

Build Your Digital Playbook & Toolkit

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I'm going to say a word. I want you to close your eyes and tell me what comes to your mind.

Ready?

"Government Websites"

What did you see?

OK, here's another one...

"University Websites"

What comes to mind?

If it wasn't something elegant, streamlined, cohesive, inspiring yet practical, then maybe you'll understand why this conversation matters.

Every leader who shapes or manages the web presence of a complex organization wants to deliver a powerful, online experience. An experience that reflects the brand, attracts people, and delivers great service at all levels – from the main gateway to the smallest department. If your web presence is larger than what one small team can manage, you've probably adopted a distributed governance model where you've given different sub groups or units some level of responsibility for their part of the website. The units want control of their own presence anyway and they have the subject matter expertise.

But doing distributed governance well is hard. In this white paper we propose a shift to a culture of collaboration. Where you can empower units and individuals to successfully execute digital strategy without necessarily having to become web experts. It involves creating a playbook, toolkit, and developing training to better equip leaders and website owners across the organization.

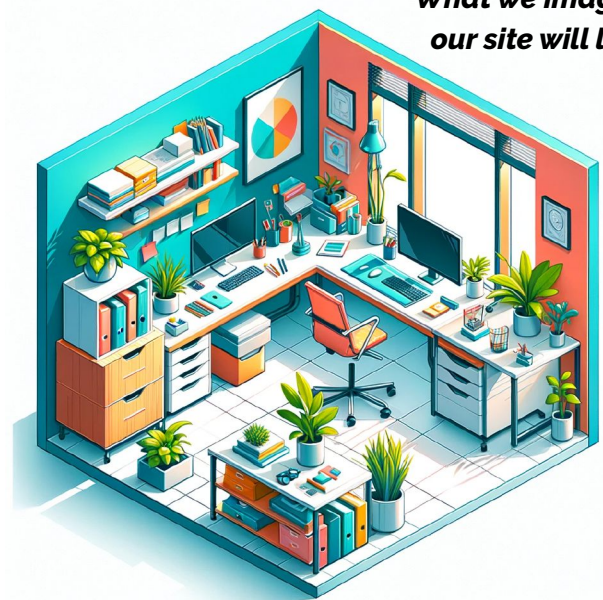
WHY DOES THIS MATTER?

The approach our team at NewCity most often sees is a central marketing or web team to provide:

- ✓ site architecture and designs
- ✓ brand standards and templates
- ✓ a Content Management System (CMS)
- ✓ documentation on how to use these resources properly

You have a vision in your head of how it will look...

***What we imagine
our site will look
like***



...but the reality turns out quite differently.

And you think to yourself “But we tried!” or “We’re a small team, we can only do so much!” Which may very well be the case, but now what? Usually central marketing and communications teams respond to this sort of web entropy in one of two ways:

- focus on what they can control and put a “Somebody Else’s Problem Field”¹ around the other unit sites.
- try to enforce tighter control playing “brand police,” centralizing management or requiring all units to work through them to get their sites done.

In these situations the problem grows slowly. Either due to lack of attention, the piling up of work, or lack of resources. Colleges and departments end up waiting in line, sometimes for years, to get what they need.

Meanwhile the competition is pulling ahead. Eventually a powerful dean clamors for independence, and is granted freedom to hire an outside agency for their site.

These problems happen because people don’t have a shared vision, and they don’t have all the materials or tools they need to build what you imagined.

When the units go off on their own, they spend valuable resources creating yet another set of templates or implementing yet another CMS that you can’t support.

Whether we’re ready to admit it or not, this has a significant impact on the organization’s brand and mission. In the article “Brand is Experience in the Digital Age,” Kate Kaplan of the Nielsen Norman Group writes:

“Most people can’t differentiate how they feel about a brand from how they feel about the experiences they have with that brand, so in many situations, UX becomes the brand differentiator. It can be part of — or all of — the reason a customer chooses to engage with a company or its products.”

