

Collaborating on Vision and Design

22 JUL 2016

STOCKPORT COUNCIL CHANGE TOOLKIT –V1

Agile Principles

Manifesto for change

We are uncovering better ways of working. Through this we have come to value:

People-led change over process-led change

Collaborate towards a solution over negotiating between solutions

Creating something that works over writing documentation

Responding to change over sticking with a plan

That is, while there is value in the items on the right, we value the items on the left more.

Adapted from the Agile Manifesto www.agilemanifesto.org

Collaborating on Vision & Design

Essential or Inception?

This section is divided into two parts: Essential and Inception.

Why? There are many techniques to use when collaborating on vision and design. The key factor is size of problem.

For smaller problems, there are the essential techniques: goals, user journeys, service design.

For larger problems, we introduce the idea of an 'inception' which is 1-3 weeks of collaborative workshops to derive a shared understanding and a joint plan whilst also establishing relationships and ways of working needed to ensure success of implementation.

Collaborating on Vision & Design: Essential

Essential Vision and Design

Methods:

- Goals
- User journeys
- Actions
- Prioritising & MVP

Techniques: Facilitating collaboration

Methods

Generating Goals

What are you aiming for?

Make it SMART: specific, measurable, achievable, relevant/resourced, timed.

Try to include(/state relevance to) end-users

Tips for Generating goals

Differentiate between your goal and similar aspirations e.g. your longer term vision, someone else's goal, risks, related goals, nice-to-haves - it's ok to write all these down and show links

Avoid specific solutions, if solving the problem by any means would mean the goal was achieved

Does it inspire action amongst those who are involved? At least, is it understandable by them? At best, it's collaboratively written by those involved.

Facilitating goal writing

Set up:

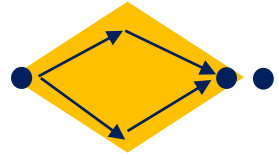
- Who is in the room?
- Do they know why? E.g. the ‘incoming goal’?
- When do they need to know the incoming goal?
- Explain the goal could be better with their help

Generating ideas/discussion – encourage, set aim

Turning towards a focus – give time and structure

Coming to a conclusion – facilitate hard if needed

Keep the goal visible



Goals

Much of this has focused on one goal – which is good for smaller, focused changes

More than one goal is fine

Some goals help shape the work from different angles

To keep a focus with multiple goals, also refer back to or create a vision statement

Example of multi-goal work

Customer can complete application functionally (not all background checks done, as will be there for go-live)

We can test actual product in front of German customers on supported devices

We prove out integration with key systems: X,Y,Z

Initial validation on integrating systems V and W

Team have technology to continuously deliver tech changes to live

EXERCISE

A new hotel has opened outside Stockport station. The success of the hotel depends on reviews of the first customers leave on TripAdvisor. First impressions count – smooth check-in is critical

You are Reception Manager. Your team come from sister branches around the region and some are new. Other teams include: housekeeping, IT, buildings. You need to get buy-in and ideas.

Your ‘incoming goal’ is: “Don’t mess up the check-in!”

As Is User journeys...

focus on value

create shared understanding

give end-to-end context

- citizen
- internal
- external

gather wide range of info:

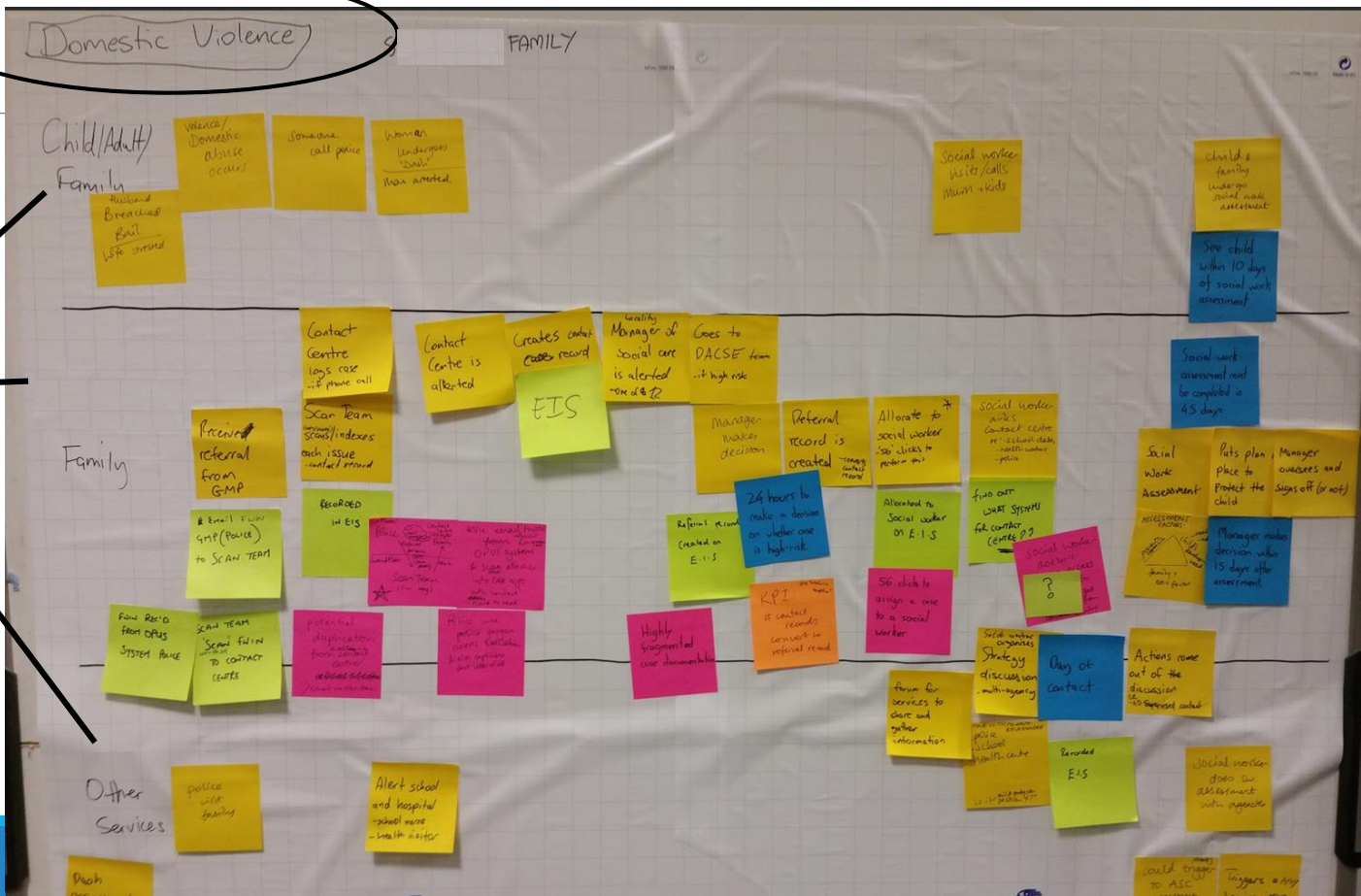
activities

systems

timings/volumes

reporting

pain points



Facilitating user journeys

Split out the roles: vocal facilitator, writer of activities, writer of other notes

Who is your customer/user?

