

Collaborative Chartering & Storymapping

An Introduction

Paul Culling

Collaborative Chartering

What We're Not Talking About

What We Are Talking About

The Mechanics

- **Determining who to invite**
- **A Name and time frame**
- **An Elevator Pitch**
- **Goals and Success Measures**
- **Mapping the Community**
- **Strengths & Challenges**
- **Establishing a cadence**

Who's Coming to the Party

**Skills and Experience
Over
Titles and Org. charts**

Who's Coming to the Party

Think about:

- Investors or sponsors?
- Product or Project Vision?
- Domain Expertise?
- Market opportunity and needs knowledge?
- Builders of the product?
- Packaging and deployment?
- Document and provide training?

This is just a guide...

A Name & Time Frame

What's in a name?

The not too distant future

A Name & Time Frame

1) CHARTER: FAXING FOR PS+A (SCRUM PILOT)
 DATES: JULY - OCT (23.5 SPRINTS)

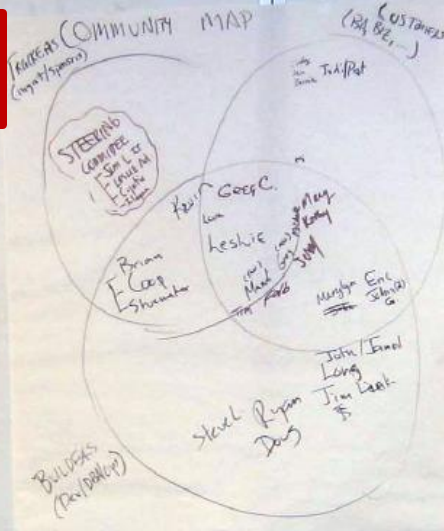
VISIBLE STAKEHOLDERS SUPPORTING
 FAXING FOR MG, PA and THERAPEUTIC
 (exclude externally educated clients)

GOALS

- Increase MD contact rate by 10x/yr
- Automate FAXing process
- Increase patient satisfaction through automation
- Reduce time to send (over 15 min hand off)
- Improve main of FAX templates de-fraction
- Activity reporting to FAXin
- Online support
- Offline generated data to FAXing

SUCCESS MEASURES

- 50% ↑ in MD contact rate
- 100% success with manual error handling
- no one walking to FAX machine
- ↑ # sent per day by 1P
- 1h (coordinators are not being or doing less work)
- Big time can change and mod templates (not waiting for release)
- ownership has been transferred to business
- Done
- Customer reports available
- FAXin success (success)
- FAX data can be loaded to SQL



LOGISTICS

Release Planning: backlog 7/11

3 week sprints

Sprint Planning: Sprint Review/Repos:

Sprint	Start	End
Sprint 2	7/17	7/24
Sprint 3	7/24	7/31
Sprint 4	7/31	8/7
Sprint 5	8/7	8/14
Sprint 6	8/14	8/21

Stand up: 9:30 CST
 SCRUM

Core Lab Hours: 9-NOON

Dates: production drop on 10/31 (pilot)
 for some other release drop to 11/12

2) CHARTER (CONT.)

GOALS

- Simple application (Scrum)
- For all FAXing
- Visibility of FAX attempts in Compass
- Streamline process for acceptance testing
- Trackable feedback

SUCCESS MEASURES

- All FAX done in compass
- Anyone can see attempt tied to a member
- tracking spreadsheet is updated (current) to all

VALUES / VIA / S + I (ROADBLOCKS)

- Strengths
 - started FAXing (ending momentum)
 - exec sponsorship ("Highly motivated")
 - clearer direction
 - good domain knowledge
 - good dedicated team
 - #/finding

Issues / Roadblocks / Challenges

- Timeline / Limited Resources - shifting
- Distributed work / community (new domain)
- Program constraints (skin pipes in IT)
- Cross coupling (competing for people) (context switching)
- Compass webframe in infancy
- FAX service in new + unknown

COMMUNITY

NAME	ROLE	% ALLOCATED
Jeremy W/Fale	1/initial client flow - set back process - generalist group	25%
Gina/Maria	provide feedback from users	
Michelle	Write/develop/flow - set process - FA Project manager	25%
Sandra	Program Manager (PA) - provide ARB, Receive Feedback to team comm.	25% - 100%
Greg	Program Manager (IT) - IT & Business Partner	0 - 100%
ANN	Scrum Master - Facilitator of Scrum Process	25%
Kevin	Scrum Master - Scrum Process	10%
Miriam	PA/D Technician	75%
John	PA/D Technician	50%
John	UI	100%
Paula	Scrum Master / UI	15%
Matt	QA	25%
Tina	QA	25%

The Elevator Pitch

1 | CHARTER: FAXING FOR PS+A (SCRUM PILOT)
DATES: JULY - OCT (v3.5 SPRINTS)
VISION STATEMENT: SUPPORT MD FAXING FOR M&C, PA and THERAPEUTIC (include externally educated clients) #

GOALS

- Increase MD contact rate by 10x/yr
- Automate FAXing process
- Increase mp satisfaction through automation
- Reduce time to send (over 15 min hand off)
- Improve main of FAX templates & function
- Activity reporting to FAXin
- CD capture & record data to FAXing

SUCCESS MEASURES

- 50% ↑ in MD contact rate
- 100% success with manual error handling
- no one walking to FAX machine
- ↑ # sent per day by 1P
- 1h (coordinators are not being or doing less work)
- Big biz can change and mod templates (not waiting for release)
- ownership has been moved to business
- CD capture reports available

TEAM AS COMMUNITY MAP

LOGISTICS

Release Planning: backlog 7/11

Sprint Planning: → Sprint 2 7/12
 Sprint Review/Reus: Sprint 3 8/2
 Sprint 4 8/23
 Sprint 5 9/13
 Sprint 6 10/4

Stand up: 9:30 CST
 SCRUM #

Core Lab Hours: 9-NOON

Dates: production drop on 10/31 (pilot)
 for some other release drop to 11/12

2 | CHARTER (CONT.)

