

AGILE SPECIALIZATION COURSE 1 MODULE 4 THE PROBLEM WITH IT PROJECTS

Alex Cowan

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IT, ENTERPRISE SOFTWARE CAN BE REALLY GREAT

EPIC STORY

1) 'As the HR manager, I want to create a screening quiz so that I can understand whether I want to send possible recruits to the functional manager.'

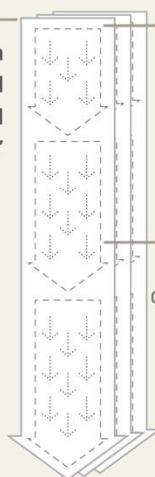
CHILD STORY A

1A) "As an HR manager, I want to match an open position's required skills with quiz topics so I can create a quiz relevant for candidate screening."

CHILD STORY B

1B) "As an HR manager, I want to send a draft quiz to the functional manager so I make sure I've covered the right topics on the screening quiz."

...
STORY N



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IT, ENTERPRISE SOFTWARE CAN BE REALLY GREAT

I[♥]Enterprise Software
I[♥]End Users

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BUT USUALLY IT'S NOT

CRM PROJECT FAILURES

Source	Statistic
Gartner	50%
Butler	70%
AMR	29%
The Economist	56%
Forester	47%

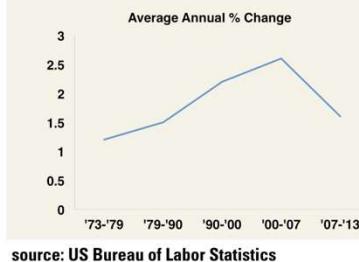
source: ZDNet



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BUT USUALLY IT'S NOT

LABOR PRODUCTIVITY (US)



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4 PROBLEMS WE CAN READILY IMPROVE



Order Taking
vs.
Consulting

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ORDER TAKING VS. CONSULTING

"We need values for this important drop-down menu. What do you want there?"



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ORDER TAKING VS. CONSULTING

"We need values for this important drop-down menu. What do you want there?"



"Well, at my last six jobs we used {x, y, z}, so I guess let's go with that."



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4 PROBLEMS WE CAN READILY IMPROVE



Order Taking
vs.
Consulting



Building
vs.
Designing

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BUILDING VS. DESIGNING



"I'd like to spend more time with the folks in support to understand how they do things and see what ideas they have about how things should work."



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BUILDING VS. DESIGNING



"I'd like to spend more time with the folks in support to understand how they do things and see what ideas they have about how things should work."



"Let's not make this a science project. We're short on time. Let's just get the system online."



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4 PROBLEMS WE CAN READILY IMPROVE



Order Taking
vs.
Consulting



Building
vs.
Designing



Papering Problems with
Software
vs.
Solving Them

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PAPERING PROBLEMS VS. SOLVING THEM

"Tell me about your order management process and how that's working for you."



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PAPERING PROBLEMS VS. SOLVING THEM

"Tell me about your order management process and how that's working for you."



"We don't exactly have one. I was hoping that would come with the system."



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4 PROBLEMS WE CAN READILY IMPROVE



Order Taking
vs.
Consulting



Building
vs.
Designing



Papering Problems with
Software
vs.
Solving Them



Big Batches
vs.
Iteration

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BIG BATCHES VS. ITERATION

"Here's what I think we can do in the next two weeks based on the priorities. Then we can review."



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BIG BATCHES VS. ITERATION

"Here's what I think we can do in the next two weeks based on the priorities. Then we can review."



"Look, I need a plan for the whole project."



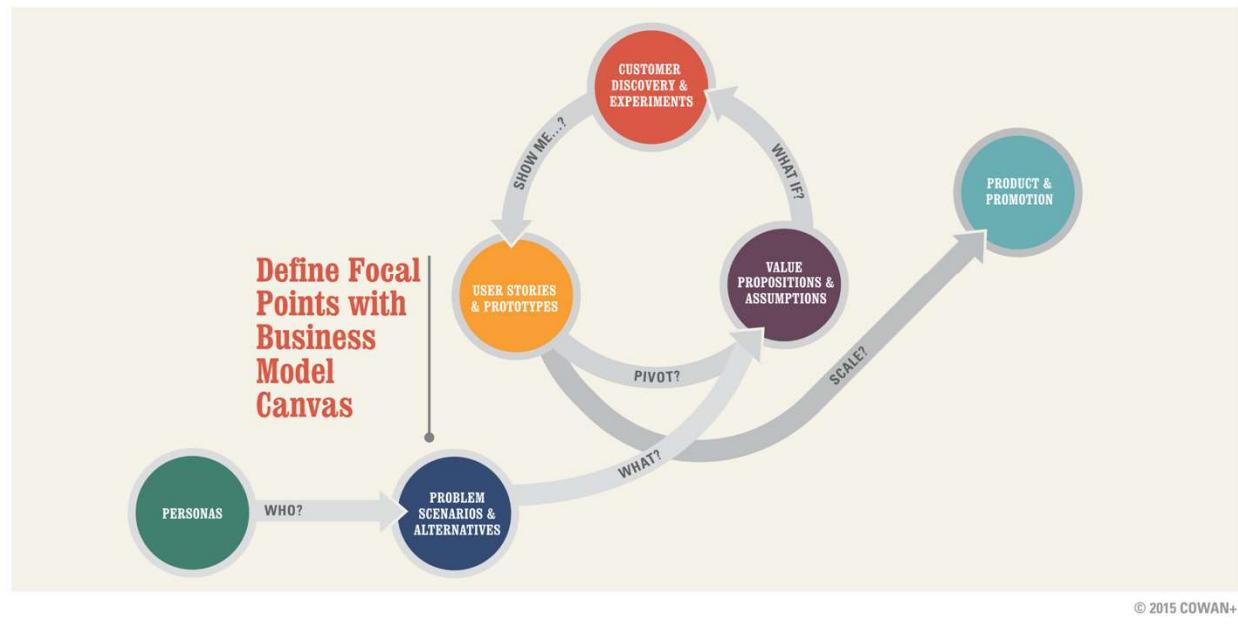
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THE SILVER BULLET?