Trigger point

Leave space for adding more

Facilitating user journeys

Get going and keep pace but don't miss a detail that could have a bearing on the change

Keep coming back to the customer

Review after a break – chance to add more

Encourage others to write – especially the pain points

Capturing user journeys quickly

Photo – good quality, email them from your phone

Excel – see embedded example – quicker than Visio

Physical artefact – take the journey(s) back to a wall in your team workspace - continue the conversation, adjust the stickies as new facts come to light, share them more broadly.

If it falls off the wall and no one cares, it's probably time to throw it away. If you also have photos it's ok and if someone does care – why not do the exercise again – a more up to date version is better anyway.



Microsoft Excel
Worksheet

Designing change

Moving from what's wrong to how we fix it is an important transition

It's important to separate out the two exercises but not to leave the problem hanging for too long

Same people in the room – or add more – who can help us fix this – walk them through the As Is journey in advance

Methods: Focus, Generate Ideas, Converge, Map

Focus: What do we want to change?

Is the focus of what you want to change clear?

Faster process?

Better result for customer?

Adopting a new solution?

Lose dependence on a person or team?

Be clear – put the focus of change on a post it note above the To Be process

Methods to generate ideas

Vote on pain points – discuss potential solutions

Go through the As Is – generate ideas

Or just generate ideas on to a blank sheet – give people quiet thinking time, come back together

If people have big ideas, let them present

Converging to choose ideas

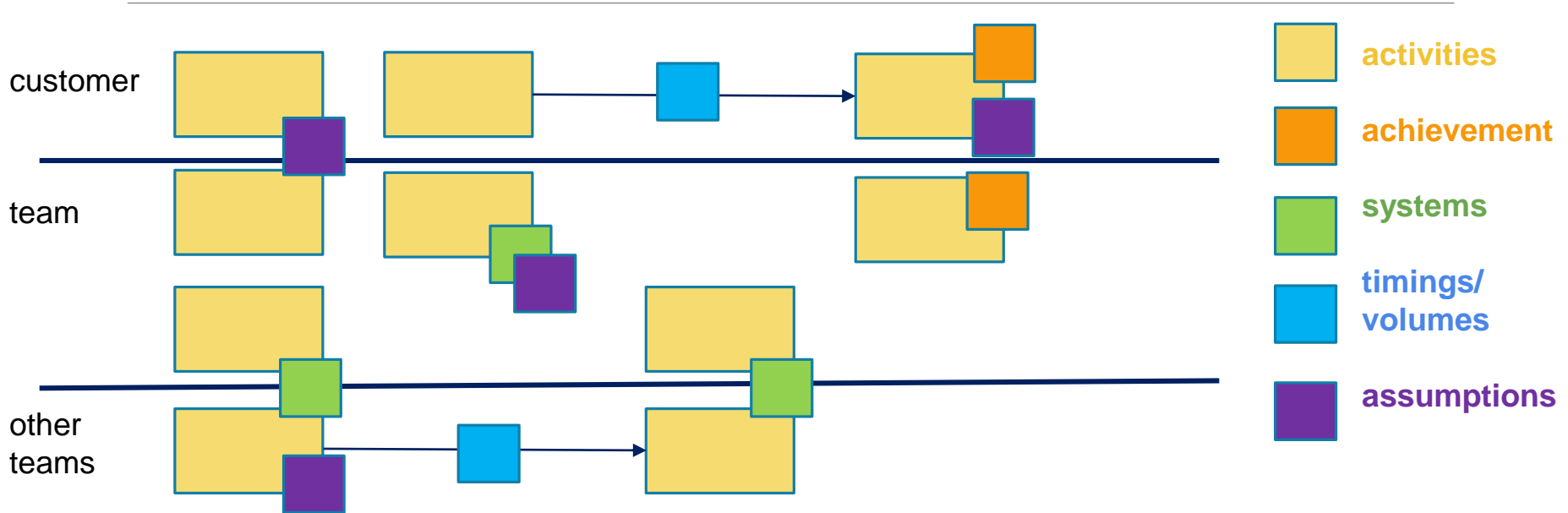
Get each idea on to a large sticky note – organised in areas – discuss and vote

Park ideas if need be or agree what is a skateboard solution (now) and what is a car (park for later)

Some ideas may need further investigation - create an action for a time boxed investigation day/week

User journey – map out how the selected idea(s) work in a new user journey – does it solve the pain points? Does it answer the focus of change?

To Be User Journey - Design



EXERCISE

Develop your team process for check-in

Preparation time

As facilitators work through what you want to achieve your team(s) and external partners

Who do you want to invite?

Work out how much time you have

Choose appropriate exercises to suit the context, aim and time *e.g. if the goal is uncontentious and time is short, you could just focus on user journeys*

See the Techniques slides for tips on preparation

Preparation time

Develop an agenda to help work through what and when

Work out who is best to facilitate – note that if one or two of you have a lot to contribute for a session, best not to facilitate

Allow time for setting ground rules, context and settling in

Preparation time

The invite doesn't need to include the detailed agenda – the expected outcomes and what the participants can get out of it is probably more compelling

Logistical info – when/where

Encouraging to delegate if they can't come, if their role is representational e.g. representing users and/or their team

Preparation time

Allow set up time and clear up time

Ideally use hour or two after the session to write up the most important artefacts

If you can draw in support from participants this can be a good way of encouraging ownership of the artefacts on going

Photos will do for some parts

Techniques

Facilitating collaboration

Shared understanding

Physical artefacts – post it notes, visual meetings

Inclusive and participatory:

- 1 conversation
- Silence is agreement
- No laptops/mobiles
- Get the right people in the room
- It's ok not to know the answer
- Parking lot

Facilitators need to be 'on' this. If you see people talking over people, or quiet people not being heard, call it out, gently/strongly – as needed. Draw people in by saying their name and listening.