GOALS

- Simple application (Scrum) for all FAXing
- Visibility of FAX attempts in Compass
- Streamline process for acceptance testing
- Trackable feedback

SUCCESS MEASURES

- All FAX done in compass
- Anyone can see attempt tied to a member
- tracking spreadsheet is visible to all

VALUES / VIA / S + I (ROADBLOCKS)

- Strengths
 - started FAXing (ending momentum)
 - exec sponsorship ("Highly motivated")
 - clearer direction
 - good domain knowledge
 - good dedicated team
 - #/finding
- Issues/Roadblocks/Challenges
 - Timeline / Limited Resources - shifting
 - Distributed work / community (new domain) - send
 - Program constraints (stun pipes in IT)
 - Cross coupling (comping for people) (context switching)
 - Compass webteam in infancy
 - FAX service in new + unknown

COMMUNITY

NAME	ROLE	% ALLOCATED
Jeremy W/Fale	1/initial change flow - set back process - green/red status	25%
Gina/Maria	provide feedback from users	
Michelle	Write/change flow - set process - A Project process	25%
Sandra	Program Manager (PA) - provide ARB, Review Feedback to team comm.	25% - 100%
Greg	Program Manager (IT) - IT & Business process	0 - 100%
Ann	Scrum Master - Facilitator of Scrum Process	25%
Kevin	Scrum Master - Scrum process	10%
Miriam	QA Technician	75%
John	QA Technician	50%
John	QA Technician	100%
Paula	UI	15%
Paula	Scrum Master / UI	25%
Mark	QA	20%
Tina	QA	25%

AgileSherpa

A gentle guide to the best of the Agile landscape wherever it lives.

Roadmapping

Capture and visually communicate the longer-term direction of our products.

DINERO

*'Get my reps out of invoicing' –
automagic invoicing and online
payments.*

Goals & Success Measures

1/ CHARTER: FAXING FOR PS+A (SCRUM PILOT)

DATES: JULY - OCT (23.5 SPRINTS)

VISION STATEMENT: SUPPORT MD

FAXING FOR MG, PA and THERAPEUTIC

(include externally educated clients) #

GOALS

- Increase MD contact rate by therapeutic
- Automate FAXing process
- Increase mp satisfaction through automation
- Reduce time to send (over 15 min hand off)
- Improve main of FAX templates de-fraction
- Activity reporting to FAXin
- On-time delivery
- Capture geocoded data to FAXing

SUCCESS MEASURES

- 50% ↑ in MD contact rate
- See mission programs
- 100% success FAXing automated
- error handling
- no one walking to FAX machine
- ↑ # sent per day by 1P
- 1h (coordinators are not taking or doing less work)
- Big time can change and mod templates (not waiting for release)
- ownership pins been from head to business
- Done
- Customer reports available
- FAXin success (success)
- all data can be loaded to SQL

2/ CHARTER (CONT...)

GOALS

- Simple application (Scrum)
- For all FAXing
- Visibility of FAX attempts in Compass
- Streamline process for acceptance testing
- Trackable feedback

SUCCESS MEASURES

- All FAX done in compass
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LOGISTICS

Release Planning: Backlog 7/11

3 week sprints

Sprint	Start	End
Sprint 2	7/12	
Sprint 3	8/2	
Sprint 4	8/23	
Sprint 5	9/13	
Sprint 6	10/4	

Sprint Planning: → Sprint 2 7/12

Sprint Review/Rebus: Sprint 3 8/2

Sprint 4 8/23

Sprint 5 9/13

Sprint 6 10/4

Stand up: 9:30 CST

SCRUM

Core Lab Hours: 9-NOON

Dates: production drop on 10/31 (pilot)

for some other release drop to 11/12

VALUES / VIA / S + I (ROADBLOCKS)

- Strengths
- started FAXing (ending momentum)
- exec sponsorship ("High on behavior")
- clearer direction
- good domain knowledge
- good dedicated team
- #/finding

- Issues/Roadblocks/Challenges
- Timeline / Limited Resources
 - Distributed work / community (new domain)
 - Program constraints (stuck pipes in IT)
 - Cross coupling (competing for people) (context switching)
 - Compass webframe in infancy
 - FAX service in new + unknown

COMMUNITY

NAME	ROLE	% ALLOCATED
Jeremy W/Faul	1/ initial change flow - set back process - operational crew	25%
Gina/Maria	provide feedback from users	
Michelle	Write/change flow - set process - A Project manager	25%
Sandra	Program Manager (PA) - provide ARB, Receive Feedback to team comm.	25% - 100%
Greg	Program Manager (IT) - IT & Business Partner	0 - 100%
Ann	Scrum Master - Facilitator of Scrum Process	25%
Kevin	Scrum Master - Scrum Process	10%
Miriam	ITD Technical	75%
John	ITD Technical	50%
Janet	UI	100%
Paula	Scrum Master / UI	15%
Mindy	QA	25%
Tina	QA	25%

Goals & Success Measures

Starter questions:

- What will the business gain from the project?
- How will this project improve the product?
- What value are we creating for the users?
- Are there technology goals? Are we paying down technical debt?
- What are the Social (community) goals?
- What are the process or practices goals?

