

# PRODUCT KICKSTART PLANNING GUIDE

COMPANY:

NAME:

DATE:

# FOREWORD

This workbook condenses lessons learned from ten years of product development consulting. It outlines five core aspects of lean and agile adoption spread across a five day program intended for development of an actual product.

Introducing new ways of working is difficult at scale. This approach sets out to create positive momentum and a sense of urgency and helps focus on risks and assumptions. By creating an environment where healthy constraints drive priorities and decisions, this framework yields weightings that reflect real world constraints: what is desirable from a customer and revenue perspective, and what is achievable from a development perspective.

As with most products, we fully expect kickstarts to evolve beyond the publishing of this workbook. Check out [moduscreate.com/kickstart](https://moduscreate.com/kickstart) for updates and case studies.

A handwritten signature in black ink, reading "Patrick Sheridan". The signature is fluid and cursive, with a long horizontal line extending from the end.

Patrick Sheridan  
CEO

# INTRODUCTION

## FOR YOU

This workbook gives you a broad canvas on which you can view your enterprise and product opportunities and a structured way to introduce new thinking complete with a deliverable and planning approach. The daily structure gives context to meetings and offers a way to incorporate new approaches into current work.

## FOR YOUR TEAM

Use this workbook to help advocate and educate your team about Lean methods. This workbook helps your colleagues clarify their thoughts and focus each day's activity on planning aspects of the product that matter at an early stage.

For more information on Product Kickstart  
**[moduscreate.com/kickstart](http://moduscreate.com/kickstart)**

# PRODUCT KICKSTART IS

**Five days** of facilitated product discussion.

**A framework** for feature **prioritization**.

A focus on **assumptions, constraints,** and **KPIs**.

A **deliverable based** way to codify information.

A way to estimate **scope** to **plan** an MVP or product release.

# KICKSTART FRAMEWORK OVERVIEW

Kickstart is a “DIVE IN” approach to improving the way **product teams work**. Living every phase of a product lifecycle in 5 days sets expectations and pacing for the entire release cycle to follow.

# WHY KICKSTART?

Create **urgency** and **momentum**.

Create **shared understanding**.

Catalyze **process** and organizational change.

**Introduce** new technology.

Increase scope and budget **confidence**.

