

Guide to writing a Working Backwards Document for Candidates

Our CBH Working Backwards Document is to be used for substantive Feature Specs (such as Matching Algorithm) and other Major Initiatives (for example, if we began an effort to get Joint Commission Accreditation today we would write a Working Backwards Document first). With a nod to Amazon, who popularized this working backwards methodology, we've adapted it for use in our own corner of the economy. This is a living document, and I expect us to add to this document as we get more repetition writing these Working Backwards Documents and get more mature as a business.

Which projects necessitate a Working Backwards Document?

Writing a working backwards document is a mechanism to force higher quality thinking, but admittedly takes time, and thus is a tradeoff. Write a Working Backwards Doc if it checks at least 1 or 2 of the following:

- Time: if the project will commit the company to more than one person-week of time (i.e. a feature that will take more engineering time than one engineer for a week) then write one.
- Quality vs Speed: if the project is better launched one week later at higher quality than launched immediately, write one. (The obvious example of when not to write one is a bug in our mobile app, for example, in which case getting the fix out immediately is the priority). By the same token, if it's better launched immediately... are you launching it today? If not why not?
- Second order effects: if your project may impair other parts of the org, but for good reason (i.e. new credit underwriting policies that impact sales, account management, and billing) then write one. If your project may change the way our HCPs or HCFs behave in a way that's costly to change back, write one.
- Obvious to the reader: if your project is patently obvious in that if you emailed three people to do it without much description and you're confident they're deliver three identical solutions back to you, then you don't need to write one. Otherwise do.

The Working Backwards Methodology & Why We Use It

Working Backwards tests the customer value of your ideas and helps you crystallize what you want to do and why in customer-centric terms that anyone can understand. Customer Centric is one of our Company Values. Note that some Working Backwards Documents will have internal-only customers, that's fine, and actually identifying the true customer of your work is a key decision worth spending time on.

Three tools comprise the Working Backwards methodology and are each encompassed in this Working Backwards Document. Each tool is used to drive clarity into what we want to build and why:

1. Future Customer Quotes

As a customer-centric company, our product features and major initiatives are only successful if customers are delighted. So, we start at this end result: what will these customers say when this feature is out and they love it? We write these Future Customer Quotes before we start building anything to make sure that, as a customer-centric company, it's the right thing to work on.

AND

Metrics & Milestones

If your initiative is designed to move a metric - and most are (such as fully-onboarded-to-active conversion rate or number-of-new-HCPs-onboarded-per-month) then this section also includes Metrics and Milestones. What's the metric you're trying to move, how far will it move as a result of this project, by when, and what are the milestones along the way? For example, "We need to hit and sustain 700 new onboarded HCPs across CNA LVN RN a month starting July 2020. Milestones along the way will be 400 a month starting in May, 550 a month starting in June. This document describes how we'll get there."

2. FAQs (from the perspective of each type of customer, as well as internal stakeholders)

The list of Frequently Asked Questions is where we add meat to the idea described in the Future Customer Quotes. An FAQ includes questions that came up when writing the Future Customer Quotes - both stakeholder and customer questions. Put yourself in your customer's shoes and consider all the questions you would have and make sure these are included in your FAQ. Also put yourself in the shoes of your stakeholder to address how it will get done and why it's important to do. The Future Customer Quotes and the FAQ are the business requirements.

3. Visuals (for example, mock ups if this is for a feature in our CBH App)

Sketch out what the experience will be like for customers (or users if it's something you're building for internal users). How will customers discover it, and what will they want to be able to do with it? What will it actually look like? Visuals might be a drawing on a whiteboard, a workflow diagram, or a wire-frame, or several of these.

As a set, these three sections comprise the Working Backwards Document. **To enforce clear concise thinking, the first two sections together must fit within a maximum of six pages (but can be shorter), and Visuals are often added as an appendix that can be as many pages as needed.** This document is the currency we use to share, test, and to bring our ideas to life for customers.

Section 1: Future Customer Quotes

As the first of the three sections of the Working Backwards Document, and the first of our three tools we use in Working Backwards, start here. Who is the customer?

- If it's a HCP, what are some quotes you'd hope to hear from them when they call in after this feature is out? What are some text messages you hope to get to Support because they love this feature?
- If it's a HCF, who inside that HCF (admins, scheduling coordinators, directors of nursing, etc) will care and what do you hope they'll say?
- If it's internal stakeholders (such as NAMs, CSMs, SDRs, the Director Sales, etc) who is it exactly, and what do you hope that person(s) say after you're done?
- If it's the press (and the press is rarely our customer) what article do you hope they'll write about your feature once it's done and in production? Write that article yourself in this section as a anchor point for your design.
- Note: oftentimes the customer is more than one type above at the same time - this is the magic of marketplace businesses such as ours.

A good Future Customer Quotes section answers the following very clearly:

- Who is the customer?
- What is the problem or opportunity? Again, from the eyes of the customer (internal and external)
- Is the most important benefit clear? (Also, WHY would a customer care?)
- Can the customer explain in to a friend easily and succinctly in a way that quickly conveys what it is and what the value is? i.e. what do you expect customers to say to their friends when they're telling them about this cool new thing you built? Write that out in this section.

