

Managing an Agile Team

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Company : SLF / AMT
Project : Develop a few key sections to anchor an agile team charter. Answer the 3 focal question in the exercise

Part 1: Positioning Statement

Assignment

Introduce your the company whose product you're working on with the positioning statement structured as follows [fill in the brackets]:

For [Advisors] who [are not able to meet their clients face to face], the [Canvas] is a [virtual advisors office solution] that [connects them with clients virtually over video and enable them to do all transaction in a co-creation mode, same as if they would have done if met face to face physically]. Unlike [other non-face to face solutions], our product [does not create an alternate workflow but connects existing enterprise workflow within the existing enterprise security and enterprise look and feel. It also offers all required connection on single platform].

Part 2: Focal Questions

1. What's important to this business? Why? How is it measured with regard to customer/user behavior?

<u>Key partners</u>	<u>Key Activities</u>	<u>Value Propositions</u>	<u>Customer Relationships</u>	<u>Customer Segments</u>
1) Cloud Partners. 2) Technology vendors.	1) onboard new technology. 2) Product creation. 3) TCO Mgmt.	Do business without stepping out of home. No investment in physical office space.	1) Web chat & auto resolution of tech issue. 2) Direct personal service.	1) Advisors. 2) Insurance companies.
<u>Cost Structure</u>	<u>Revenue Streams</u>			
1) Digital platform development. 2) License cost of underlying technologies. 3) Operational cost of platform running.	1) Number of Insurance companies signing up for product. 2) Number of Advisor, client virtual meetings. 3) Number of closed transaction without a need of face to face interaction.			

Top Persona and CX

CX scenario	Notes	Questions & Observations/Metrics
1	Advisor (Gini) not able to step out and go to her office do client meetings as she has been quarantined in high pandemic impacted area	<ol style="list-style-type: none">1. How can Gini be provided option to work remotely2. How can reduce the number of physical meetings reduced by Gini
2	Subbu, the client is foreign expat and hence need to see what Advisor is filling in the form the accent on the phone and VC call cannot be comprehended completely	<ol style="list-style-type: none">1. How can be provide option to Subbi to Cowork on the same application as Gini is filling2. How transactions are closed with a need of physical meeting
3	Gini requires a number of enterprise apps from the insurance company to fill the application, get client info which becomes very confusing	<ol style="list-style-type: none">1. How can we connect a platform with the required enterprise applications

2. For which problem scenarios/jobs-to-be-done should we test new propositions?

1st PS relates to the key value proposition; 2nd JTBD relates to the key activities

Problem Scenario/Job-to-be-Done	Your Value Proposition	Notes (optional)
<p>Today either the advisor has to step out to connect with client</p> <p>OR</p> <p>In virtual world they use “multiple” software to connect with client and “complete” their transaction without client being able to see what they are doing</p>	<p>We are delivering a platform where advisors are not just able to see the client bit also co-work on applications, forms with clients with interaction. Also they can complete transactions on the same platform</p> <p>Also the platform is having the security & look and feel of the insurance parent insurance company which will buy the platform</p>	<p>Test for</p> <ol style="list-style-type: none"> 1) No need for physical office 2) Meet clients virtually 3) Co-browse the applications and form 4) Enterprise security & look & feel
Which Audio video technology to pick	<p>The product can be customized with the AV technology of the insurance company. The product deployment comes with many options of popular AV platform – Zoom, Webex, Google meet, Jio</p>	

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3. How will we define and measure success?

Problem Scenario/Job-to-be-Done	Measuring Success/Outcomes
<p>Today either the advisor has to step out to connect with client</p> <p>OR</p> <p>In virtual world they use “multiple” software to connect with client and “complete” their transaction without client being able to see what they are doing</p>	<ol style="list-style-type: none"> 1. Reduction % advisor , client physical meetings 2. How many Advisor , client successful meeting with successful closure of transactions
Which Audio video technology to pick	<ol style="list-style-type: none"> 1. Time to deploy product with the available AV technology of the choice