**Execute** with confidence.

MONDAY



GOAL ALIGNMENT

BUSINESS ARCHITECTURE

PORTFOLIO ANALYSIS

SUPPORTING TECH

TUESDAY



USER ANALYSIS

USAGE CONTEXT

TASK AND WORKFLOW

CANDIDATE USER STORIES

MOBILE FIRST CASES

WEDNESDAY



DESIGN PATTERNS

DOMINANT PATTERNS

MARKET LEADERS

COMPETITOR APP ANALYSIS

CANDIDATE USER STORIES

THURSDAY



SCOPE AND COMPLEXITY

USER ICEBOX

NATIVE / HYBRID / MOBILE  
WEB

BUSINESS VALUE  
WEIGHTING

COMPLEXITY WEIGHTING

FRIDAY



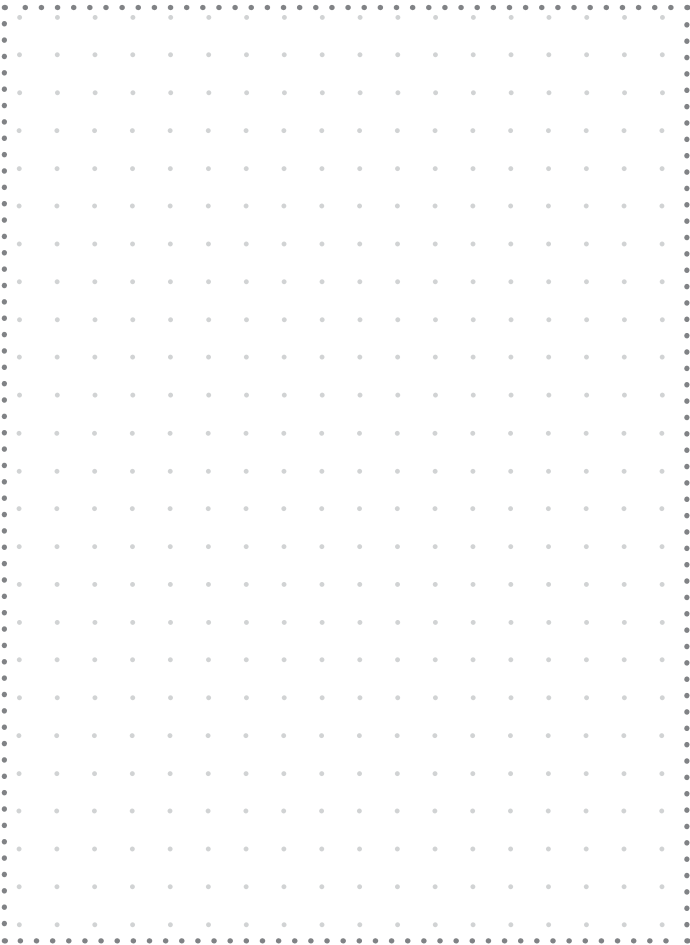
PRIORITIES AND PLANNING

HEALTHY CONSTRAINTS

RELEASE THEMES

INFRASTRUCTURE TOOLS

# ANALYZING YOUR APP PORTFOLIO



SKETCH

B2C .....

B2B2C .....

B2B .....

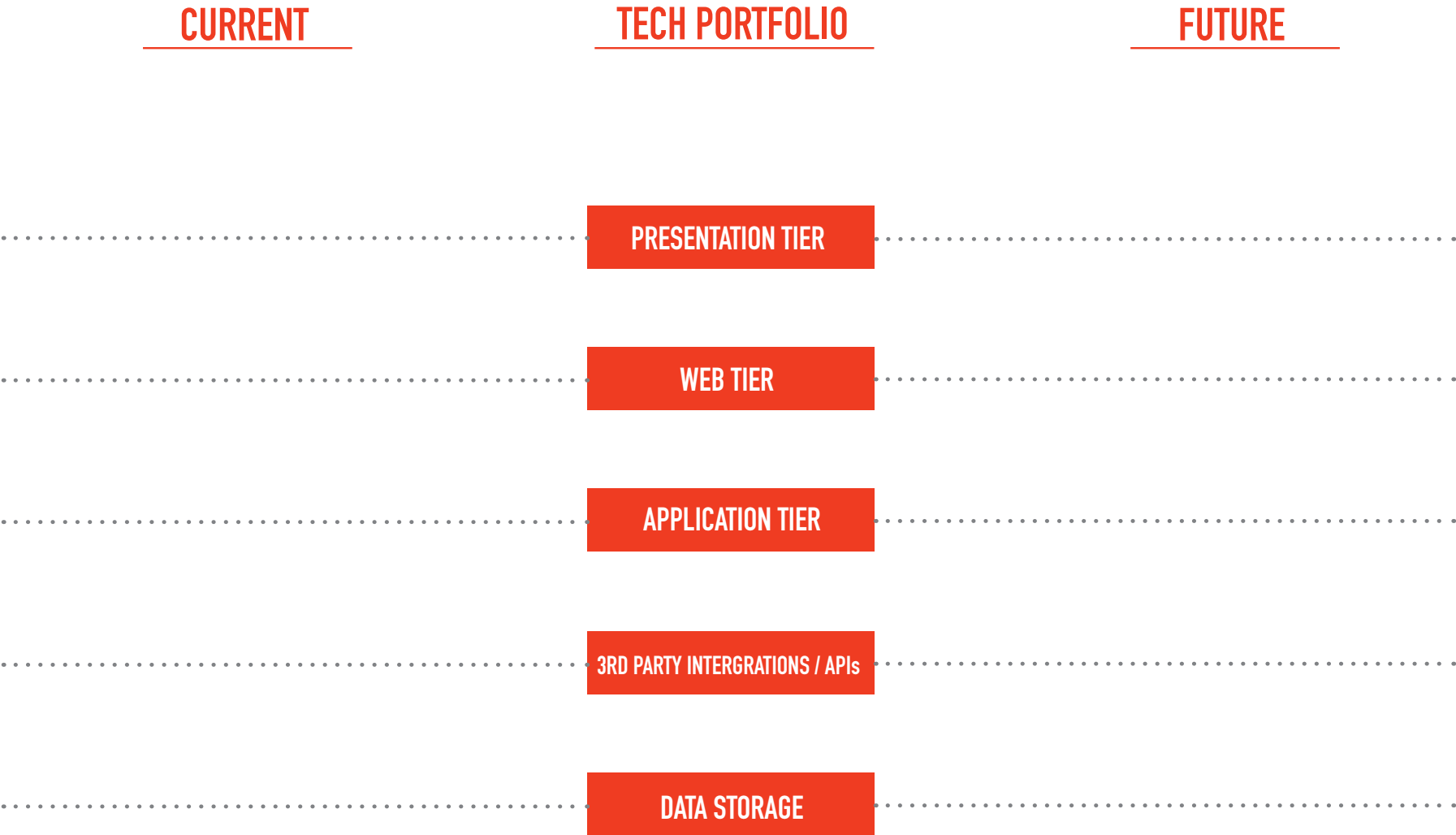
DMZ .....

