

Workshop

State of Washington

3 session agenda

Session #1 - learning session

↪ Overview, methods, and goals

Session #2 - small group work session

↪ Product vision, roadmap review, and decision points

Sessions #3 - small group work session

↪ QASP review + RFQ Drafting!

Building a successful product

Two keys to success

Everyone understands why

With agreement on...

- What problem we're trying to solve
- What we hope to accomplish
- Who we are solving for

We get...

- Empathy
- Flexibility
- Basis for making decisions
- Criteria for success

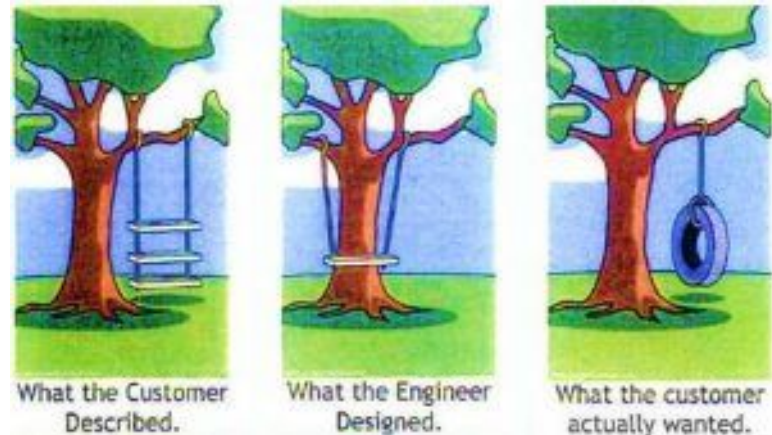
Everyone has the same picture

With clarity on...

- What we are building
- What we are not building

We get...

- Aligned expectations
- Common language
- Meaningful estimates



Session #2 agenda

1

Setting the
product vision

2

Defining your
goals

3

Choosing a
strategy

Break

4

Writing
customer
promises

5

Creating a
roadmap

Setting the product vision



Why a vision statement is important

A vision statement acts as a north star that motivates and guides your team, conveying the overarching goal your team is aiming for

**Your vision statement helps you and your team
communicate clearly about the work you're
doing to anyone at any time.**

And it helps you pitch the value of your product at every stage of the project.

You will revisit and may adjust your vision at times as you learn more, but maintaining a clear, inclusive vision is critical to product success

How to create a vision

A vision statement should answer:

- 1. Who are we helping?**
- 2. What's the problem?**
- 3. How are we helping?**
- 4. What's the outcome we're hoping for?**
- 5. How will this solution be better than others?**

**Vision statements should be clear, concise,
informative and inspirational**

Be aspirational: Where do we want to be in 5 years? 15 years?

**A good vision paints a picture of the future that
draws people in**

Vision statements should be devoid of specific implementation details

**We want a world where [some constituent] is
able to [get some clear value that is meaningful
to *them*]**

What's your vision?

Get at your vision

1

What problem are you solving? Why is it meaningful?

2

Who are your constituents? What's important to them?

3

What is your vision? Why is your solution desirable to your constituents?

What problem are you solving? Why is it meaningful?

Washingtonians applying for benefits can find it difficult to keep track of what is supposed to happen next and what additional steps they need to complete, especially if they have multiple applications and enrollments. As a result, it can take them longer to receive their benefits, and they risk having their application denied if they take too long to respond.

Who are your constituents? What's important to them?

We want Washingtonians to have clarity about their application for benefits so that they can more quickly and easily navigate the process and receive their benefits.

What is your vision? Why is your solution desirable to your constituents?

The Eligibility and Enrollment Status Tracker will provide Washingtonians with a self-service, single point of access to understand eligibility and enrollment status across multiple HHS Coalition programs.

Vision

1

What problem are you solving? Why is it meaningful?

Washingtonians find it difficult to keep track of what is supposed to happen next, and they risk having their application denied if they take too long to respond.

2

Who are your constituents? What's important to them?

We want Washingtonians to have clarity about their application for benefits so that they can more quickly and easily navigate the process and receive their benefits.

3

What is your vision? Why is your solution desirable to your constituents?

The Status Tracker will provide Washingtonians with a self-service, single point of access to understand eligibility and enrollment status across multiple programs.

