

Successfully Blending

Agile Methods

and

Design Thinking



DISCOVERY

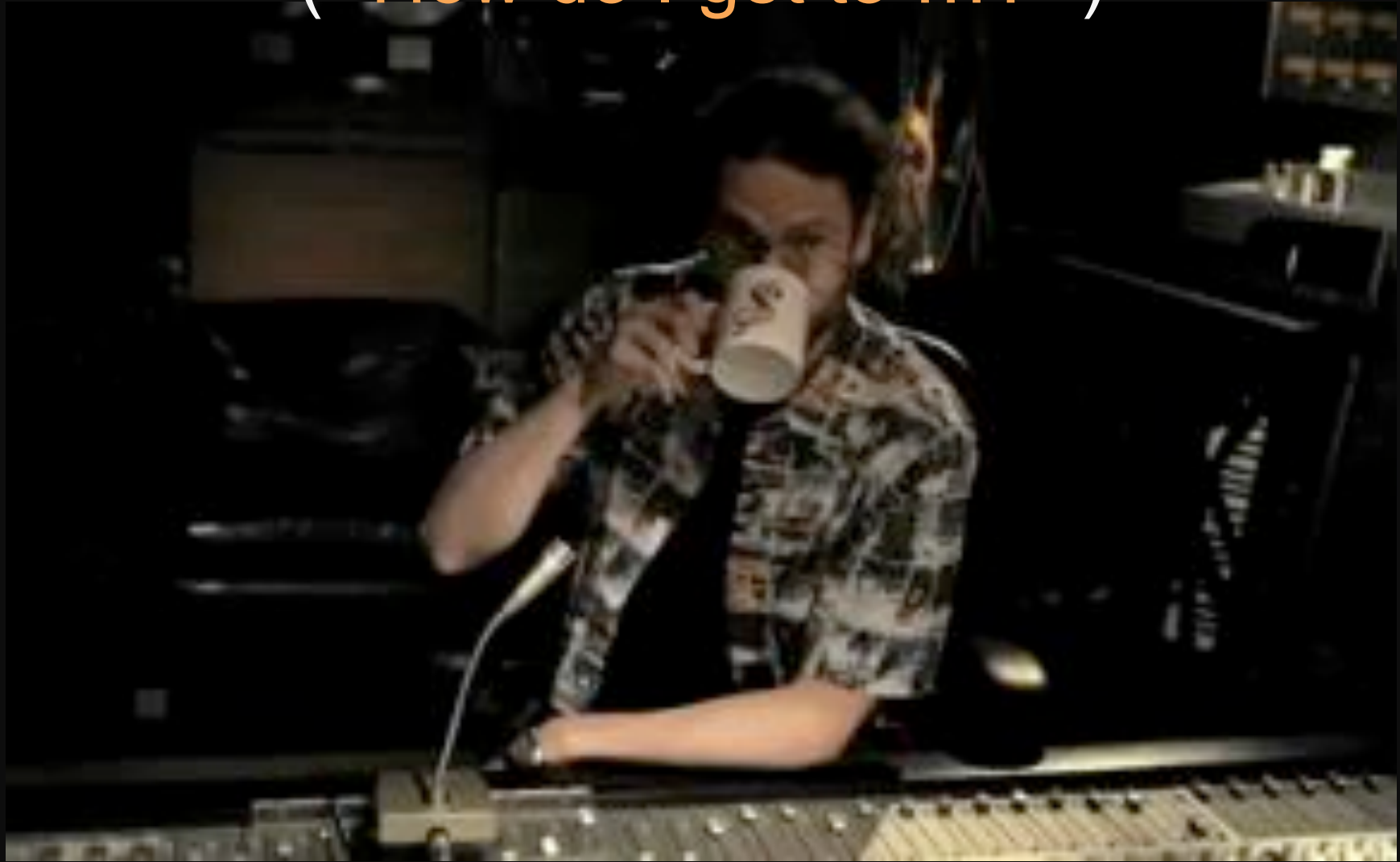
# Discovery Topics for Today

purpose

users

use

# Today's Discovery: A Navigation Tool ( "How do I get to ...?" )



1

Discovering

Purpose

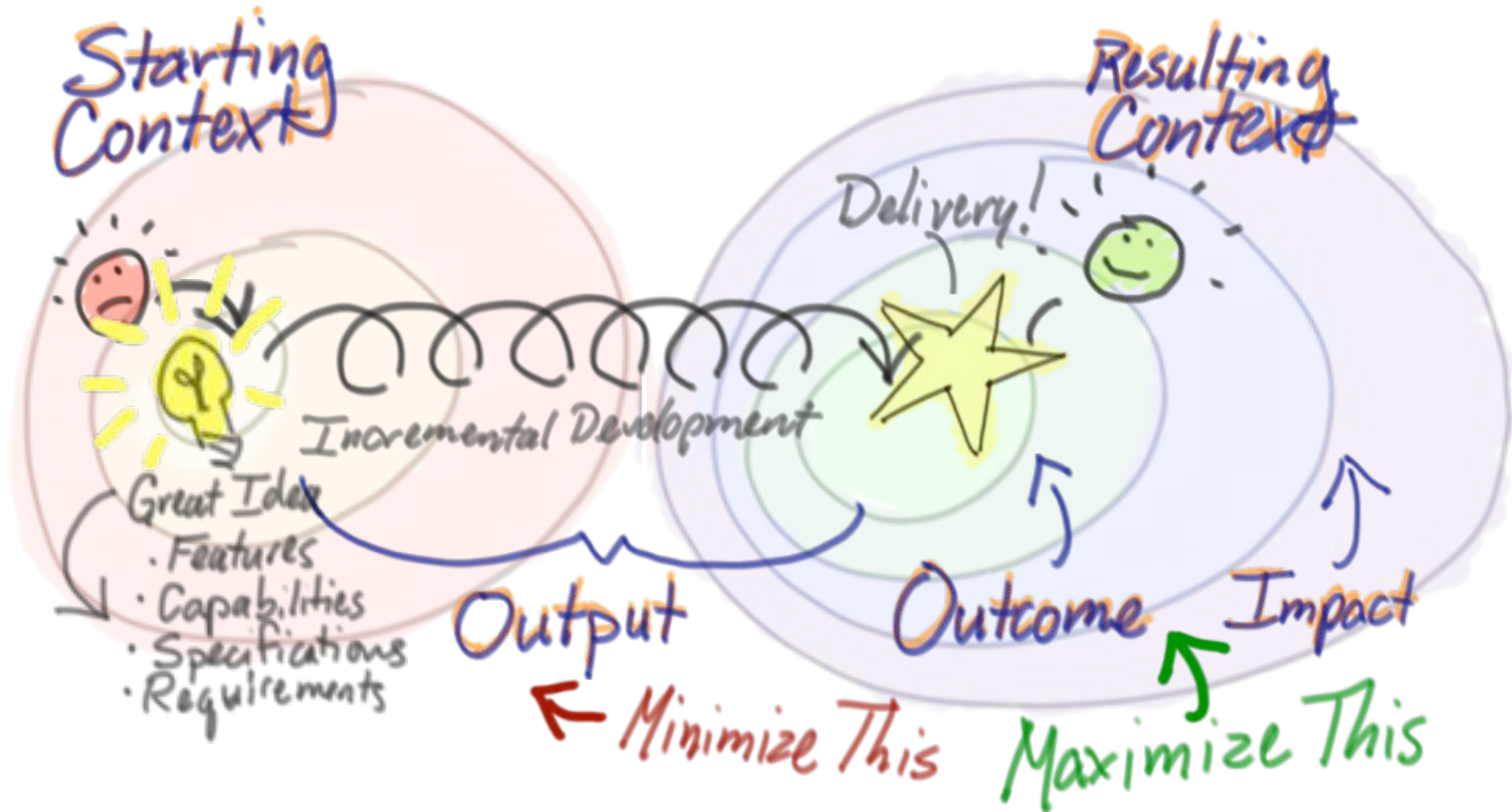
( why )

Chartering  
( elevator pitch )

Outcomes  
( product goals )

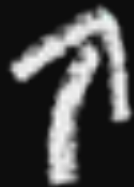
# Output and Outcome

# The difference between output and outcome



# Decide outcomes you'd like to achieve

*output*



*we build this*

*outcome*



*we want this*

# Arrive at outcomes working collaboratively



Chartering  
( elevator pitch )

Outcomes  
( target outcomes )

**Why** are you building **what** you are building?

# A community meets to discuss ...

Elevator Pitch  
(what and why)

---

Goals-Success Measures  
(meaningful outcomes)

---

and more ...