B2E .....

**Instructions:** *Sketch out the depth and breadth of your application portfolio. Segment apps by end user focus: internal employees, partners and affiliates, business customers, white labeled offerings, and direct to consumer.*



# SUPPORTING TECHNOLOGY



**Instructions:** Describe the current state of each tier of your technology infrastructure. The idea here is to identify the technologies that drive your core business. If you are not sure about a particular technology, mark down a person who can answer this question for you.

# IDENTIFY THE TARGET APP

PROJECT NAME: ..... ☐ NEW ☐ EXISTING

BUSINESS OWNER: ..... *who ultimately controls the line of business?*

PRODUCT OWNER: ..... *who manages the execution of the product vision?*

PRIMARY USERS: ..... *who engages with and buys the app and ultimately determines the app's success or failure?*

SECONDARY USERS: ..... *who indirectly interacts with the app and may influence the behavior of primary users?*

USER TYPES	KEY SUCCESS METRICS	ASSUMPTIONS ABOUT THE APP	FEEDBACK LOOPS
			BETA CUSTOMERS: <div></div>
			INTERNAL USERS: <div></div>
			CHAMPIONS: <div></div>

PRIMARY REASON FOR MOBILE	SUCCESS AS DEFINED BY THE BUSINESS	ASSUMPTIONS ABOUT THE BUSINESS

# CONCEPT OF OPERATIONS / BUSINESS ARCHITECTURE

**Instructions:** *Focus on identifying the 'nouns' that describe the business and the relationship between these nouns. This exercise helps frame a birds eye view of the business and create a shared understanding of the business' main moving pieces:*

# MONDAY: GOAL ALIGNMENT

## BUSINESS GOALS

## PRODUCT GOALS

<i>Mark down key features, enhancements, UX improvements, and bugs. For mobile apps, note target devices, platforms, and key device integrations.</i>	<i>Example:</i> <b>Tangible (measurable) Outcomes</b> <b>Revenue Target</b> <b>KPI</b>	<i>Identify any technical debt items that should be addressed this release. Consider system upgrades, performance, and scaling concerns, as well as platform change decisions and major architectural changes.</i>	<i>Example:</i> <b>Existing Roadmap Items</b> <b>Existing User Feedback</b> <b>Potential for Assumptions Here</b>
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# MONDAY: GOAL ALIGNMENT

## TECH GOALS

## TEAM GOALS

## NON – GOALS

**Note:** Any items that could strengthen the product and delivery team, such as technical or process training.

**Example:**  
**Upgrade Forum.**  
**Implement API for Invention Management.**

**Note:** Any items that could strengthen the delivery team having technical or process training.

**Move from iOS to HTML5.**  
**Our developers need training.**

Call out anything that is NOT a priority for this release and could be a distraction to the release goals.

**Example:**  
**We are NOT developing for tablet in this release - phone only.**

## TUESDAY: USERS

*Internal users exist inside the building. In many cases, there can be direct line employees, managers, and reporting users.*

*External users are those outside the building, meaning those not directly employed by the business.  
For example: partners, suppliers, or customers.*

# INTERNAL

## EXTERNAL

**Instructions:** *Align this page with the next (with Usage Contexts and User Goals) as you fill these two pages out.*

*Sketch out the different people who will interact with the app. It is often helpful to identify users by job title or primary usage behavior (ex: District Manager, single purchase one-time user).*

# TUESDAY: USERS

## USAGE CONTEXTS

## USER GOALS

**Note:** How long are users on the app? What time of day do they use the app? What are their surroundings when using the app? How much training or experience do they have with the app?

