

Work Smarter, not Harder

Start building things you know are Good Ideas™



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About Me

Psychology major switched to B.A. in International Business.

Self-taught - hobbyist techie to **problem solving** professional.

9 years in ecosystem. Accidental Architect @ Colliers => Independent Consultant @ Google.
Startups, big firm consultant, freelance, digital nomad, **tiny & large** enterprise teams.

Embraces both **business** and **technical** aspects of the platform.

20% Business Analyst / Scrum Master / Product Owner.

80% Architect / Developer.

Soft skills I use on the daily

Beginner

Active Translations

Being able to **turn techno-babble into layman's terms** while still making your point or collecting information.

Business stakeholders will like working with you (that's pretty important).

Be a listener

Everyone coming to you with a problem is trying to solve something.

Listen, acknowledge, and even if you disagree, you're **looking for what they need** (even if they don't know yet).

Be transparent

Voice concerns, stress levels, what you can and can't do within your skills and knowledge.

Only two outcomes come from this. Your team hears you and **supports you** OR your team hears you and they **don't support you**.

Beginner+

Document your bandwidth

If you don't have a backlog, start it now.

Visual representation (spreadsheets, sticky notes, JIRA etc) of workload helps stakeholders understand bandwidth, and thus priority.

Is your work item **more important than** what you're currently working on? Ask that, but **with tact**.

Turn taking

During discussions, take the lead and **have everyone add their thoughts** to the current topic.

Be open. Even if it sounds like a bad idea, the new perspective might allow for a mix of ideas or **new perspectives** altogether.

Facilitating this makes people naturally inclined to **include you** in conversations because you are a **"harmonizer"**.

Medium

Empathy

We're all human. And busy. And not everyone is an expert at building solutions on Salesforce.

Be **patient**, understand where your users/stakeholders are coming from and allow them **their point of view**. Even if you disagree, **don't cut them off**.

Tact

There are no stupid questions. Maybe some from ignorance. Maybe some from misunderstanding.

Disagree with tact. Calmly explain why something might be a Bad Idea™.

Humility

We all make mistakes. I'm sure you do too. I sure do.

Admit it, then fix it. Or, correct your knowledge. Hubris makes you really hard to work with. Don't let pride get in your way.

Medium+

Keep conversations focused

Business is complicated. Real life doesn't work like in Trailhead modules (sadly).

When topics begin to go on tangent, **gentle reminders** about what the **current goal / action item** at hand goes a long way to help sync everyone partaking

See the xy problem

We all get caught up in solutioning. Sometimes we have to ask ourselves:

"What is the original problem we're trying to solve"?

This is related to keeping focus, but this also helps pivot the conversation on rallying around the **original problem**, not the **attempted solution**.

Advanced

Solution-on-the-fly

This is a blend of **active translation** with coming up with **candidate** solutions while in any discussion (whiteboard, meeting, walking to lunch etc).

Being able to effectively communicate

Negotiation

Don't want to work on stuff that is destined for failure?

