NODE Technical Book Club

Shape Up

Stop Running in Circles and Ship Work that Matters

Ryan Singer

Background

- What do you know about Basecamp?
- Have you heard about Shape Up before?

How do they work?

- No waterfall, agile or scrum
- No dailies, sprint etc.
- No backlogs, no Kanban , no velocity tracking

Entirely different approach!

Motivation

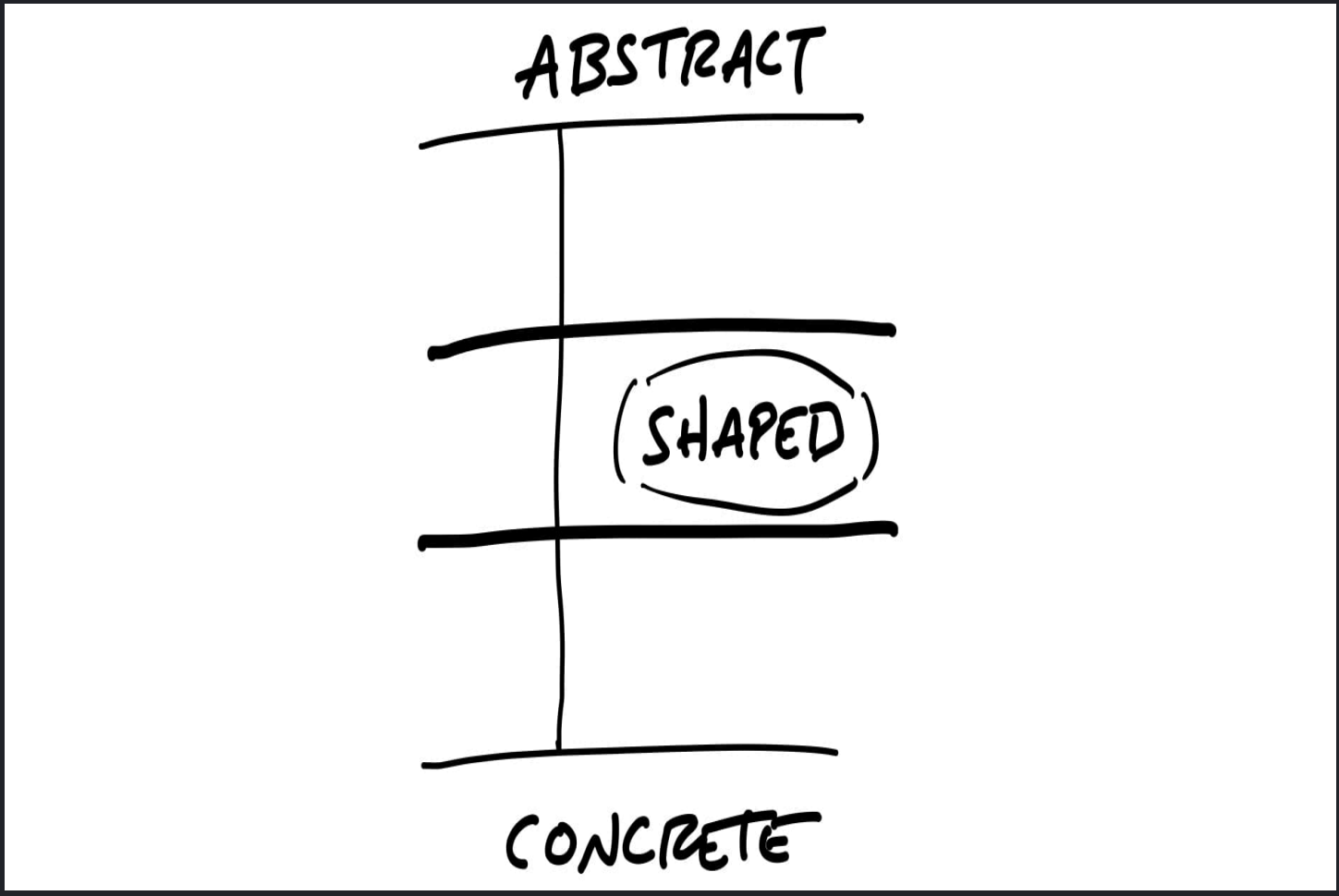
As software teams start to grow, some **common struggles** appear:

- Team members feel like projects go on and on, with no end in sight.
- Product managers can’t find time to think strategically about the product.
- Founders ask themselves: *“Why can’t we get features out the door like we used to in the early days?”*

