

ATB Financial

WORK REIMAGINED PERSONAS (2017)

My role:

Project Director and Design Lead - partnered with client and internal team to define research approach. Managed client's expectations regarding project deliverables. Managed team of 3 researchers and conducted reviews, presented outcomes. Lead work on Customer Journey Mapping component.

Challenge

ATB was in the late stages of starting their journey to "Work Re-imagined", an ambitious "hot" change from Microsoft suite to Google's GSuite. As they neared the initial kickoff, they realized they needed a breakout way to communicate the overall change management component to their 5,500 ATBers in a way that was inclusive and supportive.

Approach

After an initial call, we recommended developing personas for their entire internal workforce. With a three-week timeline, we were hoping to get most of it done before their hard deadline. We decided on immediate in-person interviews to breakdown their internal twelve role grid. After over 40 interviews in a couple days, we presented our initial findings.

We also had to find a way for them to immediately operationalize these personas. As the timeline was critical, we needed to create a framework to enable empathic decisions throughout their challenging process.

Solution

We presented our initial six-person persona line-up to their steering committee and hand-picked 50 internal Google Ambassadors to high acclaim. We tested out the grid on additional groups with almost perfect validation of our results. These six personas was the foundation of their entire change management, support and communications plan throughout the months-long transition.

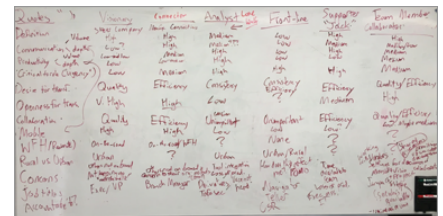
To provide something tangible for the personas, we decided to use a journey mapping framework, but adapt it to their forward-looking challenge. By having teams of ATBers interpret the thinking, feeling, doing sentiments of each persona based on the milestone, we were able to build a map to guide truly empathic touchpoints throughout the process.

Results

ATB was able to create a positive environment around this sea change in how people interacted with technology at work. Most productivity suite changes for enterprise are challenging and troublesome. This one, coming from a place of empathy and empowerment, had their team looking forward to the change instead of fearing it. Our framework helped them understand how to make that happen.

Here's a few brief articles that talk about the transition. [<https://gsuite.google.com/customers/atb-financial.html>] [<https://www.forbes.com/sites/tomgroenfeldt/2018/05/16/alberta-fi-boosts-collaboration-with-google-g-suite/#45933c096b74>]

ATB Financial™



Interview Methodology

48 remote conversational and semi-structured interviews across the organization

Topics included:

- Understanding of individual roles
- Technology use
- Thoughts and concerns on the switch to G-Suite

Interviews were conducted March 8th - 14th, 24th and 27th.

Half hour interviews

ATB | Work Reimagined

VI The Visionary

I create and execute on the strategic vision for ATB.

It's a bit messy managing the inbox. They are constantly harried with email, and find it difficult to prioritize items.

Always on the go. They are constantly away from their laptop and desire a way to check emails on their mobile device.

Back steps with them. They are, and feel, responsible for any impact to the work brought on by the switch to G-Suite.

Communication: [Progress bar with green and orange segments]

Tools: [Progress bar with green and orange segments]

Mobile: [Progress bar with orange segment]

The Visionary

	New	Ignite & Listen	Excite & Discover	Adapt & Monitor
Doing	Send Email, Push to send messages, Collaborate, Working on Project			
Thinking	How will my users be properly supported through the implementation? What will happen if all of the email that will be able to access their work when they're mobile?			What do we want to be?
Feeling	I can't wait for the implementation. This will be an inflection point for our organization.			

Context: Training, Messaging, Transformation, Day-to-day