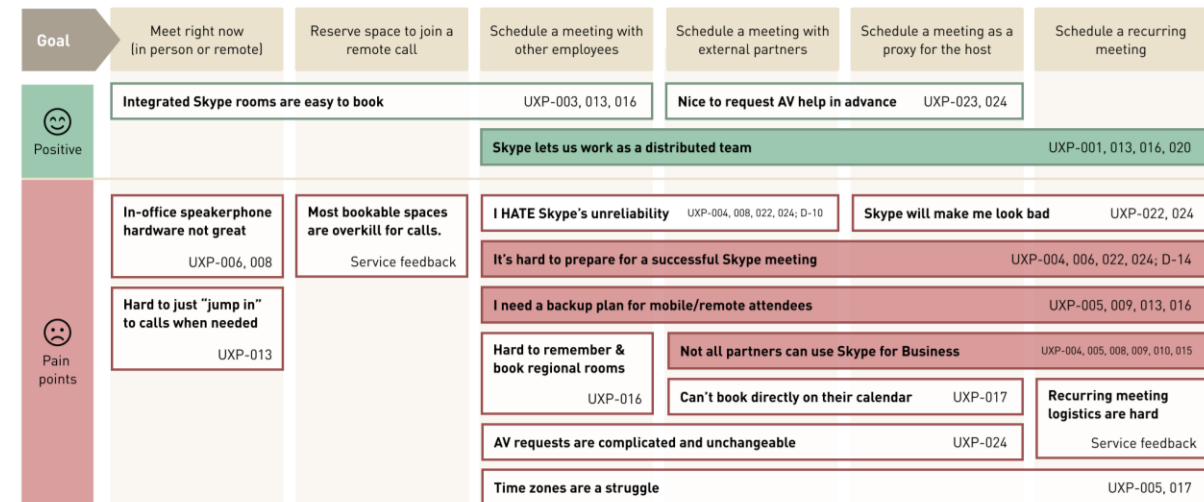
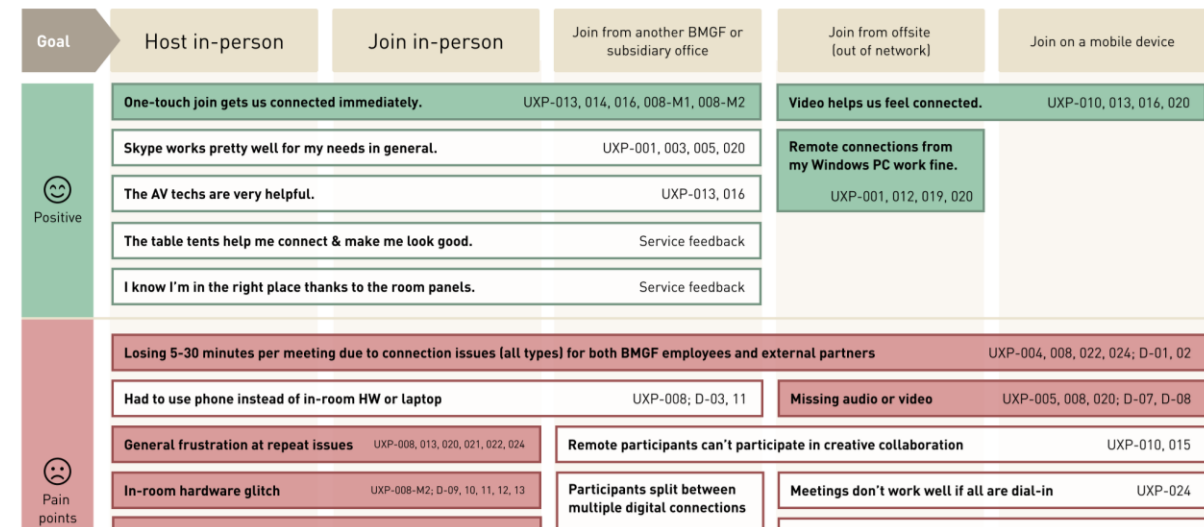**Tell IT about your meeting experience!**

Whether you're working

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BUT I DIDN'T USE PSYCHIC POWERS. I USED STRONG DESIGN AND RESEARCH TECHNIQUES TO ENSURE THE IT TEAM WAS SOLVING THE RIGHT PROBLEMS.