Defining your goals



Why goals are important

Creating the product strategy

Vision, strategy, and tactics

1

Vision

The aspiration, the idea

2

Strategy

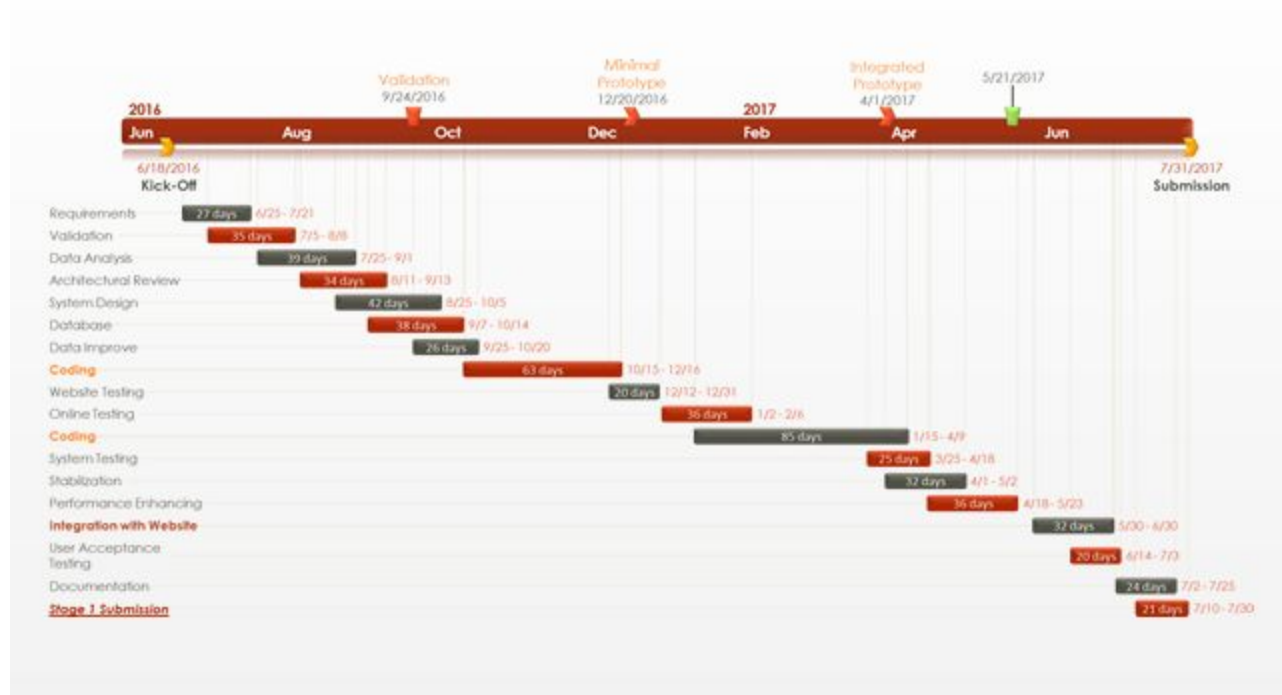
The plan to achieve that aspiration

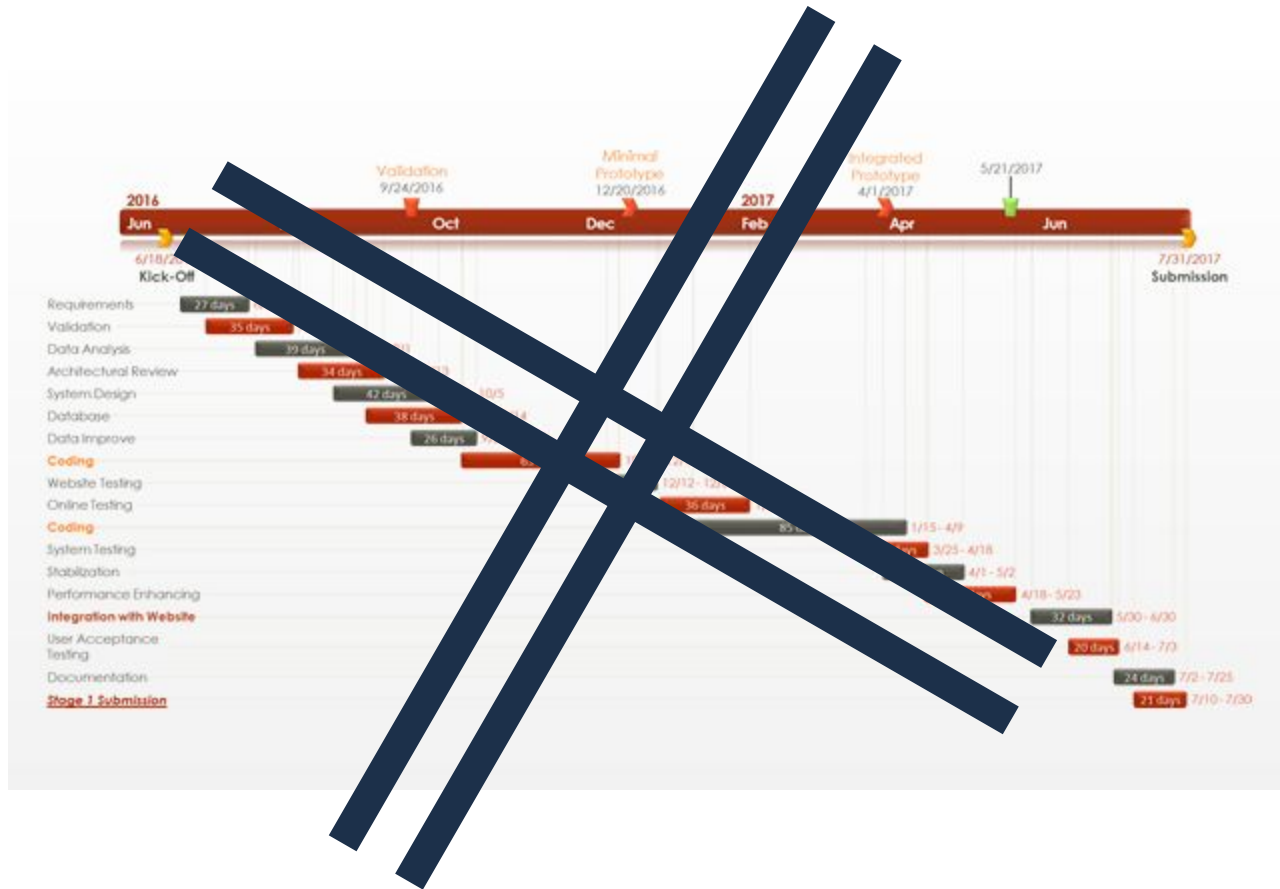
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Tactics

