

PENDOMONIUM 2024

**Meeting of the minds:
Design & product unite**





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Product Owner, PNC Bank



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Lead Experience Designer,
PNC Bank

Agenda

- **Defining a Data Strategy**
- **Data Strategy Evolution**
- **Creating a Cross-Functional Working Group**
- **Implementing New Team Processes**



Defining a Data Strategy



Variables of a Data Strategy

Data Collection

Data collection is an investment which comes at a cost of one or more of the following resources:

- Time
- Money
- Space
- Energy

Data Utilization

Data utilization should result in one or more of the following valuable outcomes

- Reduced risk
- Increased efficiency
- Increased effectiveness
- Identified opportunity
- Validated decisions
- Buy-in/alignment


Don't Be Too Data Obsessed

Over-collecting

Over collecting data can hinder the delivery of value through information overload or data irrelevance.

Over-utilizing

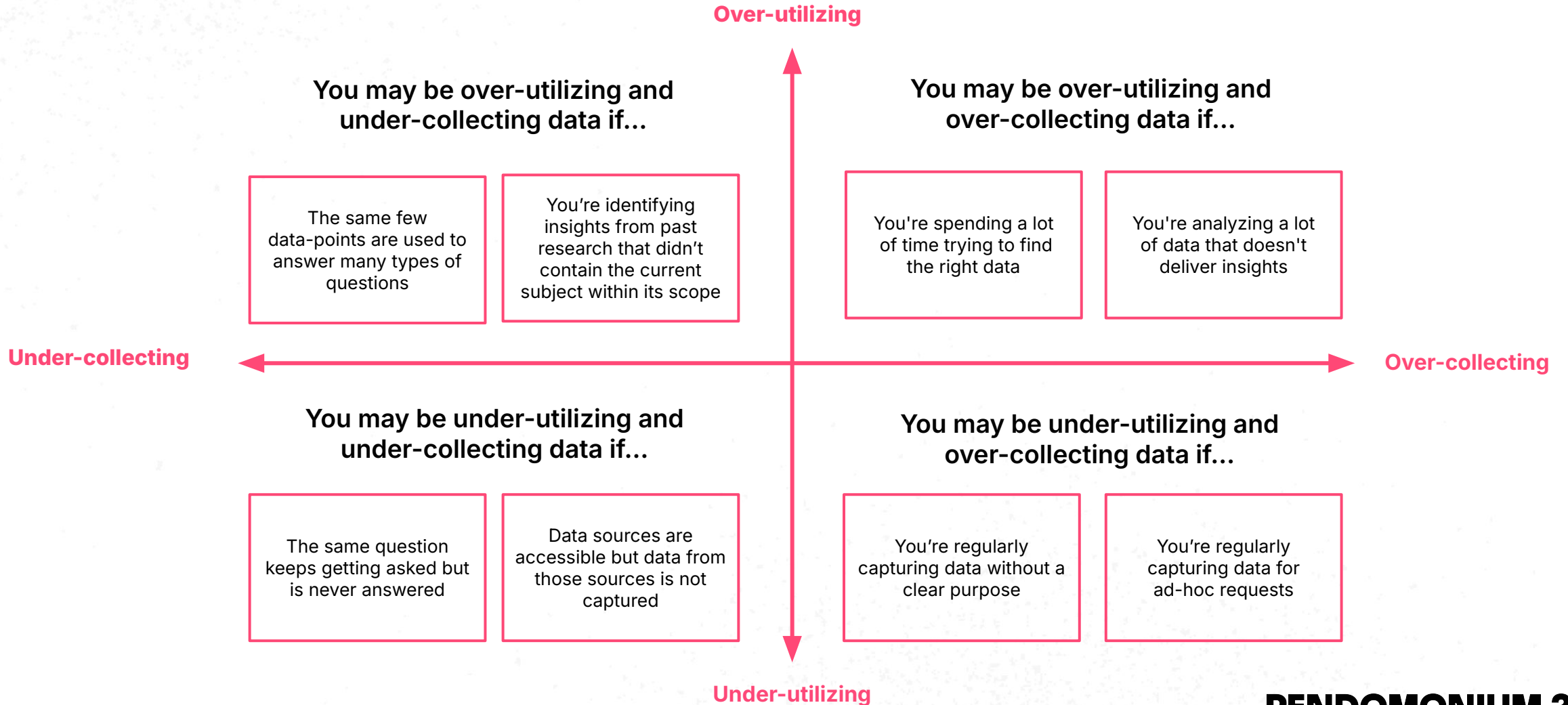
Over-utilizing data can lead to inaccurate results due to misinformation or analysis paralysis.



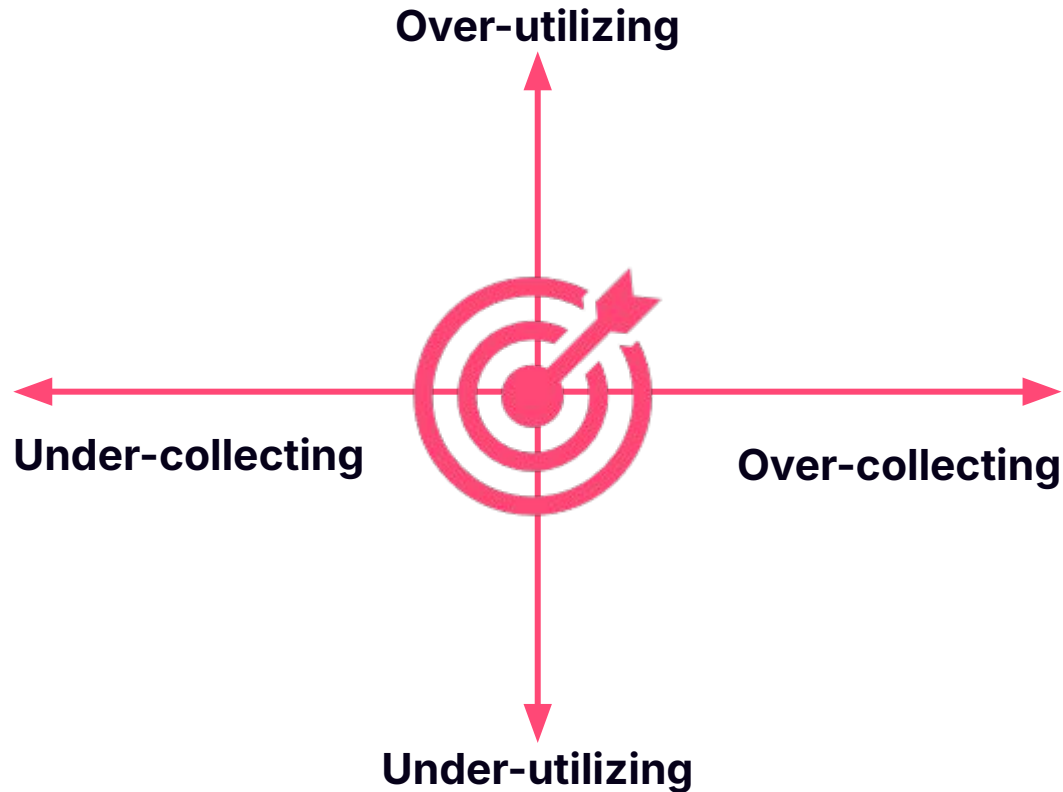
You are becoming too data-obsessed when you're over-collecting and over-utilizing data



Assess Your Current Position



Setting your sights



**Aim for a balanced,
data-driven
approach to product
design and
development**



Taking action

Know if you need data

Ask yourself:

- Is this something I've done before?
- How much risk is associated with my assumptions?
- Are there remaining knowledge gaps about client needs regarding the product / feature that we need to fill before starting design?