Active listening

Active listening is a communication technique used in counselling, training, and conflict resolution. It requires that the **listener** repeat what they hear to the speaker—re-stating or paraphrasing what they have heard in their own words, to verify what they have heard and confirm understanding of both parties.

People who are actively listened to feel more engaged and will be more willing to listen to others. This is crucial for collaboration. As a facilitator you can encourage active listening by doing it and enabling people to be listened to.

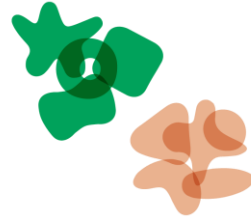
Preparing to facilitate a session



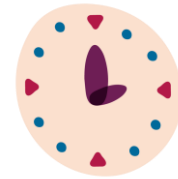
Who is attending?
Where are they on the journey?



What's the aim?



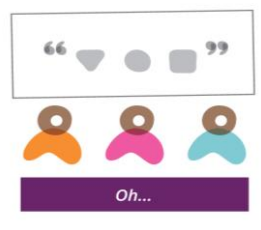
How do we get there?



Timing



Facts / inputs



Shared understanding



Location



Materials



Capture

Collaborating on Vision & design: Inception

Inceptions- Work in progress

This section is still a work in progress

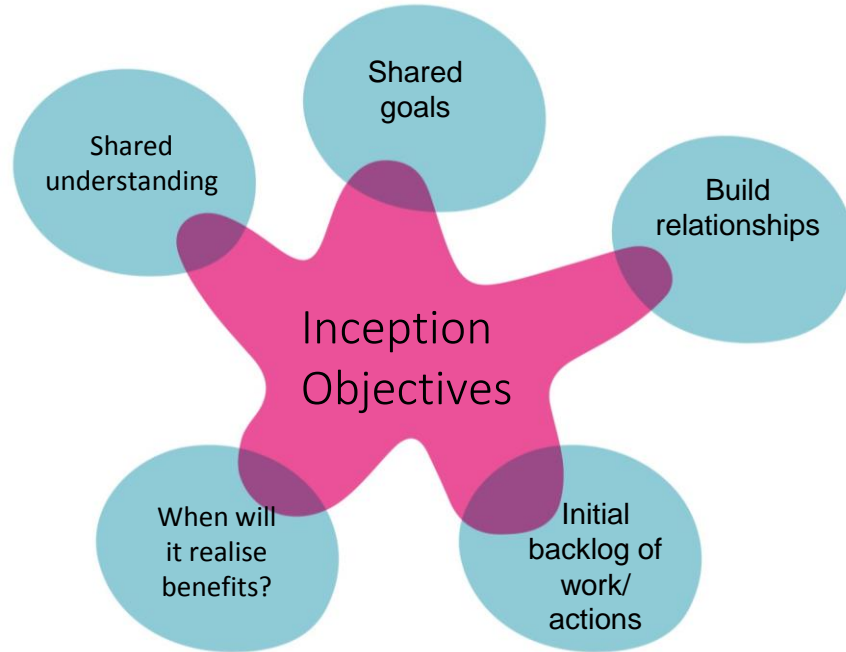
Contents so far

- Intro to inceptions
- Sample of inception sessions

What is an inception?

An inception is a collaboration of key stakeholders, including most of the team who will do the work, to gain a shared understanding of vision, value and approach.

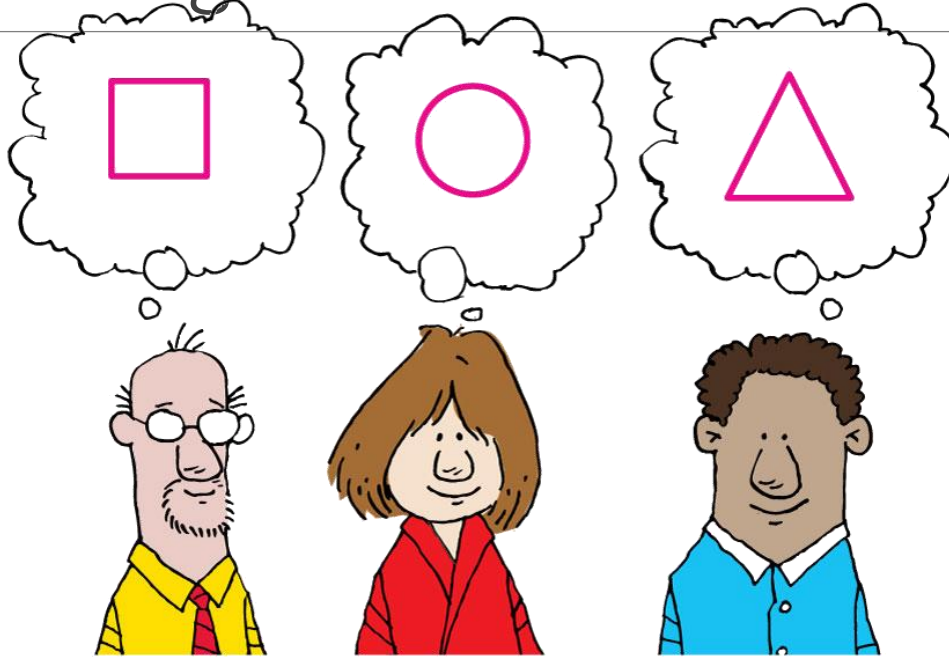
Inception objectives



Shared understanding

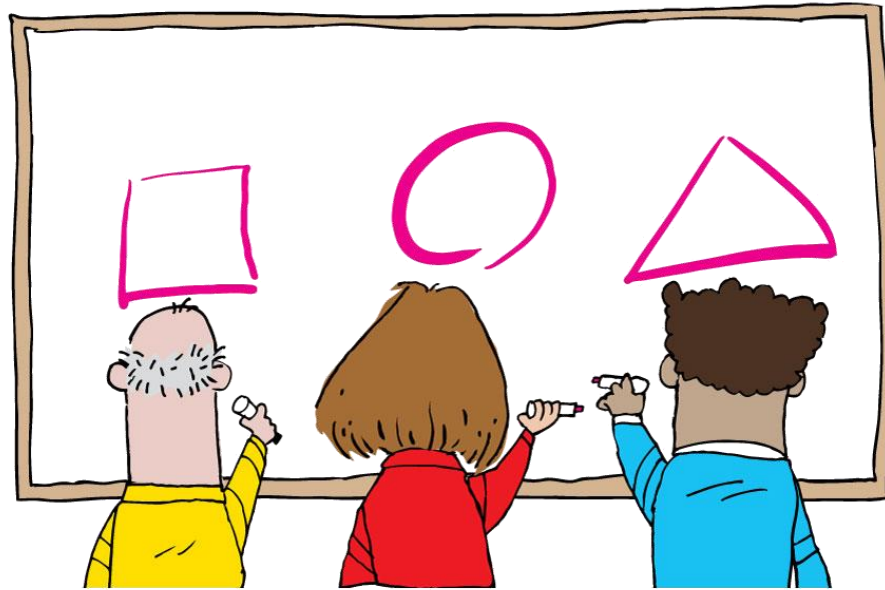
Why is having a shared understanding important?