As part of the Working Backwards methodology, the Future Customer Quotes is a tool we use to start with the customer and work backwards. We leap into the future to imagine what we want a customer to say or feel when after they've used your product or feature. Writing Future Customer Quotes drives customer focus into our work before we write a line of code or commit resources. It helps us spend the right amount of time agreeing on who our customers are and what they care about.

Once you have written the Future Customer Quotes, you have an anchor that describes in a simple way what you're doing and why a customer would care - in their own words! Anyone can read your Future Customer Quotes and quickly get behind your idea.

Section 2: FAQs

FAQs are short for Working Backwards Frequently Asked Questions. We use FAQs to channel our customers and our stakeholders to define how something will work and how we will execute. Solid FAQs describe workflow, business rules, requirements, and scope. Solid FAQs uncover risk and help us decide if a project is the right investment – because big or small, every project is an investment.

Put yourself in your customer's shoes and consider all the questions you would have. Also put yourself in the shoes of your stakeholder to address how it will get done and why it's important to do. The FAQ should be a living section that includes questions that people asked when you shared early iterations of this Working Backwards Document.

A well-written FAQ is important to the Working Backwards methodology because:

1. Good FAQs help us vet an idea. While we may fall in love with the idea when writing the Future Customer Quotes, the FAQs help us get into the details of how it will work for customers and how we'd execute.
2. Writing FAQs uncovers risk and helps us assess the feasibility and complexity of what we want to do.
3. Good FAQs capture the decisions made for a project along the way. It's a living document.

Good FAQs help make team meetings more efficient. Ideally, all the key questions triggered by the Future Customer Quotes are already answered in the FAQ thus eliminating the need for any discussion. In most cases, the meeting can be focused on the few unanswered questions.

Tips for Writing FAQs

- Jumpstart the FAQs by sharing your Future Customer Quotes with other people who know very little about your space and capturing their questions.
- If you have more than one set of customers, include FAQs for all customer sets. At CBH this is almost always the case.
- If you ask a yes-no question, the answer should be yes or no.
- If you don't know the answer, that's okay; include the question and answer the question by saying, "We don't know yet." Bonus points for explaining how and when you'll figure out the answer.
- Which questions do you want to answer the least or will be the toughest to answer? Include those, or you may get asked those questions by reviewers and have to answer them anyway, just with no preparation.
- Imagine what your customers will be most frustrated about or surprised by and include that as an FAQ. Some people might refer to these as WTFs.

I highly suggest answering these questions in your FAQ

- What is the problem? Set up the problem & context so that we can use our network to get ideas / experiences / learnings from outside the building (including of course our own customers).
- What's the metric that you most want to move - i.e. if you had a magic wand, and didn't have to worry about how to move it, what would be the metric you want to move? (Maximum two, in situations where there are two countervailing forces such as Number of New Customers Per Month and Customer Acquisition Cost)

- Is this the best customer experience you can think of, unconstrained? If not why not? What constraints (internal, external) prevent you from your best customer experience idea?
- Premortem: what's the most likely cause of failure if this fails?
- Rollout plan? What if it goes badly during rollout - what mechanisms have you put in place to tell (especially if by that time you've moved on to another project), and what will we do as a result?
- What's the plan for training internal teams and educating external customers? Including sample content? Almost all complex features that directly impact the customer experience will need sample Healthcare Professional Email and/or Text Message and/or samples of other methods of Notification & Education.

Appendix of common FAQ questions to jump start your FAQ thinking

These starting FAQs drive clarity into what you want to do and why. As the idea crystallizes, the Future Customer Quotes takes a back seat, and you'll focus on the FAQs because you're ready to get to the next level of detail. There is an art to asking good questions at the right time. Good FAQs are not every question that might be asked; instead, good Working Backwards FAQs help us determine if it's the right project and the best plan.

Customer FAQs—Put yourself in the customer's shoes

1. Who is our customer?
2. What is it and who should use it?
3. What's going to excite me about this?
4. What might disappoint me?
5. How will I discover or find this?
6. Do I have to learn or unlearn something?

Stakeholder FAQs—Anticipate your stakeholder's questions

1. What is the problem we're solving?
2. Why is this customer problem or opportunity important right now?
3. How will we know if this raises the bar on customer experience?
4. How do we know if we're succeeding?
5. What's provoking the most internal debate?
6. How does this fit into the overall portfolio?
7. Why are competitors not doing it? If they are, how have they succeeded or failed?
8. What are the untested risky assumptions we have? Which are the ones whose risks can be lethal for success and which are the ones we can live with being untested right now (in favor of speed)?

FAQs for a new business

1. Is this a big idea?
2. Can we win?
3. If we can win, is it worth it?

Section 3: Visuals

Attach as many pages as necessary as an appendix to the first two sections of this working backwards document in order to visually illustrate (oftentimes with captions and call-outs) what your product will look like and/or how key algorithms work (state diagrams) so that stakeholders across the company can quickly understand what you have in mind.

How your Working Backwards Document will be reviewed

Stakeholders will come to Working Backwards Document Reviews to ask probing questions, many of which are already in this template! You'll succeed based on 3 things:

1. Did you ask yourself all these questions and even harder / more specific ones (and write down the answers) before you arrived at review?
2. The quality and thoughtfulness of your answers.
3. How many reviews it takes to get the document to a good state.