Know why you need data

Ask yourself:

- What level of detail do you need to capture?
- How much time do you have to collect the data?
- What's your budget?

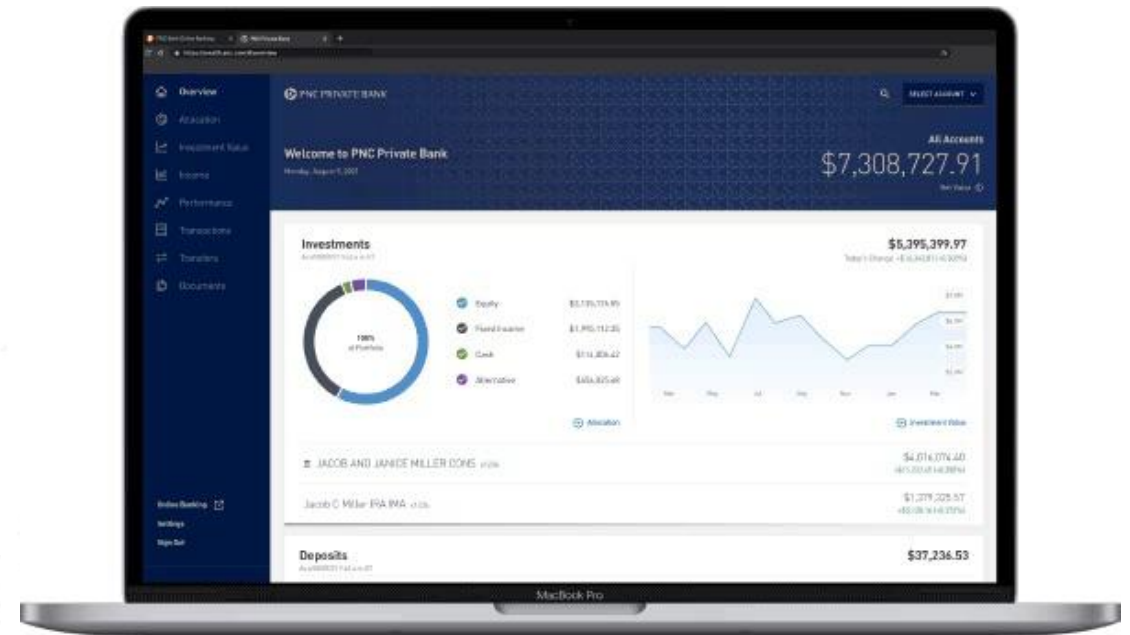
PNC Private Bank Online



PNC Private Bank Online provides users with an integrated experience combining advanced investment views, private banking information and interactive self-service features.

This dynamic tool offers users a complete view of all PNC accounts as well as interactive features including:

- Comprehensive view of your PNC Relationship
- Consistent view across all of your devices
- Custom account group to view your Wealth the way you think about it
- Ability to include balances from accounts at other institutions for a more comprehensive picture of your net worth
- Advanced views of your investments