Using
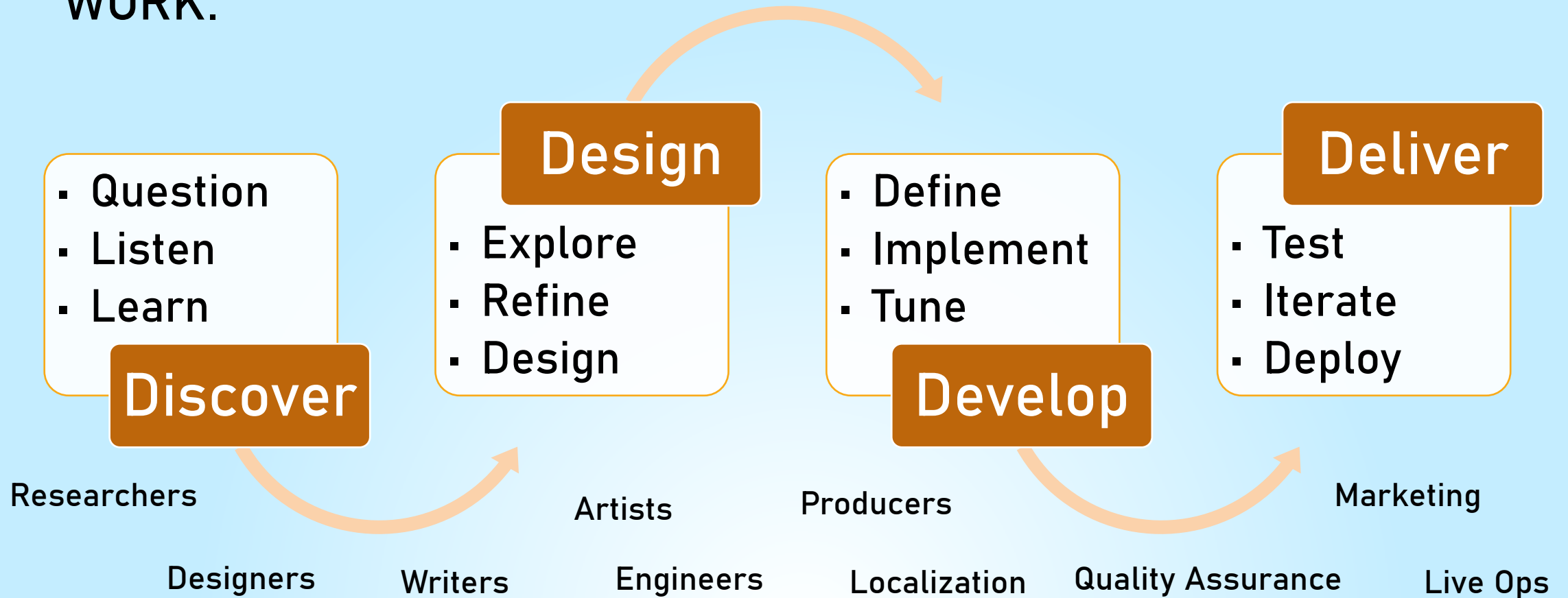
			Conf room hardware		Conf room hardware	
BMGF Laptop	BMGF Laptop	BMGF Laptop		BMGF Laptop		BMGF Laptop
		Headset	Personal or BMGF phone	Headset	Personal or BMGF phone	

Outlook	Ampersand (Sharepoint)	Outlook	OneNote	Skype for Biz	Outlook	Skype for Biz	OneNote	Outlook	OneNote
Skype for Biz		Skype for Biz	Visitor management	Zoom	Dial-in number	Zoom	Dial-in number		

Experience insights: Booking a meeting

Goal	Meet right now (in person or remote)	Reserve space to join a remote call	Schedule a meeting with other employees	Schedule a meeting with external partners	Schedule a meeting as a proxy for the host	Schedule a recurring meeting

Positive

- Integrated Skype rooms are easy to book — UXP-003, 013, 016
- Nice to request AV help in advance — UXP-023, 024
- Skype lets us work as a distributed team — UXP-001, 013, 016, 020

Pain points

- In-office speakerphone hardware not great — UXP-006, 008
- Most bookable spaces are overkill for calls. — Service feedback
- I HATE Skype's unreliability — UXP-004, 008, 022, 024; D-10
- Skype will make me look bad — UXP-022, 024
- It's hard to prepare for a successful Skype meeting — UXP-004, 006, 022, 024; D-14
- I need a backup plan for mobile/remote attendees — UXP-005, 009, 013, 016
- Hard to just "jump in" to calls when needed — UXP-013
- Hard to remember & book regional rooms — UXP-016
- Not all partners can use Skype for Business — UXP-004, 005, 008, 009, 010, 015
- Can't book directly on their calendar — UXP-017
- Recurring meeting logistics are hard — Service feedback
- AV requests are complicated and unchangeable — UXP-024
- Time zones are a struggle — UXP-005, 017

Experience insights: Joining a meeting

Goal	Host in-person	Join in-person	Join from another BMGF or subsidiary office	Join from offsite (out of network)	Join on a mobile device

Positive

- One-touch join gets us connected immediately. — UXP-013, 014, 016, 008-M1, 008-M2
- Video helps us feel connected. — UXP-010, 013, 016, 020
- Skype works pretty well for my needs in general. — UXP-001, 003, 005, 020
- Remote connections from my Windows PC work fine. — UXP-001, 012, 019, 020
- The AV techs are very helpful. — UXP-013, 016
- The table tents help me connect & make me look good. — Service feedback
- I know I'm in the right place thanks to the room panels. — Service feedback

Pain points

- Losing 5-30 minutes per meeting due to connection issues (all types) for both BMGF employees and external partners — UXP-004, 008, 022, 024; D-01, 02
- Had to use phone instead of in-room HW or laptop — UXP-008; D-03, 11
- Missing audio or video — UXP-005, 008, 020; D-07, D-08
- General frustration at repeat issues — UXP-008, 013, 020, 021, 022, 024
- Remote participants can't participate in creative collaboration — UXP-010, 015
- In-room hardware glitch — UXP-008-M2; D-09, 10, 11, 12, 13
- Participants split between multiple digital connections
- Meetings don't work well if all are dial-in — UXP-024

RESEARCH AND DESIGN ARE USUALLY AT THE FRONT OF A LONG PROCESS, WITH LOTS OF PEOPLE DEPENDENT ON OUR WORK.

Discover
- Question
- Listen
- Learn

Design
- Explore
- Refine
- Design

Develop
- Define
- Implement
- Tune

Deliver
- Test
- Iterate
- Deploy

Researchers

Designers

Writers

Artists

Engineers

Producers

Localization

Quality Assurance

Marketing

Live Ops

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HOW OFTEN HAVE YOU FELT THE PRESSURE TO HURRY UP AND SKIP THE DESIGN PROCESS?

Do you have the language to express why it's important to take the time up front?

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ENTER **OPTI-PESSIMISM**.
MY DESIGN FRAMEWORK FOR CATASTROPHIC IMAGINATION AT SCALE.