Are we all agreed?



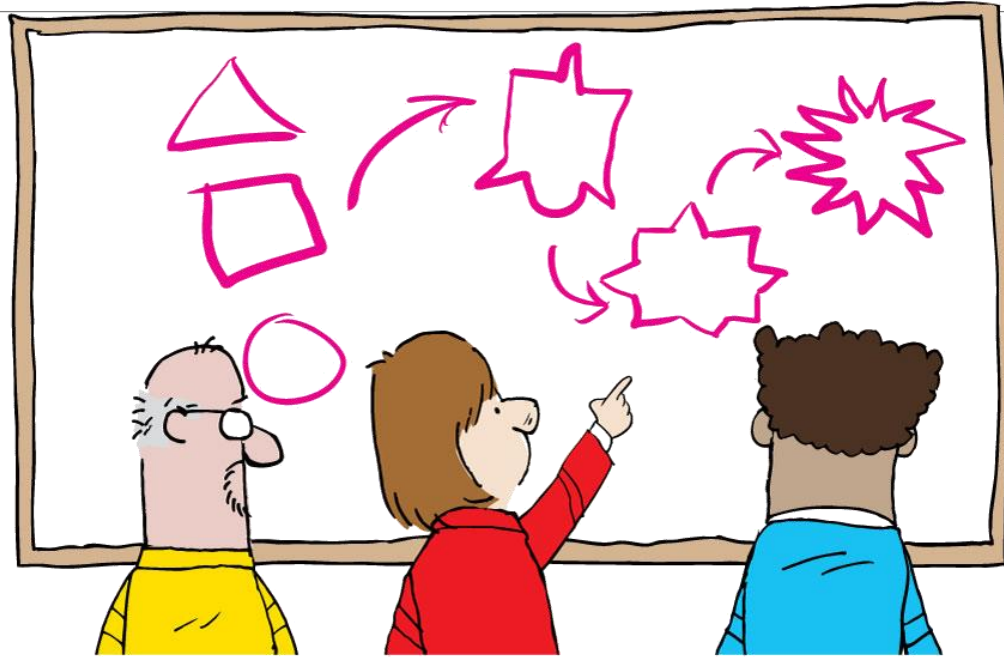
"I'm glad we're all agreed then."

Get mental models out



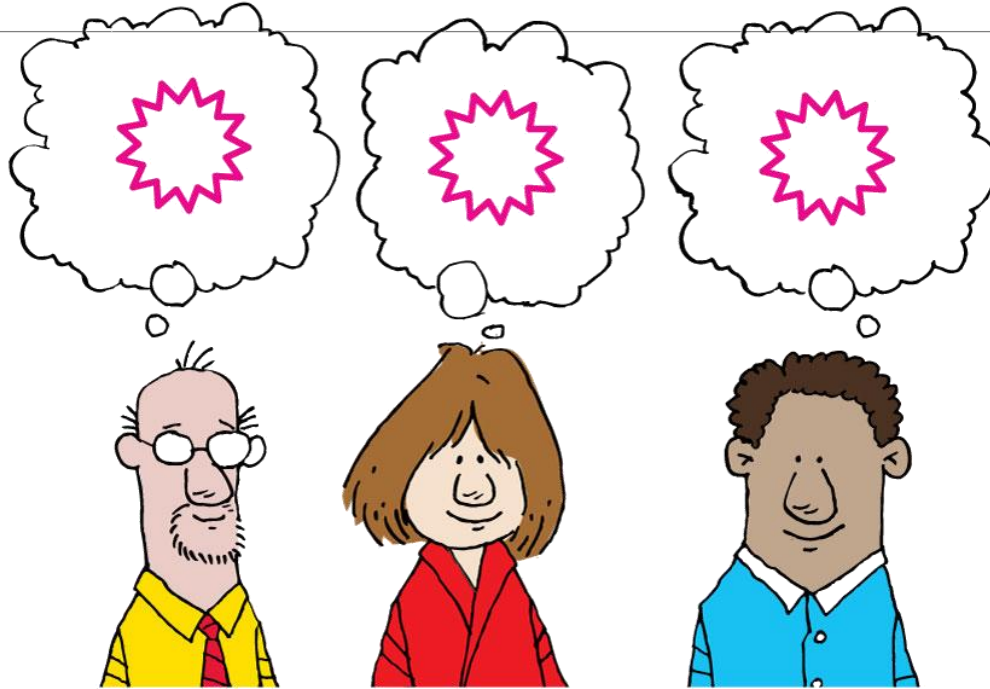
“Ah...”

Convergence



"Ah!"

Are we all agreed?



"I'm glad we're all agreed then."

A shared understanding of ...

Why are we doing this project?