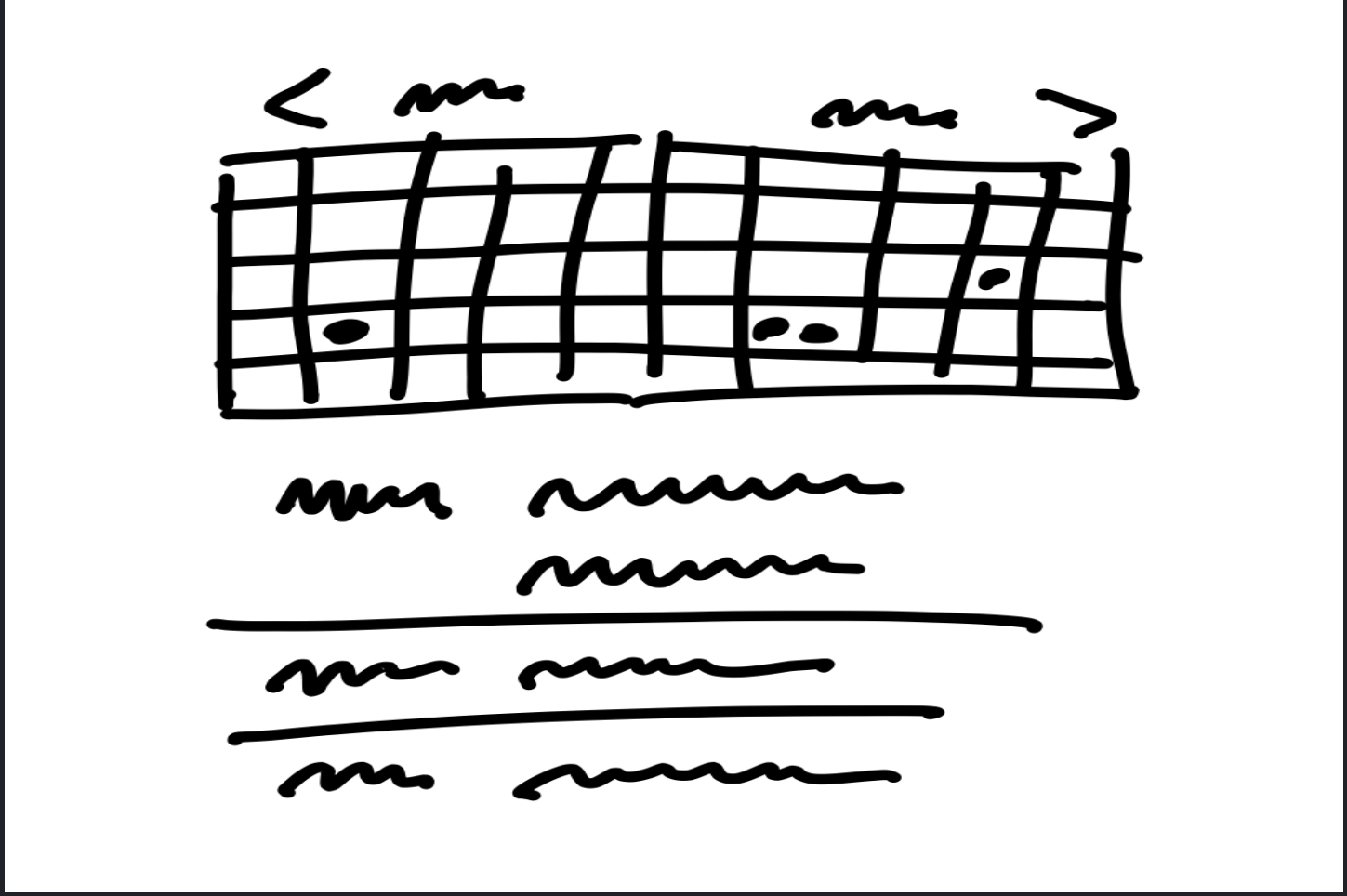
Main Ideas

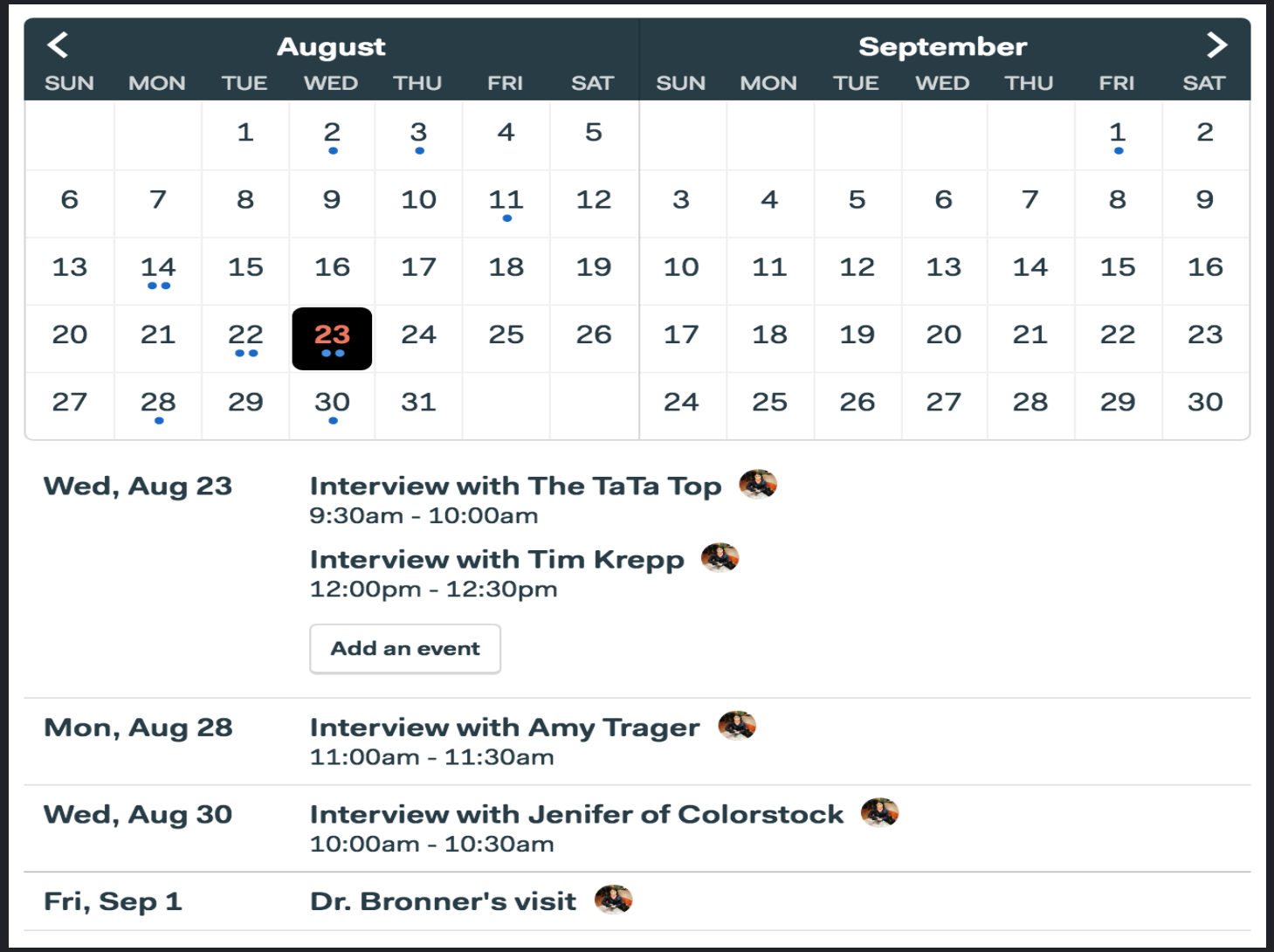
- Six-week cycles
- Shaping the work
- Making teams responsible
- Targeting Risk

Principles of Shaping



Case study: The Dot Grid Calendar




August
SUN MON TUE WED THU FRI SAT
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31
September
SUN MON TUE WED THU FRI SAT