**Note:** Why do people use the app? What needs does the app fulfill?  
What outcomes do users desire? What defines a successful experience?

# TUESDAY: EXAMPLE USER PERSONA TEMPLATE

## NAME, OCCUPATION



**NAME, OCCUPATION** *Sally Superuser, Engineer*

**Age** *38*

**Income** *\$110,000*

**Education** *Bachelors of Engineering*

**Family** *Husband and 2 kids*

**Years of Experience in the Industry** *15*

**Level of Tech Savviness** *High*

**Tech Preferences** *Apple phones and tablets*

**Tolerance for Risk** *Low*

## BEHAVIORS

*Impulsive Buyer*

*Early Adopter of Electronic Gadgets*

*Hates Watching Sports*

*Listens to Talk Radio*

*Early Riser, Exercises Before Work*

## STORY:

*Write a story about a specific problem this person has that you are trying to solve.*

*Sally doesn't cook, but she wants to eat out or order for delivery less often. She wants an easy way to eat healthier and spend less money.*

## NEEDS / GOALS

*Efficiency*

*Minimal Use of Email or Texting*

**Instructions:** *Use the example above as inspiration in filling out the blank user template. Copy the template as needed for multiple personas.*



# TUESDAY: USER PERSONA TEMPLATE

## NAME, OCCUPATION



SKETCH

Age

Income

Education

Family

Years of Experience in the Industry

Level of Tech Savviness

Tech Preferences

Tolerance for Risk

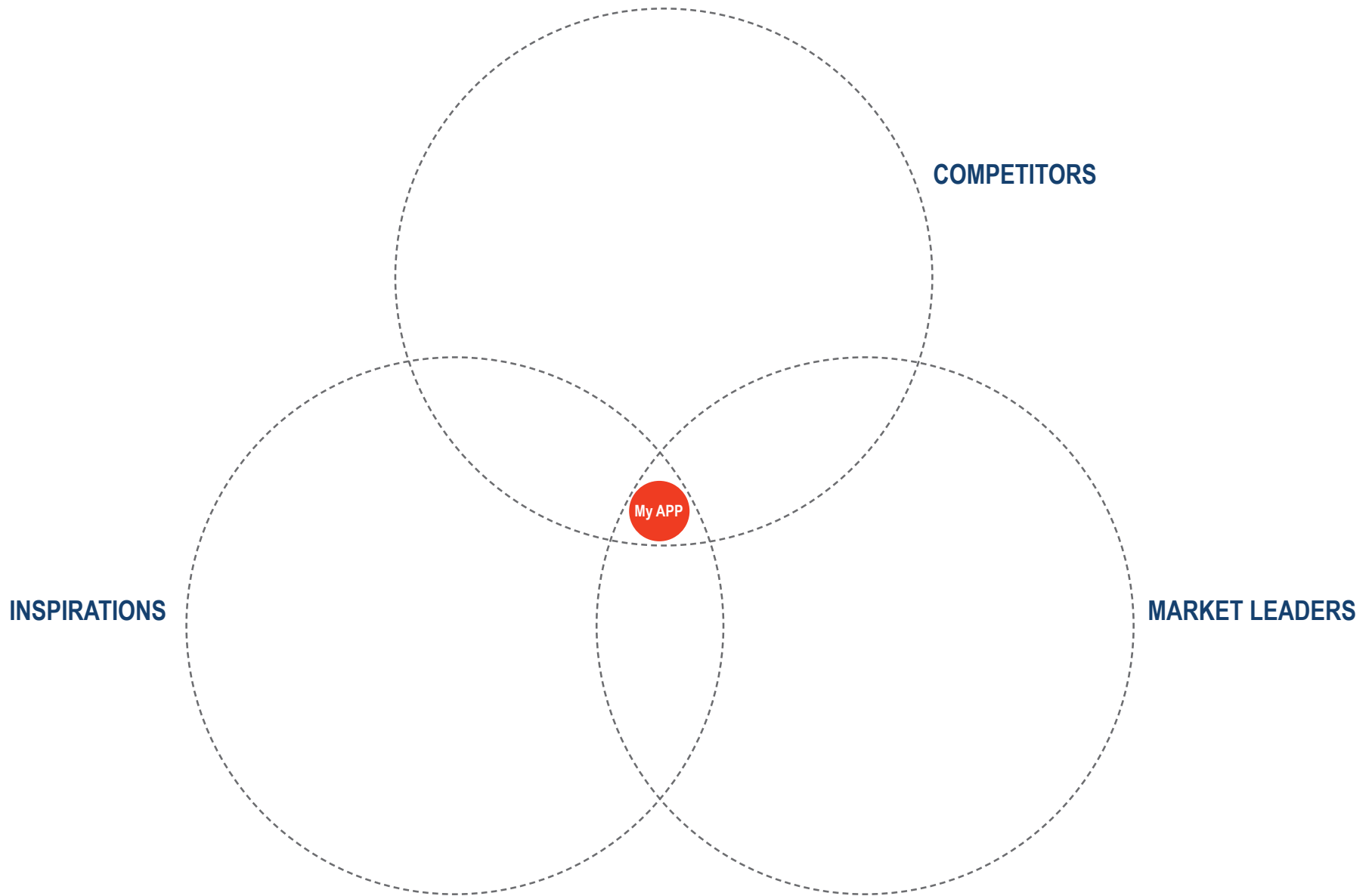
## BEHAVIORS

## STORY:

## NEEDS / GOALS

**Instructions:** Base your personas on target users. Bring any information that you have about target users to the session: their needs, goals, or known pain points, as well as customer feedback and help desk requests.

## WEDNESDAY: DESIGN PATTERNS



**Instructions:** *Identify applications related to your app that are in the same problem domain or could serve as inspiration because they do something in a way your app could do as well. For example, for an ordering application, Amazon's shopping cart might be in the "Market Leaders" section of the diagram.*

# WEDNESDAY: DESIGN PATTERNS

<div>DOMINANT PATTERNS</div>	<div>PRIMARY WORKFLOW</div>	<div>DELIGHTERS</div>
	<div>SECONDARY WORKFLOW</div>	<div>MOBILE VALUE ADD</div>