Map the Community

1 | CHARTER: FAXING FOR PS+A (SCRUM PILOT)

DATES: JULY - OCT (23.5 SPRINTS)

VISION STATEMENT: SUPPORT MD

FAXING FOR MG, PA and THERAPIST

* (exclude externally educated clients) *

GOALS

- Increase MD contact rate by 10x/yr
- Automate FAXing process
- Increase user satisfaction through automation
- Reduce time to send (over 15 min hand off)
- Improve main of FAX templates & functions
- Activity reporting to FAXin
- CD capture & record data to FAXing

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- Biz has can change and mod templates (not waiting for release)
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- CD capture reports available
- FAXin can be used to send data



LOGISTICS

Release Planning: backlog 7/11

3 week sprints

Sprint Planning: Sprint Review/Rebus:

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Issues / Roadblocks / Challenges

- Timeline / Limited Resources - shifting
- Distributed work / communities (new domain)
- Program constraints (stagnant in IT)
- Cross coupling (competing for people / context)
- Compass software in infancy
- FAX service in new + unknown

NAME	ROLE	% ALLOCATED
Jeremy W / Fabio	Initial change flow - set back process - operational crew	25%
Gina / Marla	Provide feedback from users	
Michelle	Write / change / test - set process - A Project process	25%
Laura	Program (PSA) - provide ARB, Receive Feedback to team	25% - 100%
Greg	Program Manager (IT) - IT & Business process	0 - 100%
Ann	Scrum Master - Facilitator of Scrum process	25%
Kevin	Scrum process	10%
Miriam	ITD Technical	75%
John	ITD Technical	50%
David	UI	100%
Paula	Scrum process / UI	15%
Scott	ARB	25%
Tim	QA	20%

Strengths & Challenges

1 | CHARTER: FAXING FOR PS+A (SCRUM PILOT)

DATES: JULY - OCT (23.5 SPRINTS)

VISION STATEMENT: SUPPORT MD FAXING FOR MC, PA and THERAPIST
 Exclude externally educated clients

GOALS

- Increase MD contact rate by 10x/yr
- Automate FAXing process
- Increase mp satisfaction through automation
- Reduce time to send - access (no handoffs)
- Improve main of FAX templates & functions
- Ability reporting to FAXin
- CD capture & record data to FAXing

SUCCESS MEASURES

- 50% ↑ in MD contact rate
- 100% success with manual error handling
- no one walking to FAX machine
- ↑ # sent per day by 1P
- Coordination on not being or doing less (workload)
- Big time can change and mod templates (not waiting for release)
- Ownership has been moved to business
- CD capture & record data to FAXing



LOGISTICS

Release Planning: backlog 7/11

3 week sprints

Sprint Planning: Sprint Review/Repos:

Sprint	Start	End
Sprint 2	7/12	7/19
Sprint 3	7/20	7/27
Sprint 4	7/28	8/4
Sprint 5	8/5	8/12
Sprint 6	8/13	8/20

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Core Lab Hours: 9-NOON

Dates:

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2 | CHARTER (CONT...)

GOALS

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- Compass webframe in infancy
- FAX service in new + unknown

COMMUNITY

NAME	ROLE	% ALLOCATED
Jeremy W/Faul	VP/Chief Analyst - Set Prod Process - Operational Group	25%
Greg/Maria	Product Feedback from users	
Michelle	Write/develop/steer - Set process - A Project manager	25%
Sandra	Product Owner - Provide Prod. Release Feedback to team comm.	25% - 100%
Greg	Program Manager (IT) - IT & Business Partner	0 - 100%
ANN	Scrum Master - Facilitator of Scrum Process	25%
Kevin	SP/owner of Scrum Process	10%
Miriam	ITD Technical	75%
John	ITD Technical	50%
Israel	UI	100%
Paula	Scrum Master / UI	15%
Matt	QA	25%
Tim	QA	25%

Our Experiences

Project Charter: Agile Sherpa

Timing: Robert's Goal is June 30th Launch

Vision / Elevator Statement:

A gentle guide to the best of the Agile landscape whenever it lives.

Goals:

- High return traffic
- External trainers and event organizers are self-serving the calendars
- Seen as a 'go-to' resource
- Google page rank 6 or more
- Search rank high for identified keywords

Value to Company:

- Increase traffic to VersionOne site
- Generate training & event leads for both us and our partners

What are we building?

MUST HAVES FOR LAUNCH

- Self-serve training and event calendars (can launch without self-serve if it can be updated in point release (not until R2)) Possibly separate webinar calendar?
- Resources
 - Book shelf (recommended reading)
 - Message board (forum) listing
 - Whitepaper directory
 - Agile Coach / Agile 301 content
- Latest news (Agile Chronicles reprint)
 - Self service desired but can be relegated to R2

Release 2

- Job Board (employers to post)
- Tools section (context based, not just a big list)
 - Comment made about a spreadsheet (?)
- Store (AgileOutfitter)
- Resources
 - Blogs
 - Articles
 - Video (embedded or pointers)
 - Training deck

Who Are We Serving?