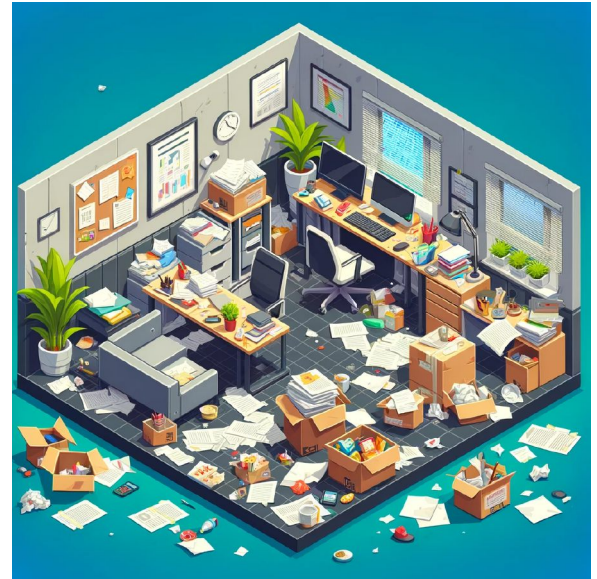
<https://www.nngroup.com/articles/brand-experience-ux/>

One thing I know for certain: we can’t win this on our own. We need to make allies out of all these groups across the institution. So what do we know about the people who are often tasked with building sites in our distributed web presence?

Website owners and content editors within each unit often:

- have 10 other jobs
- answer to a dean, department head, or faculty member - not their real end-users

What we got



¹ The idea of an “SEP field” was introduced by Douglas Adams in his novel *Life, the Universe and Everything* https://en.wikipedia.org/wiki/Somebody_else%27s_problem

- have no authority to override misguided requests
- don't have a communications background

It's possible to improve this situation, but it requires significant organizational change. Many organizations are investing to grow a cadre of professional communicators across their units. But I think it's possible to make progress even if this description is true in your organization.

What about the resources they're given? Distributed web governance usually means they get:

- templates
- training on how to use the CMS
- brand standards
- guidance on web content best practices

NewCity is often in the position of being brought in to help one of these units create a website. We see how people struggle to create effective websites with only these resources. What I want you to consider is that these things are like **utility** services – gas, power, and water.



Image credit: City of Ocean Side, CA



Illustration by Salomon Moshe

People need strategy and process, along with training on how to carry it out.

They're necessary infrastructure, but they're not **digital strategy or planning**. They don't explain the why or how. More than utilities, people need strategy and process along with training on how to carry it out.

Digital Strategy for a Distributed Model

I encourage you to consider a model that has proved successful, even with all the circumstances we've talked about. It requires a different way of thinking about the role of the central marketing or web team. Instead of providing basic web infrastructure to units, consider developing 3 key things: a playbook, a toolkit, and training that will help your teams create powerful websites.



Playbook



Toolkit



Training

THE DIGITAL PLAYBOOK

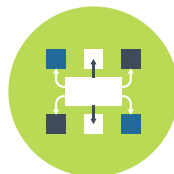
The playbook outlines practical processes that site owners can follow to do anything from redesigning their site to running a digital campaign. It's not necessarily a rigid step-by-step instruction manual, but it should be something that a person can follow without having to first become a web expert. The playbook puts the toolkit in context, showing how to use the tools within each process. It demonstrates how to take best advantage of your design patterns and CMS to create compelling pages.

THE DIGITAL TOOLKIT

Tools are resources to support the playbook, so units don't have to spend money recreating things that can be easily shared. You probably have some of the items that make up a good toolkit, but it's important to consider that tools can include strategy. They can explain some of the "why" behind the "what." These are our ideal ingredients in a digital toolkit:



Research Outcomes



User Scenarios



Campaign Concepts



Measurement Methods



Design Patterns



CMS



Content Models



Writing Guidelines

TRAINING

In this model the training goes beyond just CMS user training or web content best practices. You're teaching people how to lead planning and content strategy within their units, how to use a design system, and how to create content that's true to your brand.

MAKING THE BRAND EASY TO USE

We spend a lot of time talking about how to make websites easy to use, but this approach is ultimately about making the *brand* easy to use. People won't use your tools if it's the hard path. Even if you mandate it, people will find workarounds. You'll see yet another rogue site pop up somewhere. You have to make it easy and worthwhile to stay in brand. So you need to test the plays and tools, refine them, and help people see how much easier it is to use the foundation you're providing.

A FOUNDATION FOR REAL DIGITAL STRATEGY

Think about what units in your organization could do if they started with a strong foundation like this playbook and toolkit already in place. Let's say you have a School of Nursing that needs a new website. Instead of spending the majority of their budget on...

- learning what prospective post-graduate students want,
- coming up with basic architecture for a professional school,
- and creating their own templates and CMS

... they could invest their time and money on targeted research specific to prospective nursing students in your region and creating high quality content and media that set them apart among nursing schools across the nation.