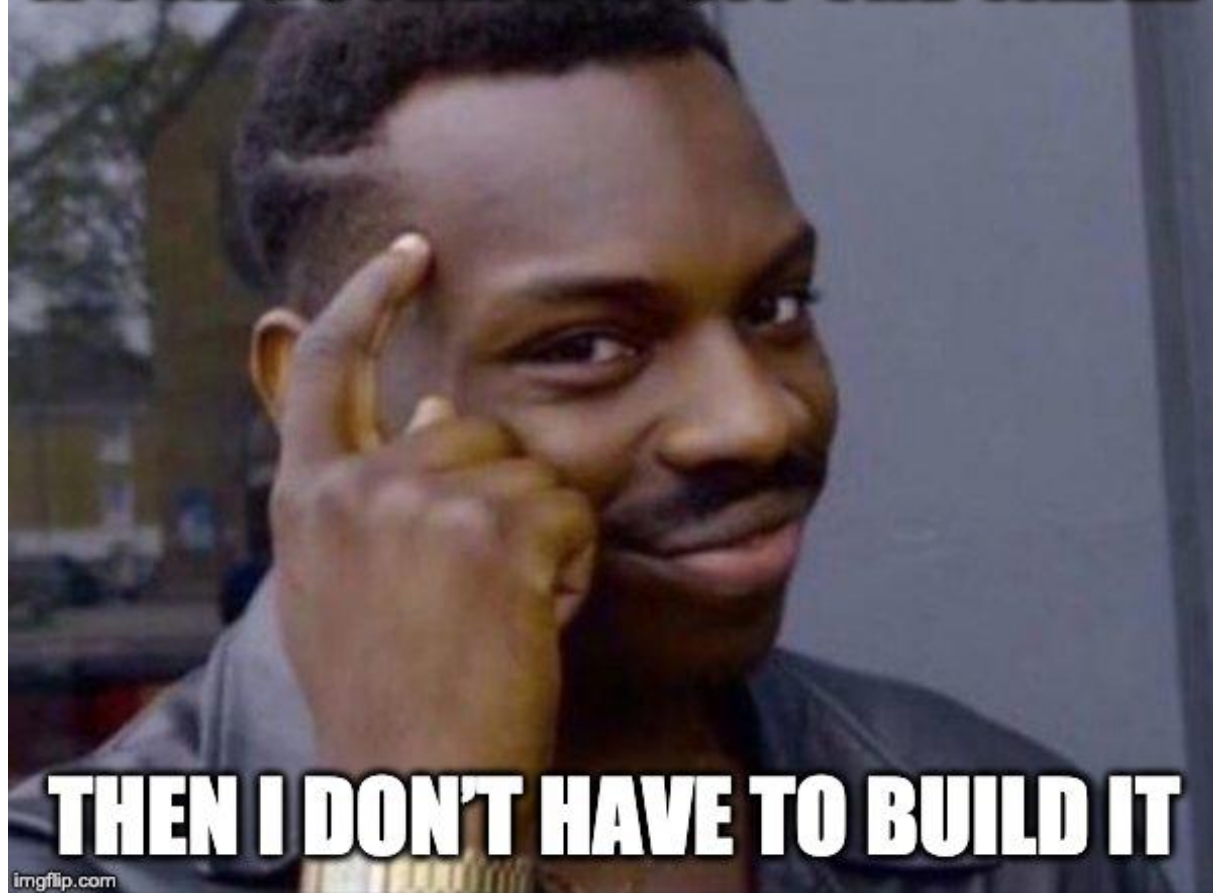
Do something about it! Head it off by **negotiating it off the table** before it becomes a trainwreck (more on negotiation later).

Establishing trade-off

However, sometimes it just has to be done.

In these situations, being able to weigh the lesser of two evils and communicating the **LOE, ROI and risks in layman's terms** will steer the project towards success

IF I NEGOTIATE IT OFF THE TABLE



THEN I DON'T HAVE TO BUILD IT

Bonus: The User Experience

Pick a design ethos

Not a soft skill, per se, but having a well grounded **team-oriented** approach to solution design is going to be key.

Consistency is key. As more modules are built out, keeping the same user experience consistent makes learning every subsequent module easier.

For in-house admins & devs, **SLDS** is a great design pattern to align to.

Taking their perspective

Clicks matter! Positioning matters!

Take a brand **new user**, no knowledge of the system. **Could they navigate your solution?** Could they navigate your ecosystem?

KISS (for the user)

Err on the side of **less complexity for the User Interface.**

If it means more code to enable **fewer user inputs / clicks** to perform a repetitive task...

It's worth **investigating the trade off** between User Experience and code complexity/maintainability.