Decision making around scope

Prioritisation of actions

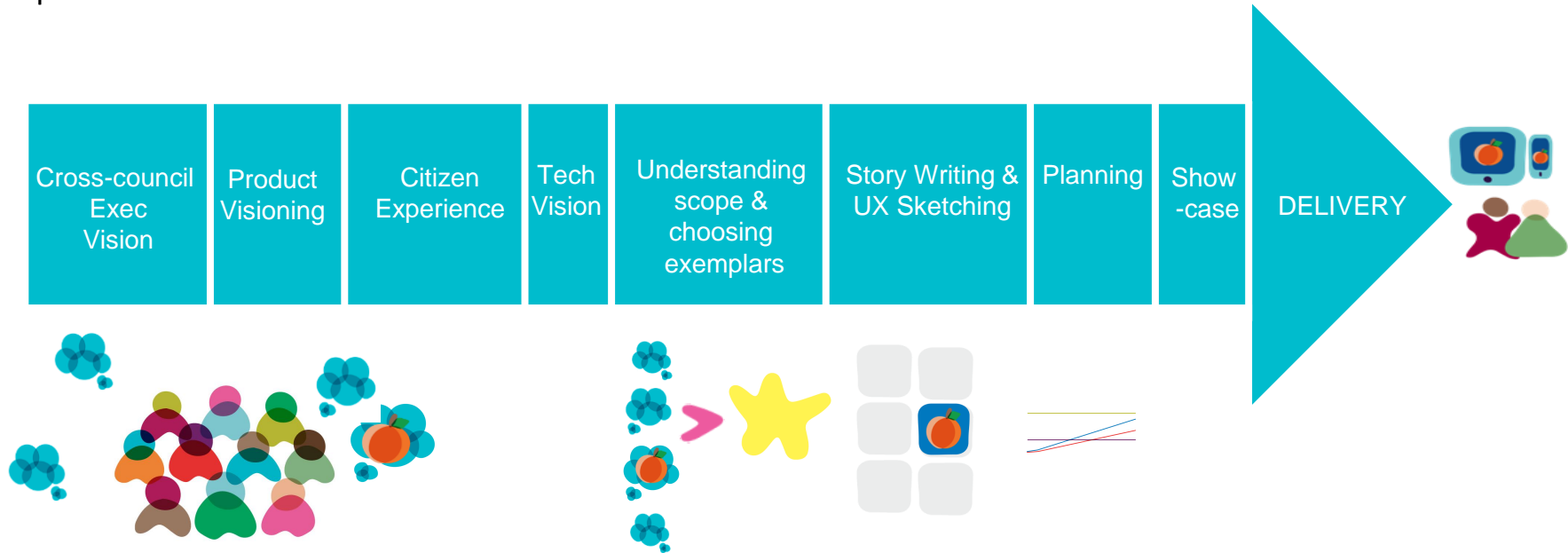
The right solution

Who attends an inception?

- Someone who represents
 - the organization vision
 - Users – externally for each group where significantly different
 - Users – internally for each team/dept affected by the change
 - Key stakeholders/communication with them – internally, up, out
 - Cross functional stakeholders e.g. infrastructure, security, information governance, business support
- Product Owner
- The team who are carrying out the work - or at least representatives from each part of the work
 - Where appropriate: people who support the team – e.g. User research, PMO
 - Where a programme team: representatives, especially those who hold budgets

Inception outline

Inception workshops held over 1-2 weeks for each
workstream defining a cross-service product for
development

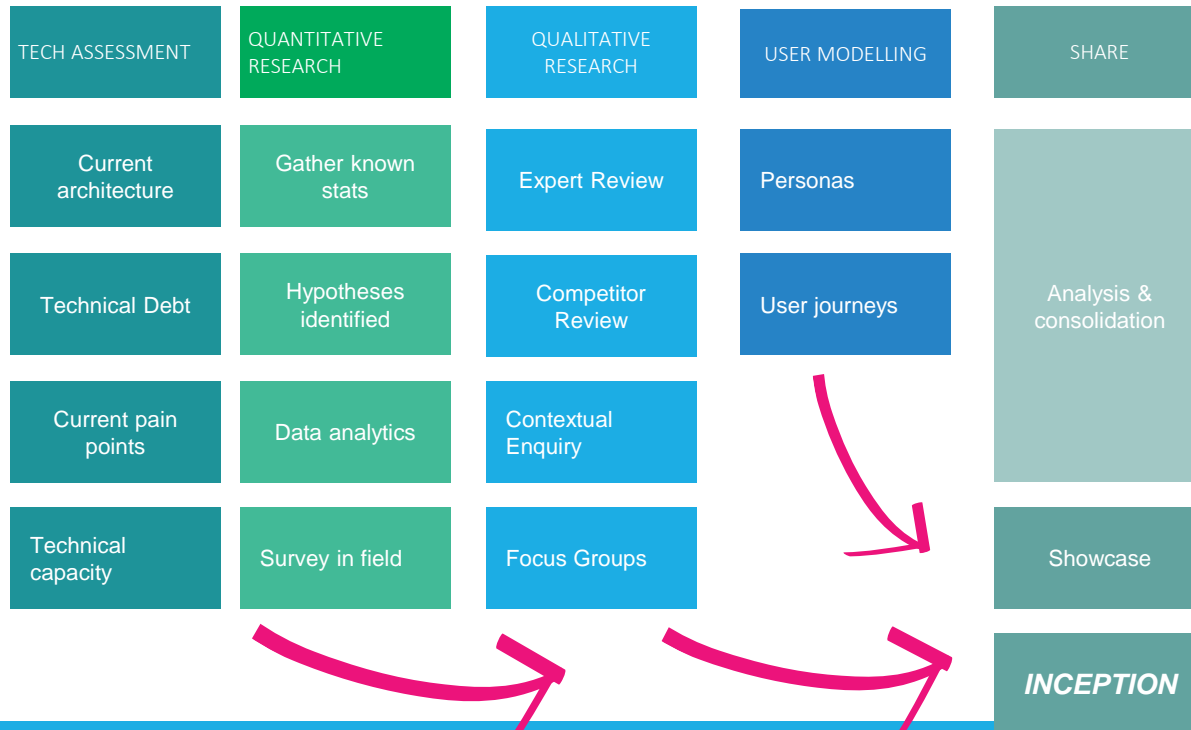


What's my role?



Inputs: Discovery Deliverables

Discovery requires research, understanding your customer and the market and identifying opportunities to provide value. All facts and opinions gathered provide fuel for inception and continuous design.



Sample Inception plan week 1

Below is an example of what a two week inception plan might look like.

	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Morning workshop 90mins (10:00 – 12:00)	<ul style="list-style-type: none"> Welcome (10) What's an inception (10) Ground rules (10) Product Owner introduction (30) Objective Statements (60) 	<ul style="list-style-type: none"> Organizational Context (45) Communications Plan (45) Trade off sliders (20) 	<ul style="list-style-type: none"> Empathy Maps (60) Customer Journey (60) 	<ul style="list-style-type: none"> Customer Journey Collaborative Design / Sketch boards (120) 	<ul style="list-style-type: none"> Customer Journey Collaborative Design / Sketch boards (120)
Consolidation* 90mins (12:00- 13:00)					
Learning lunch 45mins (optional)		Learning lunch		Learning lunch	
Afternoon workshop 90mins (14:00 – 16:00)	<ul style="list-style-type: none"> Elevator Pitch (30) Business Model Canvas (60) Scope (60) 	<ul style="list-style-type: none"> Intro to UX activities (10) Competitive Review (60) Usage Statistic (30) Customer touch points (20) 	<ul style="list-style-type: none"> Collaborative Design / Sketch boards (120) 	<ul style="list-style-type: none"> Customer Journey Collaborative Design / Sketch boards (120) 	<ul style="list-style-type: none"> Site Blueprint (100) Review Brand / Style Guide (20)
Consolidation* 90mins (16:00- 17:00)					SHOWCASE
Stand-up/retrospective 15mins (17:15 - 17:30)					