BRAND + DIGITAL LEADERSHIP

Imagine what it would be like if you take this approach to digital strategy and transformation at your institution. Your role will change from utility provider to strategy enabler. You'll have champions all over campus instead of rogue actors. As website owners are more empowered you can expect better morale and less turnover.

You'll spend more of your time developing digital strategy for your institution. You'll be teaching and equipping people to apply strategy and tools, following a playbook to create excellent experiences for all your audiences, at every level of your web presence – all of which elevates your brand and your success. Instead of increasing chaos you'll have increasing excellence.

We're seeing this approach take root at several institutions. Once they've developed a strong design system and CMS for the main website, they're able to build the toolkit and playbook in collaboration with, and sometimes with funding from, individual colleges and schools.

What Goes in a Digital Playbook and Toolkit?

If this seems at all overwhelming, in the following section we describe **what could go in your playbook and toolkit**, recommend **places to start**, share tips about getting around **common roadblocks**, and tell the story of **UK Government Digital Services** where this approach was pioneered. Read it in whatever order you prefer.

Commonly needed plays include:

- Improving a single page
- Creating a landing page or microsite for a special program or event
- Running a digital marketing campaign for a program, product, or service
- Revamping site content
- Planning a web application or form
- Planning and launching a new website

As an example, here are the steps we recommend the 'plan and launch a new website' play:

1. Focus your goals
2. Understand audience goals
3. Understand user behavior
4. Plan main user journeys
5. Plan content
6. Combine CMS patterns to present content
7. Prototype & test
8. Build out the site
9. Evaluate performance
10. Improve

Let's walk through each step in more detail, with examples of tools and methods you could provide in your playbook.

1. FOCUS YOUR GOALS

Clarify what the website owner (or team) and any leaders over this unit see as success. Sometimes the goals of the people responsible for the website are not in total sync with the goals of leadership.

Your playbook can provide tools and methods like:

- ✓ **Examples of strategic goals** for units like academic departments, research centers, colleges, professional schools, with best practices for how the web can support them
- ✓ How to run **workshop exercises like a "KJ" session or Project Context Workshop** to identify and focus strategic goals
- ✓ **Templates for project strategy summaries**

2. UNDERSTAND AUDIENCE GOALS

Gain insights into what your key audiences are seeking, what motivates them, and what factors influence their decisions about what you offer. If you've conducted any audience research for your organization, chances are some of it could be packaged in a way to be useful to various units as they plan their own sites.

Let's say for example you have a School of Pharmacy within your university. If you have insights about the goals of prospective graduate students or professional school students, you could provide those in an actionable form to use as a starting point. Then the School of Pharmacy could conduct further research focused on the needs and choice factors for pharmacy students specifically without having to repeat some of the general research.

Your playbook can provide tools and methods like:

- ✓ **Personas** describing realistic example individuals based on research with audiences like prospective undergrad and graduate students, current students, peer researchers, prospective faculty members, or journalists
- ✓ **Task maps or mental models** showing the specific information and transactional needs of audiences, grouped under goals (Read more <https://rosenfeldmedia.com/books/mental-models/>)
- ✓ **Survey data** from website intercept surveys, enrollment surveys and other studies
- ✓ **Market research** about how your organization is positioned relative to its peers, and how your target audiences respond to your key messages
- ✓ How to run **workshop exercises like "ad hoc personas" and "KJ" sessions** to form a hypothesis about your audiences and their goals
- ✓ **How to conduct well-designed audience research** through surveys, interviews and observation
- ✓ Legal docs needed like release forms for research participants

3. UNDERSTAND USER BEHAVIOR

This is less about understanding your specific audiences and more about understanding how people generally behave when they're trying to accomplish something on a website. Website owners need to grasp how people scan pages, choose links, and read (or don't read) content. There's no better way to get this than direct observation.

Your playbook can provide tools and methods like:

- ✓ Recorded **usability test videos**
- ✓ **How to use behavioral analysis tools** like CrazyEgg or Lucky Orange
- ✓ **Content analysis tools** like HemingwayApp
- ✓ **Research (often in the form of a slide or two) to counter myths** about how people use the web. Helpful when a team member or stakeholder insists on something like the "3 click rule" or "people don't scroll"

4. PLAN MAIN USER JOURNEYS

Map out the path you expect your audiences to take from entrance to completion of their most important goals. Consider that most people will not enter on the home page, but through a search that links them deeper in the site.