Ensuring a successful plan execution

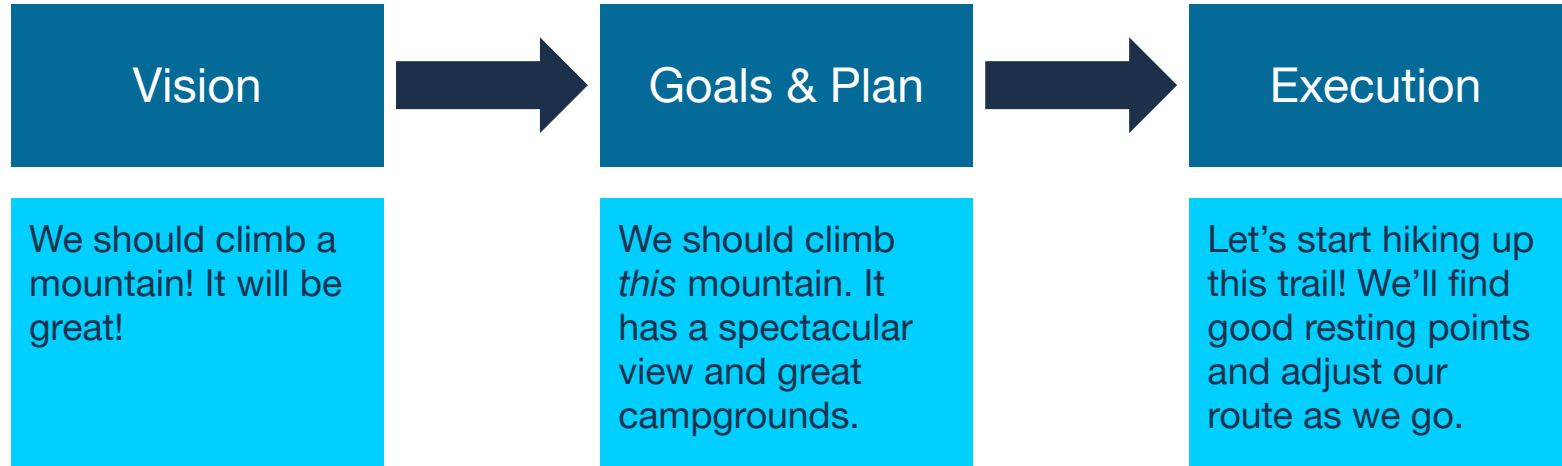
**What do goals mean in
today's world?**





Setting goals isn't about knowing everything up front and writing it down.

Setting goals means knowing what you're trying to achieve (and why).



What are your goals?

Goals

1

Deliver user value.

2

Validate the Platform.

3

**Make progress towards
the IE&E vision.**

Goals

1

Deliver user value.

Decrease days to process; reduce calls inquiring about status; reduce duplicate or abandoned applications

2

Validate the Platform.

3

Make progress towards the IE&E vision.

Goals

1

Deliver user value.

Decrease days to process; reduce calls inquiring about status; reduce duplicate or abandoned applications

2

Validate the Platform.

Cloud environments; CI/CD infrastructure; automated testing; API integration layer; authentication and authorization layer

3

Make progress towards the IE&E vision.

Goals

1

Deliver user value.

Decrease days to process; reduce calls inquiring about status; reduce duplicate or abandoned applications

2

Validate the Platform.

Cloud environments; CI/CD infrastructure; automated testing; API integration layer; authentication and authorization layer

3

Make progress towards the IE&E vision.

Tell their story once; mobile-friendly interface; optimized for accessibility; intuitive; replacing ACES

Choosing a strategy



The choice of approach impacts your goals

**Stand-alone
Status Tracker**

**Status Tracker as
a possible
foundation for a
self-service portal**

**Status Tracker as
a consumable
service
embedded into
WACONN, HPF,
IVR, etc**

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Writing customer promises / user stories



Why customer promises are important

Now that we understand the vision and strategy, let's look at the **end user experiences that enable it. These are the customer promises.**

Every piece of work that anyone on the project does, no matter how big or small, must somehow support your customer promises.

How to define customer promises

Defining customer promises

1

What are the core components of your vision?

2

Who are your end users?

3

What do they want to use your product to do?

Defining customer promises

1

What are the core components of your vision?

Self-service, single point of access, application status, next steps

2

Who are your end users?

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Defining customer promises

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What are the core components of your vision?

Self-service, single point of access, application status, next steps

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Who are your end users?

Stressed, busy, web access via mobile devices, aged, blind, disabled, low English proficiency, low tech proficiency, no stable address, need assistance

3

What do they want to use your product to do?

Defining customer promises

1

What are the core components of your vision?

Self-service, single point of access, application status, next steps

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What do they want to use your product to do?

See story map



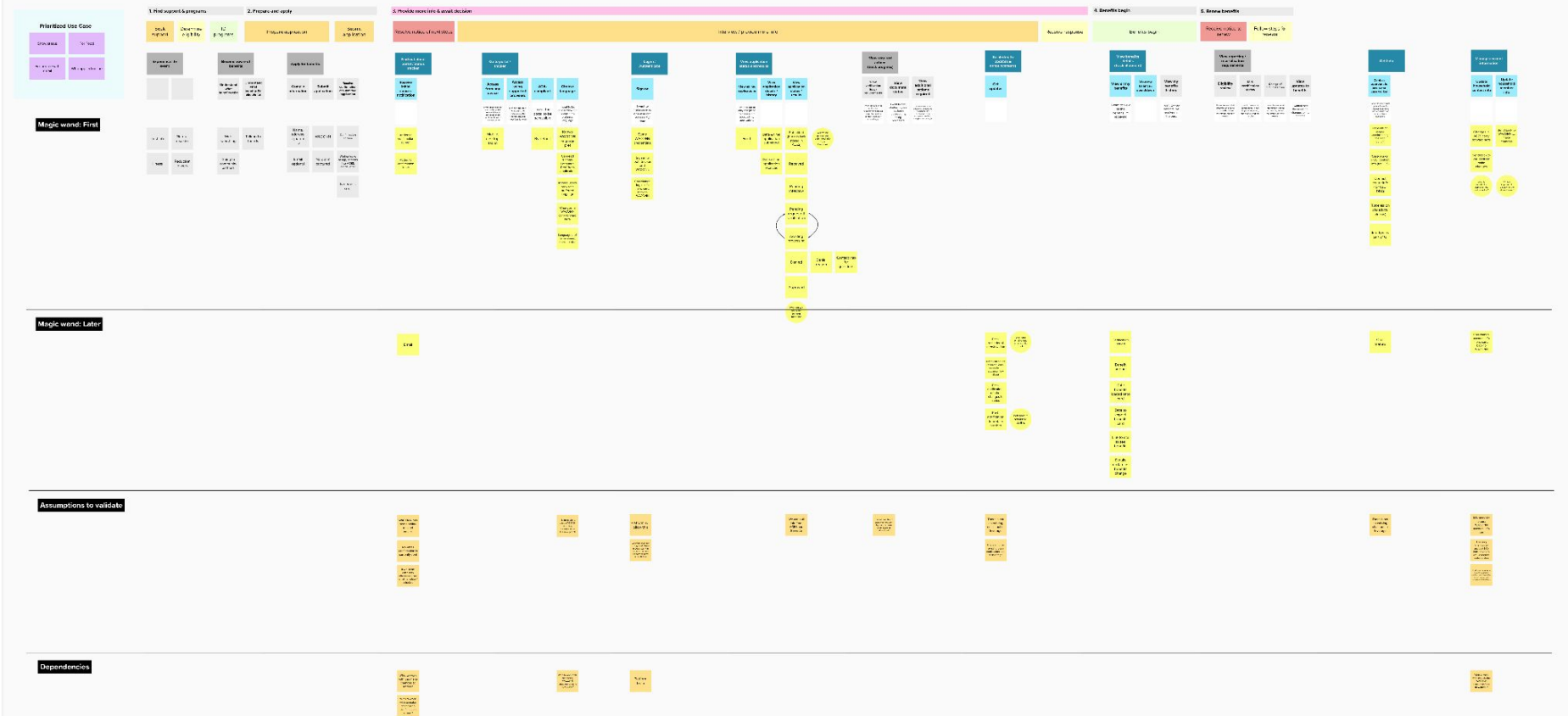
Using story mapping to identify user needs