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
Wed, Aug 23
Interview with The TaTa Top
9:30am - 10:00am
Interview with Tim Krepp
12:00pm - 12:30pm
Add an event
Mon, Aug 28
Interview with Amy Trager
11:00am - 11:30am
Wed, Aug 30
Interview with Jenifer of Colorstock
10:00am - 10:30am
Fri, Sep 1
Dr. Bronner's visit

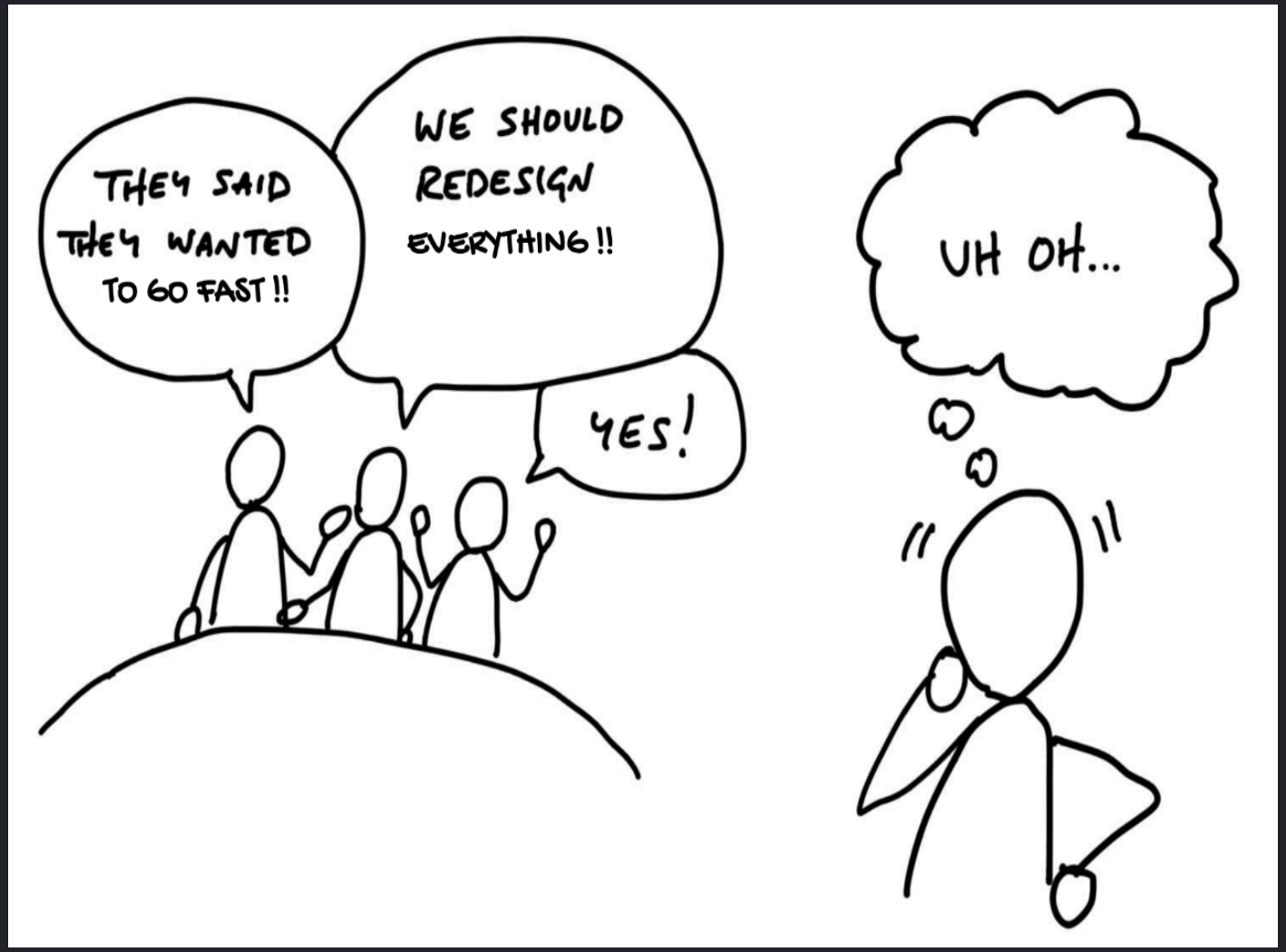
Who Shapes?