Your playbook can provide tools and methods like:

- ✓ **Templates for experience maps and journey maps**
- ✓ **Blueprints for common site maps** for units like academic departments, colleges or research centers
- ✓ **Tools for creating site maps**
- ✓ **How to interpret entrance points and clickstreams** from your analytics
- ✓ How to run a **workshop exercise to create an experience map or journey map**

5. PLAN CONTENT

Working from the journey map and site map, plan the actual content that is needed for each page. Consider what the user wants to do, and what you want them to do. Provide clear forward paths along the journey. Determine content sources, what will need to be edited or created.

Your playbook can provide tools and methods like:

- ✓ **Templates for content work plans**
- ✓ **Content models** for common content entities like people, degrees, news, publications, research labs
- ✓ Books and research on **web content best practices**
- ✓ **Rubrics for evaluating existing content**
- ✓ How to run **workshop exercises like Red Route Web Page Planning, UI Design Studio or Design Consequences**

6. COMBINE CMS PATTERNS TO PRESENT CONTENT

Experiment with different layout patterns from your design system (as implemented in the CMS) to present content in a way that's appropriate and effective for each page along the journey. Your playbook can provide tools and methods like:

- ✓ A **well-documented ui design system library**, with examples of pattern use
- ✓ How to run **workshop exercises like teaching editors how to use a design system** from your design system
- ✓ **Page Tables** that show the content that should be included in each layout pattern in a template
- ✓ **CMS user training** (live or recorded)

7. PROTOTYPE & TEST YOUR IDEAS

Build out key user journeys or parts of your site in the CMS, with paper, or in a prototyping tool. Test them with actual end users.

Your playbook can provide tools and methods like:

- ✓ **Principles of prototyping**
- ✓ **Teaching editors how to use your design system** (not just your CMS)
- ✓ **Tools for A/B testing** different prototype hypotheses
- ✓ **How to run and analyze a usability test** with a paper or digital prototype, using moderated or unmoderated methods
- ✓ **How to run tests on information architecture or navigation**
- ✓ **Legal docs needed**, such as research participant release forms

8. BUILD OUT THE SITE

Set up the full site structure in the CMS and do all of the content heavy lifting needed. Test and prep for launch. Your playbook can provide tools and methods like:

- ✓ **Content work plan** (mentioned under #5)
- ✓ **Writing guidelines** for creating content that supports the organization's brand messages with the right tone and style
- ✓ **Analytics tagging built into the design system** so it doesn't have to be added at the end
- ✓ **Unit analytics models** with recommended analytics setup for common goals like request for info, engaging with news or research, responding to a campaign etc.
- ✓ **CMS Tool for managing 301 redirects**
- ✓ **Launch preparation checklist**
- ✓ **Emergency bourbon**

9. EVALUATE PERFORMANCE

Use analytics to observe what users are doing or not doing on the new site and methods like usability testing to understand why. Your playbook can provide tools and methods like:

- ✓ **Training for your analytics platform**
- ✓ **A guide to interpreting your analytics** for leadership
- ✓ **How to conduct moderated or unmoderated usability tests**
- ✓ **Tools for gathering user feedback** on site effectiveness

10. IMPROVE

Make incremental changes, test, repeat. Remember: don't change too many variables at once.

What Sort of Training Should You Offer?

Training will depend on the role people in each unit are playing and how your central team plans to support them. Obviously you still need to offer training on how to use the CMS and web content best practices.

All site owners and editors will benefit from training on how to:

- apply your existing audience research
- use the design system to create real pages
- incorporate brand messages naturally in content
- set up and manage analytics with typical unit KPIs

If you expect site owners and editors in each unit to be able to lead a planning process for their unit, consider adding training on:

- planning your web project
- conducting your own audience research
- facilitating planning workshops
- communicating with stakeholders, soliciting helpful feedback
- developing and testing navigation
- creating content strategy tools like a content work plan, core content models, and page tables

Workshops where people learn methods and apply them directly are a great way to teach many of these things. In the next section, we propose some pilot workshops you could run both as training and as a way to identify the things that would be most helpful to include in your playbook and toolkit.

Where can you start?

If you're thinking this could be the next big strategic move for your organization, you're probably also considering where you could realistically start. This sounds like a big effort.

Our advice is always to start from where you are, with the resources and people you have. While you're considering whether there are gaps in your core team, take an inventory of the resources and tools you already have.