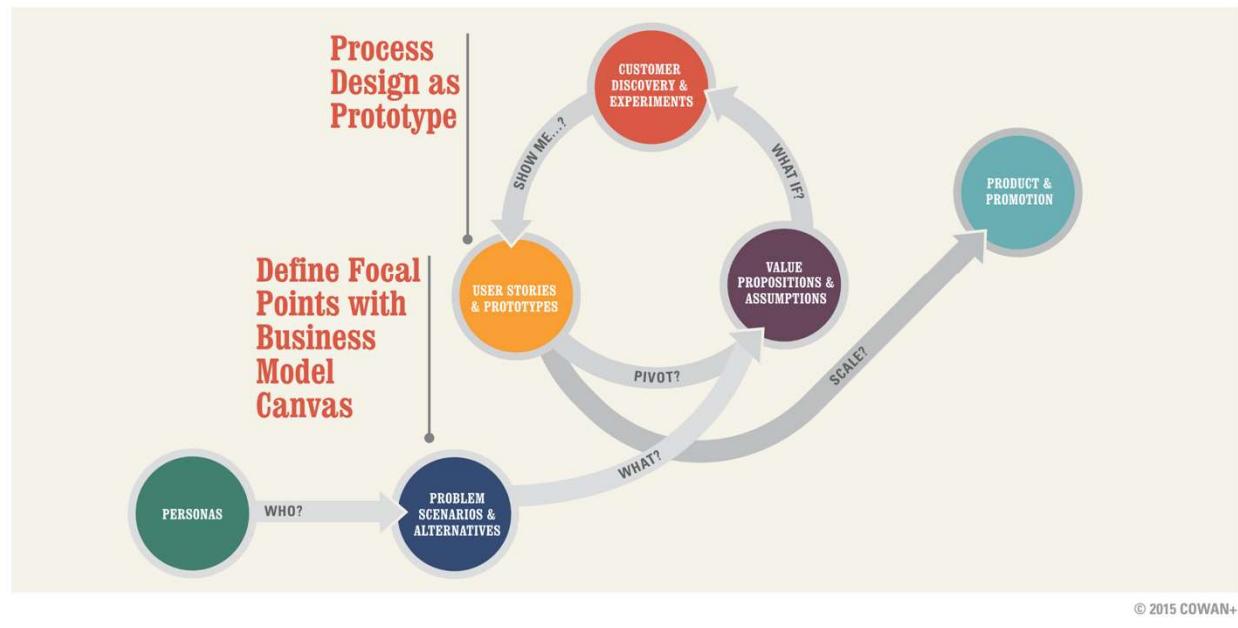


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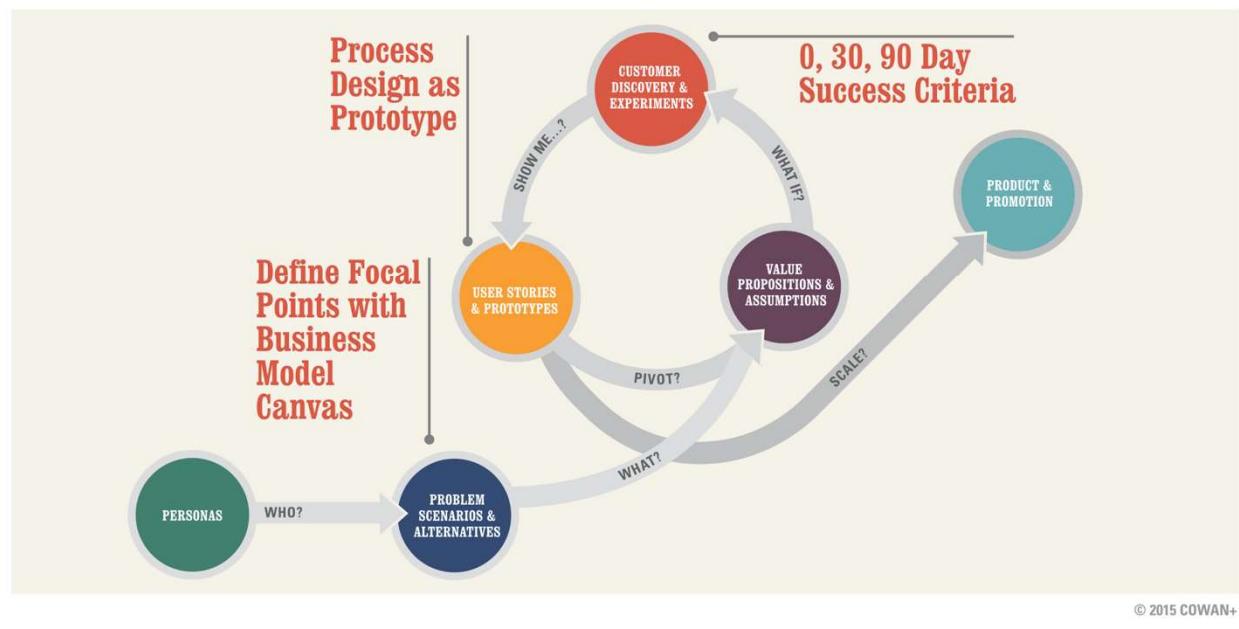
PRACTICES THAT HELP



PRACTICES THAT HELP



PRACTICES THAT HELP



AGILE SPECIALIZATION COURSE 1 MODULE 4 THE 20 MINUTE STRATEGY BRIEF

Alex Cowan

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WHY FRAME WITH STRATEGY?

Why?

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WHY FRAME WITH STRATEGY?

1. Structure.

Why?

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WHY FRAME WITH STRATEGY?

- Why?**
- 1. Structure.
 - 2. Linkage to success criteria.

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WHY FRAME WITH STRATEGY?

- Why?**
- 1. Structure.
 - 2. Linkage to success criteria.
 - 3. A drive to explicit, discussable designs.

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WHY FRAME WITH STRATEGY?

Why?

1. Structure.
2. Linkage to success criteria.
3. A drive to explicit, discussable designs.
4. Linkage to company business model & strategy.

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IT, ENTERPRISE SOFTWARE CAN BE REALLY GREAT

**CLIENTS DON'T WANT
TO PAY FOR STRATEGY**

(Or even design in some cases)

- feel they already know what they want
- believe the software will essentially just work on its own

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IT, ENTERPRISE SOFTWARE CAN BE REALLY GREAT

CLIENTS DON'T WANT TO PAY FOR STRATEGY

(Or even design in some cases)

- feel they already know what they want
- believe the software will essentially just work on its own

KEEP IT FOCUSED, KEEP IT RELEVANT

- you can do the basics in a few hours per engagement
- even if you do it in pre-sales mode, it's worth it

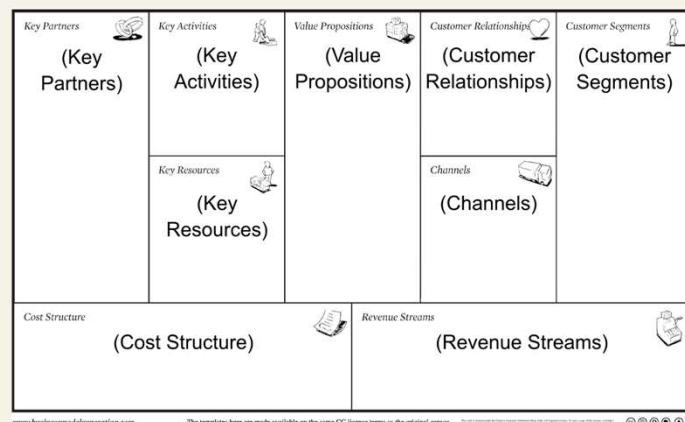
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THE KEY ITEMS FOR OUR FRAMING

Who are the buyers, users and why do they buy?

What is the end-to-end customer experience?

What activities are strategically important?



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A DESERT OR A FLOOR WAX?

**Are you sure you know the business?
Quickly define it with a clinical positioning statement.**

For (target customer) who (statement of the need or opportunity), the (product name) is a (product category) that (statement of key benefit – that is, compelling reason to buy). Unlike (primary competitive alternative), our product (statement of primary differentiation).

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A DESERT OR A FLOOR WAX?

Example: Home Depot

For homeowners who want the control and affordability of doing their own home improvement, the Home Depot is a hardware retailer that offers comprehensive selection at competitive prices. Unlike hiring professionals, our product helps you save money and work on your own terms.

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A DESERT OR A FLOOR WAX?

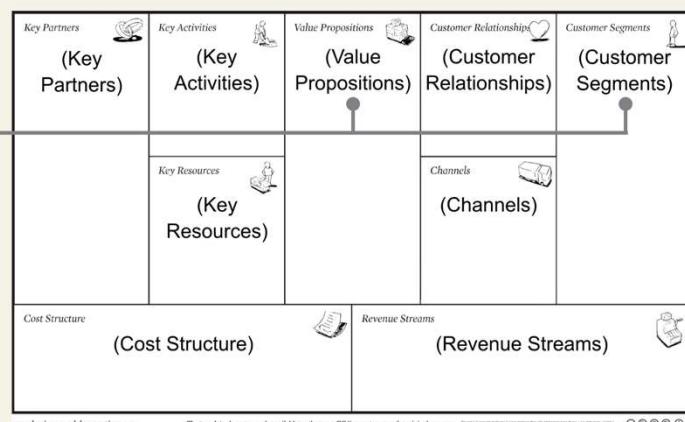
Example: United Children's Theater

For children (k-12) seeking an expressive experience through the arts, the Children's Theater is a performing arts institute that offers affordable programming to low-income schools and children. Unlike private institutions, our product offers national quality programming with a long track record of success.

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PART 1

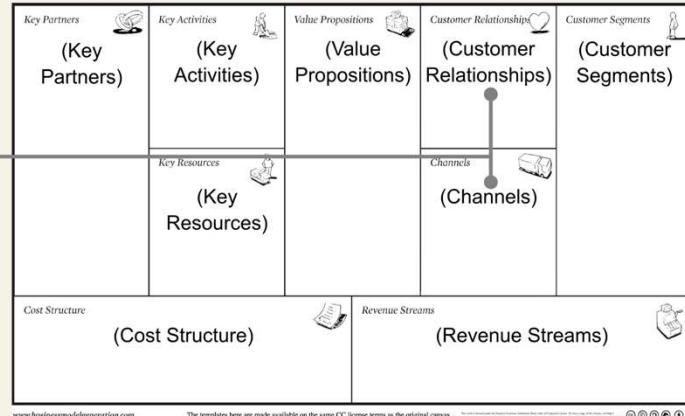
Who are the buyers, users and why do they buy?



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PART 2

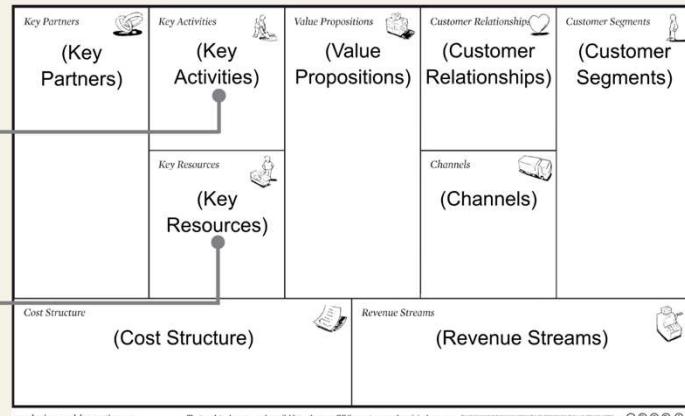
What is the end-to-end customer experience?



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PART 3

What activities are strategically important?