Anatomy of a project

Project flow

- 1 Business Ideation / Strategy
- 2 **Codify requirements into a document**
- 3 **Negotiation** / priority on initial requirements
- 4 Chunk requirements into modules
- 5 Create **wireframes** and **prototypes** on modules
- 6 **Iterate and negotiate** on feedback
- 7 Build modules to MVP (**breadth and then depth**)
- 8 **Iterate and negotiate** on feedback
- 9 UAT and **final feedback**

Slice of my week during a project

	TUE 22	WED 23	THU 24	FRI 25
GMT-07				
9 AM	Backlog Grooming, 9am			
	Standup, 9:30am	Standup, Review & Get Feedback, 9:30am	Standup, Review & Identify Gaps, 9:30am	Standup, Review & Get Feedback, 9:30am
10 AM	Whiteboard & Review BRD, 10am	Whiteboard & Option Negotiation, 10am	Negotiate Design Gap Solution(s) 10 – 11am	Whiteboard Final MVP Design, 10am
	Divvy work into EPICs / Modules, 10:30am	Whiteboard Reporting Goals, 10:30am		Append / Clarify BRD & Get Buy-in 10:30 – 11:30am
11 AM	Mock 11am – 2:30pm	Whiteboard User Experience details 11am – 12pm	Socialize readout in backlog, 11am	
12 PM		Turn Mock into Prototype 12 – 4:30pm	Prototyping 11:30am – 5pm	Prototype to MVP 11:30am – 5pm
1 PM				
2 PM				
	Gotcha & Negotiation, 2:30pm			
3 PM	Architectural Decision, 3pm			
	Socialize readout in backlog, 3:30pm			
4 PM	Wrap up mocks 4 – 5pm	Sanity Check Prototype, 4:30pm		
5 PM				



So what?

Consider the following “imaginary” scenario

Complicated requirements

This is the **first you’re hearing about this**. Looks like it will take **a lot of work** (trust your gut).

If only you had been **involved** in the discussions you could have **steered** this ship away from the iceberg.

Astronomical LOE

Yep, **after sizing** and discovery, it’s **full custom**.

Can’t even use base components because the design doesn’t align to anything in SLDS.

It doesn’t look and feel like Salesforce (maybe that’s the point though!)

Complicated solution

Tight delivery timelines, complicated requirements... It’s **spaghetti all the way** down.

Sure it (mostly) works, but why is it so *much* code?

The more code the more points of failure.

**OH, IT'S FRAGILE
AND HARD TO MAINTAIN?**

BUT EVERYTHING IS TO SPEC

Now, the following “imaginary” scenario

Temper ambitions with Salesforce Feasibility

You were involved in business ideation or a draft BRD was socialized early enough and you saw it.

Scanning the BRD, you **tactfully** present your points on where certain asks have **high tradeoffs** (e.g. high LOE, low ROI).

Remembering the **xy problem**, certain asks just don't align to it - so they get deprioritized.

Priority? Order? No way!

Draft BRD is now more realistic in both goals and priorities.

A second, maybe third round, gathering more detailed **tradeoffs** is now socialized.

A chunk of the modules may **align to Salesforce OOTB** (flexipages instead of custom SPAs, SLDS instead of custom CSS).

Good thing we built it lightweight

Because business, sometimes what you build doesn't get used the way you think it does.

It's nice that **OOTB** tools helped bridge some gaps and now the business is more sure about what should happen **post-mvp**.

Good thing you didn't **invest** all that effort in **full custom** code!



How to lead meetings

Standups are for

Pulse checks

Raise concerns to fellow teammates / product owners / SMEs.

If there are no updates, that itself is an update (i.e. all is well).

Identifying and Removing blockers

Applying the correct resources to keep the sprint velocity up is always key.

Chop down those problems **one step at a time**.

Defining Daily Tasks

Just so your team knows **which part(s) of the project** is being worked on **today**.

This can head off collaboration issues or get your team to leave you alone if it's a complicated module.

Meetings are for

Achieving a goal

What do you want to get out of this meeting?

Simple. Powerful. Keep on topic. Topics during meetings should **always** answer that question.

Strategizing, Brainstorming, Readouts etc

Swarming problems, ideating, and readouts are all goal oriented to collect or pass information to a group of people.

No Agenda/Goal? No meeting.

Defining Action Items

There's always things TODO, even if it's not you.

Identify it, **document** it, **assign** it and **follow up** on it.



Wrap-up



These slides can be grabbed here



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