# What is your product context and purpose?

Listed desired *product outcomes*:

- *List problems or opportunities in your context*
- *For each list the outcome you'd expect after the product is built*

----- *OR* -----

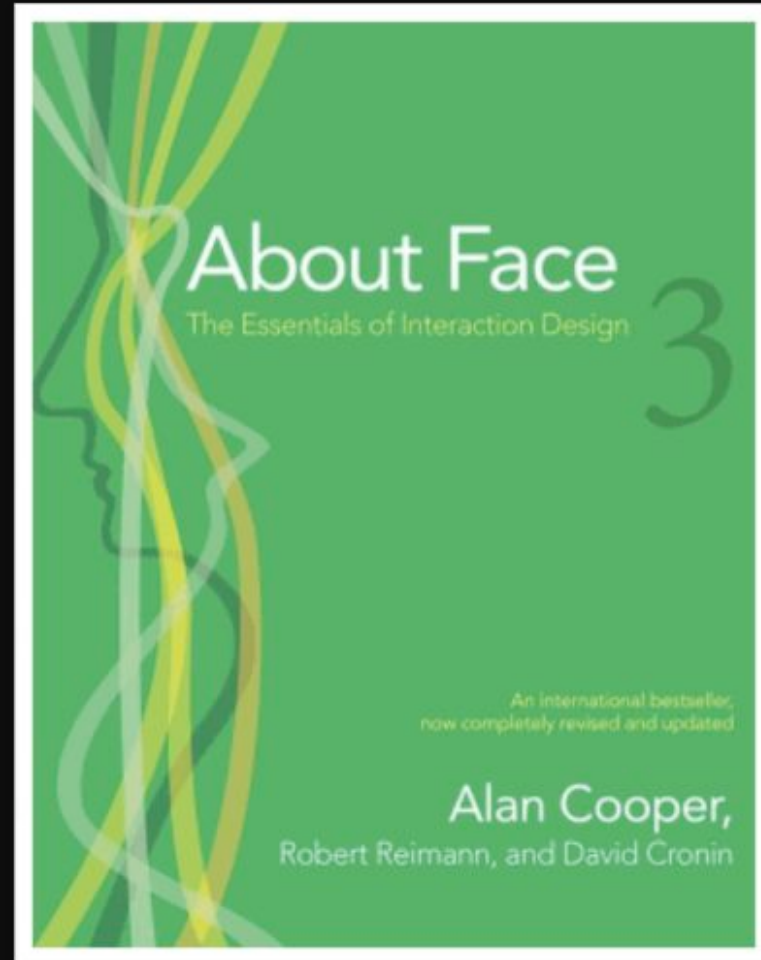
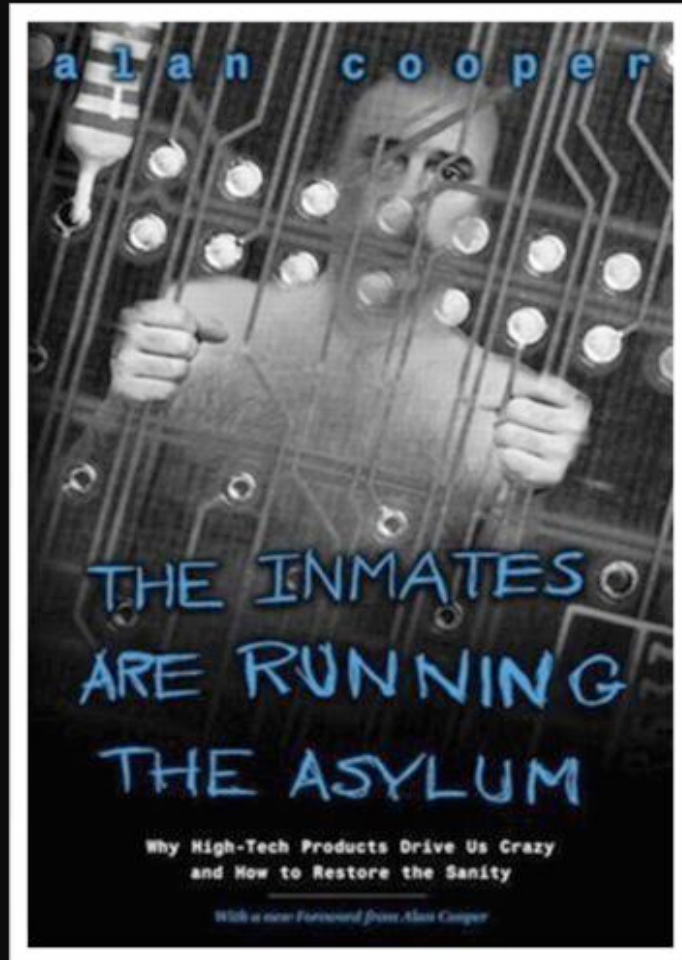
Write an *elevator pitch* which states:

*WHY you are building WHAT you are building*



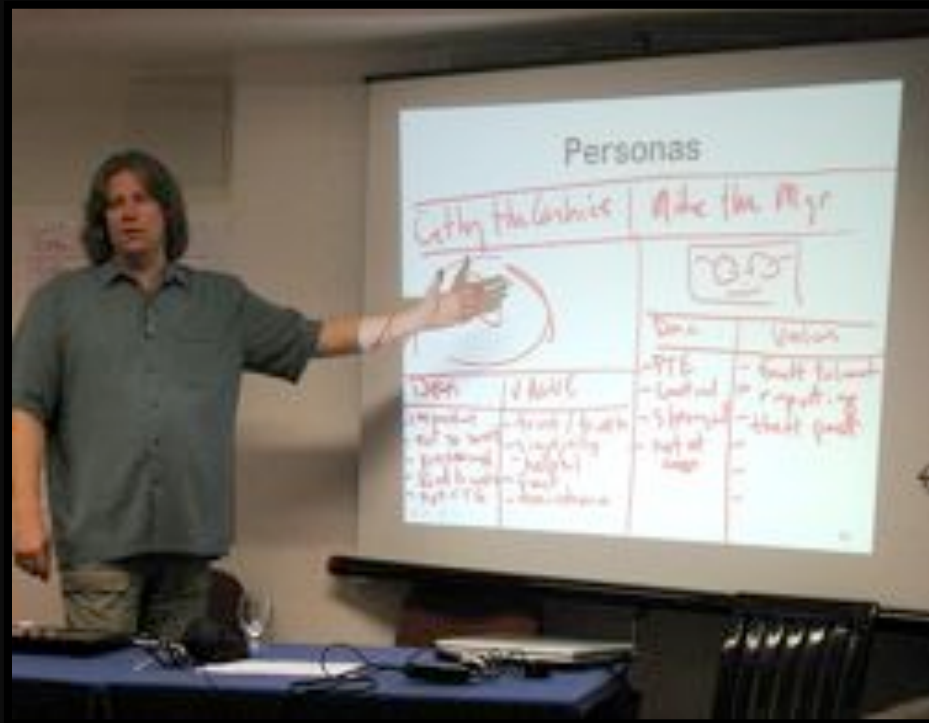
# Discovering Users ( who )