* consolidation primarily involves the core team

Sample Inception plan week 2

Morning workshop 90mins (10:00 – 12:00)	<ul style="list-style-type: none"> ▪ Logical Scope (60) ▪ Technical Vision (60) 	<ul style="list-style-type: none"> ▪ UX Context (20) ▪ Epics / Stories (100) 	<ul style="list-style-type: none"> ▪ UX Context (20) ▪ Epics / Stories (100) 	<ul style="list-style-type: none"> ▪ UX Context (20) ▪ Epics / Stories (100) 	<ul style="list-style-type: none"> ▪ Release Planning (120)
Consolidation* 90mins (12:00- 13:00)	UX in parallel throughout Morning <ul style="list-style-type: none"> ▪ Interactive Prototype ▪ Usability Testing ▪ Contextual Enquiry 	UX in parallel throughout Morning <ul style="list-style-type: none"> ▪ Interactive Prototype ▪ Usability Testing ▪ Contextual Enquiry 	UX in parallel throughout Morning <ul style="list-style-type: none"> ▪ Interactive Prototype ▪ Usability Testing ▪ Contextual Enquiry 	UX in parallel throughout Morning <ul style="list-style-type: none"> ▪ Interactive Prototype ▪ Usability Testing ▪ Contextual Enquiry 	UX in parallel throughout Morning <ul style="list-style-type: none"> ▪ Site Blueprint (100)
Learning lunch 45mins (optional)		Learning lunch		Learning lunch	
Afternoon workshop 90mins (14:00 – 16:00)	<ul style="list-style-type: none"> ▪ Cross Functional Requirements (60) 	<ul style="list-style-type: none"> ▪ Story Estimation (120) 	<ul style="list-style-type: none"> ▪ Story Estimation (120) 	<ul style="list-style-type: none"> ▪ Story Estimation (120) ▪ RAIDs (30) 	<ul style="list-style-type: none"> ▪ Prepare Showcase (120)
Consolidation* 90mins (16:00- 17:00)	<ul style="list-style-type: none"> ▪ User Testing of Prototypes (120) 	<ul style="list-style-type: none"> ▪ User Testing of Prototypes (120) 	<ul style="list-style-type: none"> ▪ User Testing of Prototypes (120) 	<ul style="list-style-type: none"> ▪ User Testing of Prototypes (120) 	SHOWCASE
Stand-up/retrospective 15mins (17:15 - 17:30)					

* consolidation primarily involves the core team

Inception Sessions

Here follows a sample of inception sessions.

- Vision
- Stakeholder mapping
- Business Context- As is process mapping
- User Stories- why and how
- Estimation
- Prioritisation
- Tech Vision
- Cross Functional Requirements

Vision

Why do you get up in the morning?

Problem

Roverdale Community facebook group has been awash with lost and found dogs and it's getting messy - people can't keep track of what dog is where or who has lost what

Request

Roverdale Town Council has put up £5k for anyone to create an MVP
online solution for the community to self-serve

What's your vision?

Vision: Elevator pitch

For (target customer)
who (statement of the need or opportunity)
.....(product name)
is a (product category)
which (key benefit/ compelling reason to buy)

Example: Bar Bar Black Sheep (my local coffee shop)

*For **coffee lovers** who **care about the community**,
Bar Bar Black Sheep is an **arts café and bar**
which **serves great coffee and is a welcoming place for community groups to meet.***

Stakeholders

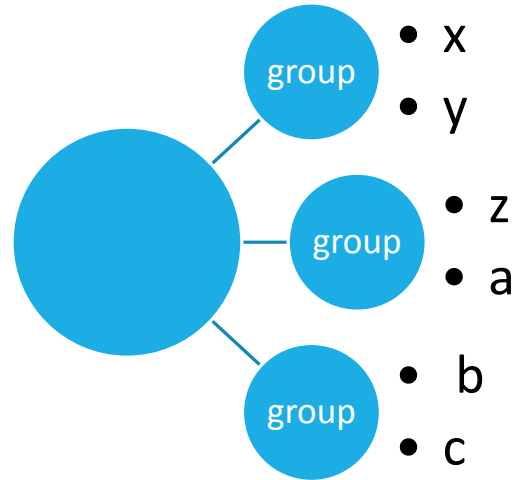
Someone who has a stake in your project / product:

- Users
- Organisation (services, infrastructure, security, etc.)
- Team

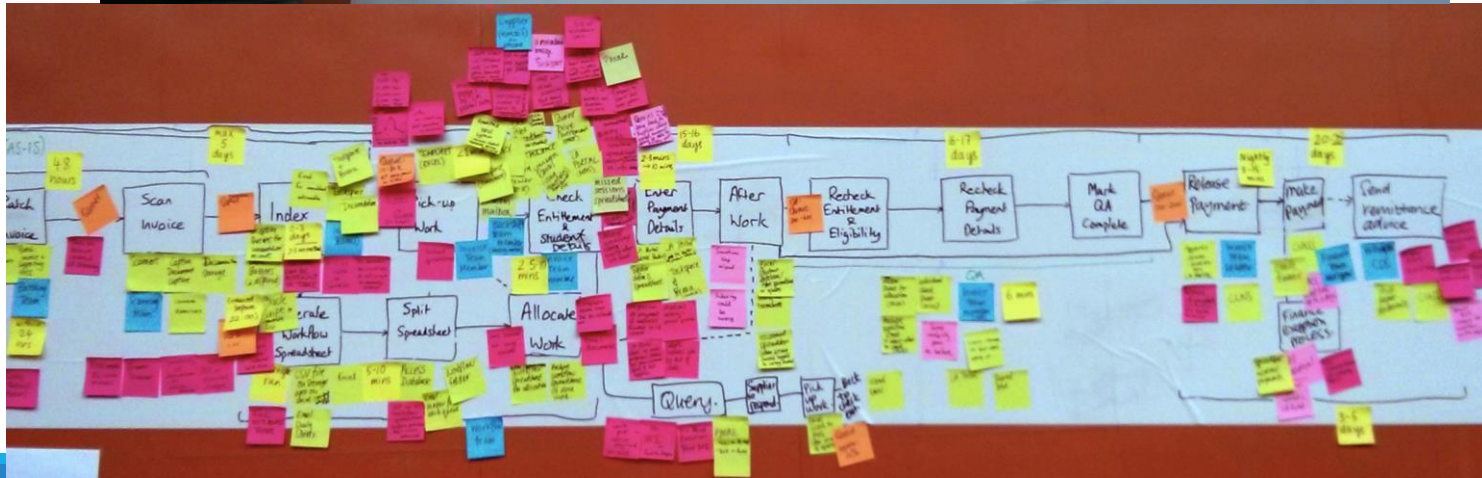
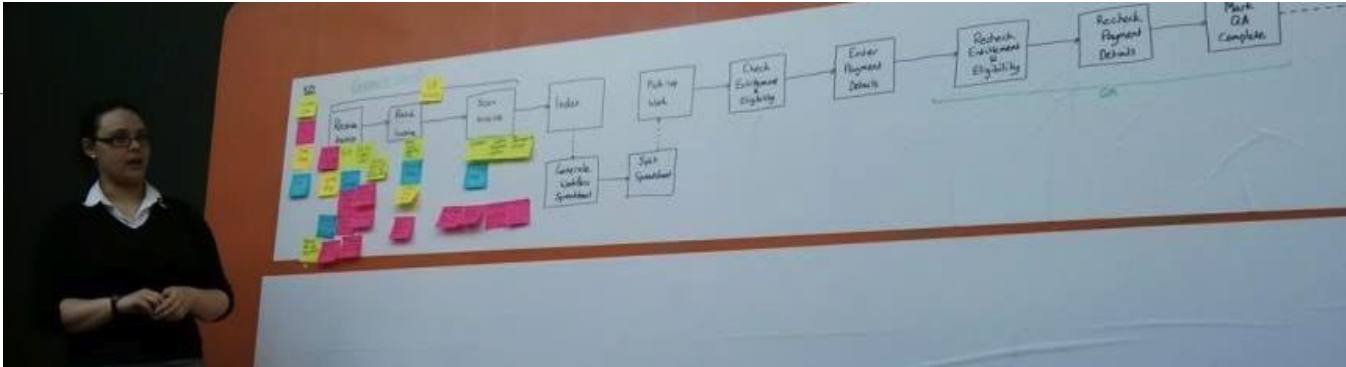
A stakeholder is someone who can put a 'stake' through your project/product and kill it!