I COACH ALL OF MY DESIGN TEAMS TO ENSURE WE'RE SOLVING THE RIGHT PROBLEMS BEFORE JUMPING TO SOLUTION.
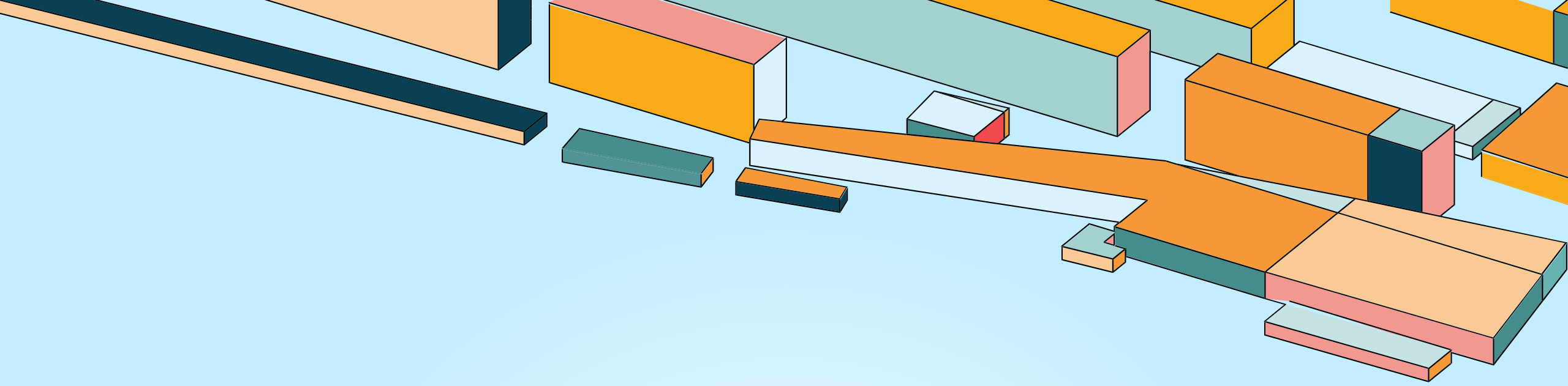
Opti-pessimism helps me find the highest value problems more efficiently and consistently.

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GUIDING PRINCIPLES OF
OPTI-PESSIMISM:

1. Consider (and lead with) the human context.

2. Design for the best case: big success.

3. Plan for the worst case: abuse, failure, and bad actors.

4. Be ready to adapt to the unexpected in the moment.

I've provided challenge questions for each of these prompts in talks, articles, and my book Design Beyond Devices if you want to engage more deeply, but we don't have time today.

CASE STUDY:
Gates Foundation Remote Work

INITIAL PROBLEM STATEMENT

As Principal UX Designer for Productivity and Collaboration, I was asked to inform the BMGF IT department in deciding on the most impactful future investments for tools and services like SharePoint improvements.

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Lead with Human Context:

My ethnographic research findings: Teleconferencing was the biggest pain point, not productivity.

This was a surprise as the Foundation was on-site, but their work was so distributed that even in 2019 most meetings had an online component.

Many employees reported losing >30 minutes a day to problems with our on-premises Skype solution, which wouldn't be replaced for 2 years+.
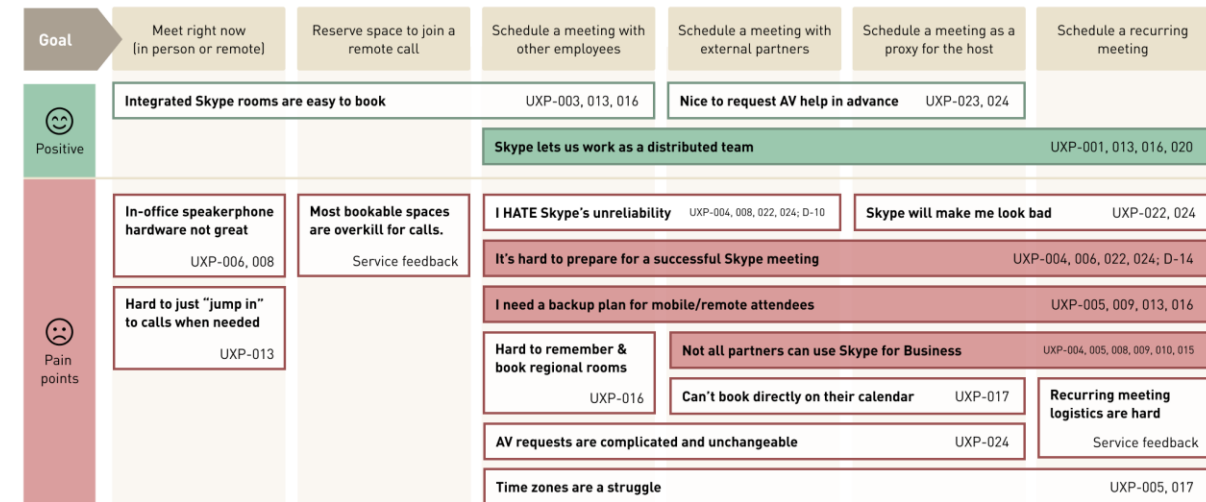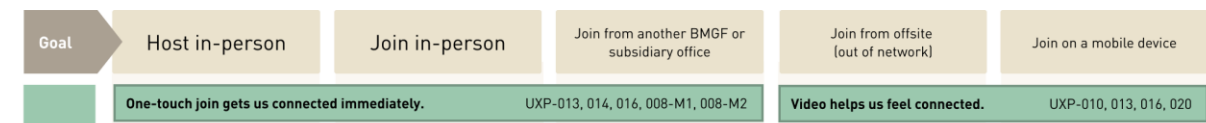
CASE STUDY:
Gates Foundation Remote Work

Design for the Best Case:

Employees really valued one-click join in conference rooms, so our recommendation had to preserve or improve the current in-room experience.

Teams was a product that Microsoft was excited to partner with us on an early launch, and included with our subscriptions; we just needed the hardware.

Build for the Worst Case:

Employees were in low-bandwidth areas or remote offices where our current solution didn't scale, where all calls were routed through our basement.

The previous migration didn't take assistants into account, so our migration would need thoughtful service design to prevent interruption.