Shaping is creative and integrative. It requires combining interface ideas with technical possibilities with business priorities. To do that you'll need to either embody these skills as a generalist or collaborate with one or two other people.

Steps to Shaping

1. Set boundaries
2. Rough out the elements
3. Address risks and rabbit holes
4. Write the pitch

Set Boundaries

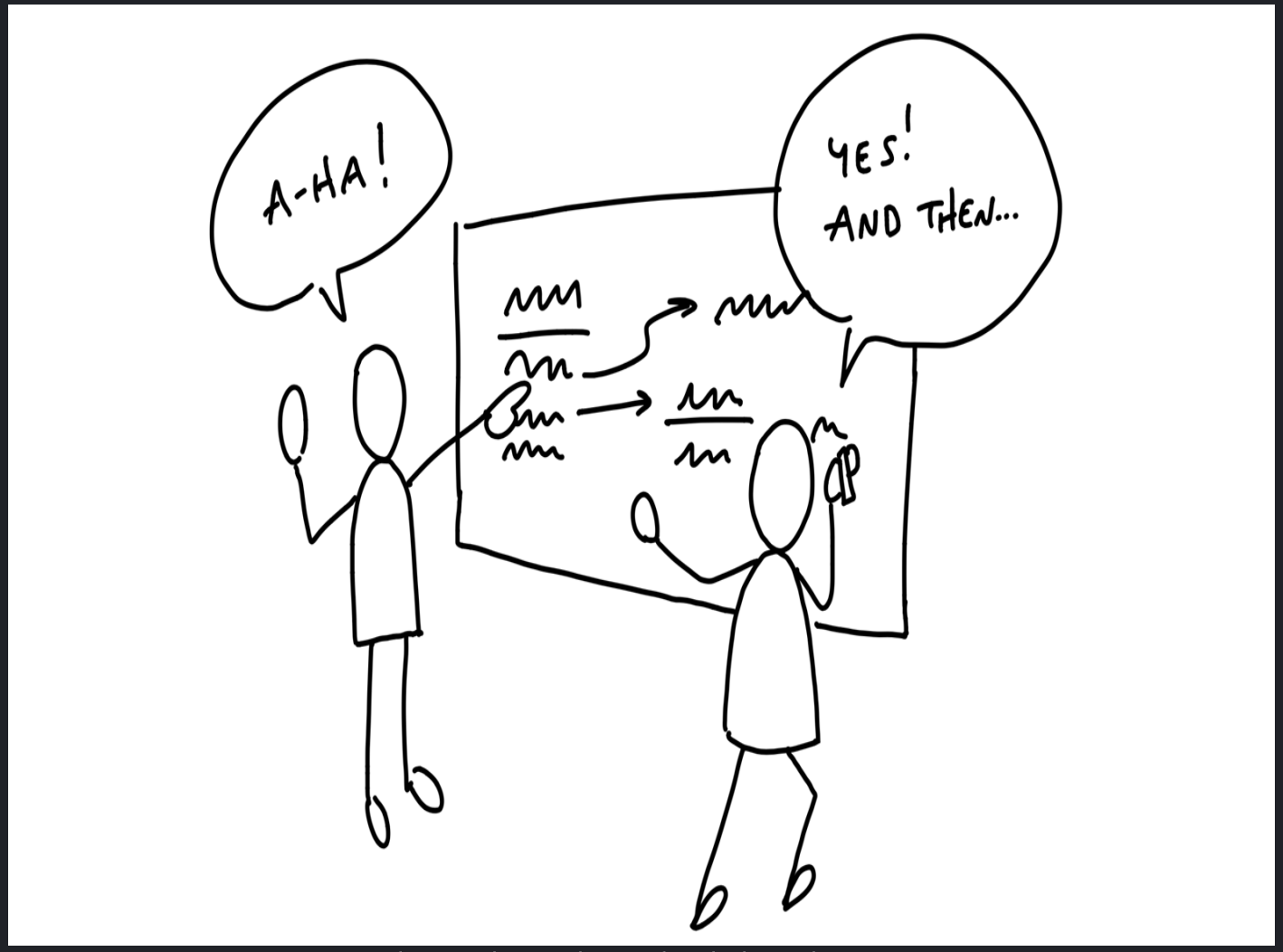


Set the Appetite

- Define how much time and effort the project deserves: Small Batch (1-2 weeks) or Big Batch (6 weeks).
- Avoid jumping to solutions without first determining the value.
- Time(*Appetite*) is fixed; scope can be reduced to fit within the timeframe.

- Investigate the Core Issue
  - Example: “Customers want a calendar.” Ask: “What problem are they trying to solve?”
- Respond with caution
  - Don’t say “yes” or “no” too quickly. Keep it open: “Maybe some day.”
    - Avoid ambiguous requests like “Files 2.0.”