- ✓ Classify your current training. Is it about using the CMS, general web best practices, or teaching methodologies for planning and building effective site?
- ✓ Look at your existing audience research. What could be packaged for re-use by different units?
- ✓ Are there exemplary units within your organization that could be used as example patterns for strategic goals, content strategy, etc.?
- ✓ Talk to your professional development folks about participating with you in developing some new training for website owners and communicators.

- ✓ Identify individual champions within your organization who want to be strategic. Start with their units.
- ✓ Pilot some website planning workshops with those units.

TEST THE PROCESS AND TOOLS WITH WORKSHOPS

In the workshops we recommend focusing on four aspects of the playbook process we outlined earlier. They're highlighted below:

1. Focus **your goals**
2. Understand **audience goals**
3. Understand user behavior
4. Plan main user journeys
5. Plan **content**
6. Combine **CMS patterns** to present content
7. Prototype & test
8. Build out the site
9. Evaluate performance
10. Improve

These four areas: organizational goals, audience goals, the content itself, and how the CMS allows you to present the content, are crucial to successful digital strategy. They are sometimes in conflict. Whenever we've brought people together to do this, one of the things we hear from stakeholders time and again is "Wow, this is hard." That's one of the most valuable outcomes - recognizing that it's not easy to meet all these sometimes competing goals within the constraints we have.



Planning workshop at George Mason College of Science

Conducting a Workshop with Stakeholders

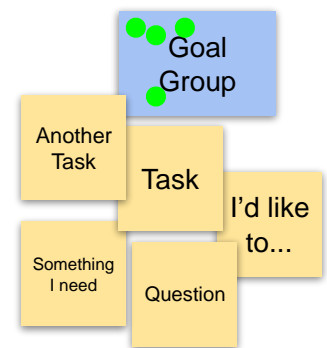
This is a guideline for a 2-part workshop you could pilot with the resources you probably already have.

PREPARE FOR YOUR WORKSHOP

- Invite communicators, leaders, and other stakeholders from within the unit. If possible invite some people who represent the key audiences of the unit. If senior leaders from a unit can only participate in one session, it should be Part 1.
- Gather existing audience research and other resources from your work on the main organization's digital strategy that could be helpful to this unit.
- Prepare supplies for each workshop exercise.

Part 1

1. Run a "KJ" brainstorming session with the focus question "How will we know this new website is a success?" to focus the organization's strategic goals.
 - If you have some existing audience research that's applicable to this unit, share it. Talk about the implications for that unit.
2. Run an "ad hoc" persona exercise, where people work individually or in pairs to come up with a total of 4-5 personas representing the key audiences of that group.
3. Run a "KJ" session with the focus question. "What would each of these personas come to our website to find or do?" Ideally have staff do one, and a group of people from your audiences do another one in parallel. Then have them present to each other.
4. Run a journey mapping exercise to show how the group thinks someone will move through their site to accomplish their goals.



Name & Description: Susan Wells - City Planner

Thinking & Feeling
What is important to this person?
Hopes, dreams, fears, concerns?
Balancing growth, public
acceptance, business
sustainability, design
perspectives
Verying on business
marketing in the middle

Hearing
What does influence this person?
City Council
City Management
Business Relations
Public Perception
Law
Universities

Gains
What does this person hope to achieve?
What does success look like?
Public service
Benefit a community
create(s)

Pains
What obstacles or challenges
does this person face?
Complex decisions
Rules & processes (time, \$)
Cotton / Hair
Cute hats
SILS

NEWCITY
Proto Personas

Ad Hoc persona exercise at Colorado State University

Interlude

- Work with the site owner to analyze the results of the goals and persona exercises and come up with a proposed high level site map.
- Revise the plan for Part 2, if necessary, to achieve the goals of the workshop.

Part 2

1. If needed, run an exercise with stakeholders to simplify the main navigation to 7 or fewer items.
2. Run a “[Red Route Web Page Planning](#)” exercise to plan content for pages along the key user journeys identified in Part 1.
3. Run a [paper prototyping exercise](#) with pre-made CMS patterns to figure out how to show the content using the available palette of CMS layout patterns.

After the Workshops

- Work with the site owner to convert workshop outcomes to a full content work plan.
- Support them as the build out and test the site.



Content Modeling at Davidson College

WHAT YOU NEED FROM THE WORKSHOPS

As you try out these workshops with a few units, identify the tools and methods that would be most helpful for you to develop further. As you refine the workshops, they can become the core of the approach you teach to website owners and communicators throughout your organization.