	Value
Trainers / Consultants	Marketing / promotion
Agile Newbie (learn 4 me)	Knowledge
	Access to training options
Agile Newbie (sell or teach others)	Provide reputable content to reference
	Save time
	Look smart
	Access to training options
Existing Agilistas	Reputation through comments/contribution
	Sell internally (see above)
	Stay current
Event Organizers	Marketing / Promotion
Employers	Access to Agile centric community / marketing & promotion

Values & descriptors that make up our mission statement/elevator pitch

- 1 stop shop
- Current
- Organize for clarity
- Editorial aspect
- Gentle (not overwhelming, 'gentle introduction')
- Guide
- Altruistic
- Benefits community
- Trusted

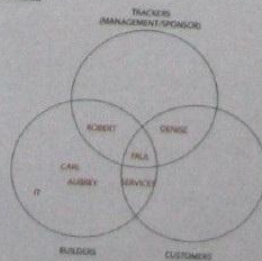
Competition

- Scrum Alliance
- Agile Alliance
- Agile Journal
- InfoQ
- Social Media Agile Communities (2 for Paul to re-identify)
- Agile Conventions

Identified Questions

- Who Owns It?
 - Us? Community?
- What does "Open" mean?
- Who is going to be moderator/ community manager if/when comments/voting is active
- Categories? Tagging?
 - Profiles?
- For pay/Featured stuff?
 - Partner content
- Branding? How tight with VersionOne?
- Trainer profiles connected to calendar?

Project Community Map



RoadMapping

Problem

High level planning takes place to feed into development schedules. These plans become much more effective if they can take into account strategic direction, key events for the organization, company and industry, as well as more tactical input to help drive the prioritization and timing of the future schedule. These plans are often in the minds or on the hard drives of the few people who develop them, so are not very visible to others.

Many organizations do not have a good place to develop these plans and communicate them effectively out to the team and stakeholders.

Charter

Name	Roadmapping
Timeframe	Summer 2010
Elevator Pitch	Capture and visually communicate the longer term direction of the product
Goals	<ul style="list-style-type: none">• Provide a method to develop and evolve the high level plan of where the team is headed to communicate to the team and stakeholders• Display major components coming over the course of time• Capture attributes of the components that are important to the organization• Allow for broad use across levels and organizational planning styles• Collaborate around and update over time• Be able to indicate progress/status• Link to something solid (e.g. an Epic, Goal, or wiki page)• point in time items and durations

Project-Level Configuration (formerly Workspaces)

Charter

Name	Project-Level Configuration
Timeframe	Summer 2010
Elevator Pitch	Allow different groups to operate differently than each other; e.g. an XP team in a sea of Scrum, or "I wanna run my team the way I wanna run my team"
Goals	<ul style="list-style-type: none">• Support multiple processes used in different groups (very large organizations w/ different methodologies, consulting organizations w/ different clients, acquisitions)• centralized administration• achieve parity with competitors• supportability: installation, upgrade and troubleshooting• adapt over the course of time• provide strategic advantage?• achievable by those with less-than-extreme needs

User research

User research finding<http://confluence/display/dev/Workspaces+User+Research>

▶ Ideaspace requests

Competitive Analysis

Storymapping

Agile Product Planning - Observations

- **Feature-oriented vs. user-centered**
- **Process-driven (template-head)**
 - **Sentence completion over storytelling**
- **Mad dash to iterate – crank out a backlog!**
- **Delivery quickly outpaces Discovery**

A Process and a Template

“As _____ I need to _____ so that I can _____”

user

story

value

As ___ I need to ___ so that ___

As ___ I need to ___ so that ___

As ___ I need to ___ so that ___

As ___ I need to ___ so that ___

As ___ I need to ___ so that ___

As ___ I need to ___ so that ___

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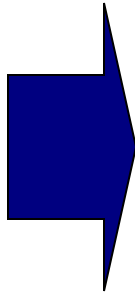
An Evolution

“As _____ I need to _____ so that I can _____”

persona **user task** **test**

A Refactoring

Persona	
Image	
Desc	Value



Story Title
- Story Test
- Story Test
- Story Test
- Story Test

Story Title
- Story Test
- Story Test
- Story Test
- Story Test

Story Title
- Story Test
- Story Test
- Story Test
- Story Test

Story Map sneak peek...