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ADAPT TO THE UNEXPECTED

I made a successful pitch to pivot my UXR work and used it to secure a $2M budget to accelerate Skype replacement with Teams from 2022 to 2020.

We then designed a 5-phase service rollout plan to allow employees to opt in early to Teams and provide feedback before it became standard, and we usability tested the rooms which caught major hardware issues early.

WHAT ABOUT QUALITY MEETINGS?
None of these three groups are currently using MS Teams for meetings.
MS Teams has not yet been integrated with our in room systems or audio conferencing capabilities.

Our current tool for meetings is Skype for Business, and **satisfaction is mixed**.

Feedback on Skype Room Systems shows **high satisfaction for one touch join**.

But when meetings include remote employees *or* grantees, **time and productivity loss is significant**.

I love though, I do… one thing I do REALLY like about how we use Skype is the functionality where when you book a room, you walk into that room and you just press a button and you're in the Skype call? That's pretty… that's pretty amazing. And I wouldn't want to lose that. That's worth whatever other frustrations come with Skype, in my mind.

Program Officer, Global Health

(Skype is) for the most part good… My only issue with it is that, when I'm using it on my phone? I'm not able to just click on the link of "join the meeting" and use Skype. I just end up dialing in manually because I know that will work. But join the link? Doesn't always work. On my laptop it's fine. On my phone it doesn't work.

Program Officer, Global Policy

Um, I would say universally, everybody hates Skype. It really doesn't work. Not just our partners, but… it's HORRIBLE… I would say at least 50% of our meetings that we spend a good chunk of time in the beginning of the meeting trying to sort out a Skype problem.

Deputy Director, Global Health

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BILL & MELINDA GATES *foundation*

Teams-ready Conference Room

Getting Started Guide
Version 1.5.3 – November 2019 – US Offices

Last-minute meeting	Page 1
Share content wirelessly	Page 2
Invite this room (Teams)	Page 3
Other ways to share content	Page 4
Join from another app (Zoom, etc)	Page 5

Need help? Please call AV Support.
x3545 or +1 (206) 709-3545, option 2.

PLEASE DO NOT REMOVE THIS GUIDE FROM THE ROOM

Invite this room: Teams

1 **On your laptop,** open the meeting using the the **Join Microsoft Teams Meeting** link in the calendar invite.

You might need to click "Join on the Web" or "Launch now" from your browser before the meeting opens.

ⓘ Hold on! When Teams opens your meeting, **don't click Join now**. Instead, go to Step 2.

2 From the **Choose your audio & video settings** screen, click **Add a Room** in the lower right.

ⓘ If you see an **Add this room and join** popup for the current room, click it and skip step 3!

3 **Select the current conference room** from the list shown. Your laptop will also join the call, but muted.

ⓘ If you don't see the current room on the list, change the room list from the dropdown.

4 **Accept the call** from the in-room console.

PAGE 3

Teams Poster Chat

Tina K. 2/29 10:16 AM
Wait, is this a chat or a poster? 👍1

Carrie W. 2/29 10:15 AM
It's a chat.

2/29 10:16 AM
It's a poster!

Bob H. 2/29 10:08 AM
It's... both! It's a poster **about** Teams Chat, the new way to IM here at the foundation.

2/29 11:44 AM
Use it on mobile or desktop.
No more lost chats! ❤4

Tina M. 2/29 11:20 AM
YES!

2/29 11:23 AM
Don't forget to tell folks they can learn more about how to use Teams Chat at bit.ly/BMGFTeamsChat on Ampersand!

Type a new message

Teams Capability Matrix – v1 – BMGF IT Human Centered Design

	CRAWL	WALK	RUN
MEETINGS	1:1 meetings	All hands meetings	Teams is the foundation standard
	Fully remote meetings	Reschedule recurring meetings with Teams when Teams-ready room is available in all regions	All regional offices are Teams-ready
	One-time meetings in Teams-ready rooms	Dial-in meetings	Skype is disabled for new meetings
IM & CHAT	1:1 quick chat (Skype for Biz replacement)	1:1 file collaboration (Office 365 documents)	Persistent group chats
	Internal 1:1 calling and screen sharing	1:1 file sharing (Non-Office documents)	Small group file collaboration (Office 365) and file sharing
TEAMS (CHANNELS)	Organization Teams and Channels (ie. IT-All, US Programs)	Workgroup/Peer Teams (K-12, Benefits, INVEST Team)	In-progress files on Teams, not SharePoint, by default
	Quarterly/monthly org updates over Teams, not email	Teams for remote document review (mobile app)	Project-specific Teams (Event planning, v-teams)
	"Water cooler" informal team communication Channel	Teams for article and topic discussion	Tab integration with other apps: OneNote, SalesForce?
		Organization adopts Teams comms and notification best practices	Teams as onboarding tool

Questions? Cheryl.platz@gatesfoundation.org

Let the message wash over you!

Segmenting our overall message into conceptual chunks lets us roll out the same content to different audiences on different timelines.

Regional audiences will receive Waves 2 & 3 in parallel.

September 2019   Teams-ready rooms: Change Management   4

Wave 1: Coming soon!
An initial awareness campaign about the upcoming changes and the timeline of potential impacts. Room preview opportunities and Skype continuity emphasized.

Wave 2: Try Teams meetings
Actively encourage our audience to try Meetings and Rooms. Provide hands-on training and reference for scheduling & room use.

Wave 3: Use Teams (when you can)
Where appropriate, audiences are encouraged to use Teams. Emphasize benefits of switching to drive voluntary adoption.

Wave 4: Teams is our meeting standard
Targeted messaging that positions Teams as the rule, not the exception. Begin to socialize phone use in Teams, and Skype retirement timeline.

Wave 5: Goodbye, Skype!
Ease the final steps in Skype's retirement. Prepare folks for removal of Skype from Outlook. Assist any late adopter groups.