Who are your stakeholders?

For your chosen lost and found dog idea:
create a stakeholder map

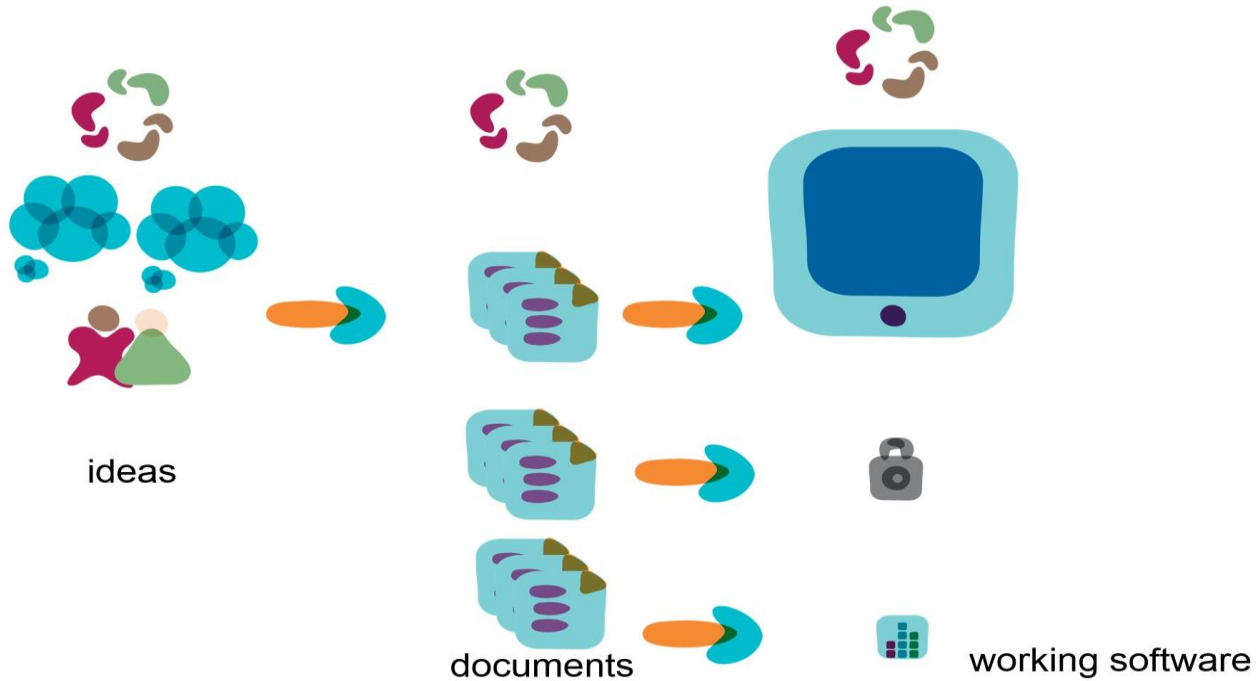


Business context: As-is Process



Getting ideas into the hands of users

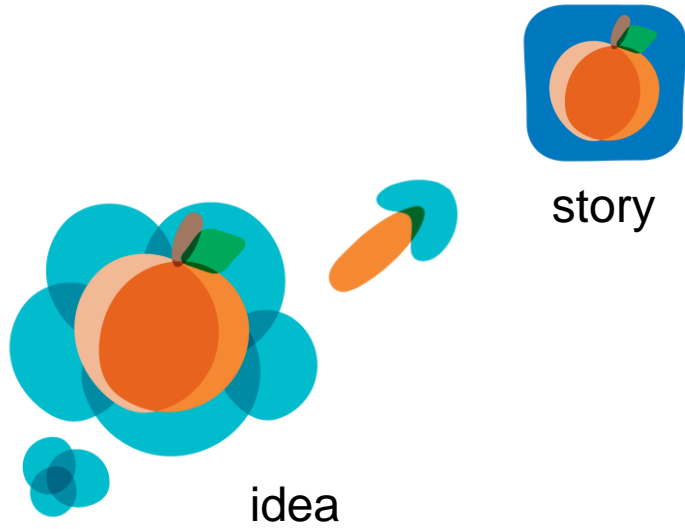
Traditional methods



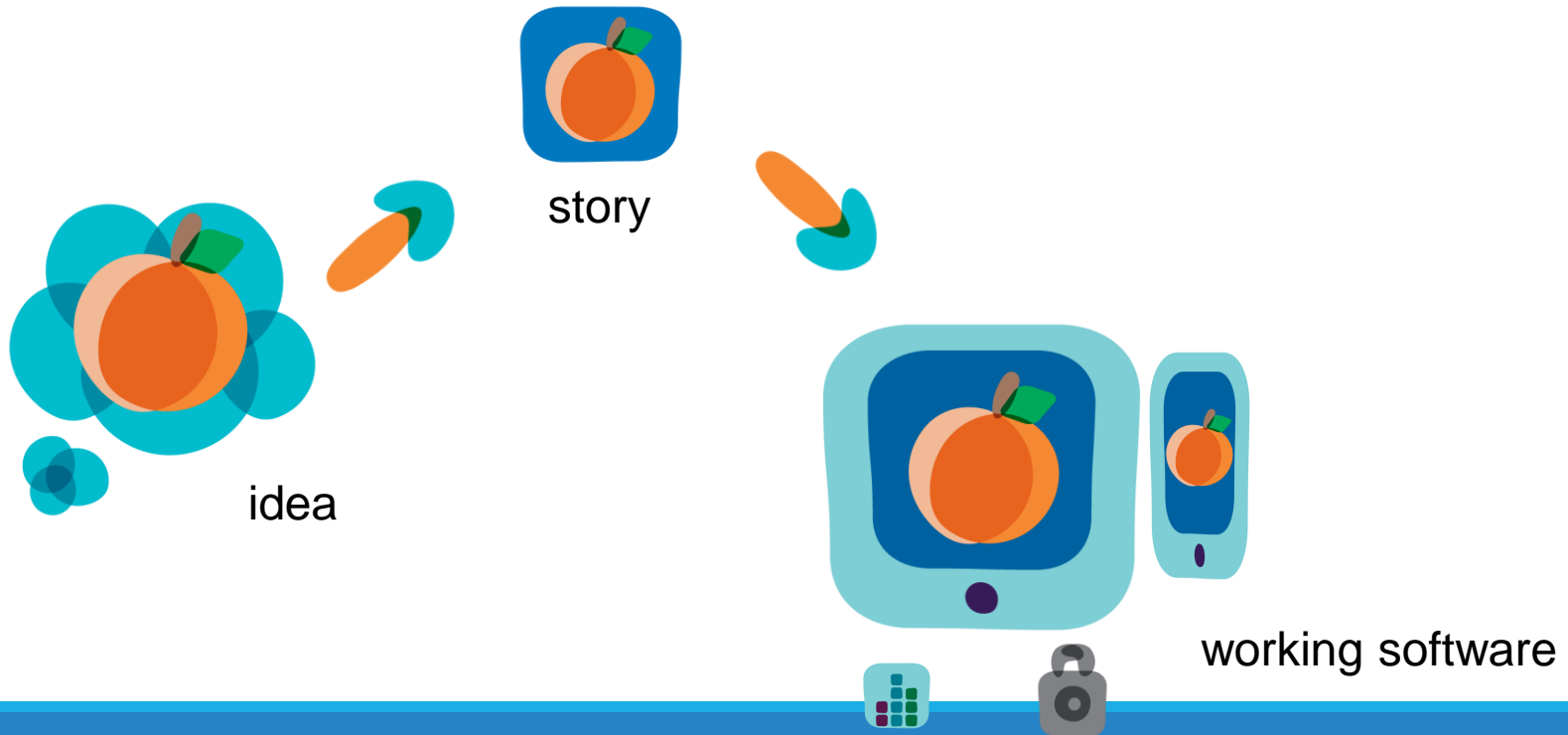
An iterative approach



An iterative approach



An iterative approach



An iterative approach



User Stories

As a dog owner,

I want to see photos of latest found dogs before I read descriptions or other details

so that I can find my lost dog really quickly

User Story Template

User: As a ...

Goal: I want/need ...

Value: So that ...

From User Stories Applied: For Agile Software Development
by Mike Cohn

User Stories

Three C's

Card physical thing, visible

Conversation placeholder for a conversation

Confirmation confirms when complete

User Stories

INVEST

Independent

Negotiable

Valuable

Estimatable

Small

Testable

Stories

For your chosen lost and found dog idea:
create 4 stories

As a dog owner,

I want to see photos of latest found dogs
before I read descriptions or other details

so that I can find my lost dog really quickly

Estimation

Estimation is relative within a team – small, medium, large, extra large

Devs & QAs decide estimates in discussion with BA/SME/PO – remember negotiation!

If there is ambiguity or risk in the requirement, it gets sized up – a good reason to remove risk and ambiguity as early as possible!

The task of estimating is more important than the estimates – the conversation is really rich and should give Product Owners lots of questions to go away and ask/investigate

Estimation of stories gives us a ‘size’ of the backlog and velocity (how many stories we estimate we can do per iteration) tells us how quickly we think we can get through the backlog

Estimation of stories and velocity early in the project is hard because the Devs may be new to the domain or the software or working together -

Story writing