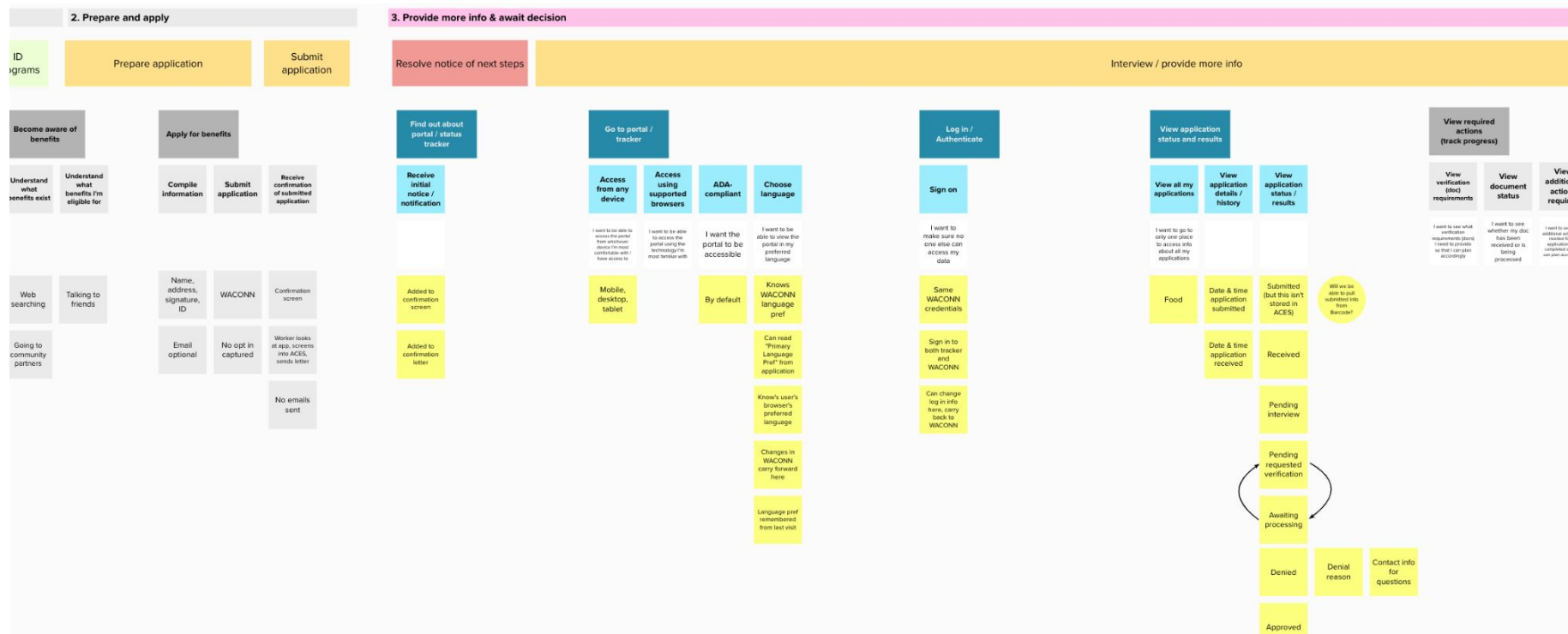
What are the most central tasks that must be accomplished in getting the job done? What abilities do the users need?

When does the user need this functionality? What is the workflow? What happens right before? What happens right after?

How will these abilities/info interact with other abilities/systems?

Brainstorming solutions





How to write customer promises

User story format

As a [type of user],
I want [this ability / functionality]
so that [this benefit / value]

Benefit of user story format

- Invitation to a conversation
- From a user's perspective
- Describes What, not How
- Plain, concise language with a common format
- Can be written at varying levels of detail

INVEST to write good user stories

Independent - Stories can be worked on in any order, independently of other stories

Negotiable - The solution and requirements are not prescribed by the story, only the desired goal. The approach is open to discussion and collaboration

Valuable - The value of the story, the “why,” is clearly articulated

The user story format is simple,

but it takes practice to do well

Examples

The “so that” should not repeat the “I want”

Weak

As a customer reserving a hotel, I want to locate previous reservations **so that I can see all the reservations I've made**

Stronger

As a customer reserving a hotel, I want to see my past reservations **so that I can rebook the same hotel, saving me time and effort searching for hotels again**

Examples

The user should be appropriately specific

Weak

As a customer, I want to locate previous reservations so that I can see all the reservations I've made

Stronger

As a customer who travels to the same site repeatedly and needs to reserve a hotel, I want to locate previous reservations so that ...