**Instructions:** *Categorize the workflows and interactions that define the user experience. Consider how a mobile framework could augment or constrain the user experience.*

# THURSDAY: USER STORY TEMPLATE

TITLE: .....

DESCRIPTION: .....

AS A .....

I WANT TO .....

SO THAT .....

GIVEN: .....

*Describe the pre-existing conditions that must be in place (eg: given I am logged in to the system)*

AND ..... ‘AND’ and ‘OR’ are optional qualifiers

OR .....

WHEN: .....

*Identify the primary VERB that drives the action of the story*

AND .....

OR .....

THEN: .....

*Describe the post-conditions created when the story action is fulfilled (ex: after completing an online purchase, THEN an email confirmation is sent to the buyer, AND a fulfillment order is sent to the warehouse, AND the inventory system is updated.)*

AND .....

OR .....

## THURSDAY: DRAFT USER STORIES

**Instructions:** *Compile a list of candidate user stories from the work you've completed on the previous days. Focus on story titles only as there will be time in the following days to explore stories in more detail.*

## TITLE

## TITLE

## TITLE

## THURSDAY: DRAFT USER STORIES

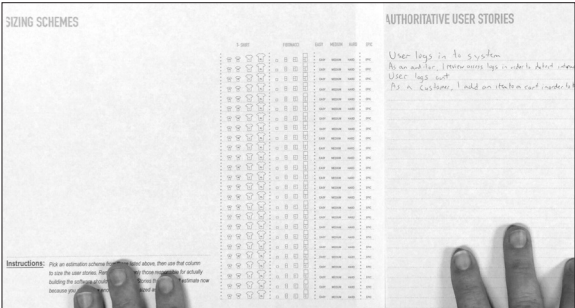
**Instructions:** *Compile a list of candidate user stories from the work you've completed on the previous days. Focus on story titles only as there will be time in the following days to explore stories in more detail.*

## TITLE

## TITLE

## TITLE

**Instructions:** *Once you have devised some draft user stories, copy the stories you choose to be authoritative to this list. You can then align this page to the right of the sizing diagrams for Complexity and Business Value as you fill them out, so you don't have to re-write the stories on each of those pages.*



# THURSDAY: ESTIMATING SIZE AND COMPLEXITY

Even experienced software developers have difficulty estimating software complexity and size. Agile practitioners have found that imprecise estimates of complexity are usually good enough to plan software projects. Given that, we use relative sizing metrics, such as story points, instead of precise measures, such as person hours. Only engineers responsible for implementing the stories should give estimates; defer estimating complexity if you are not a software developer yourself.