RUNNING WORKSHOPS WITH MULTIPLE UNITS

You can run a workshop like this with people from multiple units in the same room. In this case you'd have them working in small groups as you go around the room and engage with each group, then have the groups present to each other and give feedback. This requires more facilitation experience so practice with individual groups first.

Common Roadblocks

If you set off on this course, you will face some roadblocks. There is enough evidence of the benefit of the Toolkit + Playbook + Training approach to digital strategy to persevere through them. Some of the common roadblocks we see are:

- **Decision-makers who can't participate.** You may have key people in the organization who acknowledge the importance of this effort but can't find time to participate at key points. This isn't a problem if they're willing to truly delegate their decision-making authority to others, but that isn't always the reality. And if you roll out something like this without the strong endorsement of senior leadership, it's less likely to succeed. That's why digital transformation works best when the mandate comes from the highest levels of the organization (like President Obama with US Digital Service) and when senior leaders know their performance will be judged in part on the success of the effort.
- **Adherence to web myths.** There are many web myths that refuse to die, such as "Everything needs to be 3 clicks from the home page" or "People don't scroll." They've been debunked, but you'll still hear stakeholders say them. You don't want these myths to become enshrined in your toolkit or playbook. Be prepared with links to research studies and a few slides that explain how these things aren't true - but do so graciously. "I used to think that too and then I read this study..." is a good way to disarm the myth carrier. Or offer to run a test. We've written about some of the [myths and so-called "best practices" in higher ed.](#)
- **My expertise makes me a web expert too.** I'm sure you're familiar with this phenomenon which is especially prevalent in any organization with a concentration of advanced degrees. The best approach with folks like this is to be know your stuff and use valid research to inform your recommendations. Even with qualitative research there are ways to present it and show that you are considering the margin of error and drawing responsible conclusions.
- **Convincing academics that succinct, plain language content is better.** This is one of the biggest challenges to content strategy in any higher ed institution. People feel they must convey the totality of what they know about a subject, or that to be respected by peers they must write for a sophisticated reader. There's plenty of research proving that concise, plain language written for lay readers is more effective - even preferred by other academics. Plus the beauty of the web is you can always layer the content and provide the deeper dive for those who really want it. If the research doesn't sway them, try having them watch a usability test with their content. Here are a couple of good sources for proving the power of simple content:
 - Plain Language is for Everyone, Even Experts
<https://www.nngroup.com/articles/plain-language-experts/>
 - Lower-Literacy Users: Writing for a Broad Consumer Audience
<http://www.nngroup.com/articles/writing-for-lower-literacy-users/>

- Duke University Graduate School's Scientific Writing Resource
<https://cgi.duke.edu/web/sciwriting/>
- *Letting Go of the Words*, by Ginny Redish
<https://redish.net/books/letting-go-of-the-words/>
- **Lack of funding.** You may be thinking "We're not the British government, we can't spend millions of dollars, hire a team etc." It is possible to make the case for how this approach to digital strategy can save your organization significant money in a 3-5 year horizon. It's been proven in the government sector, although we need more examples in higher education. There is so much money spent by individual colleges, centers, schools within a university on some of the same basic research and digital infrastructure, we know it is possible to create resources like we've described within existing capital and operating budgets. It may require some duchesses and earls to pool funding for their mutual benefit.

Case Study: UK Government Digital Services

There are many large for-profit companies that have adopted design systems and pattern libraries. They have used these to shape all aspects of their digital presence or products.

Governments and higher education institutions present a special challenge due to greater fragmentation and a looser connection between their digital experience and their revenue streams.

The UK government is one of the best examples of digital transformation following this model. In fact they pretty much defined the model and may change what you expect from a government website.



Image Credit: HMRC Digital

In 2010 the British government was facing a fiscal crisis. The budget deficit was 11% of gross domestic product (GDP). They were known globally for costly government IT failures. In 2011, they scrapped the National Health Service's Programme for IT after spending £12 billion (\$19.5B USD). Most of the money had gone straight down the drain. It was the largest but not the only example of big failed IT projects in the British government.

