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- Question asked by Marie
- Methodologies
- 7 replies
- 11 months ago

Should the discovery phase be run as an agile process?

Good morning,

Hi Roadmap community.

Question:

Should the (pre-product) discovery phase be run as an agile process

Background:

I oversee two products here at Cengage.

- Product 1: Established nearing maturity.
- Product 2: We are in pre-product 'Discovery' phase. We're trying to be clear about the problem we're

trying to solve and for who.

Between the Product Owner and myself (Product Manager) there are a number of activities including:

- User research (Exploration and quantification)
- Market analysis
- Internal subject matter expert engagement
- Internal stakeholder engagement

We're running this phase as waterfall. Why?

- We're working with many groups and individuals who are not always quickly available
- We've got the freedom to decide how we want to do this, and it feels easier this way.
- I manage a separate agile scrum team for product 1. The two products don't overlap (yet) and the ceremonies are quite time consuming.

How do you run your discovery phase when there are a number of stakeholders to engage?

Does it even make sense to run this in an agile way? If so, what are the finer details of this process?

Thanks :-)

- Answer
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5 Replies

[Jaz Blakeston-Petch](#)
Product Manager @ The National Lottery (UK)
11 months ago

It's worth checking out and testing out some design sprints. AJ&Smart, an agency that helps product teams run sprints have figured out a way of running them over 4 days without needing to have key stakeholders involved in each day ([check out the overview here](#)).

The above process takes inspiration from agile in terms of applying it to a discovery process, however, it's not going to do the entire discovery process for you. It should help you verify some of your biggest and riskiest assumptions quickly though!

In terms of running a sprint team whilst trying to do discovery for something big and new, that is tough. Is there an opportunity for you to take a bit more of a back seat on that one to focus on discovery whilst a product owner focuses more on the delivery sprints?

- Comment
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[Kevin](#)
Product Manager at Product HQ
11 months ago

I think Discovery is tough to run as an agile process because during this time, you really want to reach out to a number of users, team members, stakeholders to nail the workflow and use case that you are trying to implement. Once you know the full flow, then you can break it into smaller features and iterations that can be run in an agile flow but the up front big picture planning is so critical to make sure the small releases really add up to the final product that I prefer to do it separate.

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[Marie](#)
Lead Product Manager at Cengage ANZ
11 months ago

Thanks Kevin. This is how I have been thinking about the problem also. It's great that there is someone else out there who has validated our current approach. :-)

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[Julia Voynova](#)
Product manager
11 months ago

Hi Marie!

I was working for startup at the discovery stage and I used HADI cycles framework, it's not exactly agile methodology but it has agile spirit. Basically we had weekly sprints and in the beginning of the week I set a hypothesis or 2 of them to test together with validation criteria, did customer development interviews and came up with conclusion if the hypothesis is valid by the end of the week. Before interviews I also did a super quick market research just to check if the market is big enough to look at and a kind of internal experts interviews. This was simply talking to Tanzanian colleagues to check if the hypothesis makes sense and if there're serious legal/cultural barriers as the project was aiming at Tanzania and African markets in general.

The most important part is that hypotheses and their validation criteria should be super precise. For validation you need to set how many of the interviewees face the problem, how often and how much money/time they are loosing because of it, e.g. "At least 70% of users face the problem at least once a week and loose at least 3 hours or 50$ because of it". This precise estimation is hard to make before interviews but it gives you some baseline against which you are measuring the problem significance . It doen't mean that if some of the numers are not exacly like this you have to eliminate the hypothesis but maybe you should slightly change it.

If accessing internal experts and stakeholders is a bottle neck in your case think how can you speed up the process: maybe you can schedule meeting/calls with them in advance and ask them about several hypotheses at a time even if you haven't started actively working on them yet. Or maybe you can involve smn superior who is interested in your success and has easy access to stakeholders to advocate for you.

Having too much flexibility in discovery process has pitfalls of giving you a lot of chances to stick to non valid assumptions so I think there should be some agile like framework to ensure that you are not wasting time on smth which is not going to work. Though in a big company with lots of stakholders it's more difficult than in a cosy startup.

If you want more details about our process feel free to ask and if you tell more about how your waterfall process is organized now maybe I can give you some ideas on how to imrove it :)

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[Donovan B.](#)
10 months ago

In my opinion agile methodology is too "time dependent" for the discovery phase as the discovery phase is more about the topology of milestones, interactions with others, and estimating potential value--none of these are easy to partition into time based sprints. The way I like to think about it is if you look at a transit map you don't need to break the distance traveled into "space dependent" measurements (miles or feet) to get to where you're going, you just need to know which stops are along a specific path, and what order they are traveled in.

For my projects I tend to start with a waterfall approach to set the large milestones/deadlines and then I use something like an OODA Loop (*observe, orient, decide, and act)* for handling the finer details as they come up. With every interaction I have with others (stakeholders/clients/dev team) I use an OODA Loop to define a plan of action based on the new input.

The key aspect for the discovery phase with the OODA Loop is viewing the OODA Loop from the perspective of a potential opportunity, not a potential threat. (It was originally a military strategy). I think the OODA Loop is a good model for analyzing and responding to both opportunities and threats. It also fits nicely within the waterfall model for handling the finer iteration points without taking away from the larger project cadence set by waterfall.

(If you look it up look up "OODA Loop for Business" to skip the military strategy writings)

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