## EPICS

An epic is a story that is too big to implement in a two week iteration or really should be broken up into multiple stories. If you can't estimate how big a story might be, you should make the story an epic.

## RELATIVE SIZING WITH STORY POINTS

Assigning numbers to story sizes allows you to do simple math with the results. Even though the numbers may be arbitrary, they are still useful for estimating effort. Mapping easy, medium, hard to 1, 2, 3 is a simple story point scheme.

## FIBONACCI SEQUENCE

This geometrically increasing sequence (1,2,3,5,8,...) yields a good scale for story point sizing because it forces people to recognize that as story sizes get bigger, it is harder to be precise about estimates.

## EASY / MEDIUM / HARD

The easiest way of estimating relative size is just to use easy, medium, and hard as imprecise quantifiers.

## VELOCITY

Velocity is the number of story points the team completes in an iteration. Measuring planned and actual velocity lets you understand the pace of software development and project how much work can be done by a team in a finite amount of time.

## T-SHIRT SIZE

One way of simplifying sizing is to think about stories as having the same size scale as T-Shirts: small, medium, large, and extra large.



# THURSDAY: SIZING SCHEMES

T- SHIRT				FIBONACCI				EASY	MEDIUM	HARD	EPIC	
								EASY	MEDIUM	HARD	EPIC	1.
								EASY	MEDIUM	HARD	EPIC	2.
								EASY	MEDIUM	HARD	EPIC	3.
								EASY	MEDIUM	HARD	EPIC	4.
								EASY	MEDIUM	HARD	EPIC	5.
								EASY	MEDIUM	HARD	EPIC	6.
								EASY	MEDIUM	HARD	EPIC	7.
								EASY	MEDIUM	HARD	EPIC	8.
								EASY	MEDIUM	HARD	EPIC	9.
								EASY	MEDIUM	HARD	EPIC	10.
								EASY	MEDIUM	HARD	EPIC	11.
								EASY	MEDIUM	HARD	EPIC	12.
								EASY	MEDIUM	HARD	EPIC	13.
								EASY	MEDIUM	HARD	EPIC	14.
								EASY	MEDIUM	HARD	EPIC	15.
								EASY	MEDIUM	HARD	EPIC	16.
								EASY	MEDIUM	HARD	EPIC	17.
								EASY	MEDIUM	HARD	EPIC	18.
								EASY	MEDIUM	HARD	EPIC	19.
								EASY	MEDIUM	HARD	EPIC	20.
								EASY	MEDIUM	HARD	EPIC	21.
								EASY	MEDIUM	HARD	EPIC	22.
								EASY	MEDIUM	HARD	EPIC	23.
								EASY	MEDIUM	HARD	EPIC	24.
								EASY	MEDIUM	HARD	EPIC	25.

**Instructions:** *Pick an estimation scheme from those listed above, then use that column to size the user stories. Remember that only those responsible for actually building the software should assign sizes. Stories that you can't estimate now because you don't know enough should be sized as epics.*

## THURSDAY: BUSINESS VALUE WEIGHTING

Business value weight reflects the voice of the customer. Adding business value weight helps prioritize work and delivery milestones based on actual custom commitments and features most directly tied to revenue.

### OPPORTUNITY WEIGHT

This is a specific dollar amount tied to a contracted sale or renewal effort.

### REVENUE WEIGHT

More abstract than opportunity weight, revenue weight is tied more to a percentage gross revenue target which is set by the business for a defined feature set.

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**Instructions:** *Consider the weighting schemes above and pick the one that is most relevant to your application. Then use that scheme to evaluate the relative business value options to the right for each user story. Try to assign no more than 1/6 of the total stories as the highest value category, and no more than 1/3 as the next highest value. This approach will help you prioritize the most important stories.*

# THURSDAY: BUSINESS VALUE WEIGHTING

\$ WEIGHTING

## CUSTOMER EXPERIENCE WEIGHT

As opposed to feature development, customer experience (CX) weighting refers to the impact of workflow and productivity enhancements on the overall customer experience. CX is typically tracked against metrics like conversion, subscription renewal, upsell, and cross-sell.