# Personas Are More Than Actors



Personas represent people & clarify product value

# Pragmatic Personas



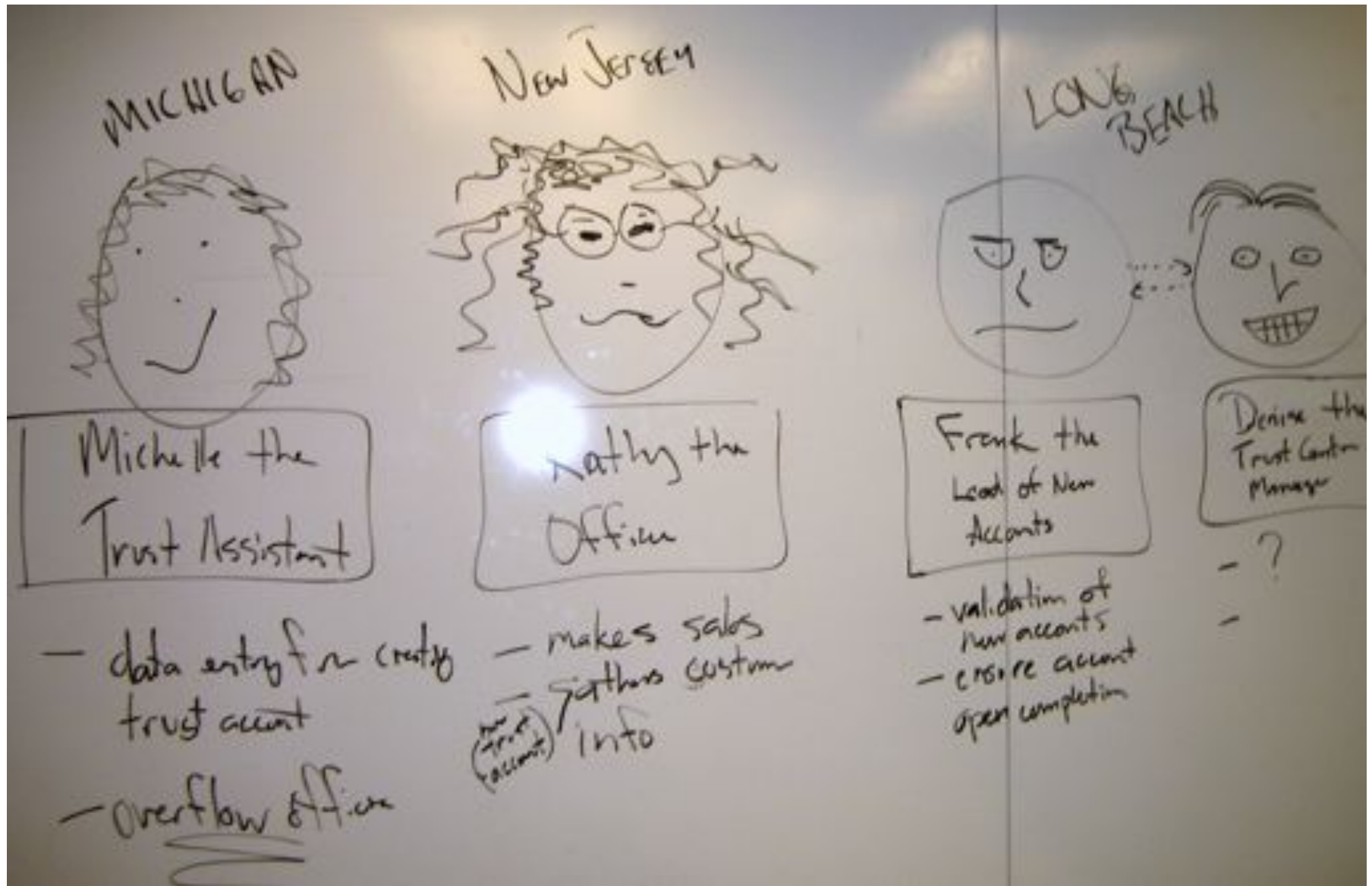
*Name*

*Image*

*Description*

*Needs (value)*

# Ugly but Conversational



# Fancy, but still conversational



**"Pete the Public Prospect"**

Description	Values
Interested in the RMD story Curious Potential Agent or Policyholder General information Why do I care about income market	Reference points / Stories Educational information Help

**Incident Facts:**  
-Could be a competitor  
-Could be the next top producer



**"AlMe the Admin"**

Description	Values
User account administration End User Support	Consistency of user name usage / SOC

**Incident Facts:**  
-Maybe spread across multiple people



**"Albert the Agent"**

Description	Values
Driven by business and getting commissions Typically male, around 35 Financial Planner Motivated by Tips and Pinks Not overly computer savvy	Deep interest in RMD being successful due to stock ownership Ability into planning business Access to commission information Ease of doing business with carrier Faster, easier customer time more money