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AGILE SPECIALIZATION

COURSE 1 MODULE 4

IT STRATEGY BRIEF- THE FIRST FIVE

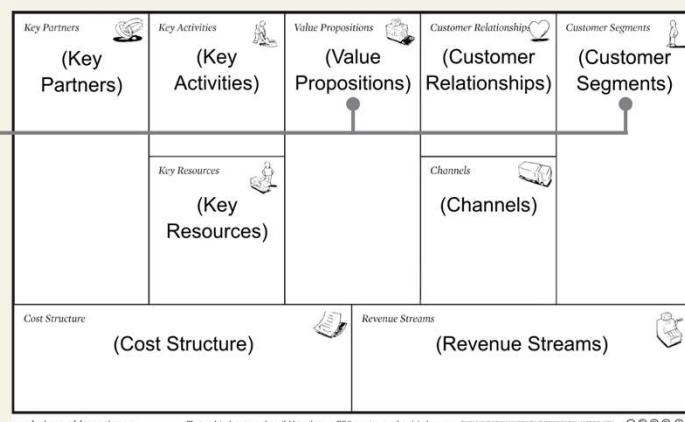
VALUE DEFINITION

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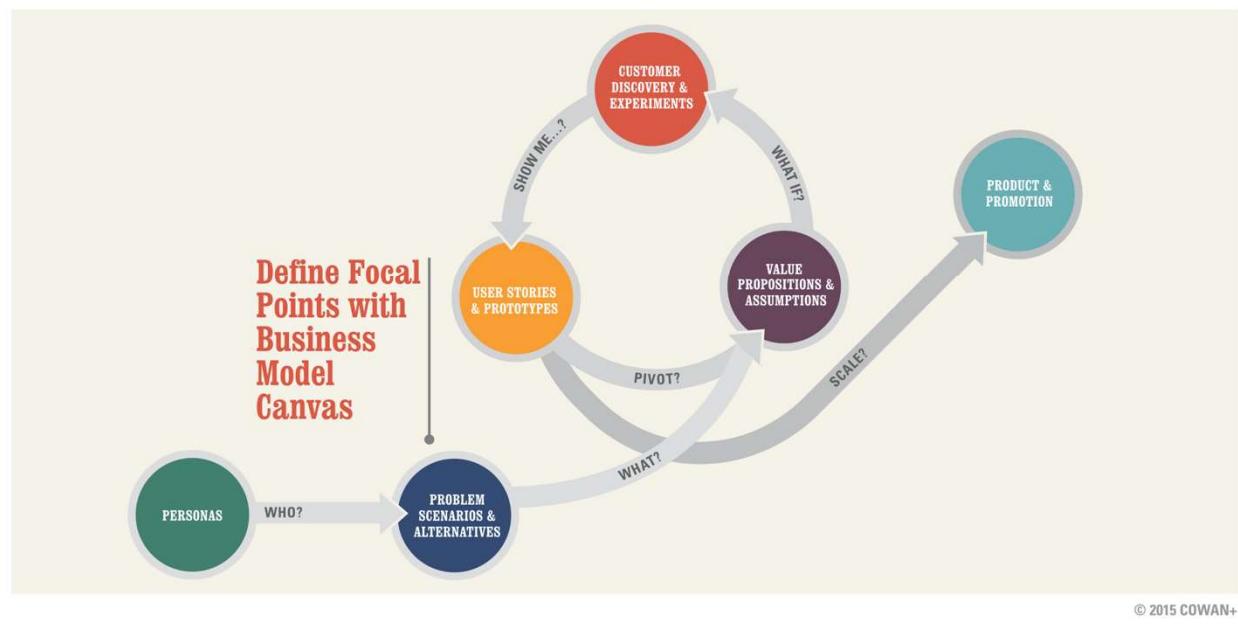
PART 1: THE FIRST FIVE

**Who are the buyers, users
and why do they buy?**



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PRACTICES THAT HELP



CUSTOMERS & PROPOSITIONS

Why do they buy?

Value Propositions



WHO?

- Broad Selection
- Competitive Prices
- Convenience

Example: Home Depot

Who are they?

Customer Segments



WHO?

- Do-It-Yourselfers
- Casual Shoppers
- Contractors

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CUSTOMERS

Why do they buy?

Value
Propositions



Who are they?

Customer
Segments



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CUSTOMERS

Why do they buy?

Value
Propositions



Who are they?

Customer
Segments



Children
Parents
Teachers & Admin.
Donors

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PROPOSITIONS

Why do they buy?

Value
Propositions



Ⓐ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ



Who are they?

Customer
Segments



Ⓐ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ

Children
Parents
Teachers & Admin.
Donors

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PROPOSITIONS

Why do they buy?

Value
Propositions



Ⓐ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ

Quality Arts Education
Unique Peer Group
Affordability
Outsourcing Arts Function
Cultivating Arts Locally
Better Ed. for Low-Income Pupils

Who are they?

Customer
Segments

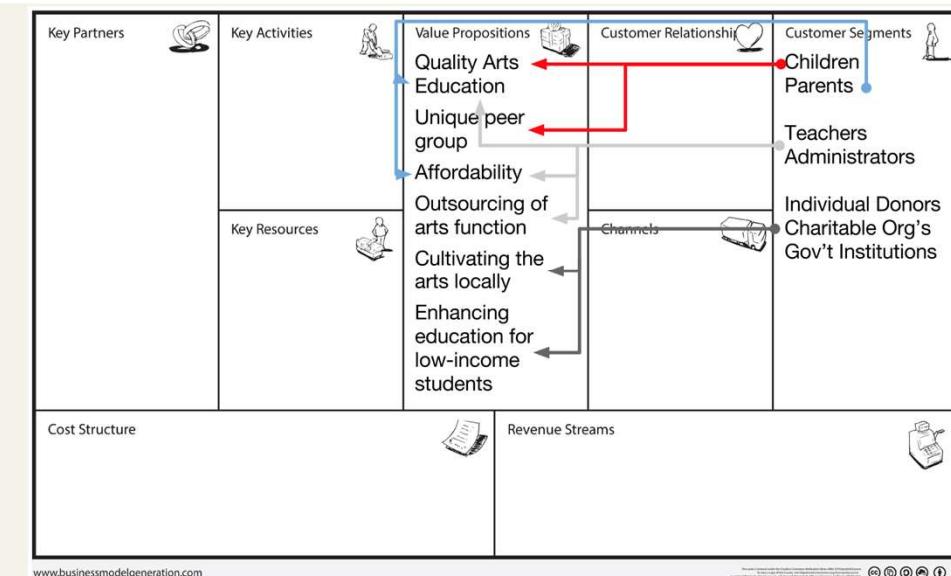


Ⓐ Ⓛ Ⓜ Ⓝ Ⓞ Ⓟ

Children
Parents
Teachers & Admin.
Donors

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CUSTOMERS & PROPOSITIONS



**Example:
United
Children's
Theater**

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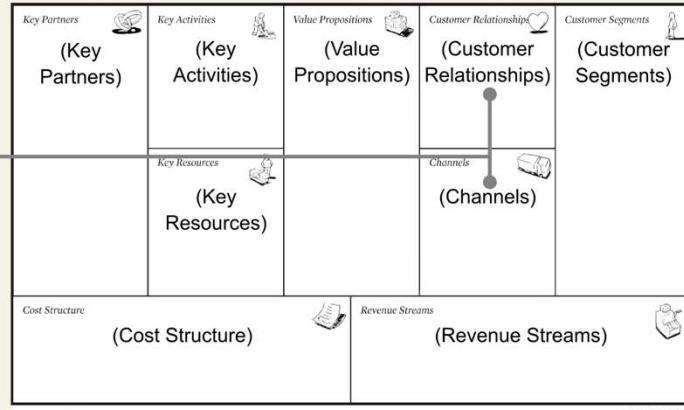
AGILE SPECIALIZATION COURSE 1 MODULE 4 IT STRATEGY BRIEF- THE SECOND FIVE CUSTOMER JOURNEY

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PART 2: THE SECOND FIVE

What is the end-to-end customer experience?



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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

Attention _____.
Interest
Desire
Action
Onboarding
Retention

How do they first find out that you, your proposition exist?
How do you break through the noise floor?

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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

Attention
Interest _____
Desire
Action
Onboarding
Retention

- What is it that engages them with your proposition?
How will you connect?

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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

Attention
Interest _____
Desire
Action
Onboarding
Retention

- Are you connecting with an important problem scenario?
Is your VP better enough than the alternative?

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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

Attention
Interest
Desire
Action —————
Onboarding
Retention

What is absolute minimum set of actions required by the customer to have you deliver on their problem?

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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

Attention
Interest
Desire
Action —————
Onboarding
Retention

How do they become a regular, habitual user? How will you know if that's happening?

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EXERCISE: STORYBOARDING THE BEFORE SCENARIO

**Attention
Interest
Desire
Action
Onboarding
Retention**

How do you deepen
their involvement?
Investment? How do
you get them talking
about it?

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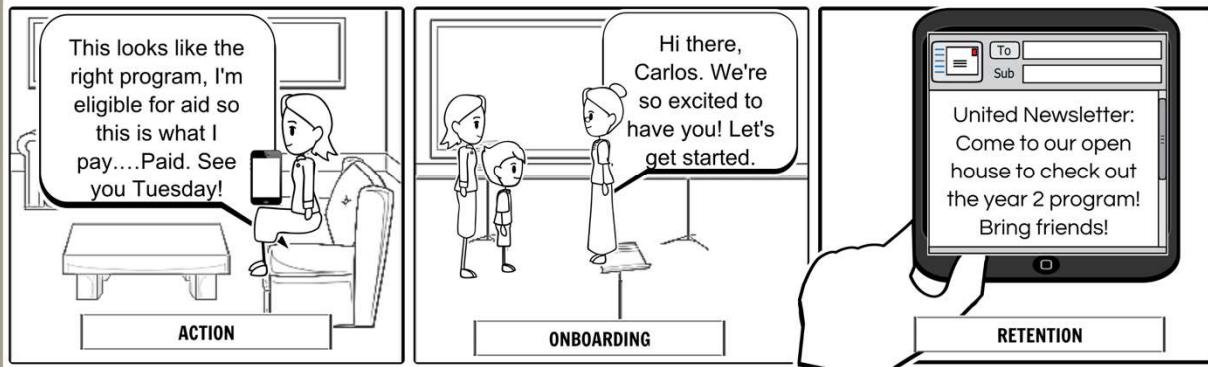
STORYBOARDING AIDAOR- UNITED CHILDREN'S THEATER

...Action, Onboarding, Retention

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STORYBOARDING AIDAOR- UNITED CHILDREN'S THEATER

Attention, Interest, Desire...



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ENHANCING STORYBOARD WITH THINK-SEE-FEEL-DO



Thinks: Is this going to be OK? What happens if something doesn't work out? What time exactly do I need to come back and pick him up? Can anyone help me carpool?

Sees: The interactions the other parents are having with the teachers, each other, and their kids.

Feels: Anxious about whether Carlos will enjoy himself. Hopeful and excited that he'll find an after school activity he likes.

Does: Comes for pickup with a list of questions. Would like to engage with other mom's but feels shy and does not initially.

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CUSTOMER JOURNEY

How do they interact?



SAMPLES

dedicated personal service (onsite? offsite?)
personal service
phone support
web/email based tickets
web self-help and forums

Who interacts?