Results and Impact

Our Goal:

Between our rolling deployment of Teams-capable conference rooms and the Teams training and support service design, we hoped that 50% of the foundation would already be active Teams users by the time it became official in February 2020.

We hit 75% by February 2020.

Skype VS Teams Meeting Usage (Percentage)

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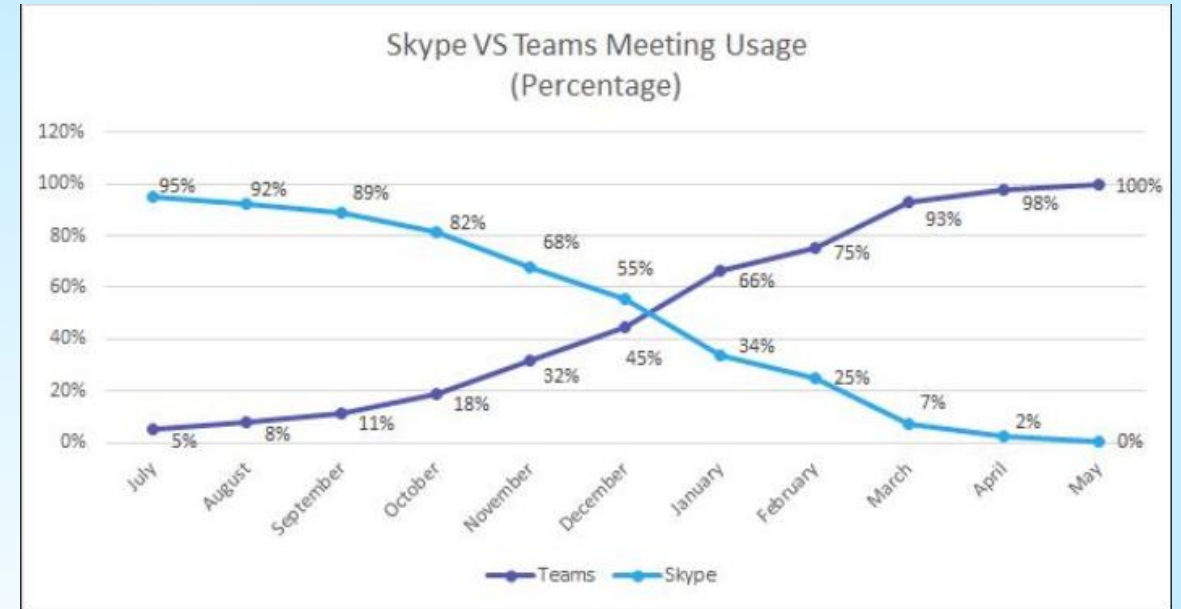
OF COURSE, TWO WEEKS LATER, WE SHUT DOWN FOR THE PANDEMIC.
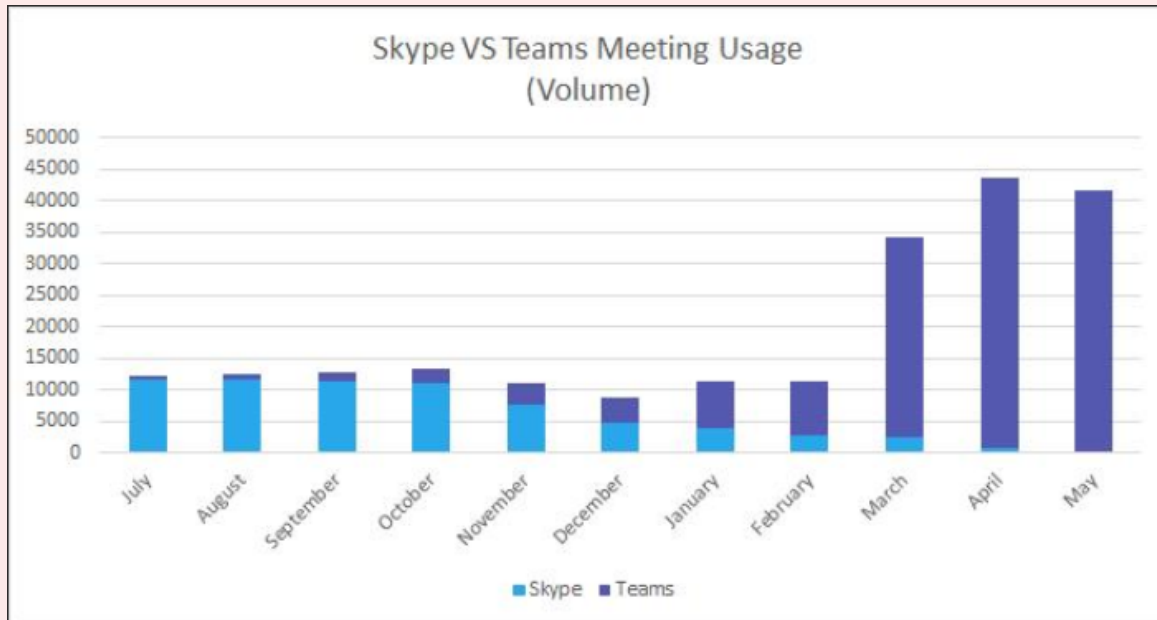
This graph shows that we were able to almost overnight push the foundation over to the new tool because we had laid strong groundwork. These calls are critical, life-or-death calls between vaccine makers, governments, and funding providers.