## FEATURE WEIGHT

Typically identified through the success of a competitor, feature weighting identifies a glaring hole in the current product and can be quantified by lost sales to competitors directly related to the existence of the feature.

\$	\$	\$	1.
\$	\$	\$	2.
\$	\$	\$	3.
\$	\$	\$	4.
\$	\$	\$	5.
\$	\$	\$	6.
\$	\$	\$	7.
\$	\$	\$	8.
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\$	\$	\$	17.
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\$	\$	\$	19.
\$	\$	\$	20.
\$	\$	\$	21.
\$	\$	\$	22.
\$	\$	\$	23.
\$	\$	\$	24.
\$	\$	\$	25.

# FRIDAY: CONSTRAINTS

## HEALTHY CONSTRAINTS:

Healthy constraints are part of every software effort. There is an old adage that says two core constraints can remain fixed if one is flexible.

When considering time, cost, and quality, it is beneficial to have an honest assessment of where the flexibility exists in our effort.

Scope: Fixed | Firm | Flexible

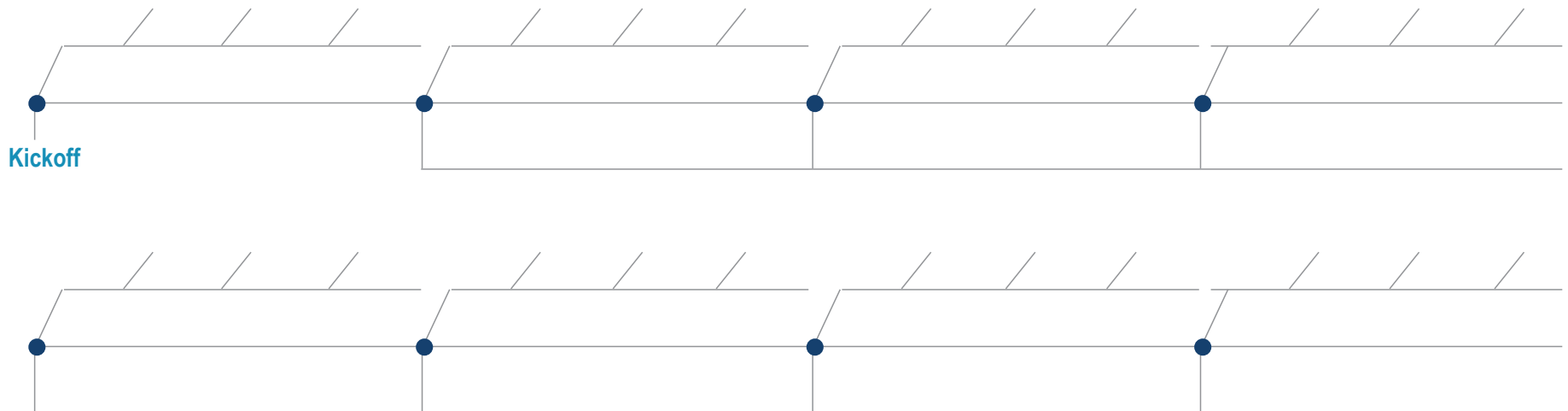
Resources: Fixed | Firm | Flexible

Schedule: Fixed | Firm | Flexible

## Note:

Mark only one of the items in the primary constraints list as 'FIXED', one as 'FIRM', and one as 'FLEXIBLE'.

## DELIVERY TIMELINE & CRITICAL DATES



**Instructions:** Fill in the most important milestones that come to mind in planning the product release. Think about the weight and the frequency of individual iterations. Enter the date above the timeline and give a name to each milestone under the timeline.

# FRIDAY: THEMES

## KEY FEATURE DEVELOPMENT

## KEY UX ENHANCEMENTS

## KEY SYSTEM AND THIRD PARTY INTEGRATIONS

## PERFORMANCE, LOAD, SCALABILITY, DEV OPS

**Instructions:** *Project themes are helpful in planning release iterations and key delivery milestones. Identifying themes keeps the 'big picture' in mind and prevents the harder work from being avoided until the end of the release.*

**Example:** performance and load testing are important in any app development, but are of particular concern when a massive user crush is expected.