Channels



SAMPLES

PROMOTION
personal direct
personal indirect
specialty media
television
radio
AdWords + SEO

SALES
hand sales direct
hand sales indirect
retail
web
phone
delivery

SERVICE
direct personal
authorized center
field contractors
community
web

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CUSTOMER JOURNEY

How do they interact?



Who interacts?

Channels



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CUSTOMER JOURNEY

How do they interact?

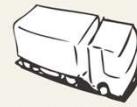


UNITED CHILDREN'S THEATER

Personal Service
Direct Personal Service
Online Community

Who interacts?

Channels



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CUSTOMER JOURNEY

How do they interact?



Who interacts?

Channels



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CUSTOMER JOURNEY

How do they interact?



Personal Service
Direct Personal Service
Online Community

Who interacts?

Channels



UNITED CHILDREN'S THEATER

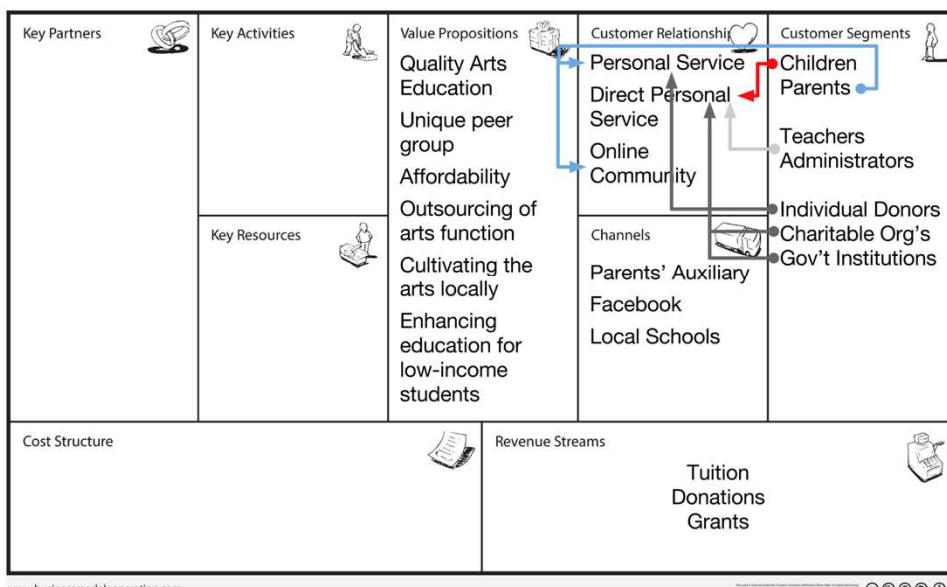
PROMOTION
Parent's Auxiliary

SALES
Direct
Local Schools

SERVICE
Parents Auxiliary
Facebook

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CUSTOMER JOURNEY



**Example:
United
Children's
Theater**

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AGILE SPECIALIZATION

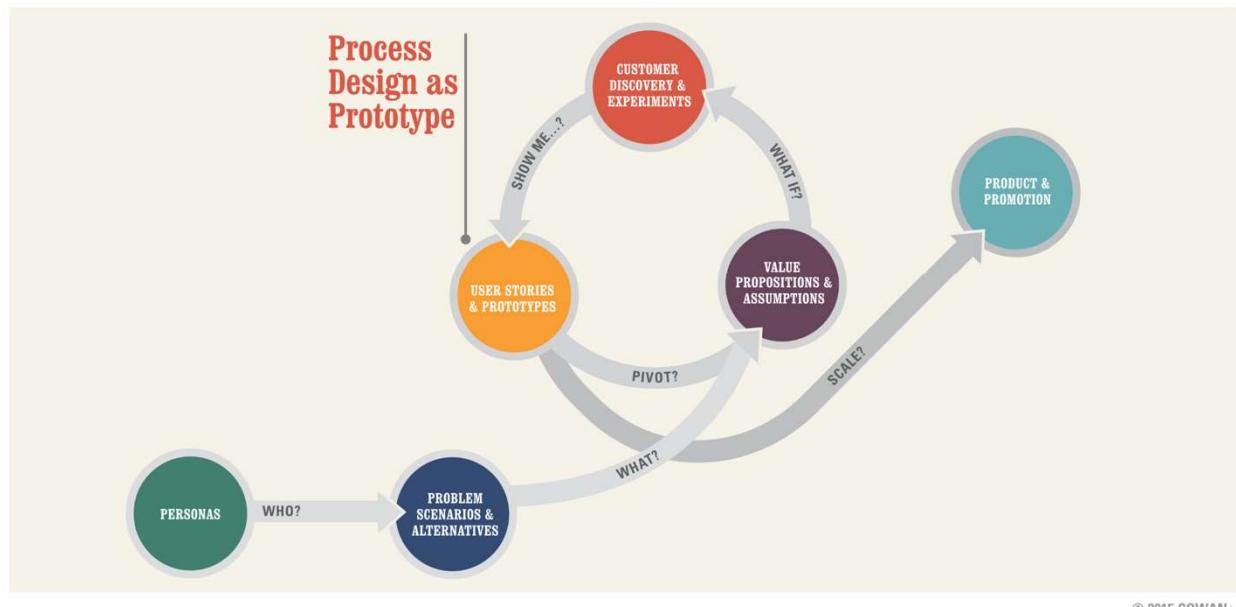
COURSE 1 MODULE 4

DRAFTING A PROCESS INVENTORY

Alex Cowan

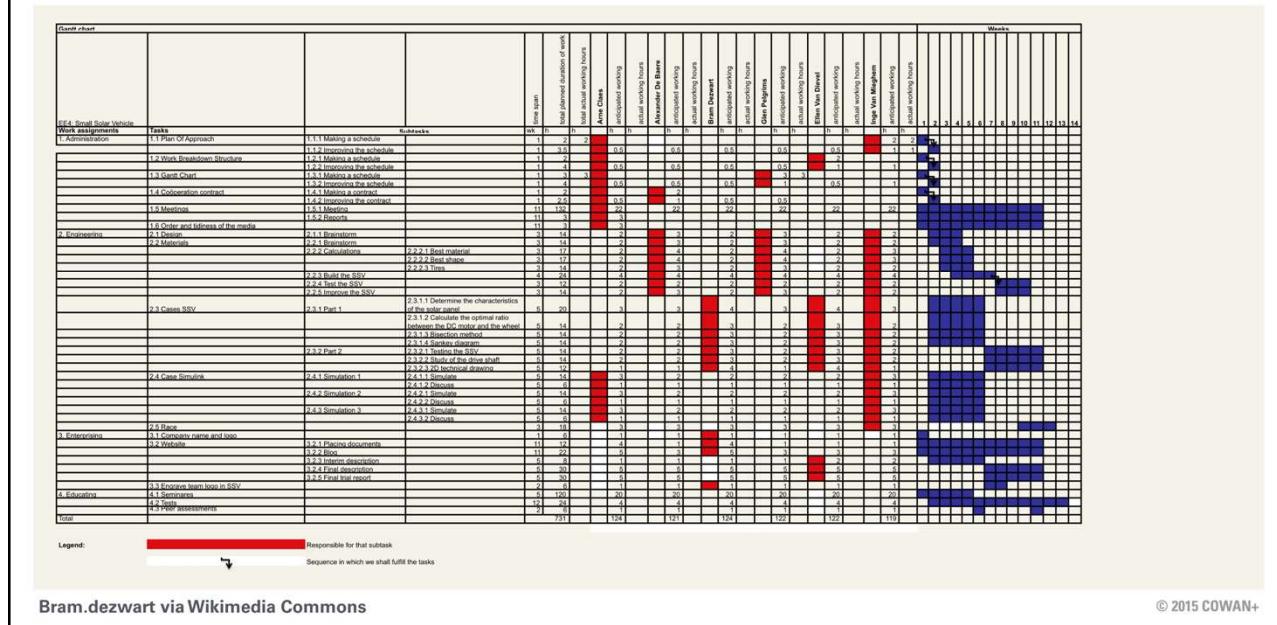
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PRACTICES THAT HELP



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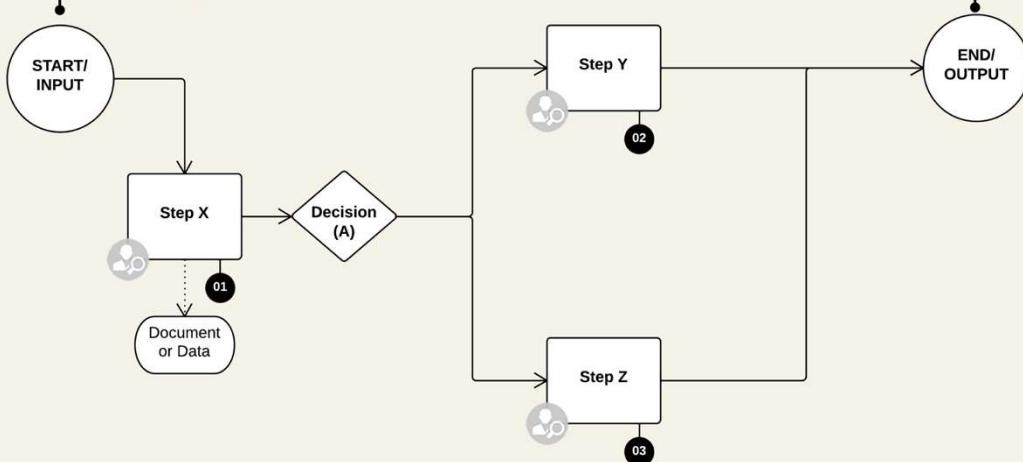
PROCESS DESIGN- NOT LIKE THIS