In retrospect it looks like I was psychic, but this was an application of opti-pessimistic design to my work that helped us ensure we were **SOLVING THE RIGHT PROBLEMS.**
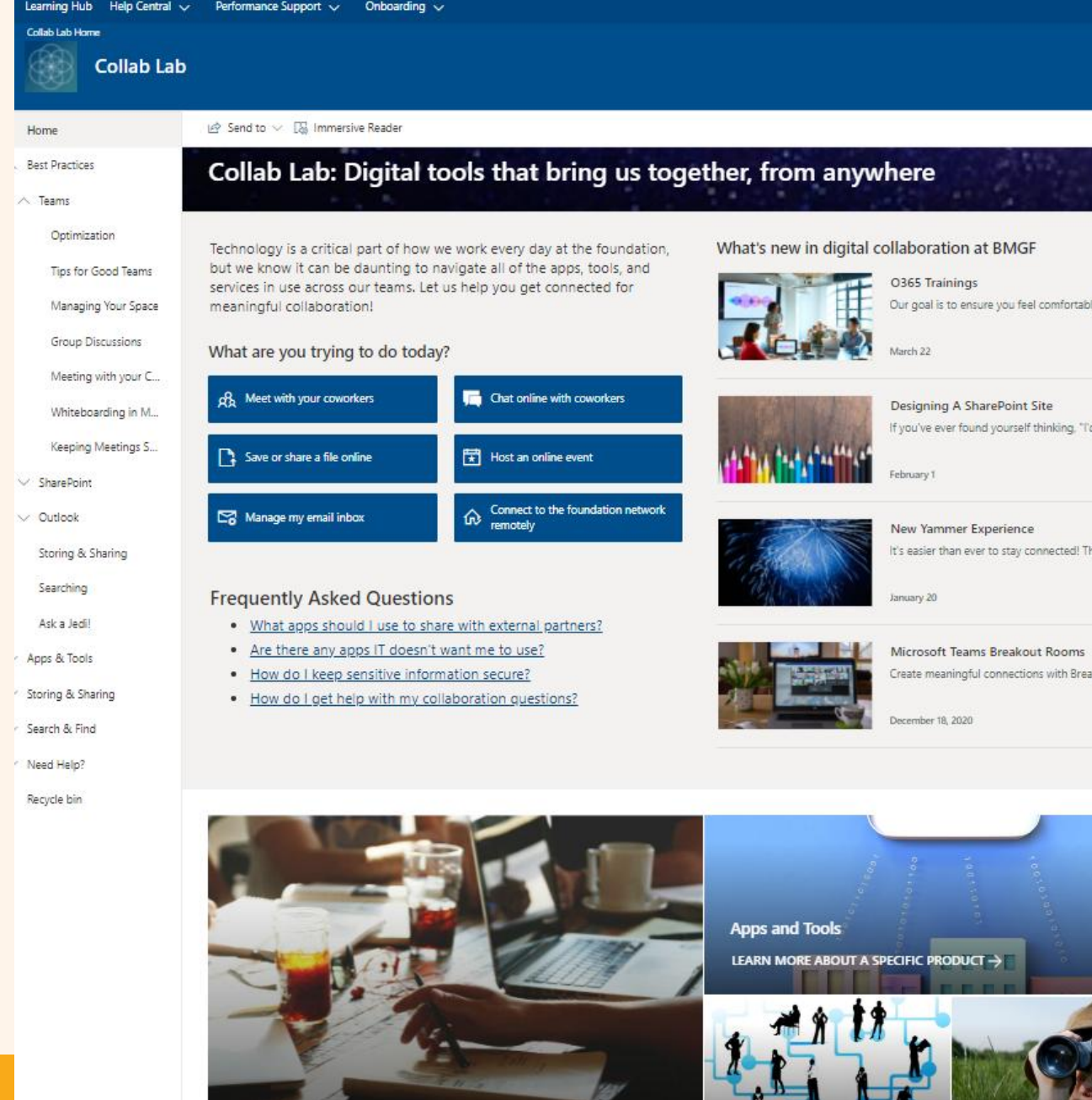
CASE STUDY:
Riot Games + Xbox Game Pass

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PROBLEM STATEMENT

Drive a shared design vision and aggressive design delivery schedule across 6 teams and a 300-person working group to support the launch of Xbox Game Pass as the Riot Design Lead, while identifying key UX-related business development issues and opportunities.

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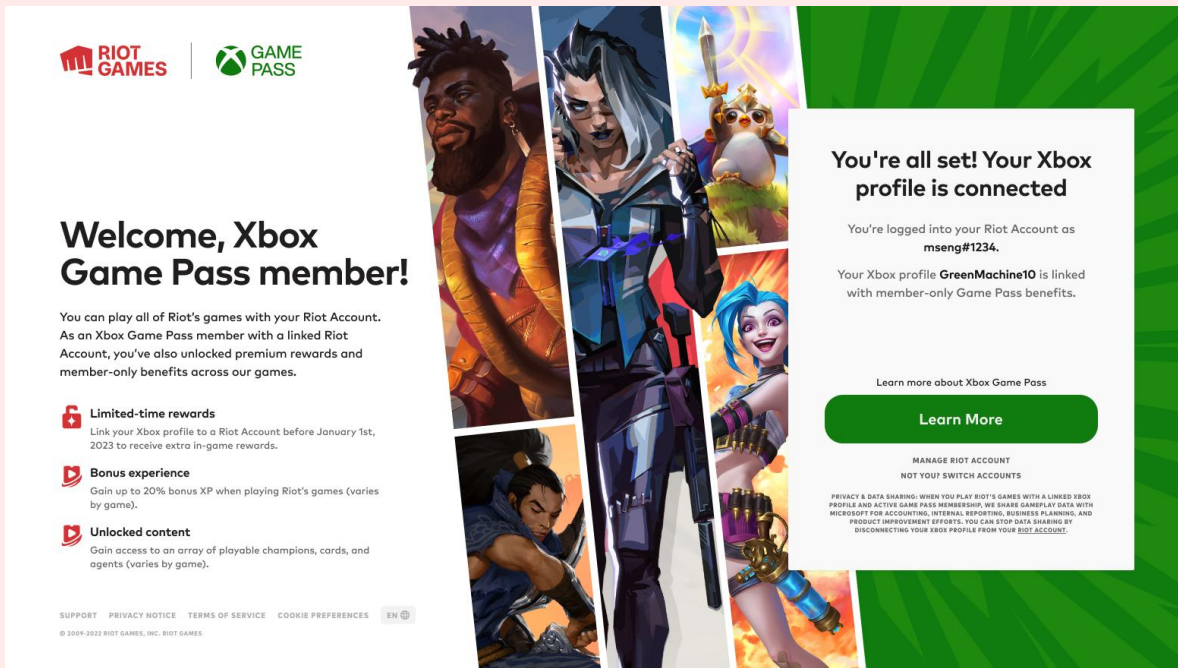
DESIGN FOR THE BEST CASE:
CONTEXTUAL CONFIRMATIONS