So a government minister commissioned Martha Lane Fox (herself a Baroness and founder of Lastminute.com back in the 90s) to make recommendations on how to improve the way the British government delivered digital services. For years Martha had been a champion of making the internet accessible and equitable for everyone in Great Britain. Her recommendations led to the formation of the Government Digital Service (GDS) in 2011. This new organization was made responsible for digital transformation across the entire government – no small task. GDS' mission unfolded in three stages:

1. Fix government publishing
2. Fix transactional services
3. Create parts of services that can be reused across the government

One of the biggest changes was to bring critical expertise in-house, particularly people skilled in human-centered design, agile development and lean practices. Up to that point the government had outsourced much of the strategic and architectural work for its IT systems.

To signal a new era and to attract more talented colleagues, the fledgling GDS team published these 10 design principles:

1. Start with user needs.
2. Do less.
3. Design with data.
4. Do the hard work to make it simple.
5. Iterate. Then iterate again.
6. This is for everyone.
7. Understand context.
8. Build digital services, not websites.
9. Be consistent, not uniform.
10. Make things open; it makes things better.

When the GDS team first started out, they knew they needed to demonstrate to those watching that by following these principles they could deliver something faster than the government had ever done before. As their first project, they chose the consolidation of over 2,000 government sites with zero design consistency into one GOV.UK website. They built a working alpha version of gov.uk in 13 weeks.

GDS' efforts since 2011 have:

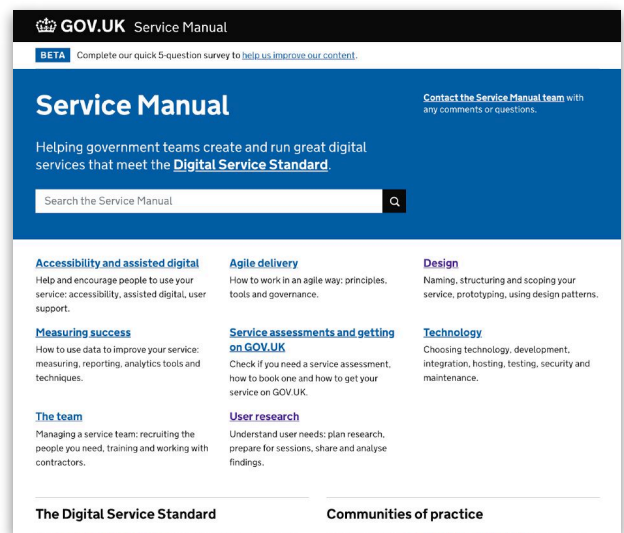
- delivered online versions of services like paying car tax or registering to vote with adoption rates of over 90%, without a big marketing campaign
- developed shared services and tools that different ministries can use when they build digital solutions
- saved over £1.2B (approx. \$1.9B USD) in project and operating costs²

The book *Digital Transformation at Scale* shares the lessons learned from GDS. The authors write:

“Digital transformation saves money – lots of money. It thaws frozen markets and creates new ones. It brings clarity and beauty to a jumbled mess. It delivers rewards, applause and validation. But far more important than all of those things, it makes things simpler, cheaper and faster for citizens, businesses and users.”³

But the point of sharing the GDS example is to show you how the toolkit, playbook, and training developed by GDS has been instrumental in scaling and spreading their approach from a small core team to thousands of people designing and running digital services across the British government.

The GDS Service Manual is their playbook, with in-depth guides for building your team, conducting user research, working in an agile way, and much more. The Service Standard describes expectations all public-



<https://www.gov.uk/service-manual>

² Cost savings are self-reported by GDS and have not been independently audited. <https://www.openaccessgovernment.org/gds-digital-capability-public-sector/67123/>

³ Greenway, Andrew. *Digital Transformation at Scale: Why the Strategy Is Delivery* (Perspectives). London Publishing Partnership. Kindle Edition.

facing transactional services must meet, such as “Solve a whole problem for users.” My favorite part? If you don’t meet the standard, your service doesn’t get included in [GOV.UK](https://gov.uk).

The **GOV.UK Design System** is the core of their toolkit. It includes not only layout styles but example patterns for digital services. Each pattern includes guidance like:

- ✓ description
- ✓ examples
- ✓ when to use
- ✓ when not to use
- ✓ how it works
- ✓ research behind it

And since everything in GDS website is open source, you can borrow and modify anything from their toolkit and playbook to start your own!

GDS Academy is the training arm of GDS. At centers around the country they offer courses in topics like agile, user-centered design, and product/service ownership. The thousands of GDS Academy alumni have become a thriving community that contributes new ideas and keeps the GDS principles alive.