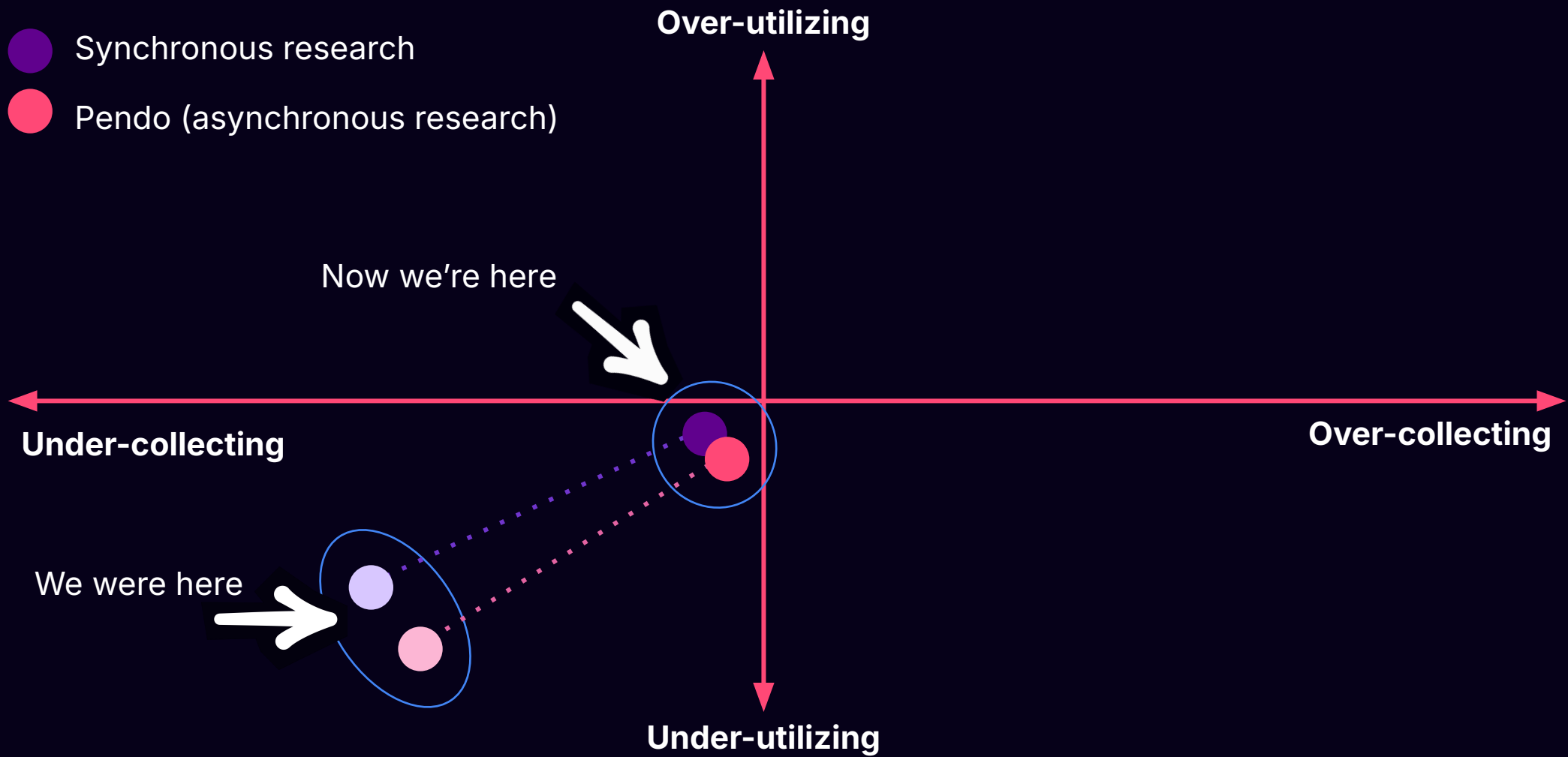


The Challenge

**Our product process resulted
in inconsistent data collection
and utilization.**



Data Strategy Evolution



Scaling impact over time

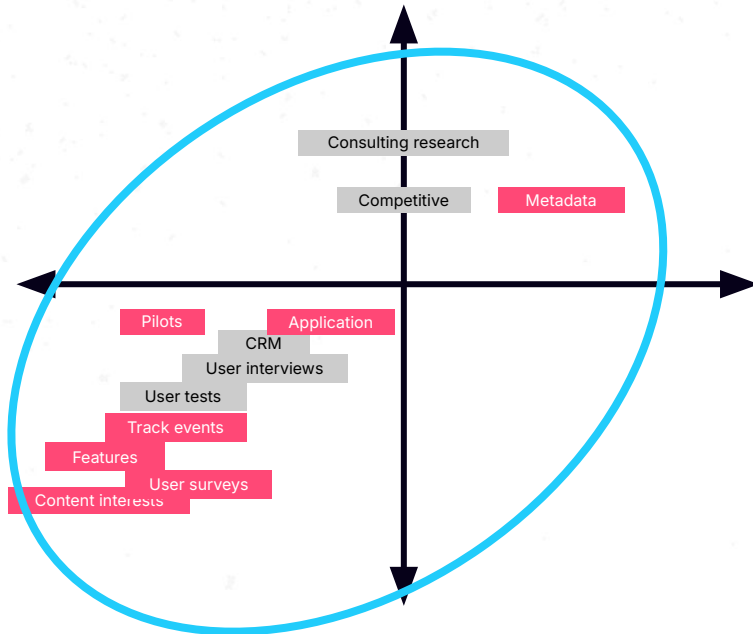
Primary Data Source

■ Pendo

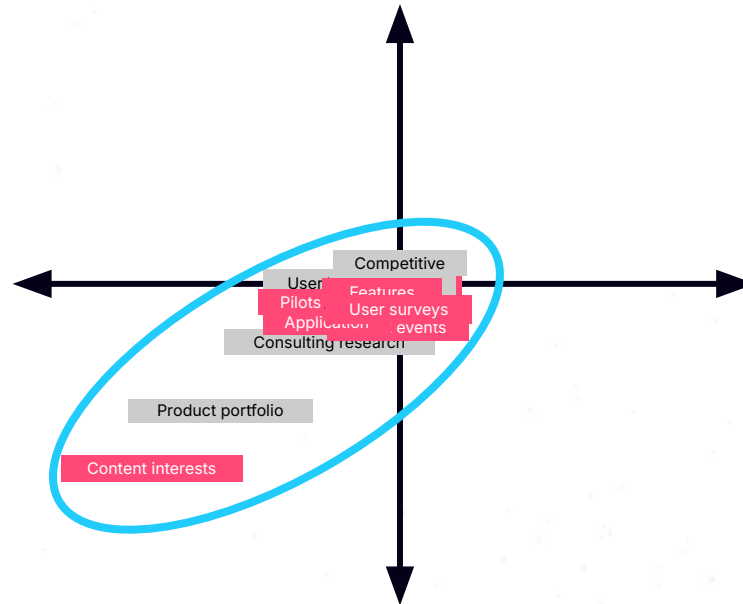
■ Non-Pendo



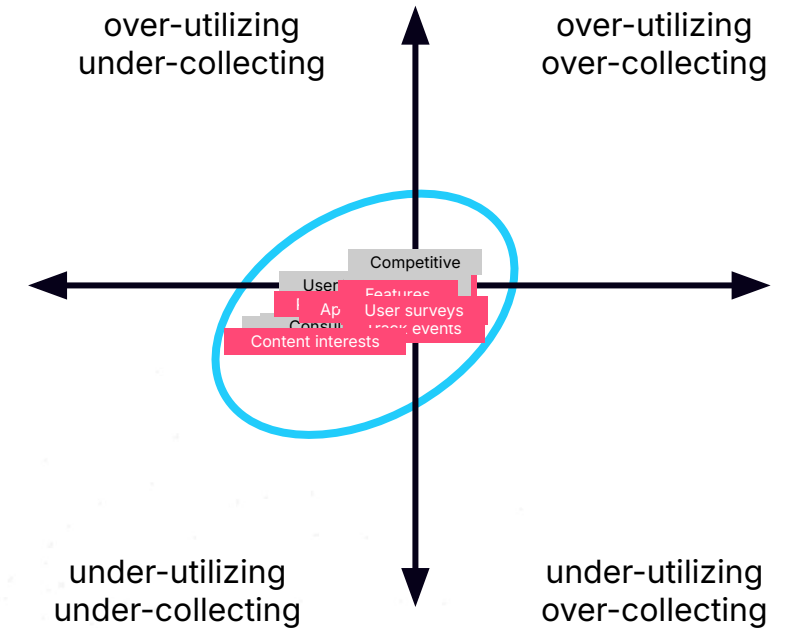
Before 2022



2022 - 2024



After 2024



Tighten that group!!

PENDOMONIUM 2024

Scaling reporting over time

Primary Data Source

■ Pendo

■ Non-Pendo



	Never	Rarely	Sometimes	Usually	Always
Before 2022	<div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Content interests</div> <div style="background-color: #9e9e9e; color: white; padding: 2px;">Product portfolio</div>	<div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Track events</div> <div style="background-color: #9e9e9e; color: white; padding: 2px; margin-bottom: 5px;">User-tests</div> <div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">User surveys</div> <div style="background-color: #9e9e9e; color: white; padding: 2px; margin-bottom: 5px;">User interviews</div> <div style="background-color: #9e9e9e; color: white; padding: 2px;">Consulting research</div>	<div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Features</div> <div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Guides</div> <div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Metadata</div> <div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Pilots</div> <div style="background-color: #9e9e9e; color: white; padding: 2px;">CRM</div>	<div style="background-color: #e91e63; color: white; padding: 2px; margin-bottom: 5px;">Application</div> <div style="background-color: #9e9e9e; color: white; padding: 2px;">Competitive</div>	
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Scaling reporting over time