I called out during business development that players would likely need confirmation of their subscription status to avoid confusion, as Xbox Profiles could be linked prior to obtaining a Game Pass subscription. This helped us avoid costly service tickets and frustration.

LEAD WITH HUMAN CONTEXT

I saw that my team was going to struggle to deliver at speed, as engineers would be coding from wireframes and not high-fidelity UI comps. I also knew that Microsoft's brand standards would be high.

I advocated for changes to our design process that abstracted all unnecessary detail out of wireframes.
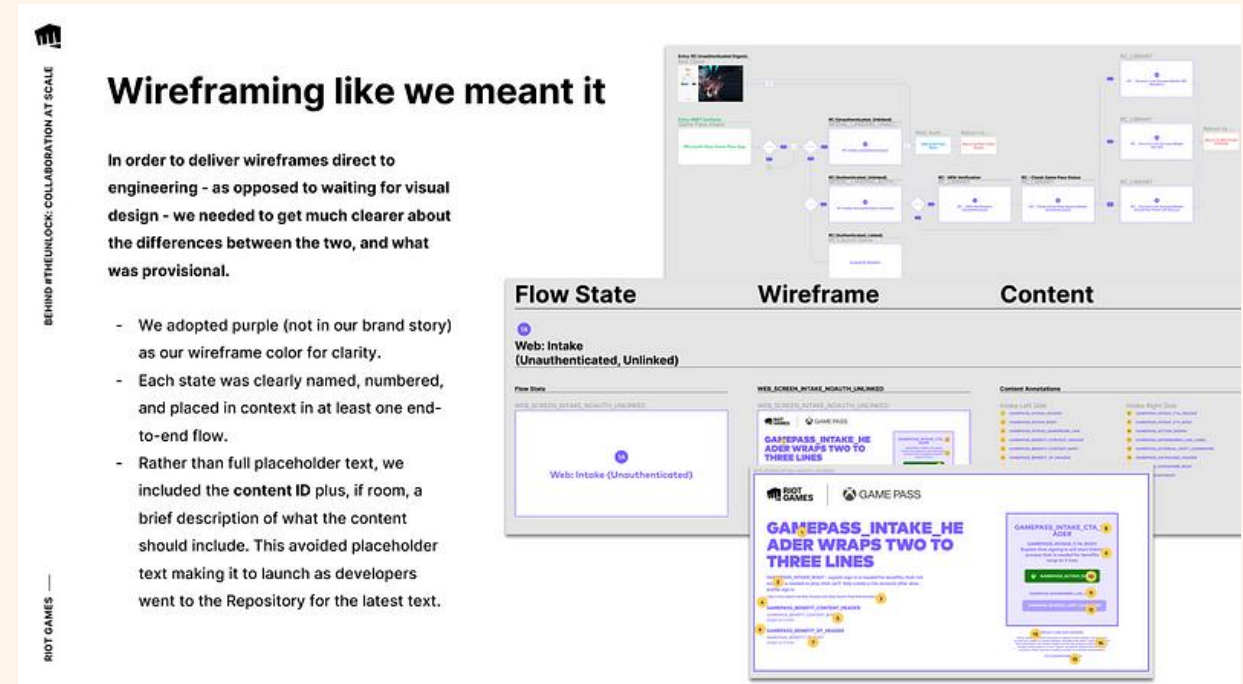
BUILD FOR THE WORST CASE and ADAPT IN THE MOMENT:
LOCALIZATION IDS

My changes to our localization process included the creation of a centralized localization table (not standard on the platform team.) All strings had a unique loc ID, and wireframes called them out instead of lorem ipsum so engineers knew where to reuse text. This meant that if last minute changes came through, we'd have less work.

BUILD FOR THE WORST CASE and ADAPT IN THE MOMENT:
LOCALIZATION IDS

Sure enough, a major change to the data protection agreement between the two companies came in less than 2 weeks before launch. If we had allowed for more than the 3 planned copies of these legal strings, we would not have had time to complete re-translations and QA without delaying our ship date.

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ONCE AGAIN, IT LOOKED LIKE FUTURE SIGHT, BUT IT WAS **OPTI-PESSIMISTIC DESIGN THINKING** THAT KEPT OUR SHIP SCHEDULE INTACT.

Xbox Game Pass

The Unlock is Here: Riot Games and Benefits Come to Game Pass

Tori Fica, Games Writer, Riot

Published
December 12, 2022

Calling all top fraggers, ARAM mains, master tacticians, and meta breakers! Riot's biggest PC and mobile games are now available to Game Pass members, along with a Malphite-sized heap of additional unlocked benefits and rewards.

Here's what just got unlocked, plus details on regional availability and some limited-time bonuses for

YOU CAN SEE THE FUTURE, TOO.
Just get opti-pessimistic.

- You don't have to get your coworkers to adopt these principles.

- You don't have to apply all of them at once.

- Even applying some is better than applying none.

- Opti-pessimism is often an ongoing process.