THE ATOMIC PROCESS

The atomic process
has... **an input**

an output



THE ATOMIC PROCESS

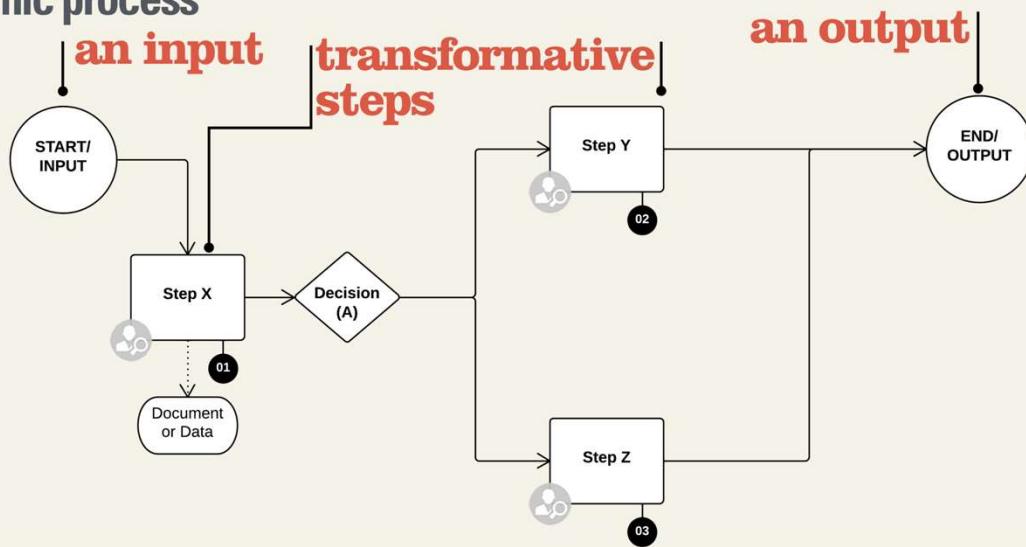
The atomic process

has...

an input

transformative
steps

an output



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THE ATOMIC PROCESS

The atomic process

has...

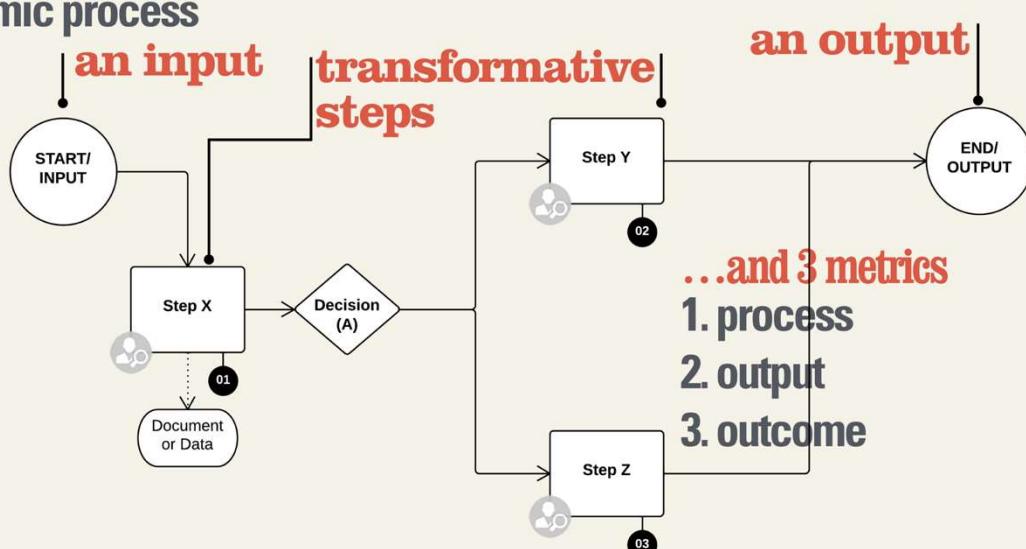
an input

transformative
steps

an output

...and 3 metrics

1. process
2. output
3. outcome



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FOCAL METRICS

Process: How many doorknobs/hour?

Output: Portion of 'flawed' doorknobs?

Outcome: Did we validate that customers like the doorknobs?

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VALIDATING PROCESSES

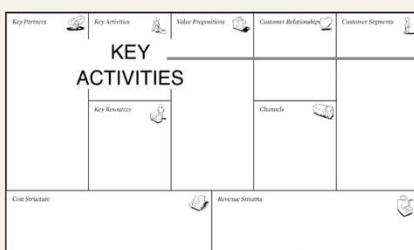
NVA: Non-Value Added Time ('wasted time') >> ELIMINATE

BVA: Business-Value Added Time ('paperwork') >> MINIMIZE

RVA: Real Value-Added Time ('work') >> MAXIMIZE

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WORKING FROM THE STRATEGY BRIEF- PROCESS INVENTORY



Key Activities

Functional Processes

Sub-Processes

PROCESS INVENTORY

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EXAMPLE- UNITED CHILDREN'S THEATER

Owner	Tools	Input	Output	Metrics		
				Process	Output	Outcome
5 Donor Development 5.1 Quality Donors	DM Salesforce-SFA	Fundraising Campaign	Qualified Donor	Num. Qualified Donors	Portion of Unqualified Donors Qualified	Fundraising \$, Size & Quality of Donor Pool

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AGILE SPECIALIZATION

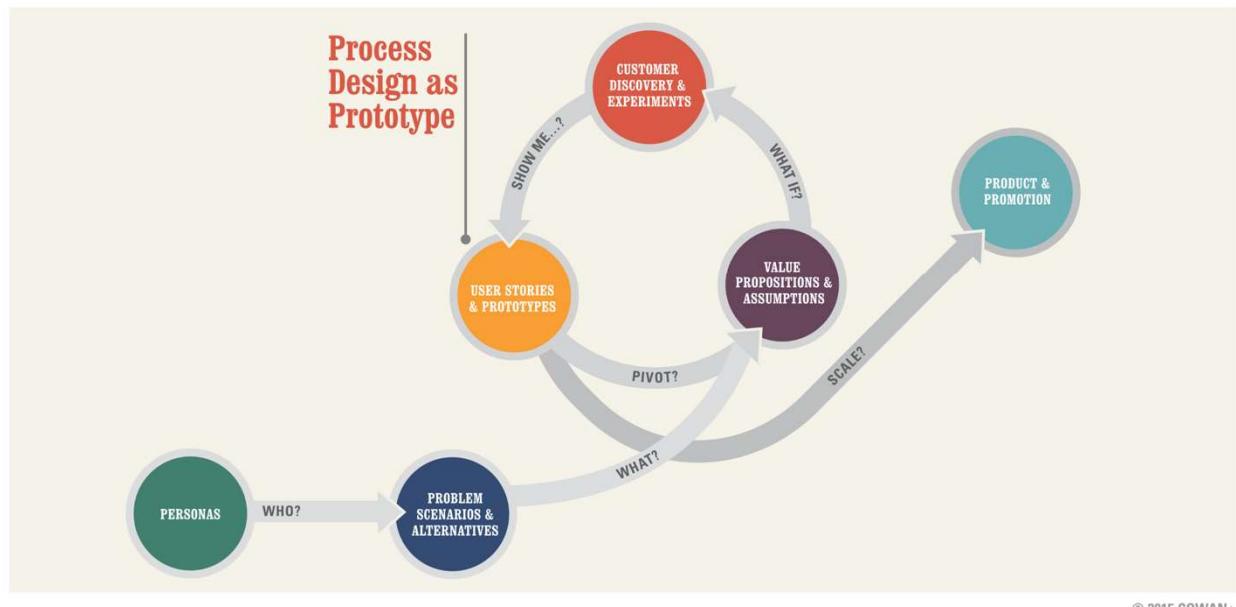
COURSE 1 MODULE 4

PROTOTYPING WITH PROCESS

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PRACTICES THAT HELP



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THE INPUT- A HALLWAY CONVERSATION

PROJECT
LEAD



"Thanks for taking the time. Can you tell me about how you qualify leads?"

"Could you walk me through a recent example?"

"So, first you qualify on whether the donor funds the arts, funds local education, and then whether they have current year funds?"

EXECUTIVE
DIRECTOR

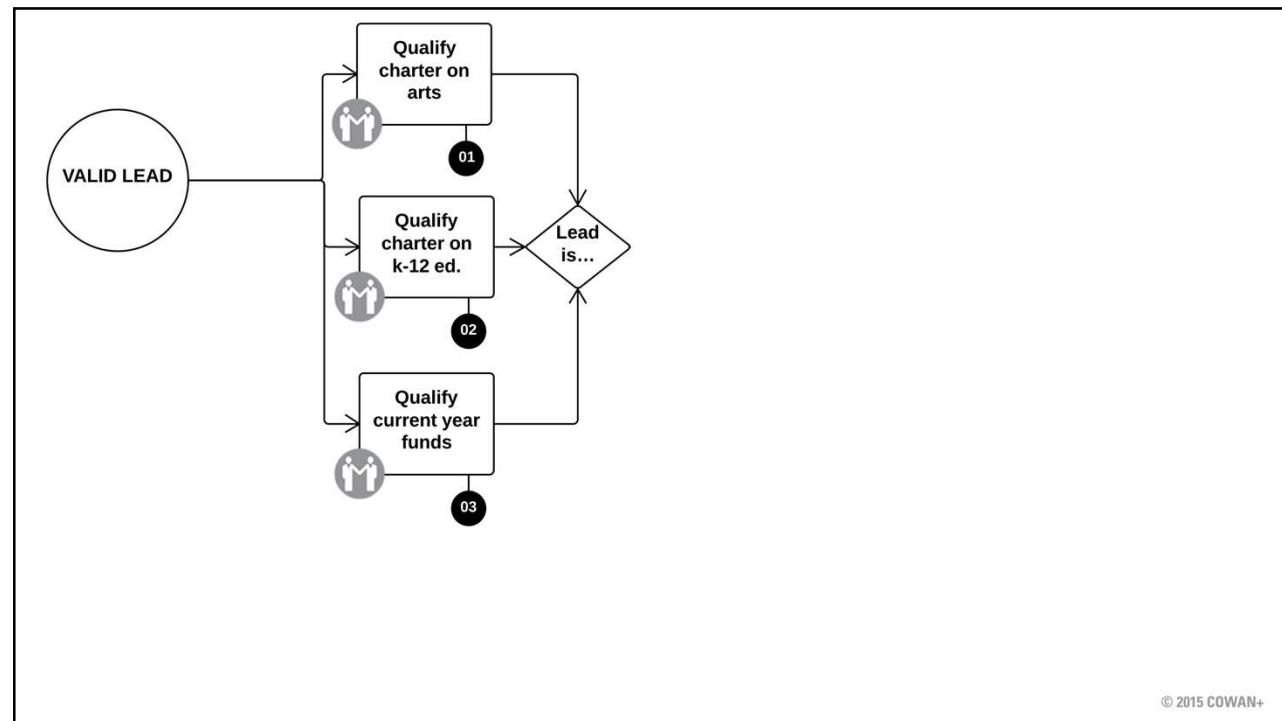


"Sure. Pretty much I ... [general answer]"