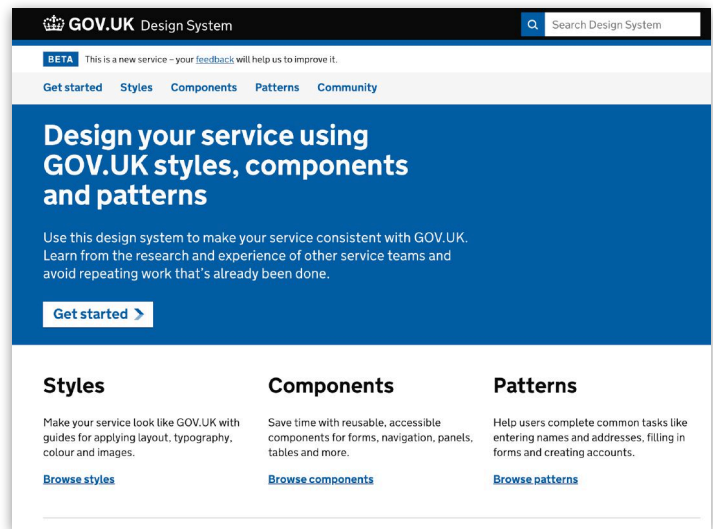
<https://gdsacademy.campaign.gov.uk/>

GDS has been careful to build **community feedback and engagement** into its approach. Decisions about the roadmap for new or improved tools and services are made with input from digital practitioners across the government.

THE BEST IDEAS SPREAD

In 2016 the UN ranked the UK first in the world for digital government. Many other countries have seen the impact of GDS and adopted a similar model. The US Digital Service (USDS) was launched in 2014 with a mission “to deliver better government services to the American people through technology and design.” You can view and borrow ideas from USDS as well.

- ➔ US Digital Service <https://www.usds.gov/>
- ➔ US Digital Services Playbook <https://playbook.cio.gov/>
- ➔ United States Web Design System <https://designsystem.digital.gov/>



SOME LESSONS FROM GDS

People First

In the case of both GDS in the UK and USDS in the States, they started with pulling together the right core team. They couldn't outsource all of it. Part of the reason they had seen so many failed projects before was that they didn't have leaders inside government with deep experience in human-centered design and agile software development. Both organizations recruited talent from the private sector, identifying people who had both the skills and a passion for the public good.

In *Digital Transformation at Scale*, the authors describe the ideal starting team:

"An excellent product manager, a handful of top-class developers and designers, and one or two superb user researchers and analysts will get you off to a fine start. Even that is a relatively luxurious position; a functioning delivery team can be as few as three good people."

You may have many of the right people somewhere in your organization already, just not in the right roles. These are some of the skills we find most helpful when you are starting your team.



USER EXPERIENCE



CONTENT STRATEGY



CMS



DESIGN



DIGITAL MARKETING



ANALYTICS

Soft Skills

We can't emphasize enough though the importance of selecting leaders for the team with soft skills like emotional intelligence, the ability to facilitate collaborative sessions and communicate well in any context. They'll be working with a diverse group of stakeholders at various levels of the organization and may have to navigate complex political waters. While it may seem like some people either have these skills or they don't, they can be learned and developed. There are many books, videos and training experiences to grow these leadership skills.

Authority

To successfully lead digital transformation for your organization, the core team needs endorsement from the top, ideally with a combined mandate from brand management or marketing, admissions, IT, and development (fundraising). The team should have the authority to make decisions about the digital strategy of the institution, although this authority should be wielded with grace - we want to win people over wherever possible - not coerce them. GDS' requirement that all new services meet their standards before being added to GOV.UK, while also offering all the support and guidance you might need, is a great example of an appropriate exercise of authority.

Reporting Structure

This will be an interdisciplinary team. In many higher ed organizations the planners, designers, writers and programmers report up through different parts of the organization. Marketing folks have to beg for developer time or vice versa. They don't speak the same languages. These people need to report to the same boss. If that breaks your org chart, fight for the change. Other models may not be absolutely doomed to failure but they will face significant obstacles. The mission will be challenging enough, make this part easy.

Can NewCity help?

Why yes, we can! Obviously we're not going to do it all for you, that would defeat the purpose. But we can smooth the way. We're helping other organizations develop their toolkit resources and training curriculum. We have a lot of material to jumpstart the process, so you don't have to start from scratch.

We are also gathering a community of peer institutions who want to learn from each other and refine their approach. If you'd like to join the conversation, please contact us.