Examples

The “I want” should not be prescriptive

Weak

As a customer who travels to the same site repeatedly, **I want to see a list of previous reservations in a yellow box at the top of the screen** so that ...

Stronger

As a customer who travels to the same site repeatedly, **I want my previous reservations to be easily referenceable** so that ...

**What are your customer
promises?**

Accessing the site

- As a Washingtonian who has applied for benefits, I need to find out about the tracker so that I know how to check the status of my application
- As an applicant or client, I need to be notified of updates and announcements relevant to me so that I can effectively manage my benefits
- As an applicant, I need to be able to sign on once to access all my applications so that I can save time and confusion from going to multiple sites or remembering multiple logins

Using the site

- As an applicant who relies on a mobile device for internet access, I need to be able to access the tracker from my cell phone, not just a desktop or tablet, so that I can use the site
- As an applicant who is aged, blind, or disabled, I need the site to be accessible so that I can use the site
- As an applicant whose first language is not English, I need the site to support multiple languages so that I can use the site

Viewing status

- As an applicant, I need to view the status / result of my application so that I understand where I am in the process and what to expect
- As an applicant, I want to group my applications based on whether they are pending, active, denied, or under recertification so that I can easily understand what's happening across all my applications
- As an applicant, I need to view what documents I need to provide and the status of documents I've already provided so that I can tell if I need to do anything to process my app
- As an applicant, I need to view any additional actions I need to take and my progress so that I can tell if I need to do anything to process my app
- As a client who needs to recertify, I need to see what information I need to provide, when, the status, and the results so I can continue to receive needed benefits without interruption

Viewing benefits

- As a client who is enrolled in benefits, I need to see what benefits I'm receiving and how to access them, as well as how much time and/or funds I have left so that I can plan my budget
- As a client, I need to see a history of previous benefit issuances/premiums/cost of care so that I can understand any changes that are made

Getting help

- As an applicant, I need to be able to authorize a representative to assist me so that I can get help managing my application
- As an applicant viewing my status, I need to view copies of documents I received related to my application so that I can still reference them in case I lose track of them
- As an applicant viewing my status, I need to know what options I have for troubleshooting so that I can follow up in case I have questions
- As an applicant viewing viewing my status, I need to know where to go to complete application- and account-related tasks that are not supported by the tracker so that the experience feels less confusing and fragmented

NOT IN SCOPE

- A staff-facing portal for status tracking
- Document uploading

Creating a roadmap



Why roadmaps are important

Roadmaps contain:

Customer promises that are **broken down** into bite sized chunks of work, **prioritized**, and set on an **estimated timeline**.

The roadmap is a **bridge** between your **strategic vision** and your **backlog** of work. They help you keep track of the big picture and correlate every work item to your end goal.

The roadmap also helps you stay aligned with your stakeholders.

**You shouldn't use roadmaps to forecast exactly
what will get delivered *when*.**

You shouldn't use roadmaps to forecast exactly *what* will get delivered *when*. **They're for planning the order in which you'll tackle the various pieces of the overarching problem.**

**Roadmaps are not a promise.
They are a statement of intent.**

Examples of roadmaps

There are many ways to create a roadmap. Here are a few examples that communicate timelines.

List-style Roadmap

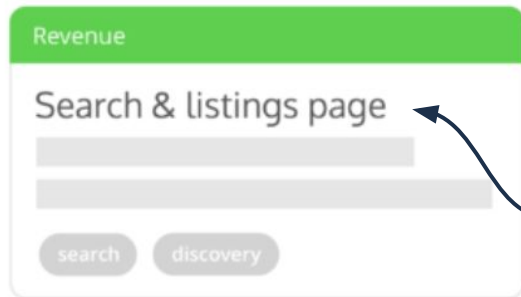
This general timeline keeps dates vague but still shows where things currently are

FEATURE	NOT PLANNED	PLANNED	IN PROGRESS	READY SOON	RELEASED
Pipeline					
Parallel stages					Released
Improvements to pipeline storage and performance			In Progress		
Notifications		Planned			
Improved Docker Pipeline engine		Planned			
Docker for Windows	Not planned				

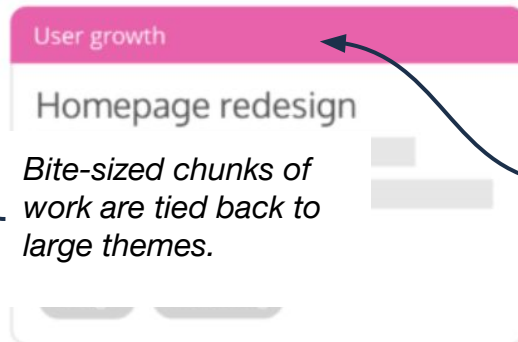
Details can be viewed by clicking through to another level