An inception produces a backlog of stories

A story is a piece of software development work in the form of a user need:

As a ... citizen
I want ... to see bin collection times for my street (without retyping my postcode)
So that ...
to me I see information relevant

Prioritisation with PO

Product Owner (PO) prioritises stories

Project Manger and team then plan
delivery of stories

The team starts coding ASAP

Priorities are reviewed by PO weekly
and changed as needed

Technical Vision

Logical scope

Current technical state

Cross Functional Requirements

Determine target architecture

Identify tools

Validate with client

Responsiveness
UI speed



Performance

Accessibility
Device support
Internationalisation



Usability

Configurability
Metrics
Monitoring
Logging



Support

Authorisation
Authentication
Privacy
Legal
Audit
Archiving



Security

Data warehousing
Analytics
Data Science



Reporting

CFRs

Maintainability
Extensibility
Build/Q tooling



Development

Build pipelines
CD pipelines
Cloud options



Continuous Delivery

Integrability
Scalability



Architectural

Resilience / Failover
Uptime requirements
Availability
Disaster Recovery



Reliability



Testing

Testability
Contract tests

Inception deliverables

Depending on which sessions you choose, these are some of the deliverables which you could produce:

- Vision statement
- Goals
- Business Model Canvas
- Scope
- Empathy maps
- User journeys (As Is/To Be)
- Service Design
- Technical vision
- User Stories (Backlog)
- Cross-Functional Requirements (CFRs)
- Sketch designs
- Site Blueprint
- Prototype
- Trade-off sliders
- Prioritisation
- Stakeholder agreement
- Risks, Assumptions, Issues, Dependencies (RAIDs)
- Estimated stories and velocity
- Release Plan
- Communication Plan

Approaching your session

For each inception session/deliverable there are various tried and tested methods

The approach for each session should depend on:

- Purpose
- Are we diverging or converging?
- People involved
- Time available