# FRIDAY: PEOPLE

## ACCEPTANCE FOCUSED

BUSINESS ACCEPTANCE	INTERNAL	EXTERNAL	USER ACCEPTANCE	INTERNAL	EXTERNAL
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

REVIEW FREQUENCY

☐ WEEKLY   ☐ BI - WEEKLY   ☐ MONTHLY   ☐ QUARTERLY   ☐ AD - HOC

REVIEW FREQUENCY

☐ WEEKLY   ☐ BI - WEEKLY   ☐ MONTHLY   ☐ QUARTERLY   ☐ AD - HOC

**Instructions:** Identify who needs to be involved throughout the development cycle to accept that features are built as expected, to give guidance and feedback, and to validate assumptions. Describe the type and frequency of reviews you anticipate having, for example, a user acceptance test (UAT) or release retrospective.

# FRIDAY: PEOPLE, TOOLS & INFRASTRUCTURE

## DELIVERY FOCUSED

PRODUCT OWNER

SCRUM MASTER

CHIEF ARCHITECT

UX LEAD

DEV OPS

QA LEAD

**Instructions:** *Identify the key roles on the delivery team. It may be the case that these people are not known at this stage. Try to identify people who could take responsibility for driving different areas of the product development effort. The earlier you can identify the main point of contact for each role, the sooner you can identify cross project dependencies affecting your delivery timeline.*

# FRIDAY: MANAGEMENT & COLLABORATION TOOLS

## COLLABORATION

## TASKING

## DESIGN & PROTOTYPING

## ANALYTICS

Google Drive  
Dropbox  
Confluence Wiki  
SharePoint  
Jive  
HipChat  
Skype  
Campfire  
GoToMeeting  
WebEx

JIRA  
Pivotal Tracker  
VersionOne  
Rally  
Microsoft TFS  
TeamForge  
Redmine

UXPin  
Balsamiq  
Omnigraffle  
Visio  
Codiqa  
Sencha Architect

KISSMetrics  
Google Analytics  
New Relic  
Comscore  
Splunk  
Webtrends  
Crazy Egg

**Instructions:** *Identify your current tools AND identify opportunities to improve communication, collaboration, and coordination by improving logistical hurdles in the supporting tool chain.*



# FRIDAY: DEVELOPMENT & INFRASTRUCTURE TOOLS

## QA

## VERSION CONTROL

## DEVELOPMENT

## INFRASTRUCTURE

xUnit  
Cucumber  
Selenium  
JMeter  
Sauce Labs  
Neustar Website Load Testing  
Test Hardware (phones, tablets)

Git  
Github  
Gitorious  
Stash  
Subversion  
Microsoft TFS  
Mercurial  
Perforce

Eclipse  
Visual Studio  
IntelliJ  
RubyMine  
Sublime  
Developer Hardware  
Ruby on Rails  
NodeJS

AWS  
Rackspace  
Colo  
Mainframe  
Heroku  
Joyent  
VPN  
Chef / Puppet  
Jenkins

**Instructions:** *Pick candidates for the tools and infrastructure to support the product development effort.*

# ACKNOWLEDGEMENTS



Patrick Sheridan  
CEO

🐦 sheridap

Patrick Sheridan is co-founder and CEO of Modus Create, Inc.

Pat is an active mentor in the DC startup community and co-organizer of NoVa.JS and NYC.JS meetups. He is a 2011 graduate of MindShare, received his MBA from Georgetown University, and holds a BFA from the Corcoran College of Art and Design.



Richard Bullington-McGuire  
COO

🐦 obscurerichard

Richard Bullington-McGuire is the COO of Modus Create, Inc.

Richard is a serial entrepreneur and versatile technologist with experience in agile processes, software development, system architecture, mobile computing, for-profit and non-profit start-up companies, and design. He is a member of both IEEE and ACM.



Geoff Bishop  
Principal

🐦 gabishop

Geoff Bishop is the Vice President, Products at Modus Create, Inc.

Geoff has served in product leadership roles at AOL and PBS, with a history of bringing products to market on emerging and disruptive digital platforms.



Modus Create is a multi-disciplinary team of engineers, experience designers, and managers. We help our clients envision what is possible with emerging technologies. We help clients realize their product vision, and build in-house development capabilities. We are an Official Sencha Partner and recognized thought leaders in the community.

We're passionate about our craft, and love what we do everyday.



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