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■ Non-Pendo



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Scaling tracking over time

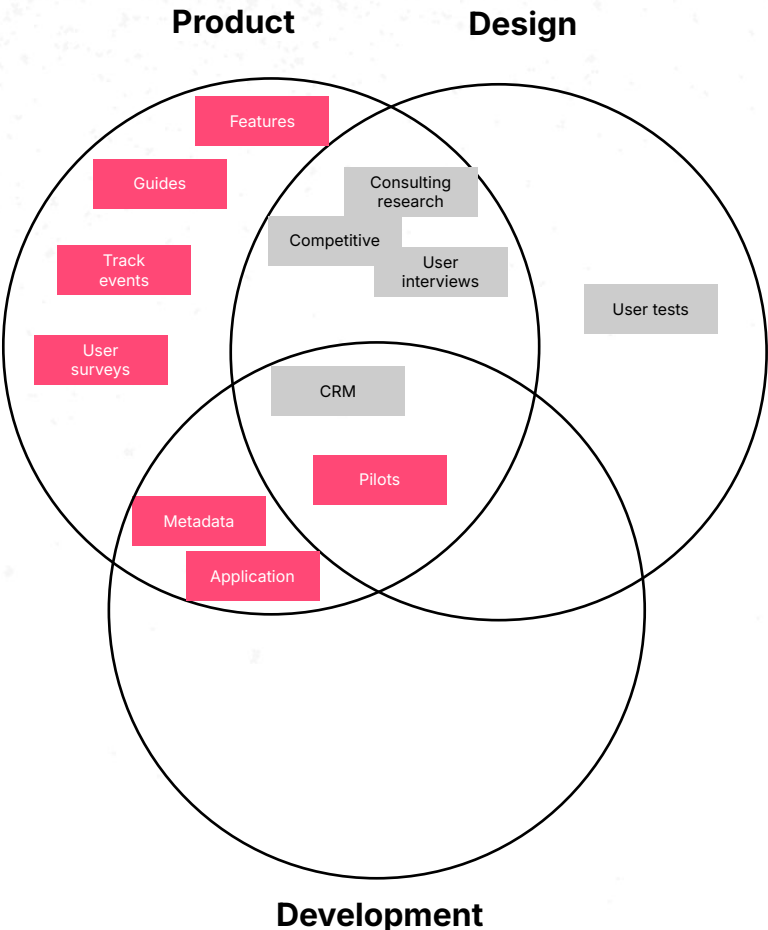
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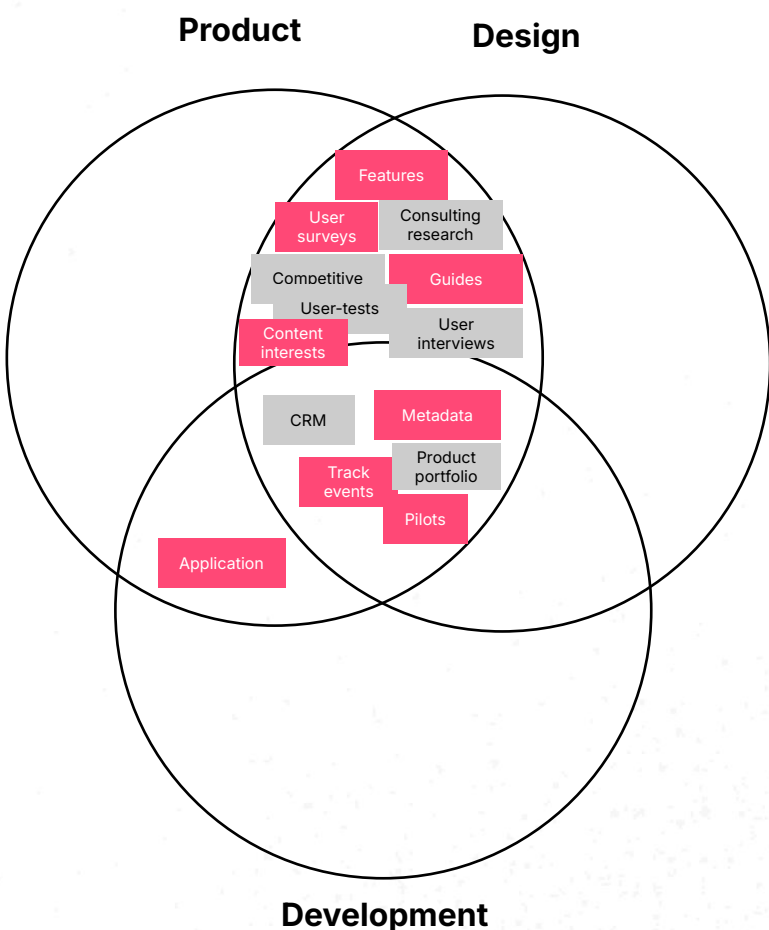
Non-Pendo



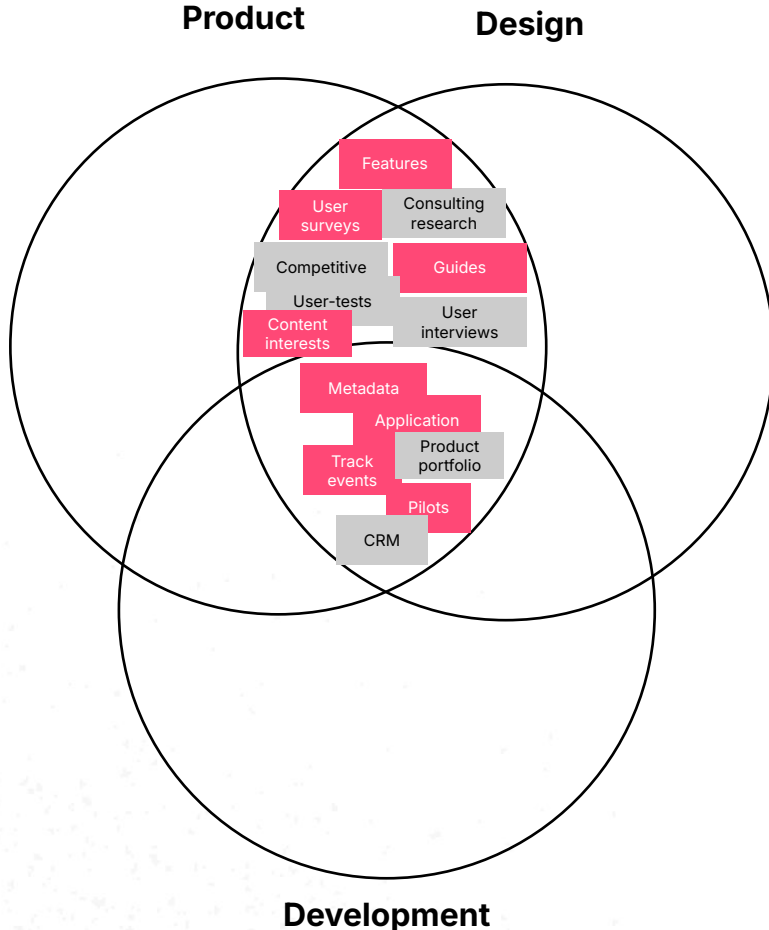
Before 2022



2022 - 2024



After 2024




PENDOMONIUM 2024



Pendo Makes Collecting Data Easy

**The hard part is empowering
your cross-functional team
to utilize the data.**



**How often are product, design,
and research communicating
about processes and outcomes
in the same room?**



Creating a Cross-Functional Working Group



The Collaborative Working Group

Product


Design

Research

Future Opportunity
Software
Development

How We Did It

- Scope a project for kick-off
- Identify a benchmark for success or further exploration
- Identify assumptions
- Prioritize riskiest assumptions
- Prioritize how to validate solutions
- Plan for experiments in the process



We created a process to help our crews know where to aim and how to hit their targets.



Working Group Results

Improving alignment across product disciplines

Strengthening our relationship with our research partners

Creating more awareness across the team on our process

Developing holistic product design process frameworks

Socializing our kick-off framework within the Private Bank Digital team

Establishing a project kick-off framework

Documenting our resources in a SharePoint site

Establishing robust research resources

Scaling Tracking

Who should use Pendo



Scaling Reporting

When to use Pendo



Scaling Impact

How to use Pendo





Guiding Principles

Patience
Collaboration
Openness
Curiosity
Flexibility



Implementing New Team Process

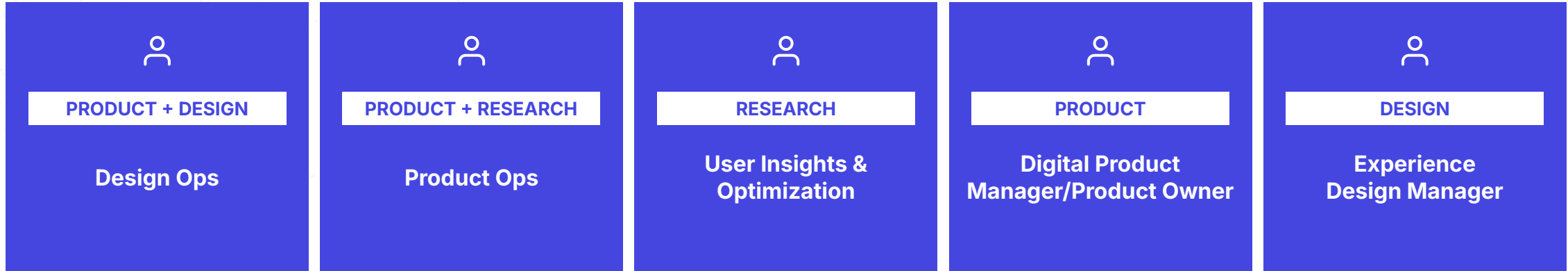


The Process | Forming Your Own Group

- 1 Recruiting Team Members
- 2 Rose, Bud, Thorn - Current Processes
- 3 Define the Problem and Goals
- 4 Develop Individual Process Maps
- 5 Identify Similarities and Differences
- 6 Form Alignment and Identify Gaps
- 7 Test New Process | Receive Feedback



1 Recruiting Team Members



Recognizes where research insights can be leveraged throughout the design process

Develops and facilitates educational materials and templates

Recognizes where research insights can be leveraged throughout the development process

Recognizes which research insights are valuable to capture

Understands how to capture research insights and leverage them

Implements processes across the entire design team



2

Rose, Bud, Thorn - Current Processes

Rose

What Has Worked
Well So Far?