**Incident Facts:**  
-Potentially 150,000 Alberts



**"Gary the Income Guru"**

Description	Values
Specialty in the Retirement Income Market Tells the Income Story to agents and FICOs Runs Evaluations and writes for agents Story Sales / Communications Trainers	Helping agents start business

**Incident Facts:**  
-Jack of all trades, one stop, they know the pain points



**"Frank the Field Marketing Org"**

Description	Values
Provides Sales Training Recruits agents Works with other Carriers All independent - all go where they can do the most business Focused on products Provides support to agents	Access to information of how agents are doing Quicker / Easier steps of doing business Ability to "cut" some of the work for the agent (streamline)

**Incident Facts:**  
-Will start business in the "best" place in town to do business



**"Polly Production Partner"**

Description	Values
One stop service experienced in Frank and Albert Vision: State these roles will be production functions Provides call center - exceptions May be assigned to specific Fields and Agents Focused around the client because it all makes their lives better	Helps to ease the business flow Cash-involvement before they become a Frank or Albert team Ability to see view of agent trip They are willing to (not) report their if agents High Customer Satisfaction

**Incident Facts:**  
-Jack of all trades, one stop, they know the pain points

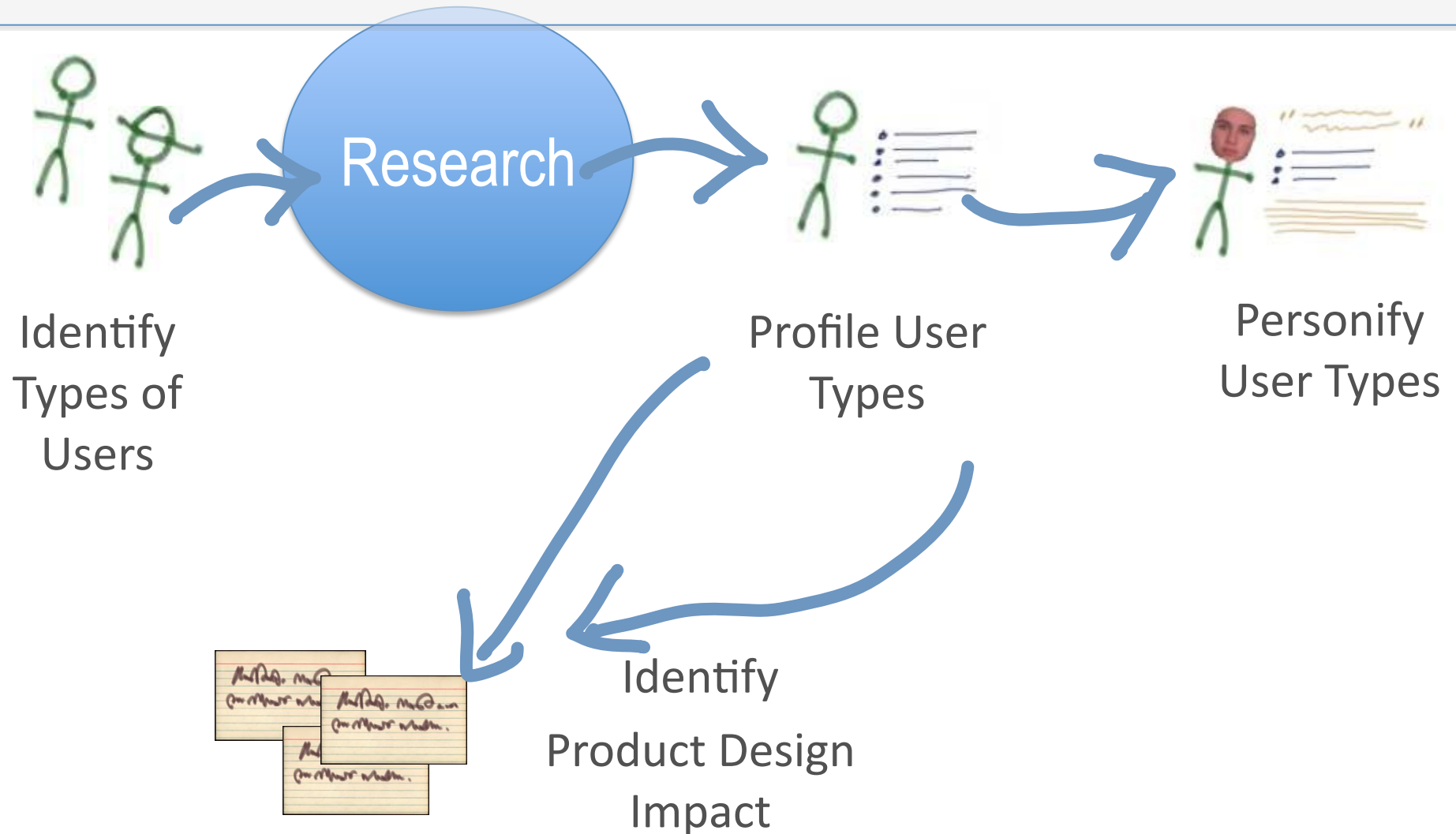
Variations on a theme

An aerial photograph of a massive, diverse crowd of people, likely at a large public event or festival. The crowd is densely packed and fills the entire frame, showing a wide variety of ages, ethnicities, and clothing colors. The top portion of the image is overlaid with a semi-transparent grey box containing text.

Segment a diverse audience into types

Traditional design practice prescribes lots of research to understand our audience


# Lots of research fits into a long process



Instead, synthesize what you understand today into a user archetype



# Pragmatic++

<u>Chuck. Casual Web Surfer</u>	
	<u>Context:</u> Just received tweet from friend about Meet a Mom - Donates from link on Meet a Mom blogpost.
<u>About Chuck</u>	<u>Implications:</u>