Persona

Activity

Task

Task

Task

Task

Task

Task

Activity

Task

Task

Task

Task

Task

Task

Task

Story Map Workshop

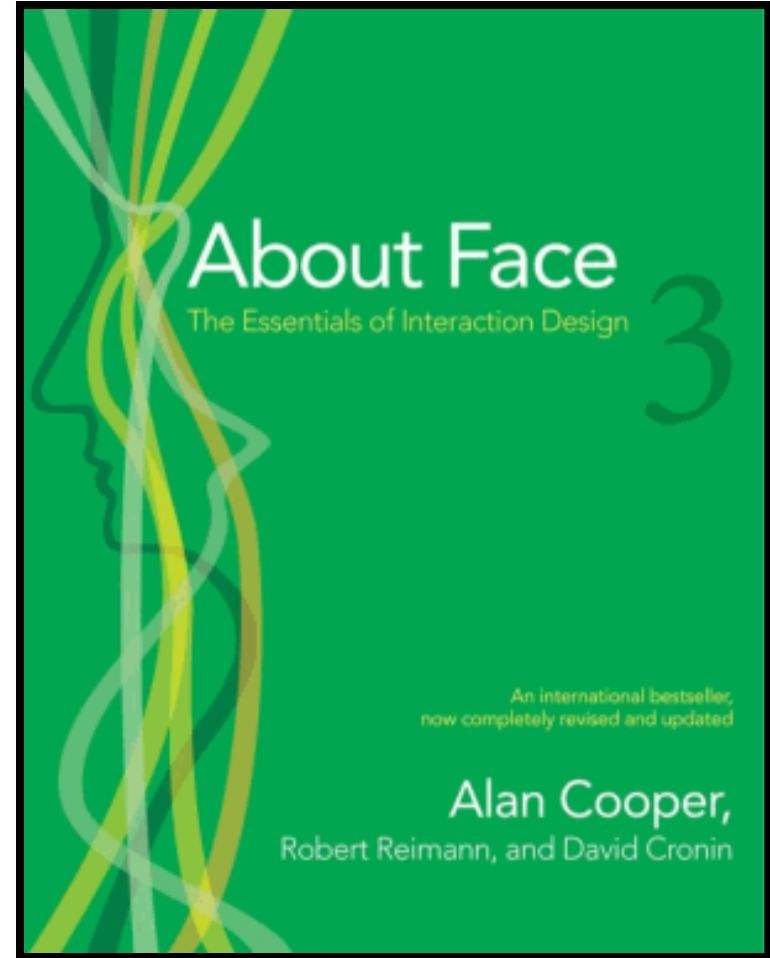
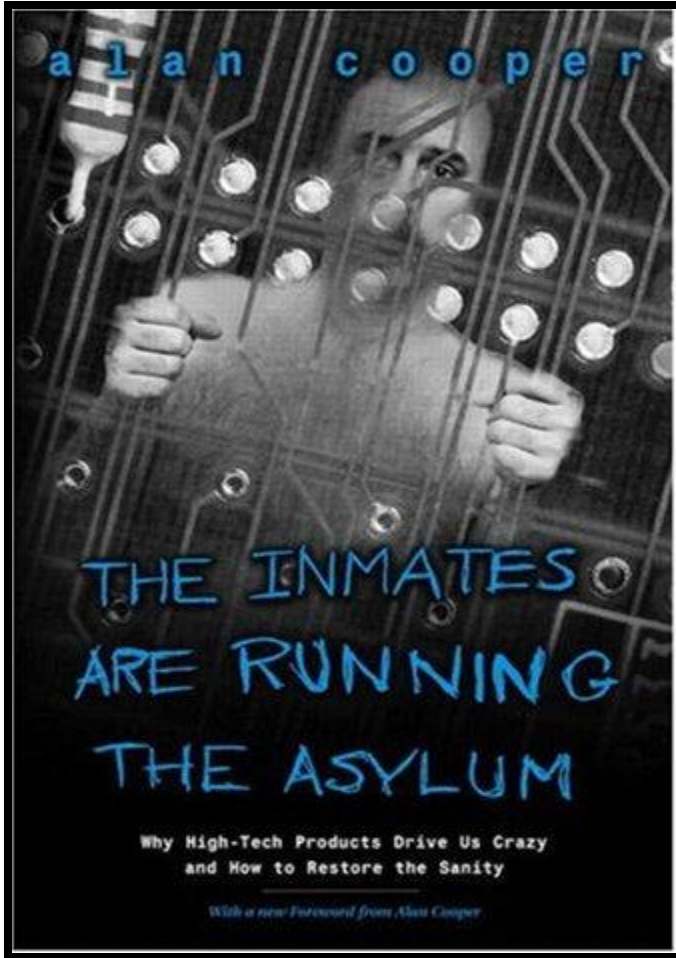
- **Identify & Rank Key Personas**
 - Those that are doing it, find it valuable or will support it
 - Who gets the most value, or is most important to serve?
- **Capture Key Activities & User Tasks**
 - “What do you do at work?” → Activities
 - “Tell me that story” → Tasks
 - “Are there any variations?” → Alternate paths
- **Mile-wide, Inch-deep**

Participants

- **Informed: end users & domain experts**
- **Inspired: product visionaries/sponsors**
- **Decision Makers: product owners**
- **Builders (design – dev – test)**

Fewer is Better

Pragmatic Personas, vs...



Ca

< our goal is to create **discussion starters** >

Emergent Personas

MICHIGAN



Michelle the
Trust Assistant

- data entry for creating trust account
- overflow office

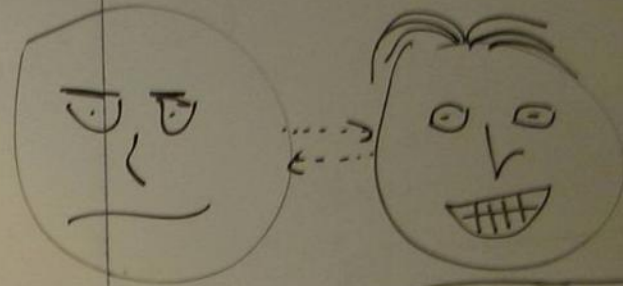
NEW JERSEY



Kathy the
Officer

- makes sales
- gathers custom (new trust account) info

LONG BEACH



Frank the
Lead of New
Accounts

- validation of new accounts
- ensure account open completion

Denise the
Trust Center
Manager

- ?
-

Informative Personas



"Petey the Public Prospect"