Theme-based Roadmap

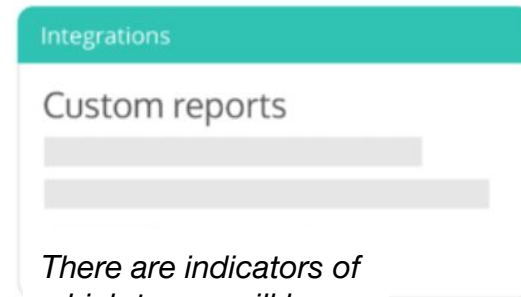
Now



Next

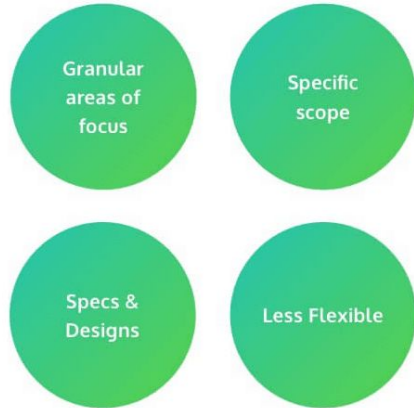


Later



Theme-based Roadmap

Now



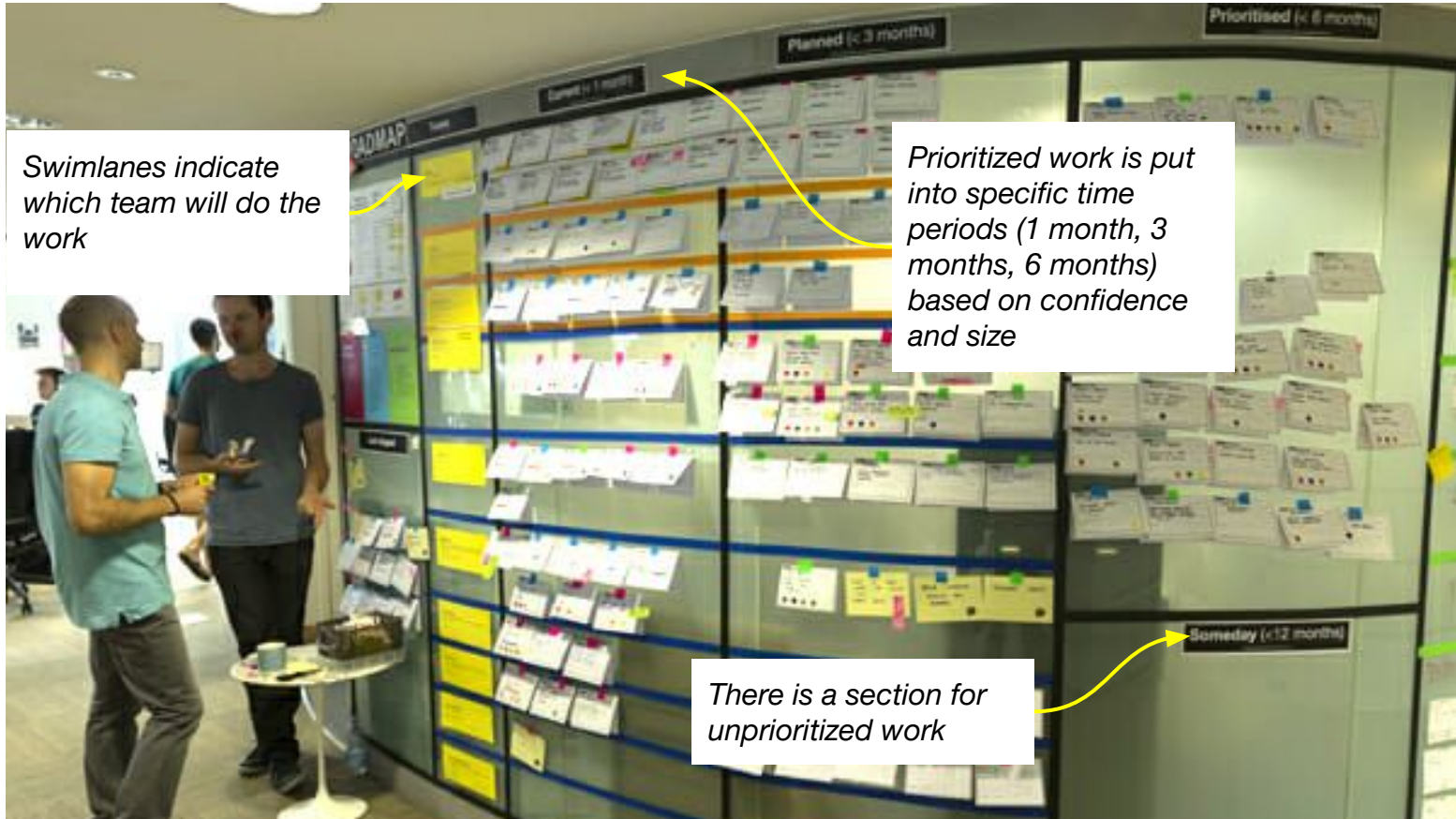
Next



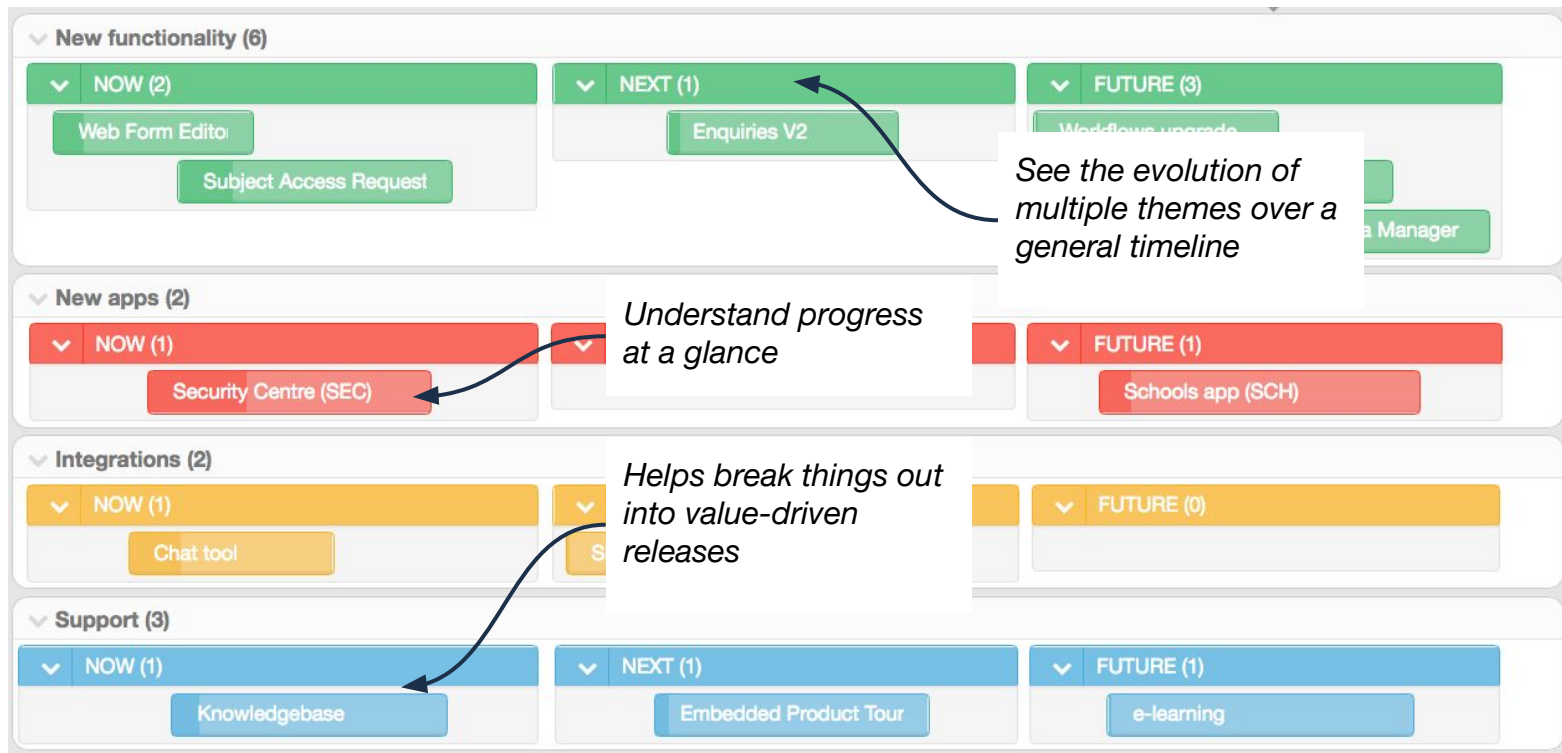
Later



Timeline + Team Swimlane Roadmap



Timeline + Theme roadmap



How to create a roadmap:

Defining chunks of work

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By doing this...

- Break down a problem iteratively
- Break large chunks into medium ones, medium chunks into small ones, and so on
- Do not break large chunks into small ones
- Provide more detail as a project matures

We can...

- Focus
- Avoid doing too many things at once
- Estimate more accurately
- Create a sensible build plan that delivers value continuously, not just at the end

Example

Make a cake that can feed 500 people



Make 10 3-tier cakes that each feed 50 people

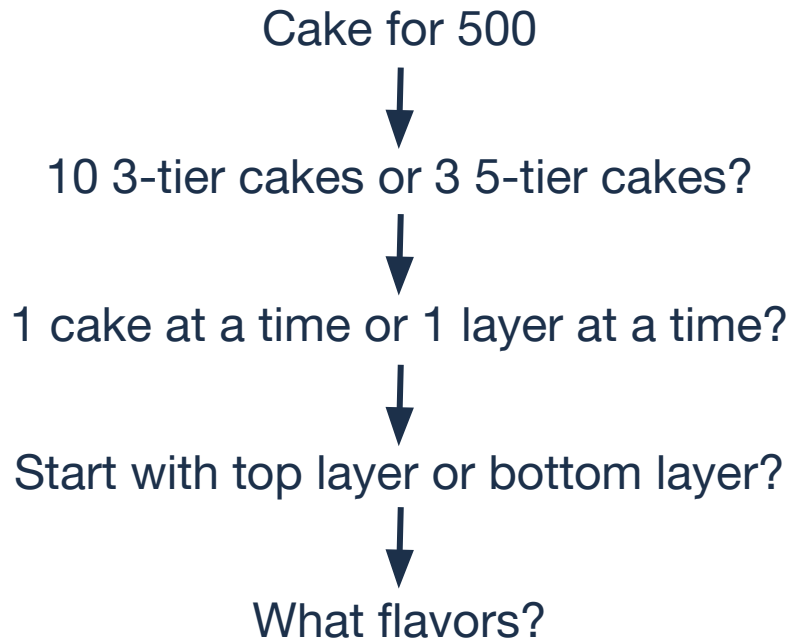
- How will you do it?
- How long will it take?
- How much flour, sugar, etc will you need?

- I know how to make a 3-tier cake
- I know how long that takes and what ingredients I need
- I can create a plan
- Even if I don't finish, we'll still have some cake

Focus on criteria that could have significant impact on estimates or timelines or user value

There may be multiple ways of breaking down the problem and defining chunks of work.

Example



Functionality

Apply for benefits

- Submit application
- Recertify
- Upload documents

Understand application status

- View their status
- Find out what additional information or actions are required
- Download documents

View benefits

- View details about benefits they are receiving (amount, period, etc)
- View previous benefits

Manage account

- Manage their account information
- Communicate securely with agency staff
- Receive notifications and alerts

Use cases

Programs

- Classic Medicaid
- Food
- Cash

Email status

- With email
- Without email

Application source

- Online
- Paper
- Phone

User type

- Self
- Authorized representative
- Helper

How to create a roadmap: Prioritizing

Which customer promises do you need to knock out of the park? Which ones just need to get done? Which ones are nice-to-haves?

Then think about timing.

Then think about timing. There are customer promises that naturally fit together, because they rely on shared infrastructural work.

Then think about timing. There are customer promises that naturally fit together, because they rely on shared infrastructural work. **Even if they're different priority levels, it makes sense to group them.**

What do we need now and what can we do later?

What can we simplify for now?

You can use that to create a rough roadmap for your product.

You can use that to create a rough roadmap for your product. **Try not to have too many customer promises in play at any one time — your team needs to be able to keep track of what promises they're working on!**

Remember:

Every piece of work that anyone on the project does, no matter how big or small, must somehow support your customer promises.

What's your roadmap?