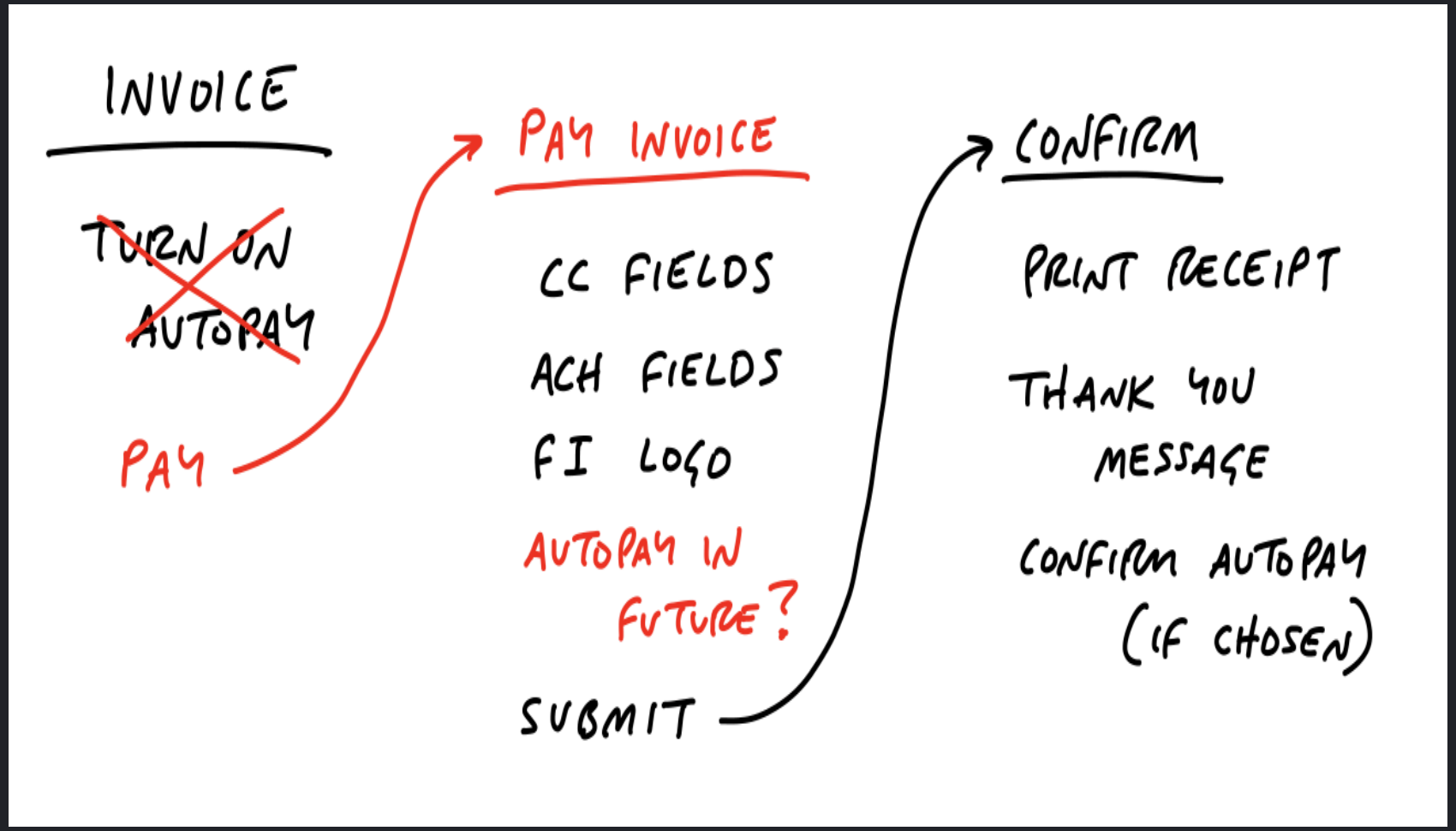
Find The Elements



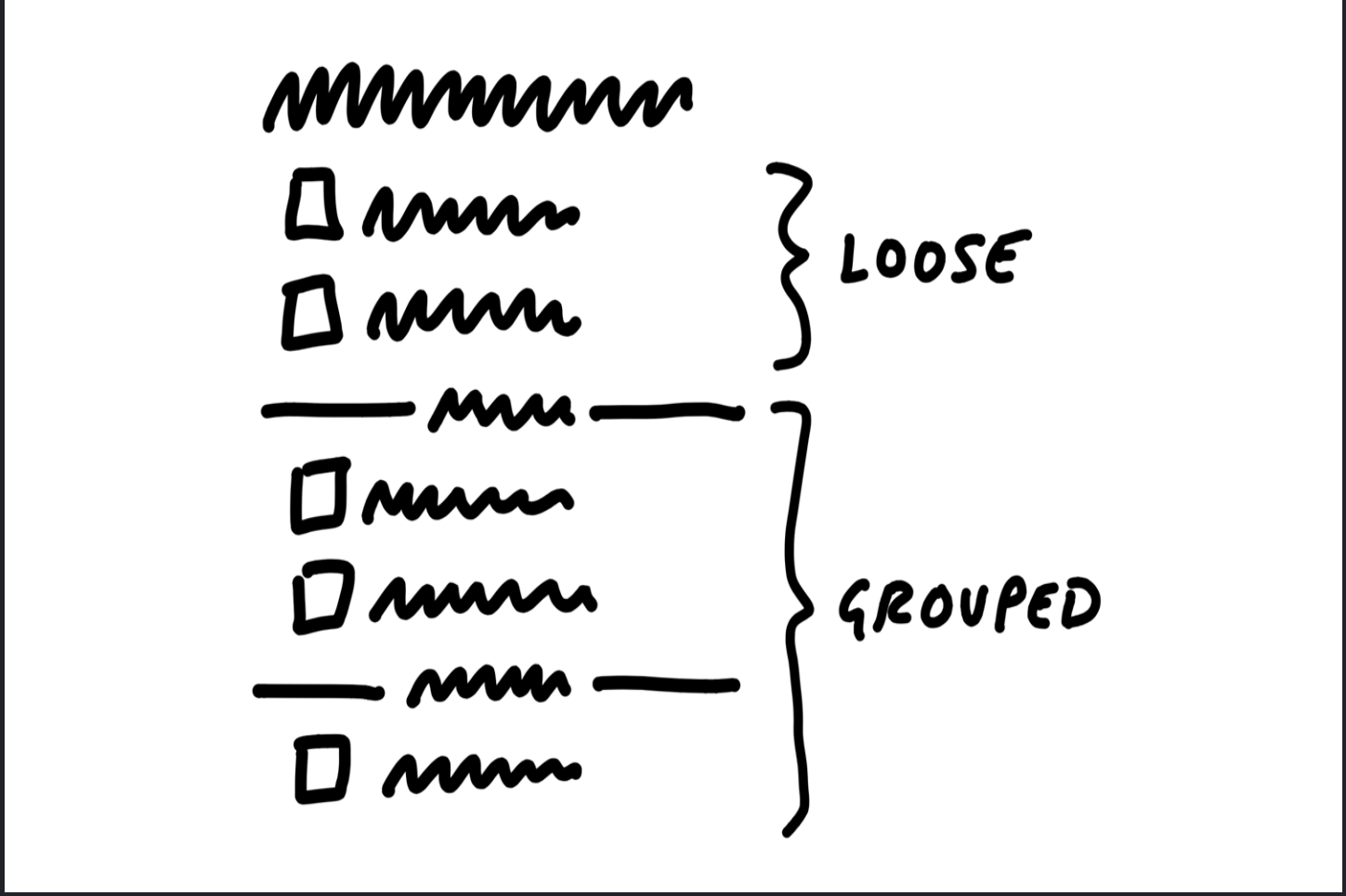
Move at the right speed

- Have the right people in the room.
- Avoid wrong level of detail in the sketches
- Try to answer the questions:
  - Where in the current system does the new thing fit?
  - How do you get to it?
  - What are the key components or interactions?
  - Where does it take you?

Breadboarding



Fat marker sketches



Elements are the output

- Autopay:
  - A new “use this to Autopay?” checkbox on the existing “Pay an invoice” screen
  - A “disable Autopay” option on the invoicer’s side
- To-do groups:
  - Loose to-dos above the first group belong directly to the parent
  - Grouped to-dos appear below the loose to-dos
  - We’d like to try an add affordance within each section