Description	Values
<ul style="list-style-type: none"> -Interested in the AIMS story -Curious -Potential Agent or Policyholder -General Information -Why do I care about income market 	<ul style="list-style-type: none"> -Reference points / Stories -Educational information -Help

Important Facts:

- Could be a competitor
- Count be the next top producer



"AIME the Admin"

Description	Values
<ul style="list-style-type: none"> -User account administration -End User Support 	<ul style="list-style-type: none"> -Consistency in username usage / SSO

Important Facts:

- Maybe spread across multiple people



"Albert the Agent"

Description	Values
<ul style="list-style-type: none"> -Driven by business and getting commissions -Typically male, around 56 -Financial Planner -Motivated by Tips and Perks -Not overly computer savvy 	<ul style="list-style-type: none"> -Vested interest in AIMS being successful due to stock ownership -Visibility into pending business -Access to commission information -Ease of doing business with carrier -Faster, easier companies drive more money

Important Facts:

- Potentially 180,000 Alberts



"Gary the Income Guru"

Description	Values
<ul style="list-style-type: none"> -Experts in the Retirement Income Market -Tells the Income Story to agents and FMCs -Runs illustrations and quotes for agents -Story tellers / Communicators -Trainers 	<ul style="list-style-type: none"> -Helping agents close business

Important Facts:

- Jack of all trades, one stop, they know the pain points



"Frank the Field Marketing Org"

Description	Values
<ul style="list-style-type: none"> -Provides Sales Training -Recruits agents -Works with other Carriers -Its independent, will go where they can do the most business -Focused on products -Provides support to agents 	<ul style="list-style-type: none"> -Access to information on how agents are doing -Quicker / Easier ways of doing business -Ability to 'do' some of the work for the agent (Impersonation)

Important Facts:

- Will steer business to the "best" place in town to do business



"Polly Production Partner"

Description	Values
<ul style="list-style-type: none"> -One stop service experience for Frank and Albert -Vision State these folks will be exception handlers -Handles odd cases / exceptions -May be assigned to specific Franks and Alberts -Excited about the vision because it will make their lives better 	<ul style="list-style-type: none"> -Ability to see the business flow -Catch exceptions before they become a Frank or Albert issue -Ability to see view of agent that they are talking to (360 degree view of agent) -High Customer Satisfaction

Important Facts:

- Jack of all trades, one stop, they know the pain points

Creating Your Personas

Choose a name *(sticky name – alliteration helps)*

Add an image *(a conversation starter)*

Add a description
(who is this person?)

- *time at job*
- *knowledge of domain*
- *FT / PT*
- *incentives*
- *level of engagement*

Value from product
(what is our sell?)

- *financial benefit?*
- *increased productivity?*
- *fewer steps?*
- *more fun?*
- *easier to use?*

Story Maps

(what's **needed**; what's **wanted**?)