"You bet ... [more of the specifics SFG needed]"

"Yup"

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THE INPUT- A HALLWAY CONVERSATION

"Then what happens?"

PROJECT
LEAD



EXECUTIVE
DIRECTOR

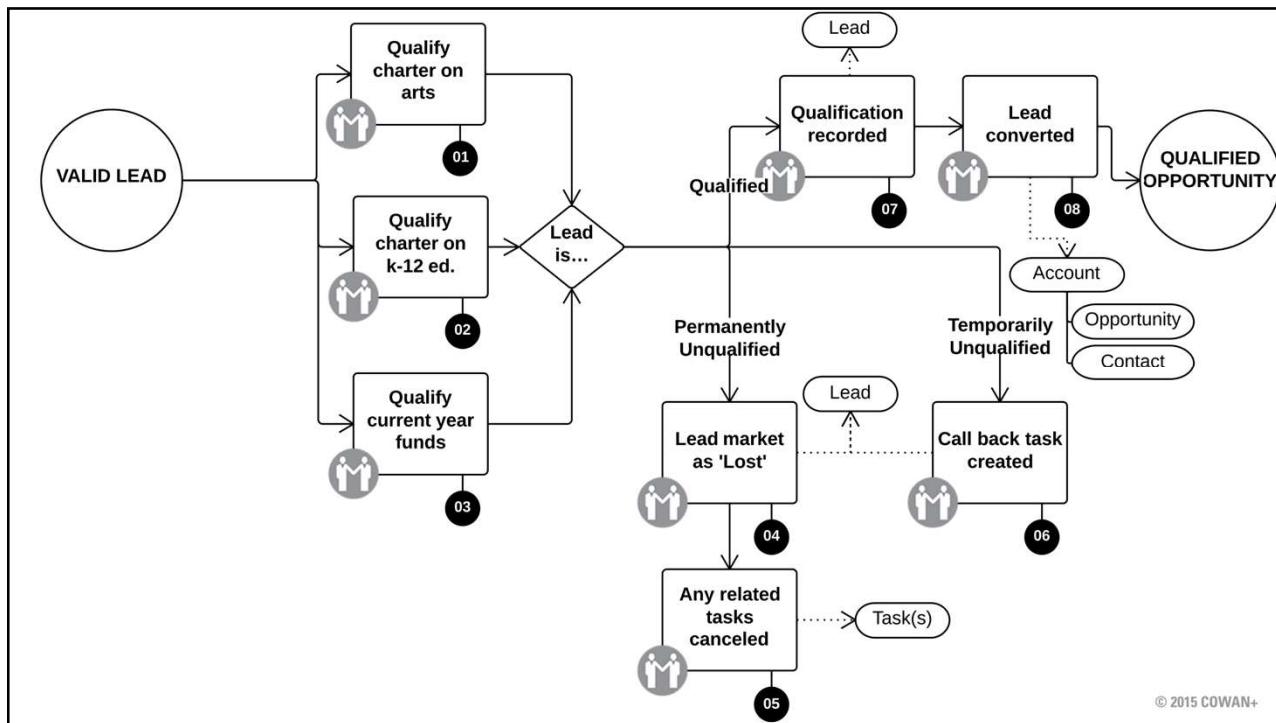


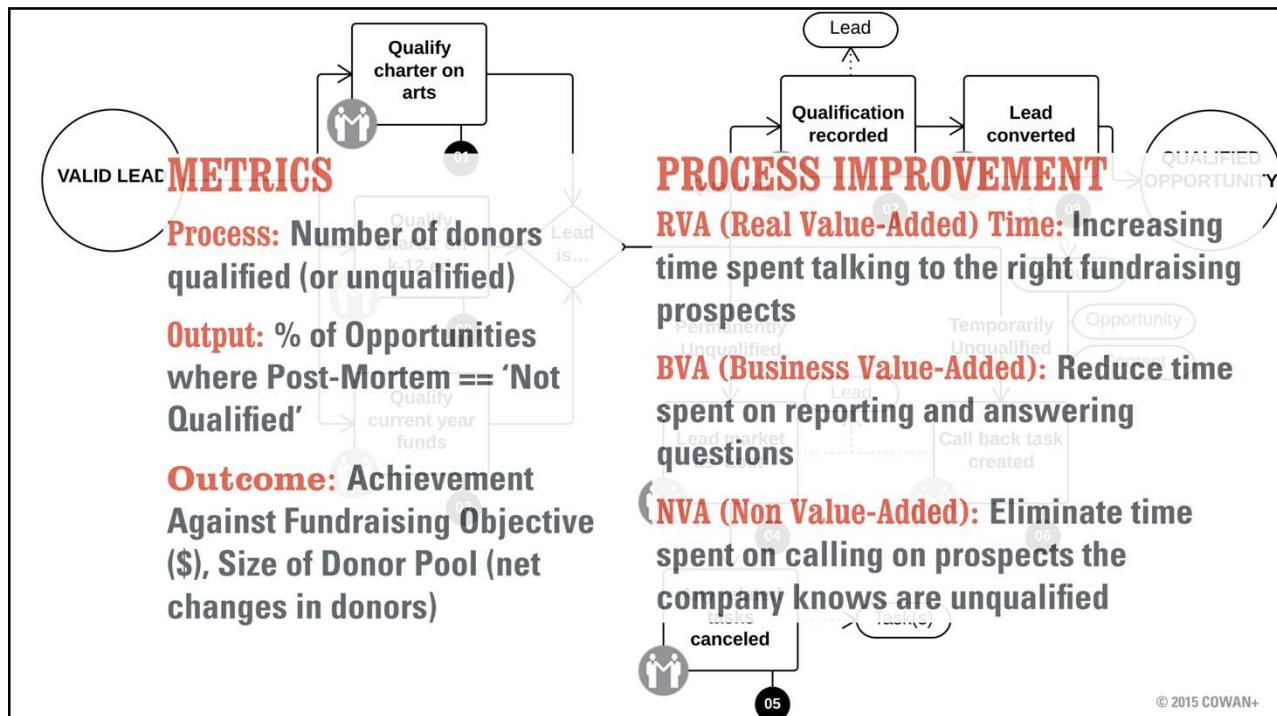
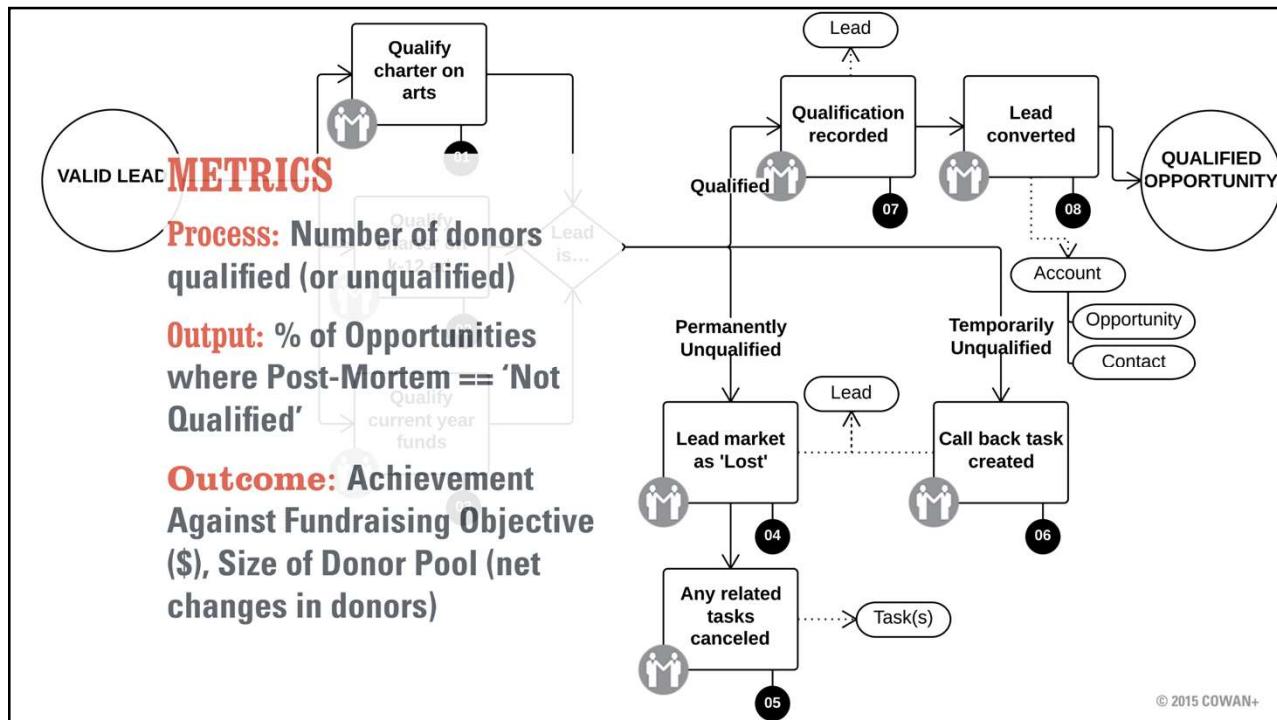
If they're a possible fit but not this year or not until we're doing something in particular, I mark them as not qualified yet but make a note to myself to call them back.