Bud

What Has Potential?

Thorn

What Is Not Working?



3

Define the Problems and Goals

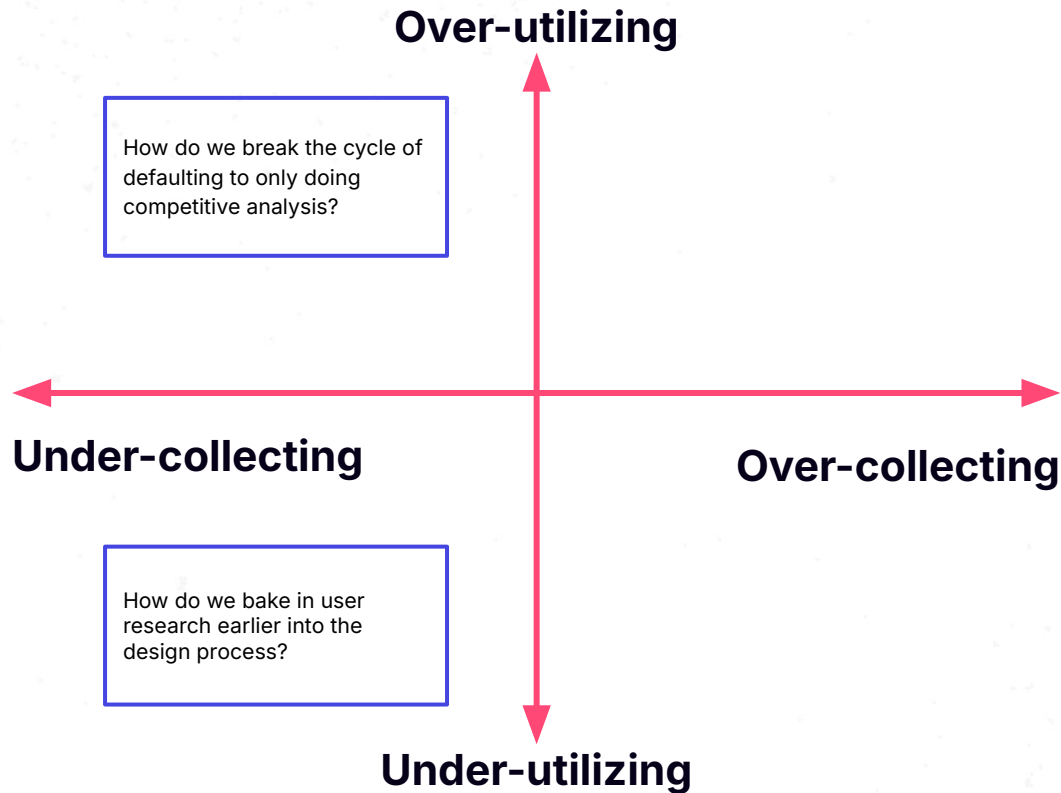
We had a strong process for reviewing design work but there was no established pattern for how to start a new project and measure its impact to the business.

How might we develop and enhance our product design process to empower our team to drive positive user and business outcomes?

- How do we clearly define the problems that we're trying to solve?
- How do our solutions connect business goals to user benefits?
- What experiments or research can we perform to validate our riskiest assumptions?
- How do we socialize the different user research methodologies so design and product are more familiar with what's available?
- How do we break the cycle of defaulting to only doing competitive analysis?
- How do we bake in user research earlier into the design process?



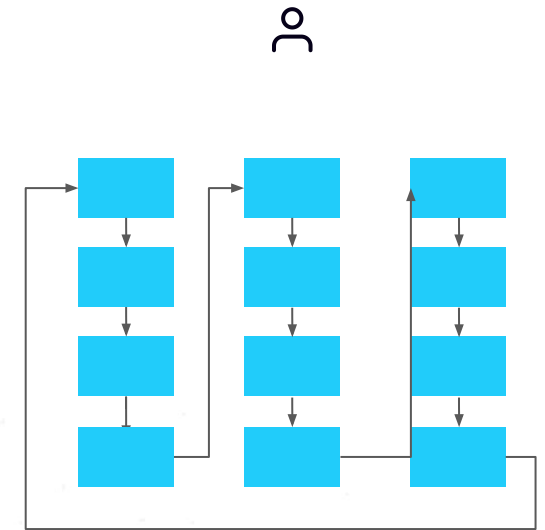
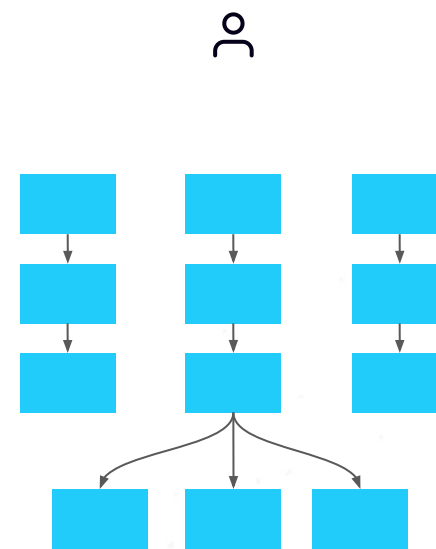
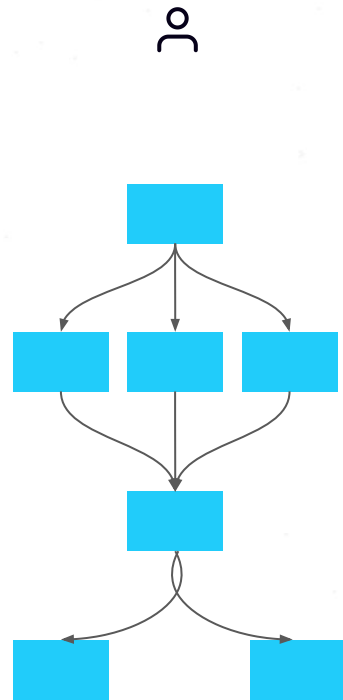
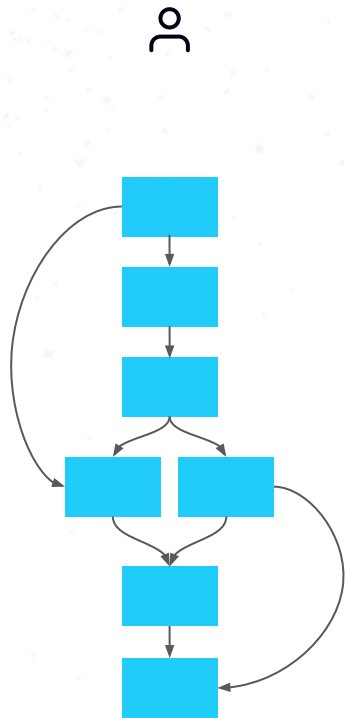
3 Define the Problems and Goals



- How do we clearly define the problems that we're trying to solve?
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- **How do we break the cycle of defaulting to only doing competitive analysis?**
- **How do we bake in user research earlier into the design process?**