<ul style="list-style-type: none"><li>• spends a fair amount of time on web<ul style="list-style-type: none"><li>- browser, phone, tablet, RSS reader</li></ul></li><li>• cares about making the world better - more of a spiritual thinker</li><li>• Wants his small contribution to matter - feel like it does</li><li>• Wants to be part of a larger web community<ul style="list-style-type: none"><li>- has web as a social vehicle</li></ul></li><li>• Prefers to donate to small orgs</li></ul>	<ul style="list-style-type: none"><li>• Support multiple channels of communication</li><li>• Feature Below highly -<ul style="list-style-type: none"><li>- help drive home about feature</li></ul></li><li>• Show what a small contribution does</li><li>• Help Chuck make Meet a Mom a topic of conversation</li><li>• Project small &amp; personal impact, on news, tell stories</li></ul>

user type, or role

a name & quick sketch

some context  
- who is Chuck?  
- what's his situation?

Chuck's Characteristics & Goals

Implications  
- what's valuable for Chuck?

# Who's Are Your Product's Users?

Choose a name	
-----	
Add an image	
-----	
Description ( <i>who</i> )	Value ( <i>what</i> )
- <i>time at job</i>	- <i>financial?</i>
- <i>experience</i>	- <i>more done?</i>
- <i>FT / PT</i>	- <i>fewer steps?</i>
- <i>incentives</i>	- <i>more fun?</i>
- <i>engagement</i>	- <i>easier to use?</i>

Name	
-----	
Sketch	Context
-----	
Characteristics	Implications

3

Discovering  
needs and use  
( what )

# Twin Sons of Different Mothers



*David*



*Jeff*

Why do we create **story maps**?



# Story Mapping

# Building a story map helps facilitate discussion about user experience



Gary Levitt, owner & designer of Mad Mimi

# Maps Foster Rich Discussions



Let's Map Our Product!

Building a story map is a discussion about user's experience, not software features



# Questions?

---

## DevJam

Coaching and Developing Agility

[david.hussman@devjam.com](mailto:david.hussman@devjam.com)

[www.devjam.com](http://www.devjam.com)



## Jeff Patton

AGILE PRODUCT DESIGN

Coaching Development  
Organizations for Product Success

[jeff@agileproductdesign.com](mailto:jeff@agileproductdesign.com)

[www.agileproductdesign.com](http://www.agileproductdesign.com)