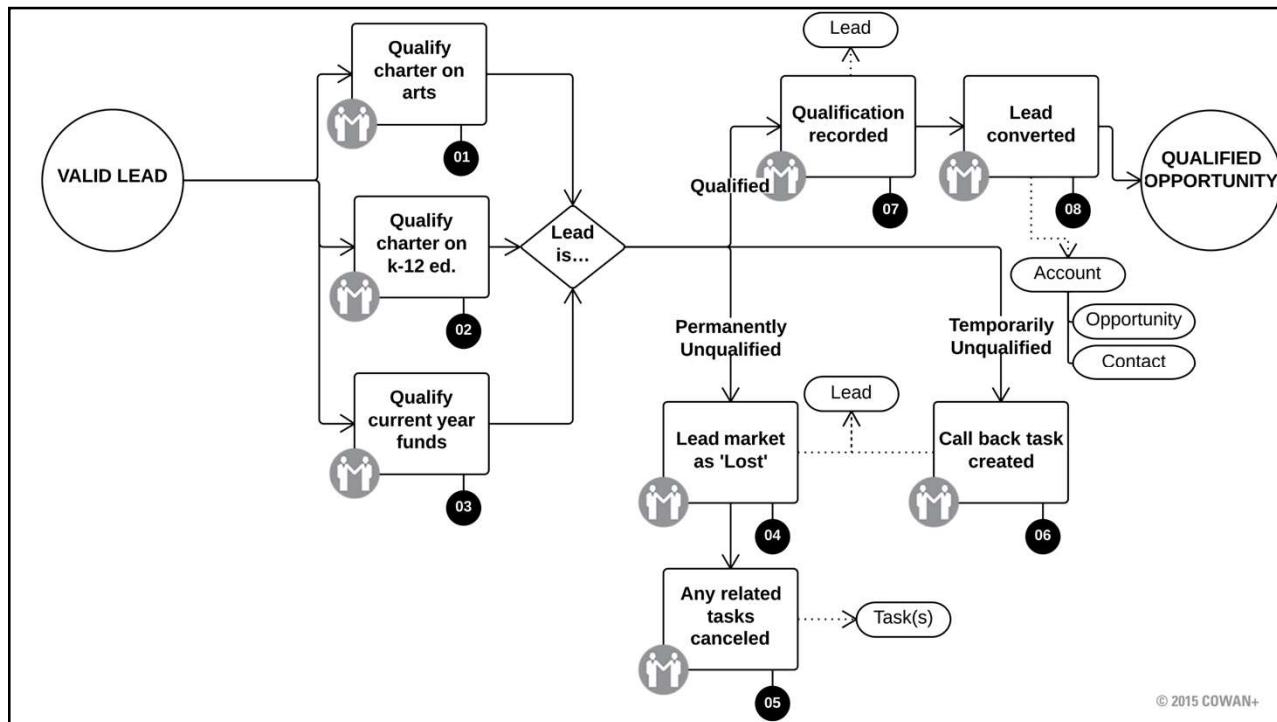
If they're not for us, I mark them dead.

If they look good I put them on my priority list.

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LAYERING STORIES ONTO PROCESS

"As a donor manager, I want to record the prospect's qualifications so I understand if and how I should progress with them."

Story

"As a donor manager, I want to record the Lead qualifications so myself or someone else can readily follow up with them on relevant next steps."

Test

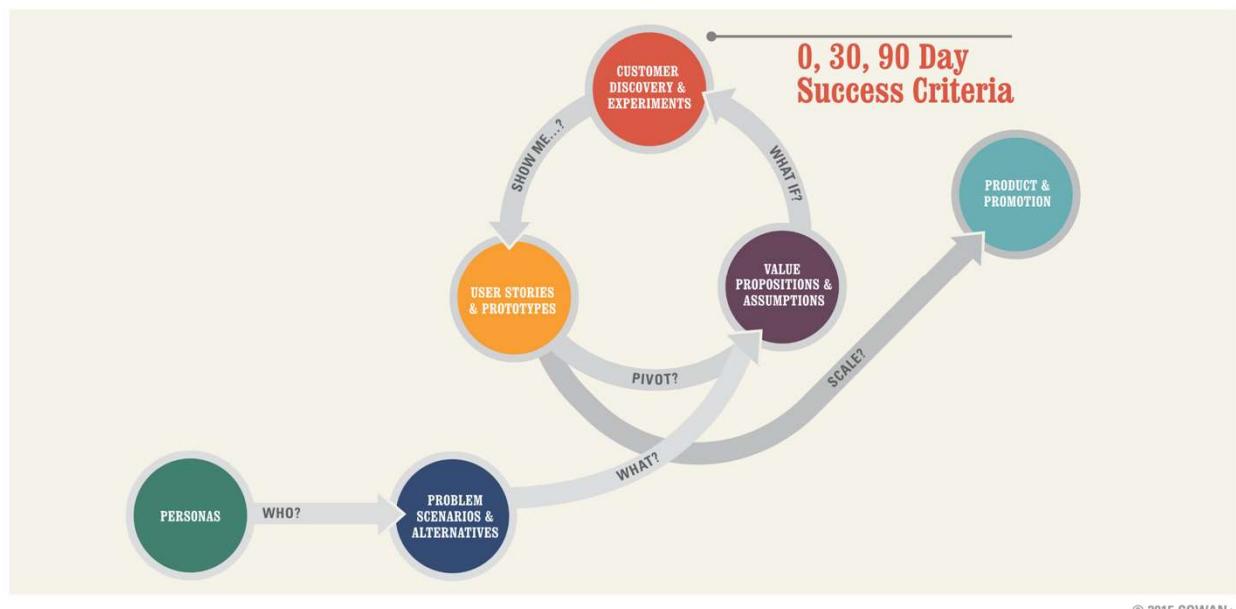
Make sure it's possible to qualify and record their charter.
 ?: Should this be a simple yes/no on arts & k-12? If so, in aggregate or separately?
 ?: Notion- would it be useful to record the URL if it's online?
 ?: Place to make notes? If so, just one for general, or some kind of prompt or relationship to other items?
 ?: What's in the DM's notes for a typical qualification?

Make sure it's possible to qualify current year funds.
 ?: What else is relevant here? Qualify when their new fund year/fiscal year starts? Size of typical donation?

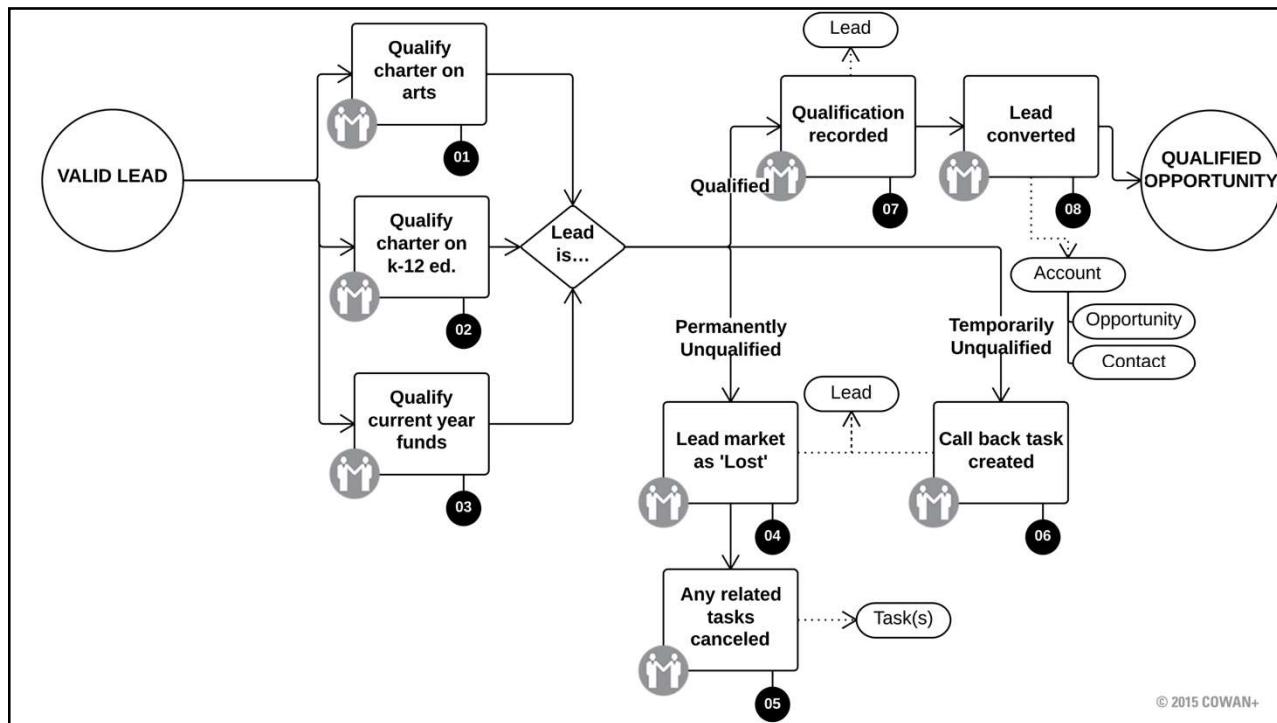
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Validating Processes

PRACTICES THAT HELP



THE INPUT- A HALLWAY CONVERSATION



VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Implementing learned best practices on account development tasks & keeping those aligned with corporate objectives			

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VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Implementing learned best practices on account development tasks & keeping those aligned with corporate objectives	Self-generated spreadsheet for account tracking on shared drive		

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VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Implementing learned best practices on account development tasks & keeping those aligned with corporate objectives	Self-generated spreadsheet for account tracking on shared drive	The Salesforce implementation will help with best practice sales and time management with structure and automation around tasks like- * lead scoring to prioritize calls * simple creation of follow-up's and related	

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VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Implementing learned best practices on account development tasks & keeping those aligned with corporate objectives	Self-generated spreadsheet for account tracking on shared drive	The Salesforce implementation will help with best practice sales and time management with structure and automation around tasks like- * lead scoring to prioritize calls * simple creation of follow-up's and related	0 Day: DM inputs last 5 prospects; they go into fields as designed without additional support or questions 30 Day: login's on at least 18 working days 90 Day: ?