Why wouldn't you plan for the worst consequences of your future success? Why wouldn't you want to be able to respond quickly to the unknown in this unstable world?
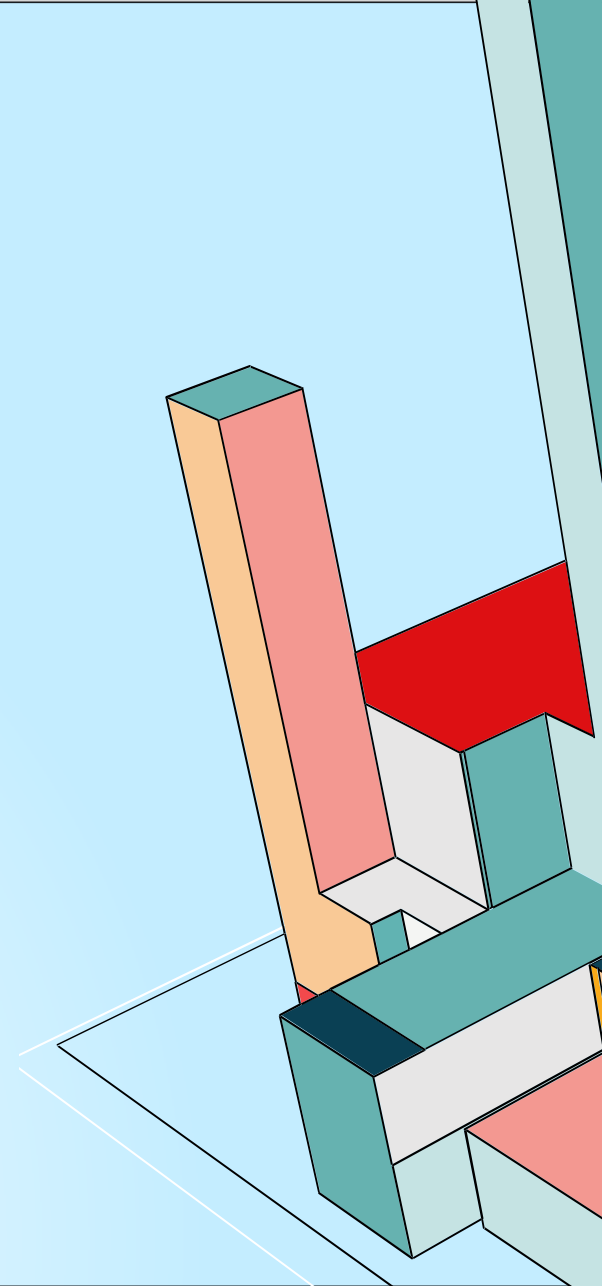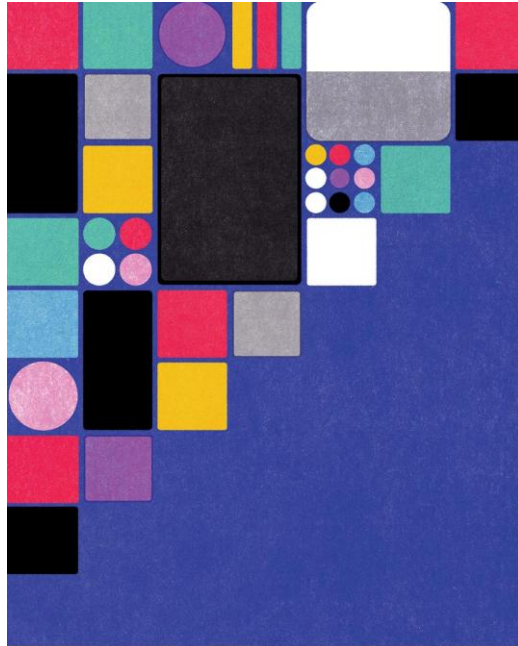
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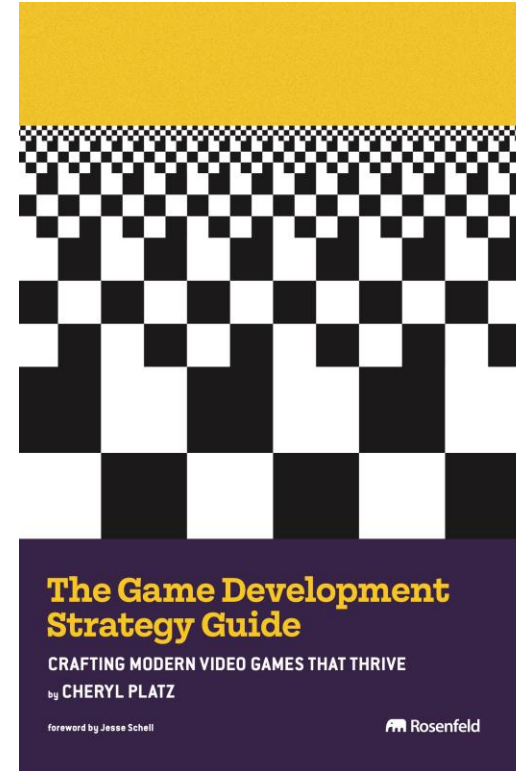
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Want to learn more?

Design Beyond Devices is for anyone designing or researching cross-device experiences (like web and mobile) or multimodal experiences (like extended reality) and defines opti-pessimism in detail.

The Game Development Strategy Guide is for anyone in the field of game development including UX designers and researchers, and covers opti-pessimism from a game development context.

Pre-order 15% discount ends tomorrow! Releases September 16, 2025

DESIGN BEYOND DEVICES
Creating Multimodal, Cross-Device Experiences
by CHERYL PLATZ

The Game Development Strategy Guide
CRAFTING MODERN VIDEO GAMES THAT THRIVE
by CHERYL PLATZ
foreword by Jesse Schell

Rosenfeld

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May your glass always be half full.

Cheryl Platz

Principal and Owner, Ideaplatz LLC

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Cheryl's new book:
gamedevelopmentstrategyguide.com

Enduring
PLAY
a game development podcast
hosted by Cheryl Platz

Cheryl's new podcast:
enduringplay.com