Prioritizing functionality

Primary focus

Understand
application status

Find out what
additional
information or
actions are required



Download
documents

Where we can simplify

Manage their
account information

Communicate
securely with
agency staff

Receive
notifications and
alerts

Not worrying about right now

Submit application

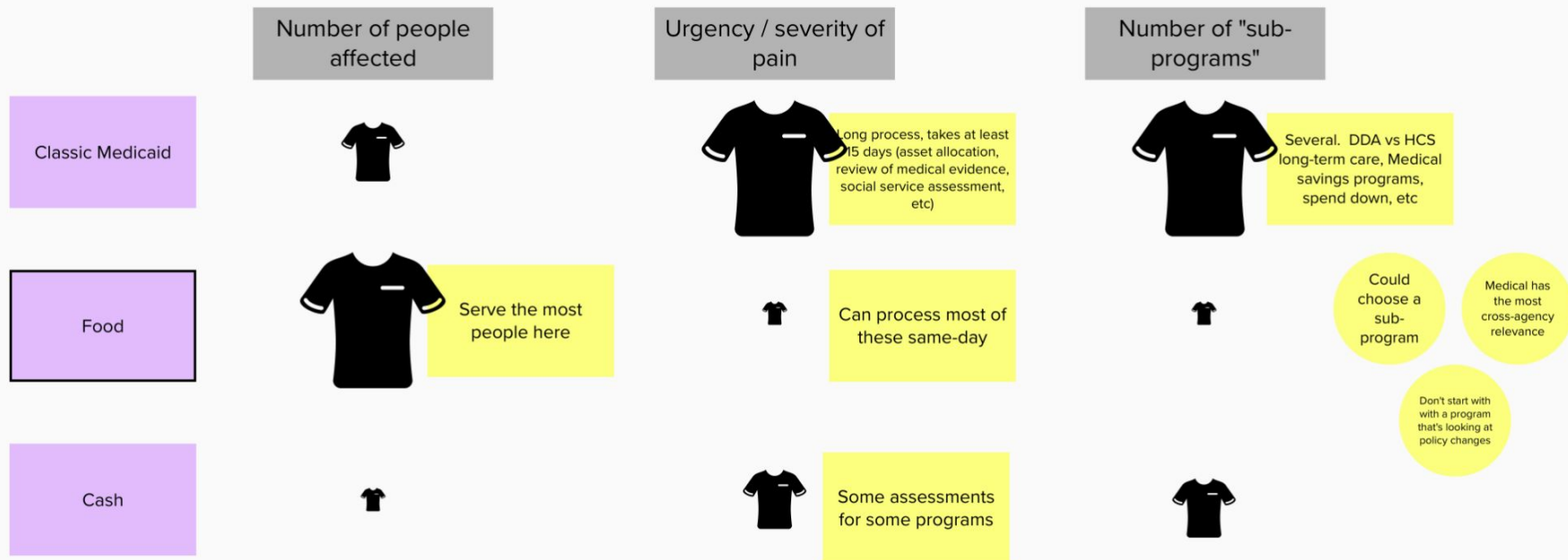
Recertify

View details about
benefits they are
receiving (amount,
period, etc)

View previous
benefits

Upload documents

Prioritizing programs



Prioritizing use cases

Complexity

Number of people
affected

Urgency / severity of
pain

With email

From online

Self

Without email

From paper

Authorized rep

From phone



Well-established



More support /
options to put in
place



More support /
options to put in
place

How many
people fall
into this
bucket vs not?

First, Next, Later

First Use Case

Show status

For Food

For people with
email

Who applied online

Who are managing
the app themselves

Next Use Cases

Show steps

Show benefits info

Later Use Cases

Cash

Medical

Use Cases for Release

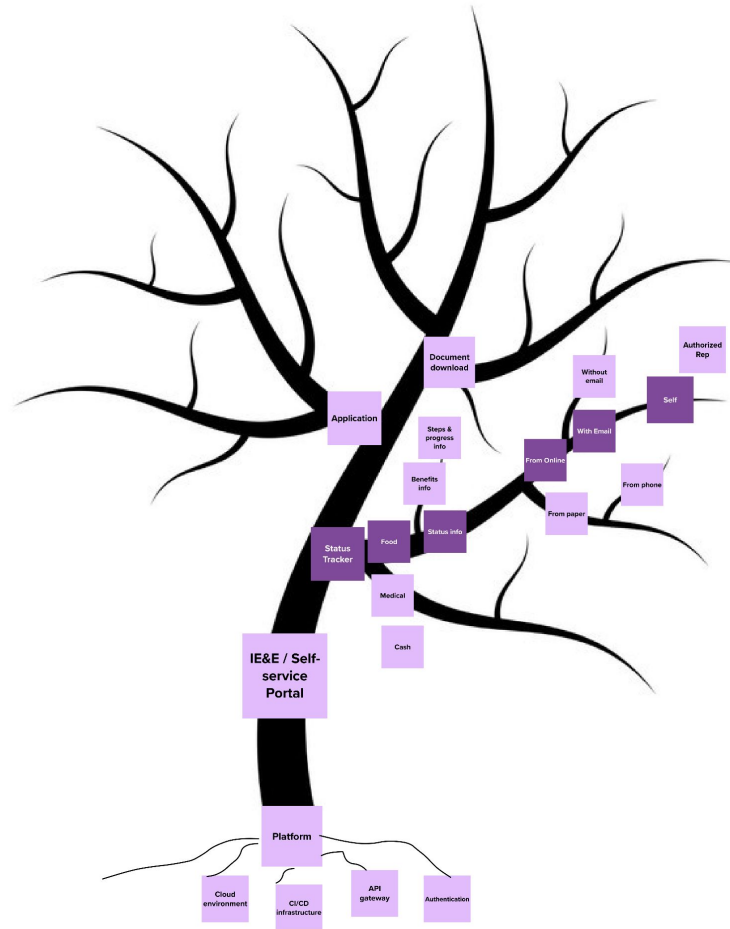
Without email

From paper

From phone

Authorized rep

Roadmap as a Tree



Questions

Discussion