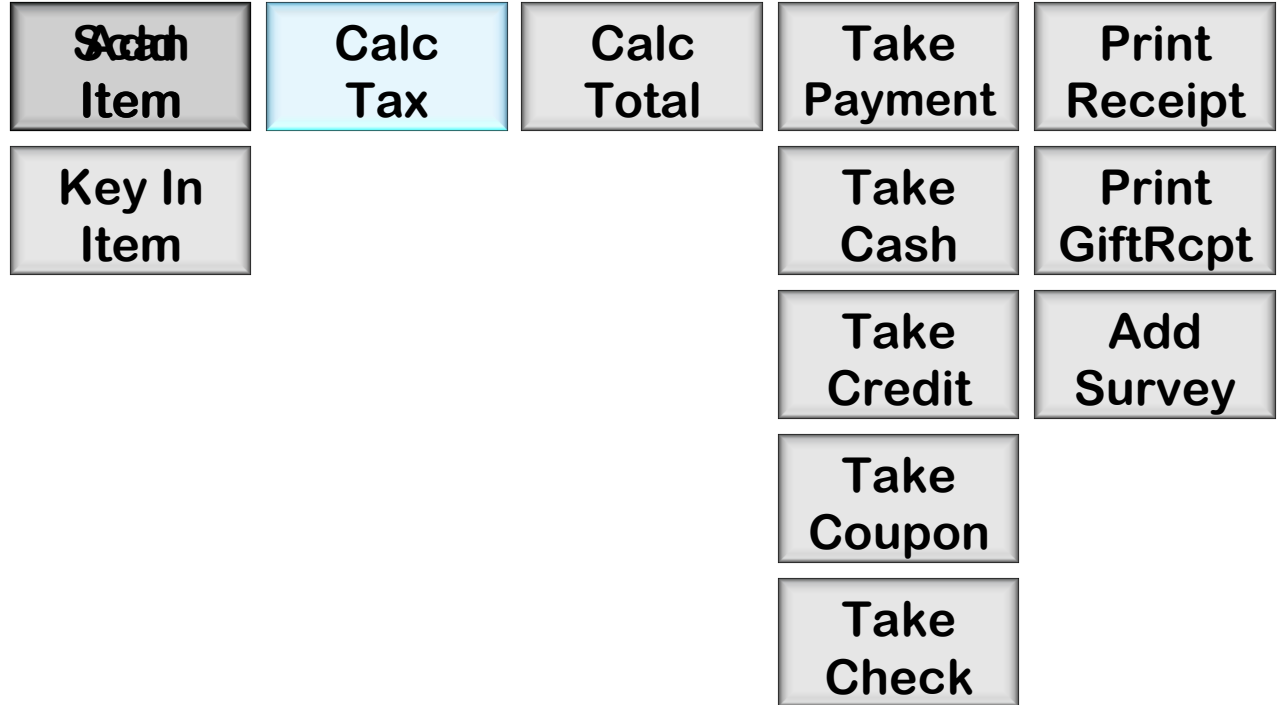
Activities, Tasks and Story Telling

- ✓ Discuss a persona's activities and goals
(“what do you do at work?”)
scenarios
- ✓ Walk a day in the life for each activity
(“what are the tasks to get that done?”)
candidate user stories
- ✓ Back up and re-tell the experience
(“are there any variations or dead ends?”)

An Example

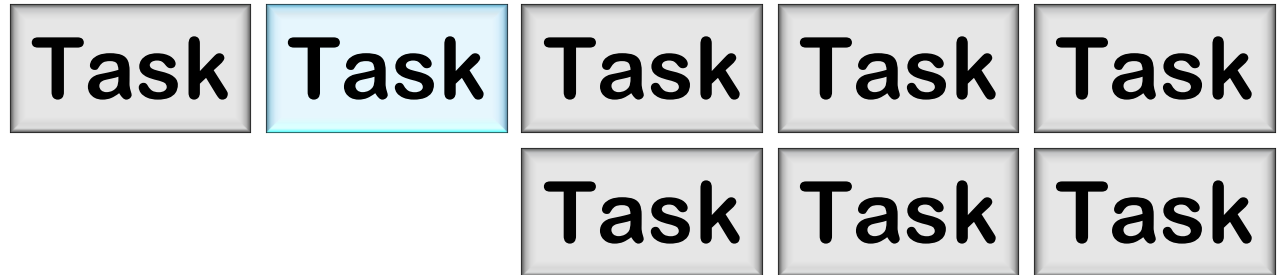
Let's Map the Point of Sale

- Make Sales
- Open / Close Register
- Take Returns

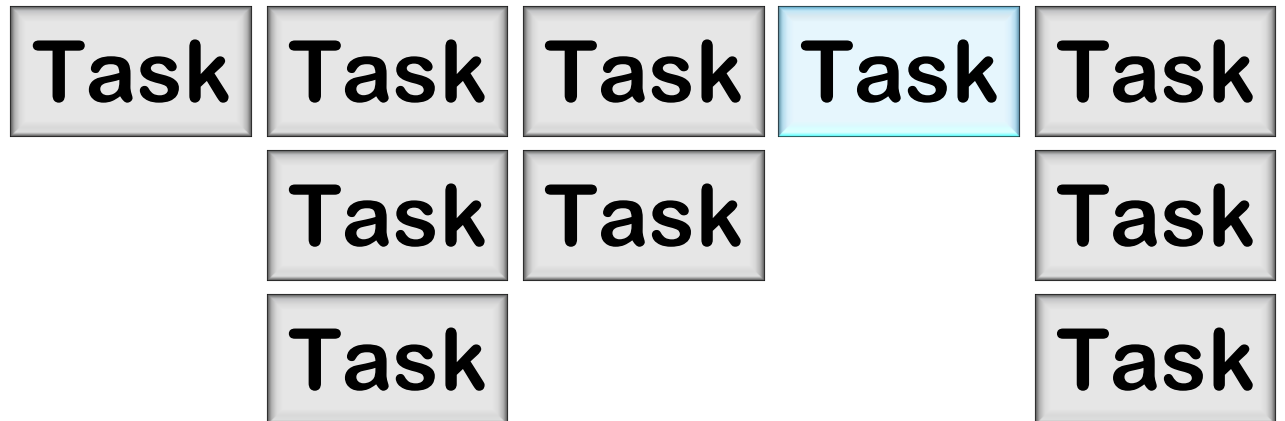


When is value delivered?

Activity



Activity



Benefits

- **User-Centered mindset**
- **A governor on feature invention & cleverness** (yours truly included)
- **Empathy**
- **Context**
- **Collaborative**
- **Lightweight**

Our Experiences

NEED THE AGILE NEWBIE

Do A Quick * STUDY ON AGILE

- walk through tutorial
- understand why agile
- where it came from & why

Overview page

View

document

Detail (4 pages)

view
content

(on page or
reference pages)

Click
thru

to content
(wherever "housed")

TAKE A
DEEPER DIVE
INTO "HOW TO"

ALLAY MY FEARS:
WHAT'S IN IT
FOR ME, AND
HOW DOES MY
ROLE CHANGE?