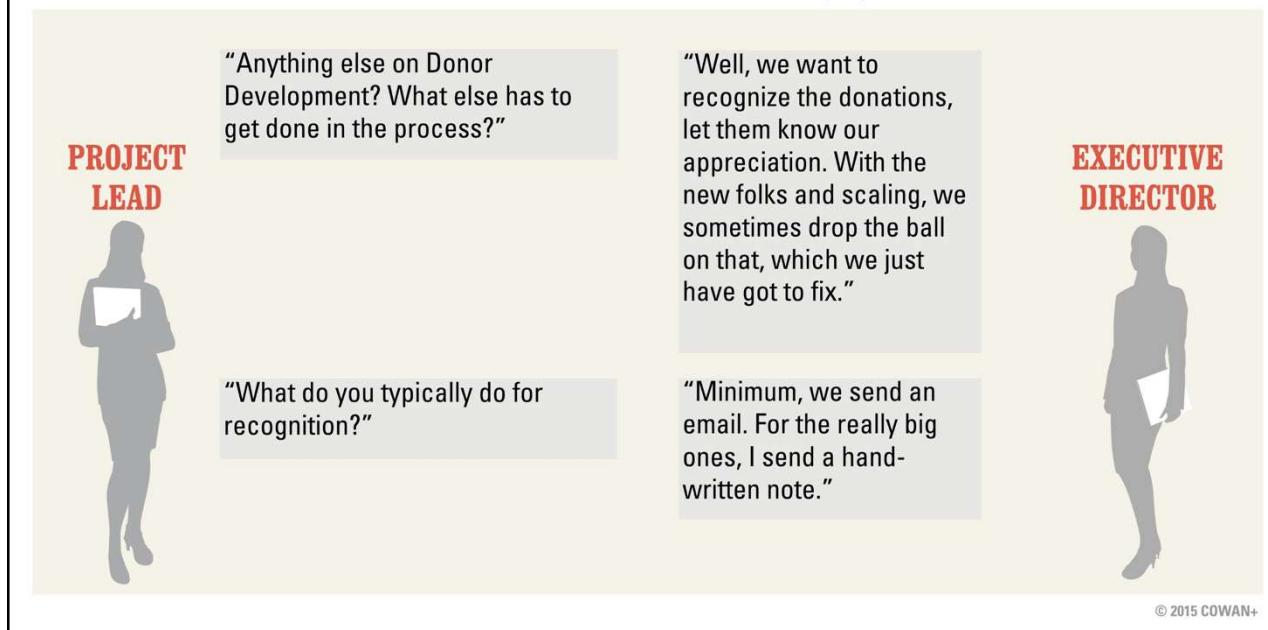
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VALIDATING PROCESSES- DONOR DEVELOPMENT

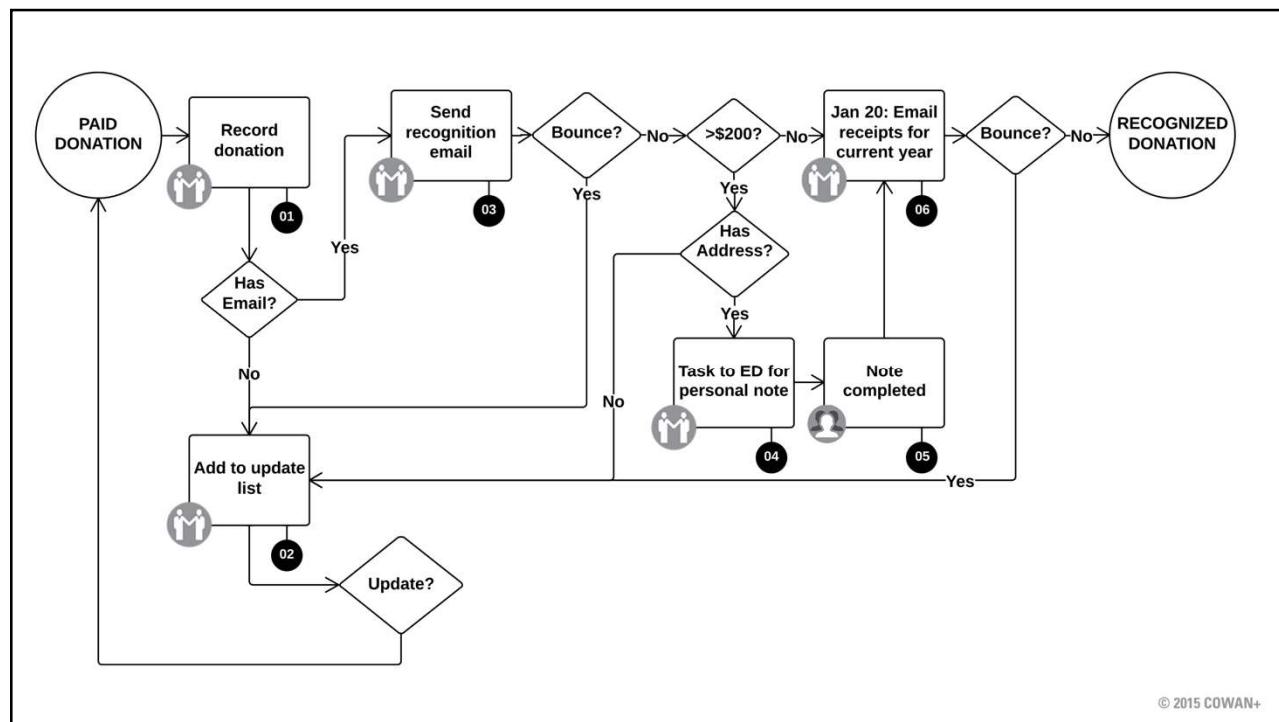
PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Implementing learned best practices on account development tasks & keeping those aligned with corporate objectives	Self-generated spreadsheet for account tracking on shared drive	The Salesforce implementation will help with best practice sales and time management with structure and automation around tasks like- * lead scoring to prioritize calls * simple creation of follow-up's and related notices to help prioritize work	90 Day: Definitive results on sales execution against strategic market plan + Result: 80% new growth is in Accounts types in target segments - Result: Most growth is not in target segments and the underlying reason can be identified in Opportunity post-mortems

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THE INPUT- A HALLWAY CONVERSATION (II)



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VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Consistently recognizing donors (for longer term relationship development)			

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VALIDATING PROCESSES- DONOR DEVELOPMENT

PROBLEM SCENARIO	CURRENT ALTERNATIVE	VALUE PROPOSITION	VALIDATION CRITERIA
Consistently recognizing donors (for longer term relationship development)	Manual process with no checks, tracking or automation		

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Consistently recognizing donors (for longer term relationship development)	Manual process with no checks, tracking or automation	The Salesforce implementation will automate recognition and track it for account & sales management.	0 Day: DM inputs sample opportunities (with test addresses); the recognition correspondence posts as expected 30 Day: Closed Opportunities are receiving recognition as expected and this is visible 90 Day: Donors are involved; Donations are up

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Key Activity 1

Key Activity 2

Key Activity 3

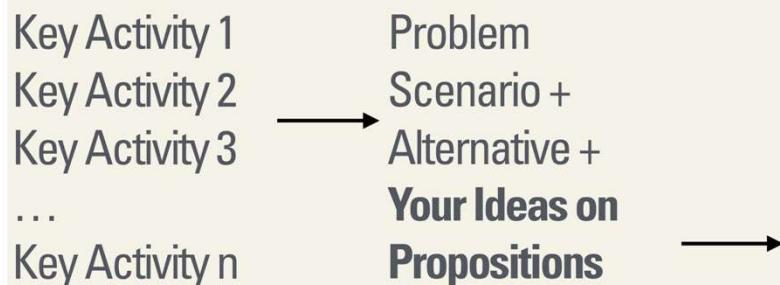


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Key Activity n

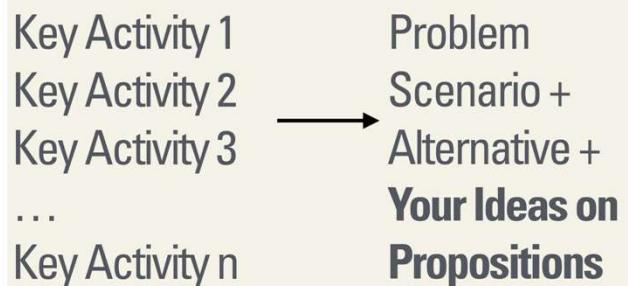
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