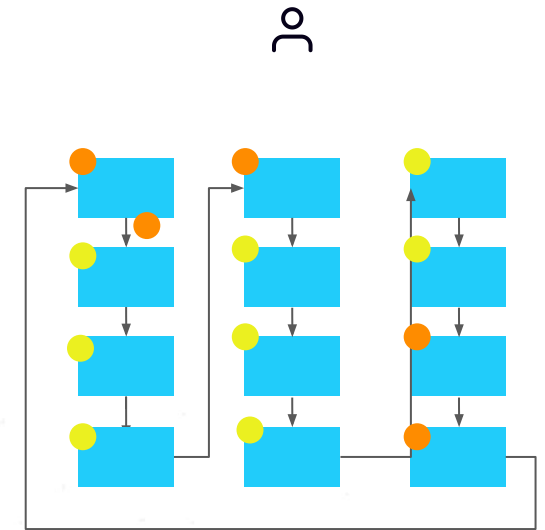
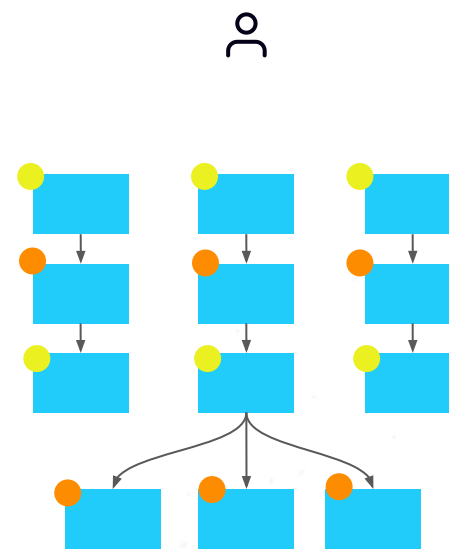
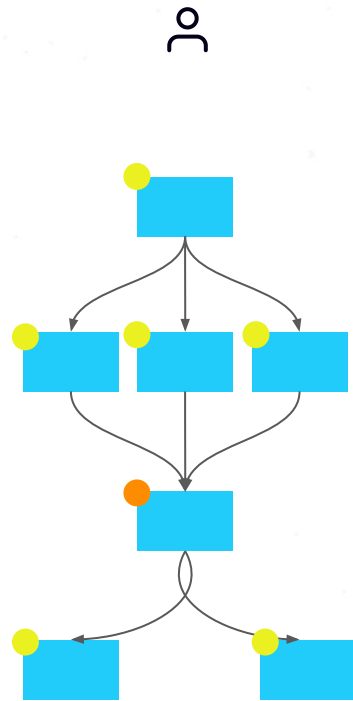
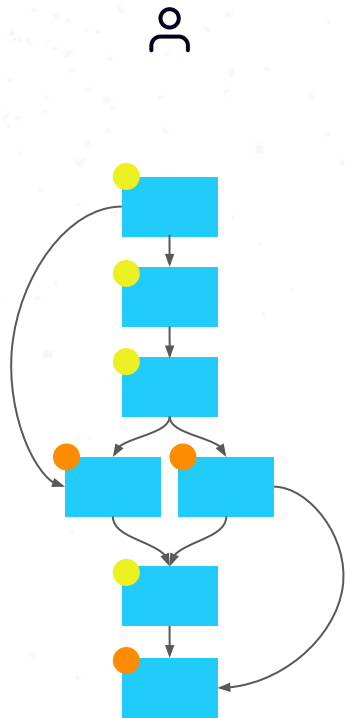
4 Develop Individual Process Maps





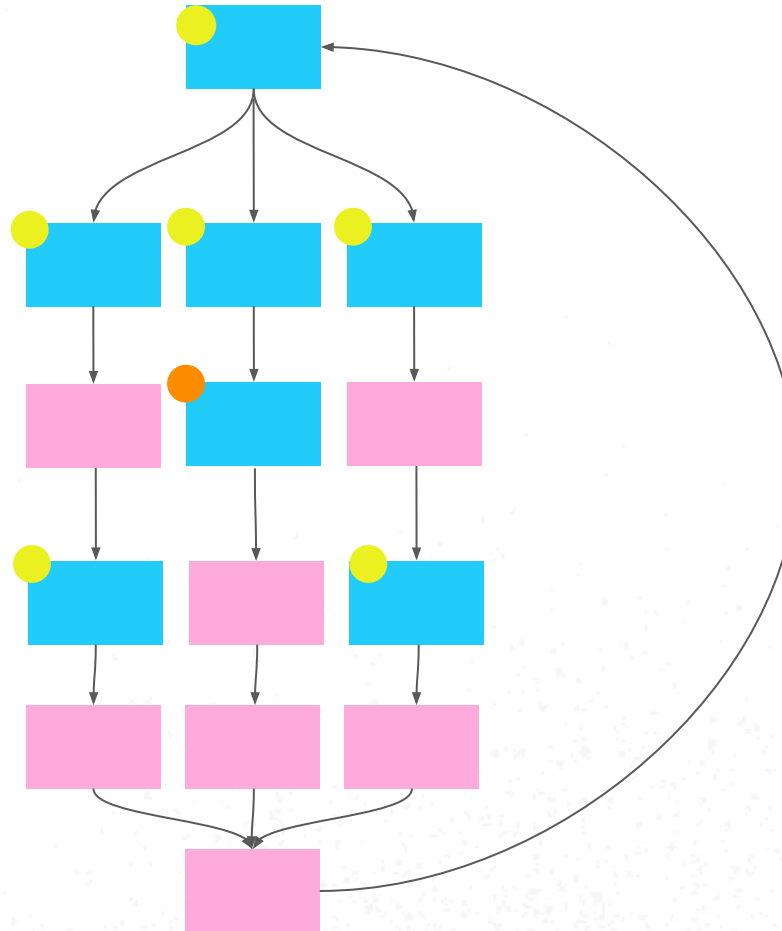
5

Identify Similarities and Differences



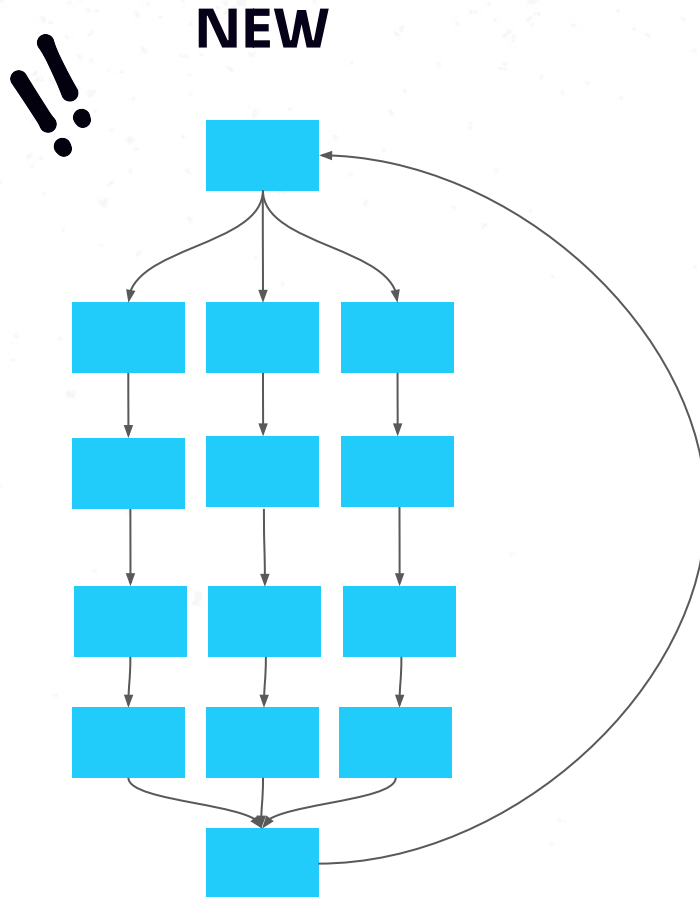


5 Form Alignment and Identifying Gaps





5 Test New Processes and Receive Feedback



Workshop Process Changes

Part 1 - 2 Hours

- Overview - 10 min
- Introduction to Workshop - 10 min
- Break - 10 min
- Workshop - 1 hr
- Share Out - 20min
- Takeaways - 10 min

Part 2 - 30-45 min

- Rose, Bud, Thorn (Repeat)



Lean UX Canvas In Practice



1 Scoping a project for kick off

Problem	Measures of Success	Users	Benefit	Feature/Solutions	Assumptions	Experiments
What business problems have you identified?	Business outcomes/ KPI's that indicate that you solved a real problem in a way that adds value to your customers?	What types of users and customers should you focus on first?	What are the goals your users are trying to achieve? What is motivating them to seek out your solution?	List product, feature, or enhancement ideas that help your target audience achieve the benefits they are seeking.	What is the riskiest assumption we have? This is the assumption that will cause the entire idea to fall apart if it's wrong.	Brainstorm the types of experiments you can run to learn whether your riskiest assumption is true or false.