FIND *
INTRODUCTORY
TRAINING

Filter by:

- ability
- location
- geography
- date

~~Sort by~~
SORT BY

- company
- trainer
- ability
- geography
- city or location
- category

Training Class
Shows
up on "newbie"
introductory
page/section

view
class details
page

FIND OTHER
PEOPLE TO
LEARN FROM
EVENTS, USER GROUPS

FLAG AN
TOPIC OF
INTEREST

PICK UP
WHERE I

JOE the
PRODUCT
MANAGER
(owner)
(BUSINESS)

EARL the
EXECUTIVE
SHAREHOLDER

Mindy the
Marketer
+
(SALES PERSON)

Bob the killer
Team
Member

Chuck the customer
BUYER (customer)
End
CUSTOMER
(user)

Customer
Requirements
Publication
St. James
London

Customer
Process
Process / Approver

Customer
Process
Customer

Customer
Process
Builder

Industry
Analyst
Partner

DESIGNS
A
ROADMAP
SCHEME

MAINTAINS
A LONG-RANGE
PRODUCT PLAN

PRESENTS
PRODUCT
PLANS TO
OTHERS

CREATES "WHAT-IF"
SCENARIOS
WITH DIFFERENT
ROADMAPS
OVER THE SAME
TIMEFRAME

Tracks
Progress

Collaborates
with
contributors

ADD ITEMS
TO FUTURE
BUCKETS

Review
Alternatives

Approves
Plan

Where
are
we?

TRANSLATES
PRODUCT PLANS
INTO
CATEGORICAL
FOR SALES

Promotes
Growth
Desired from
Product
Direction

Communicate
Customer / Mkt
Feedback

OF WHERE
WE'RE HEADED
(CONTEXT FOR MY WORK)

KNOWS WHAT
MY WORK IS
CONTRIBUTING TO

Identifies
Technical
Needs
(PROVIDE INPUT)

COMMENTS TO
ROADMAP ITEMS

Communicate
Desires

Hears the
plan/
KNOWS WHO'S
COMING



FF7
FF2
PRESENT ROADMAP TO DEV
REGULAR TEAM

REVIEW ACTIVE ROADMAP ITEMS FOR STATUS

DESCRIBE/DISCUSS NEW ROADMAP ITEMS TO GET COMMITMENT FROM DEV

DEV TEAM COMMITS TO NEW ROADMAP ITEMS

REVIEW ROADMAP (ORANGE KICKOFF) TO SHOW THE PRODUCT PLAN

REVIEW ITEMS FROM CURRENT QUARTER

DEV TEAM DOES NOT COMMIT TO NEW ITEMS AND PROVIDES A NEW DATE/SCOPE (COMMONS CHANGES)

PRESENT ROADMAP TO OTHER GROUPS

FILTER ROADMAP ITEMS TO SHOW

DESCRIBE/DISCUSS NEW ITEMS AND CHANGES TO THE ROADMAP (LIVE AUDIENCE)

REVIEW FUTURE-BUCKET ITEMS (THINGS NOT IN CURRENT PLAN)

REVIEW ACTIVE ROADMAP ITEMS (TO SHOW STATUS) FOR A LIVE AUDIENCE

CAPTURE FEEDBACK

LIMIT THE TIMEFRAME TO NEAR-TERM (ie. next 6 mos. vs 2 years)

PUBLISH/DISTRIBUTE A STATIC ROADMAP

ATTACH A "STATEMENT OF USE"

EXPLAIN SWIMLANES AND OTHER VISUALLY DERIVED ATTRIBUTES

PRESENT ROADMAP TO PUBLIC

DEFINE A "PRESENTATION" ROADMAP STRUCTURE (SWIMLANES & TIMELINE)

FILTER ROADMAP ITEMS

PUBLISH/DISTRIBUTE ROADMAP ITEMS

PRESENT ROADMAP TO UPPER MGT

FILTER ROADMAP ITEMS

REVIEW STATUS OF ACTIVE ROADMAP ITEMS

REVIEW CONFIRMED ITEMS

DISCUSS INPUTS / FEEDBACK REGARDING ROADMAP

IDENTIFY THINGS THAT REQUIRE DEEPER INVESTIGATION

NOTE APPROVAL

4 M
AVE
LTING
- E
- CL
- LA
= (i

DEVELOP A LONG-RANGE PRODUCT PLAN (ROADMAP)

ADD MILESTONES
SIGNIFICANT EVENTS
(CONFERENCES, PRODUCT LAUNCHES, ETC)

INDICATE THE GOALS FOR A SPECIFIC RELEASE
(e.g. WHICH MARKETS WE WANT TO ADDRESS)

PLACE NEW ~~EXISTING~~ ITEM ON MAP ACCORDING TO SWIMLANE & TIME
or an existing item on Map

CAPTURE JUSTIFICATION FOR DECISION

CAPTURE OR REFERENCE MORE INFO ABOUT THE ITEM

INDICATE WHICH ONE OR MORE MARKETS, EXISTING, etc. THE ITEM TARGETS/BENEFITS

SAVE A DRAFT

INDICATE ~~WHETHER~~ WHETHER PUBLIC or PRIVATE, A PRIORITY, etc.

As a Pete
[create] I thing I want to capture a Unit of Value
So that it can be represented to others in the org added to the plan

As Pete
I want to give the roadmap a name, and store it.
So that I can look at it again in the future

As Pete
I want to assign a Unit of Value to the RoadMap
So that it can be communicated to others via the RoadMap

As Pete
I want to see a list of named roadmaps
So that I can select those from among the multiple roadmaps when the view

SEARCHING ROADMAPS & OTHER DATA
SEARCHING ROADMAPS & OTHER DATA
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Special thanks to David Hussman

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Watch for his new book from Pragmatic Programmers

Resources

www.DevJam.com (David Hussman)

www.AgileProductDesign.com (Jeff Patton)

TBD Title, David Hussman

www.PragProg.com (beta soon)

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