Risks and Rabbit Holes

Look for the rabbit holes

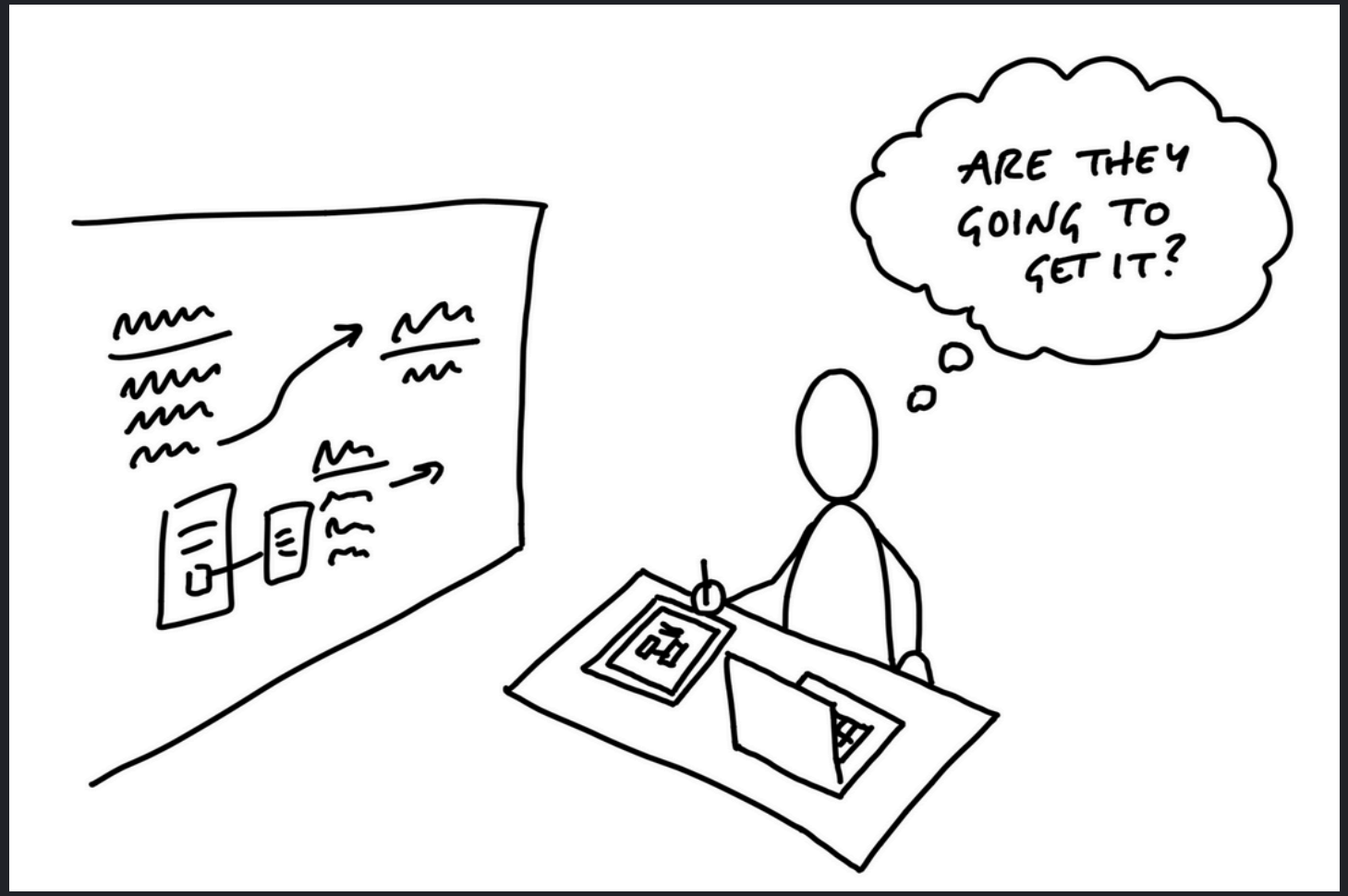
Walk through a use case in slow motion. Ask questions:

- Does this require new technical work we've never done before?
- Are we making assumptions about how the parts fit together?
- Are we assuming a design solution exists that we couldn't come up with ourselves?
- Is there a hard decision we should settle in advance so it doesn't trip up the team?

Set Focus & Validate

- Set clear boundaries by declaring what's out of scope to avoid feature creep.
- Cut unnecessary features, even if appealing.
- Present the concept to technical experts to validate feasibility within the time frame. Ask, "Can this be done in 6 weeks?" and identify risks that could blow up the project.