2 Identifying a benchmark for success or further exploration

Hypothesis Statement			
If...(Users)	Attains/Can... (Benefit)	Through a... (Feature/ Solution)	Then we believe that there will be a... (Business Outcome Measure of Success)

3 Identify assumptions

5 Prioritize how we validate our solutions

4 Prioritizing riskiest assumptions

6 Planning for experiments in the process

Rank your assumptions from 1 - having the most risk and 10- having the least amount of risk.	Experiments to plan for MVP.
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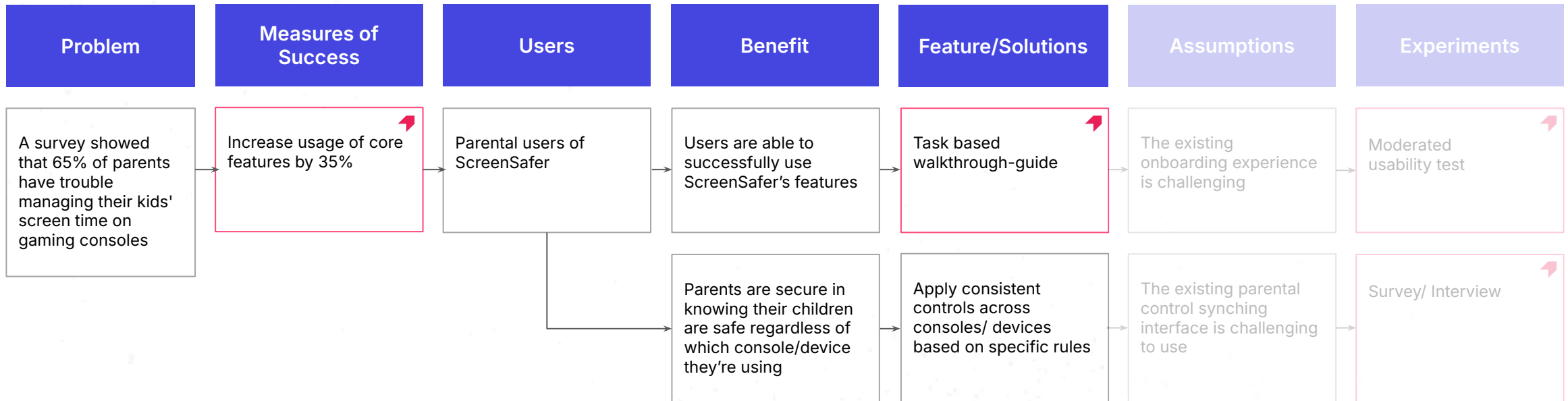


Project Example

ScreenSafer is an app that allows parents to set universal controls over their children's mobile devices, tablets, phones, and apps.



1 Scoping a Project

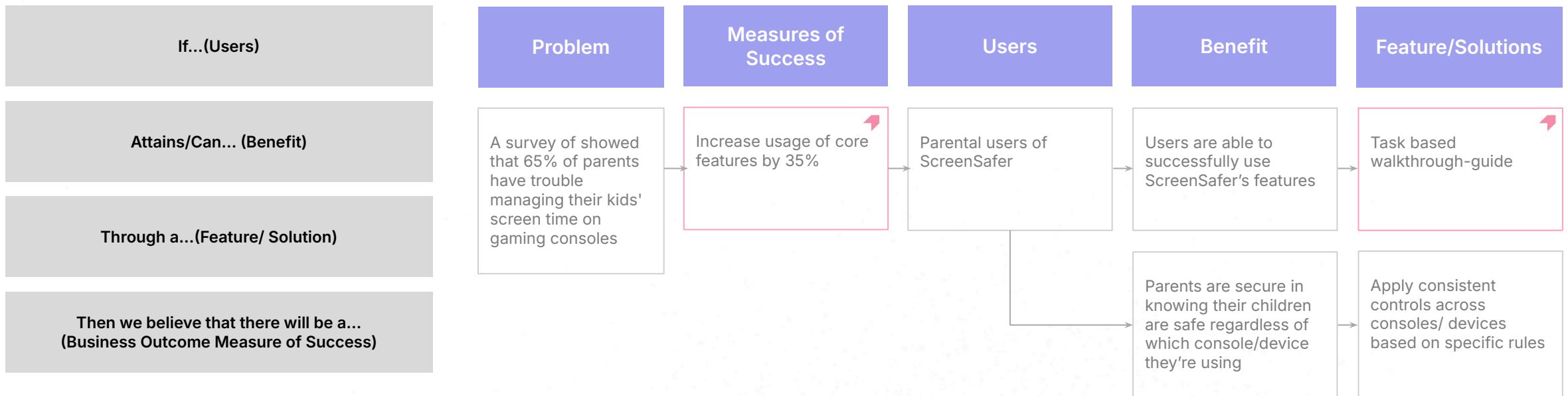




2 Identifying Benchmarks for Success

Hypothesis Statement

If parental users of ScreenSafer can successfully use ScreenSafer's features through task based walkthrough-guides then we believe that usage of core features will increase by 35%.