Write the Pitch



Ingredient 1. Problem

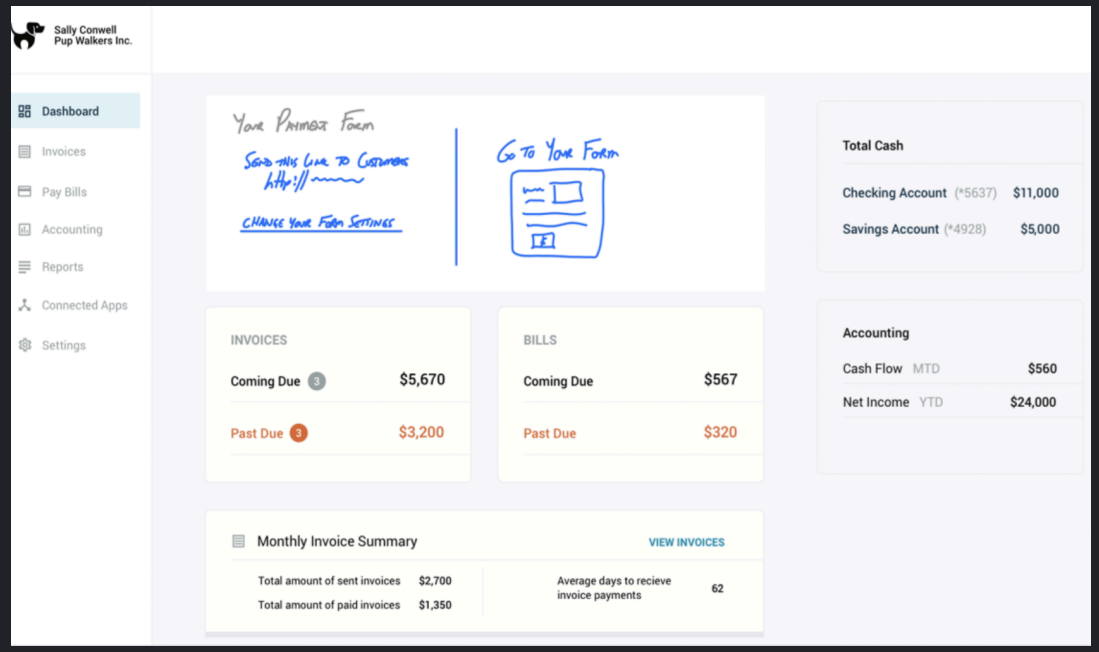
It’s critical to always present both a problem and a solution together.

Ingredient 2. Appetite

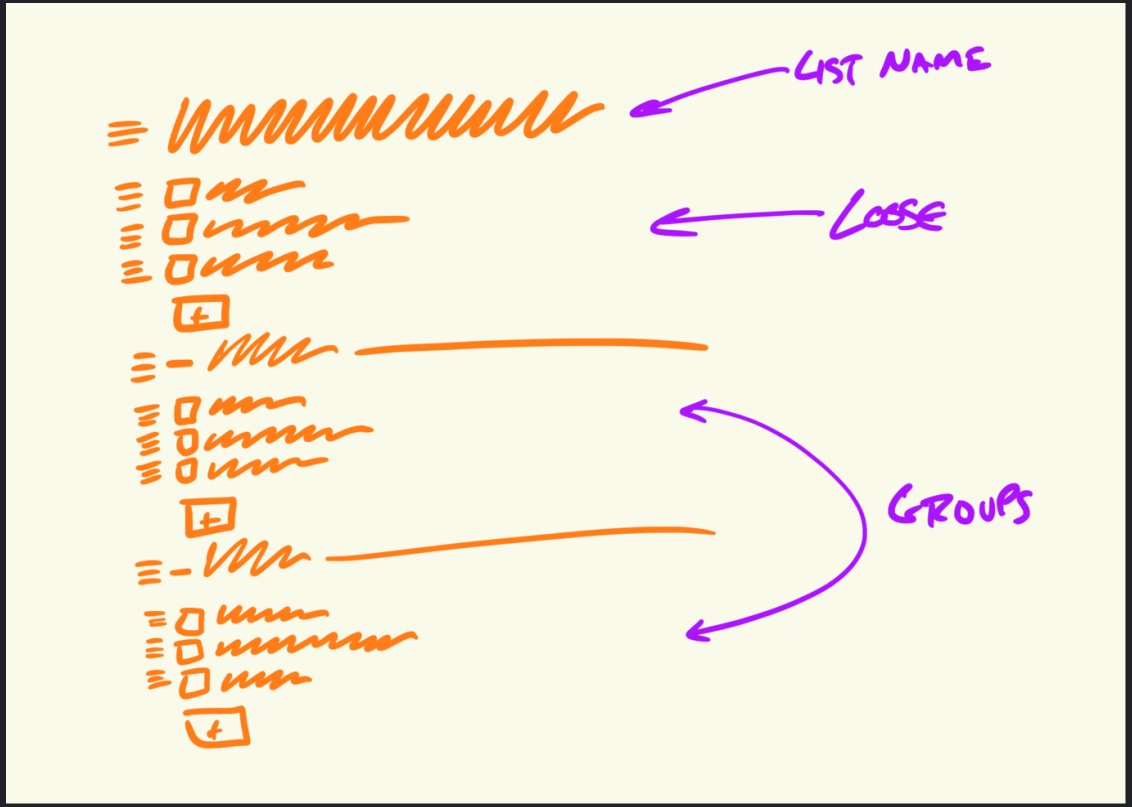
Not only do we want to solve this use case, we want to come up with a way to do it with this appetite.

Ingredient 3. Solution

- People who read the pitch and look at the drawings without much context need to “get” the idea.



Embedded sketch technique



Annotated fat marker sketch technique

Ingredient 4. Rabbit holes

Usually addressing a rabbit hole just requires a few lines of text.

Ingredient 5. No Gos

Lastly if there’s anything we’re not doing in this concept, it’s good to mention it here.

Ready to Present

- Present pitches asynchronously to maximize focused work time.
- Post write-ups in accessible locations for easy access.
- Aim for stakeholders to read pitches in advance; use live discussions only when needed.
- In Basecamp, pitches are posted in the Pitch category under the Product Strategy team for easy access and reference.

Final Words

See you in the next part!