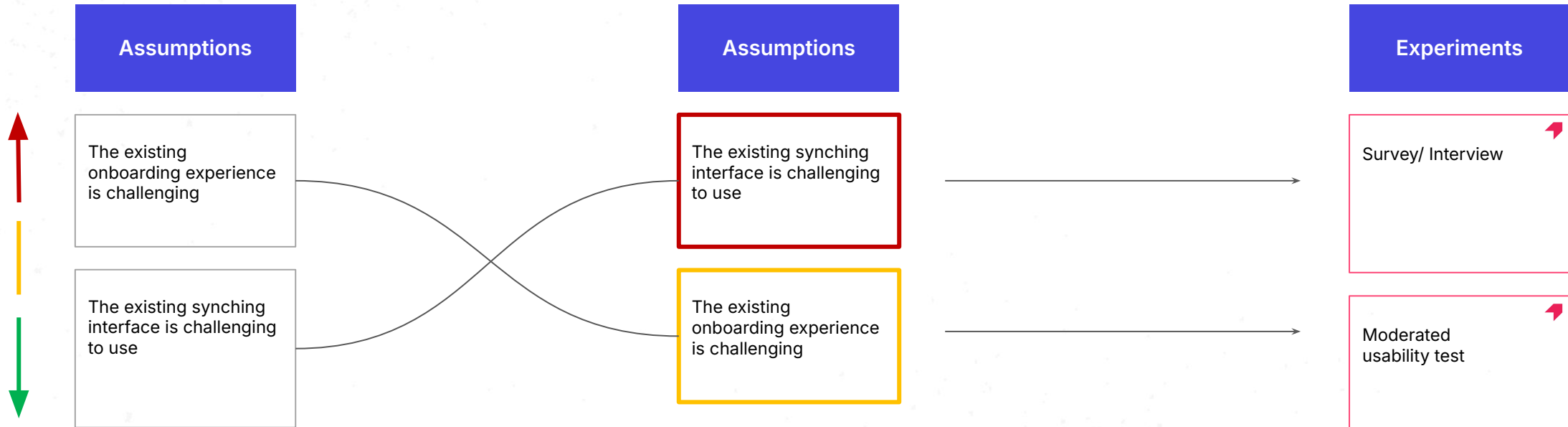




3 Identifying Assumptions

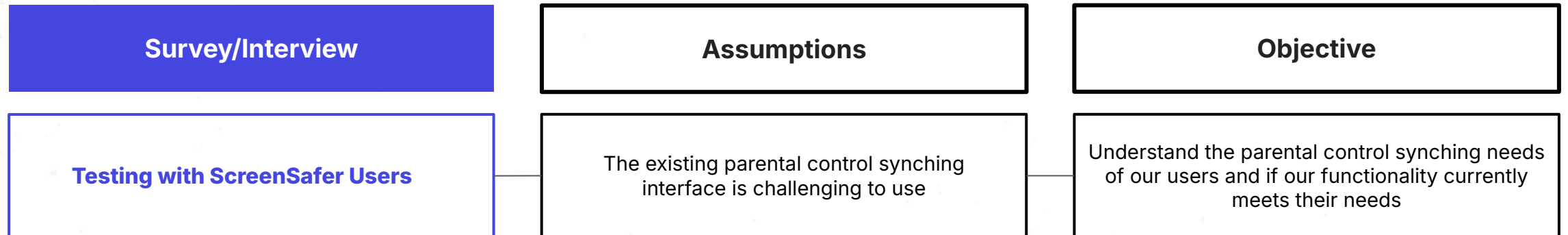
4 Prioritizing Riskiest Assumptions

5 Validating Our Solutions





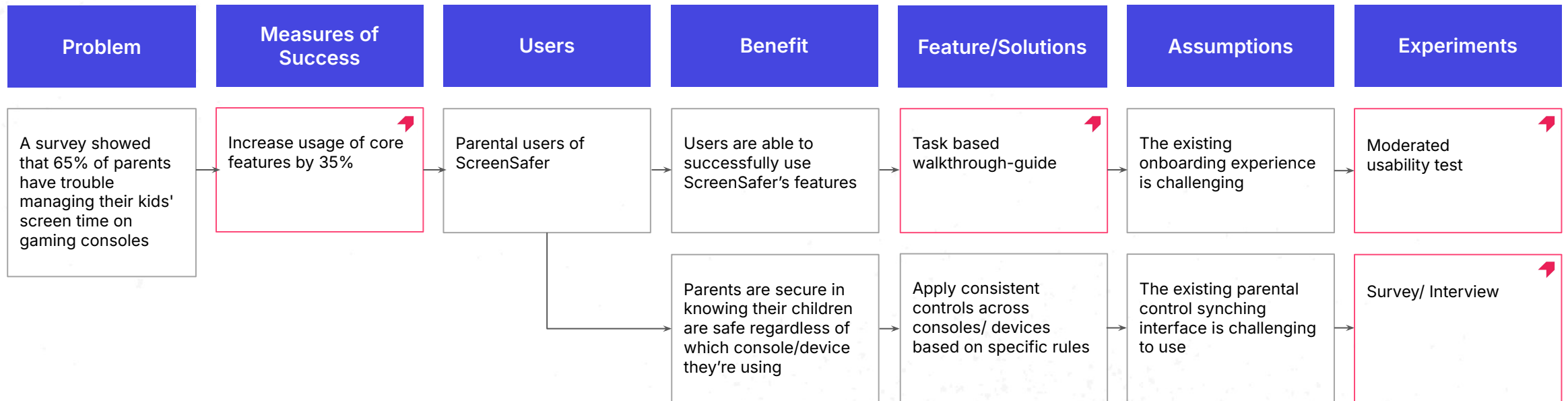
6 Planning for Experiments

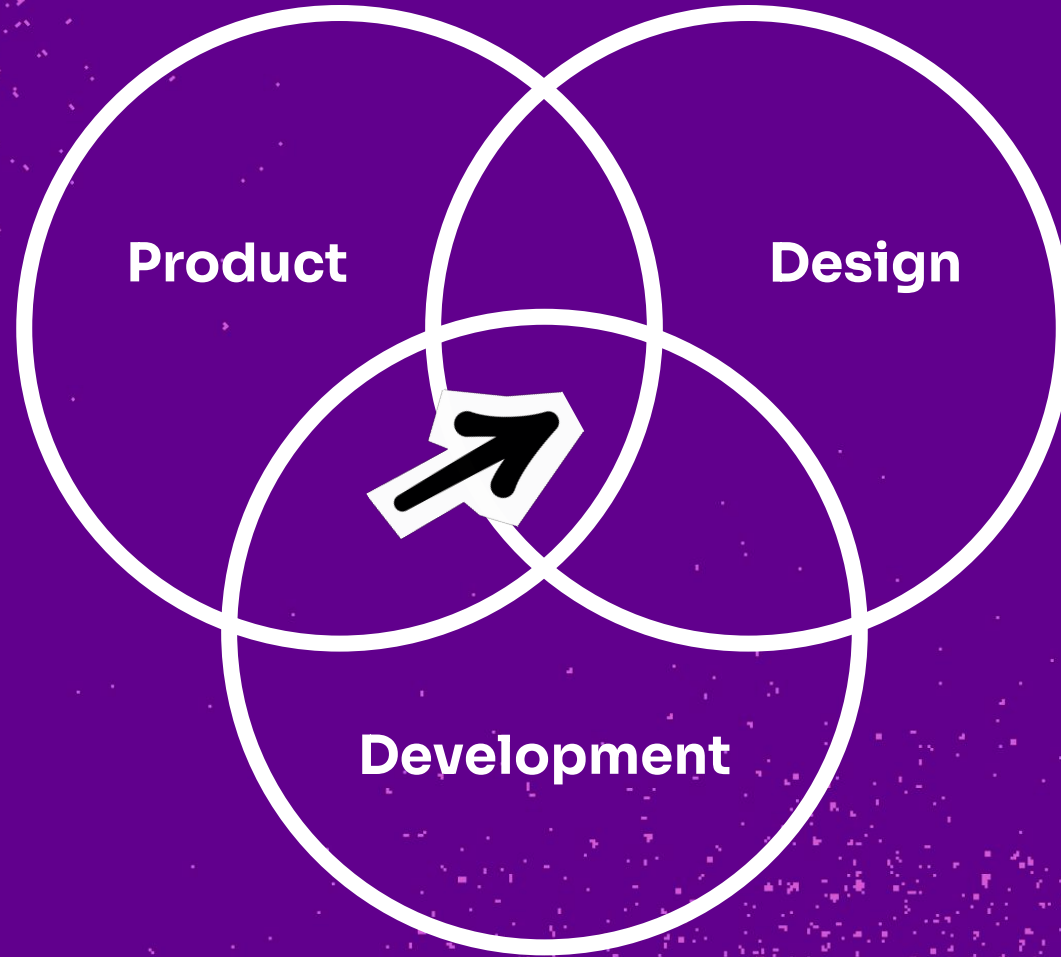




ScreenSafer Mock Scenario

ScreenSafer is an app that allows parents to set universal controls over their children's mobile devices, tablets, phones, and apps.







Questions?