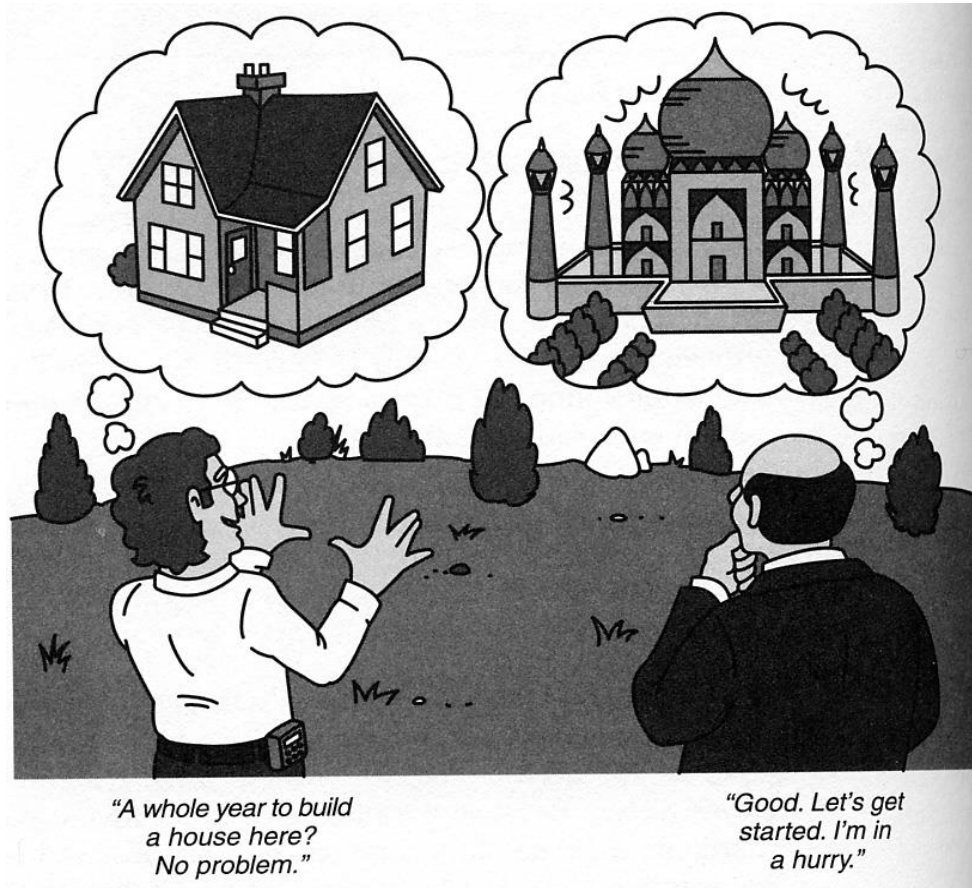


Innovation Lab 1

**Techniques, tools and examples
for the pre-project phase**

The illusion of communication



Source: Steve McConnell

Do our clients really know the truth about their needs? Or do they only **think** that they know?

Did we **understand** what they need?

Did we specify everything as detailed as needed? And what does „everything“ mean in this context?

Processes? System borders? Technology issues,...?

Do we both talk about the same **vision**?

Do we talk about the same **mission**?

Finding out the truth and building up trust

- Performing an “ORD-Check” means to **ask the right questions!**
 - Structure your conversation - e.g., using Khalsa’s quick-list technique.
 - **No Accepting!** Don’t accept self diagnosis by your clients – make up your own opinion!
 - **No Telling!** Move off preconceived solutions! You are the expert, but don’t talk your client into something. Be open minded when listening to your clients needs!
 - **No Guessing!**



WHAT DO YOU READ?

HUMPING TO CONCLUSIONS



Source: Mike Rother

Gotcha!?

IUMRING TQ GQNGIUSIQNS



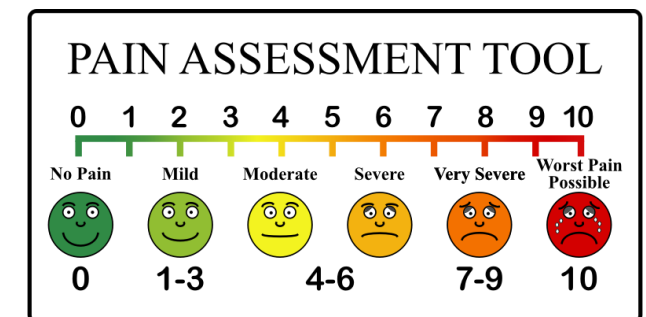
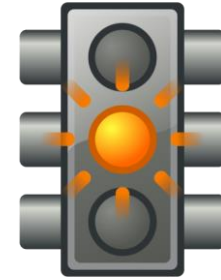
**Our brain automatically
fills in blanks, instead of
saying to us “*Sorry, I
don’t know yet*”**

Source: Mike Rother

No Guessing !

Watch out for yellow and red lights!

- Yellow means stop! It does not mean speed up!
 - It is better to stop and rethink the entire approach than running a yellow light!
 - To restart the (pre-)project after a yellow or red light:
Ask the client if he/she/they are confident to switch from red to green again!
 - If you see different ways to get rid of a “stuck red-light situation”, let the client choose the approach to solving the problem.
- Red does not mean failure!
 - Failure would mean not seeing yellow and red lights or ignoring them!
 - The later you talk about awkward issues the more they will hurt...



Talking about money...and time...

- Talk about the budget right away!
 - It is no problem to do so if you explain why!
 - Be prepared for “deescalating” using the right answers if your client hyperventilates over your question.
 - E.g., “Other clients who bought a solution for a comparable scope spent about € 100.000 - € 200.000. I just wanted to check if we talk about a similar expectation on your side, or if this is something we should discuss right now before me move on...”
- Talk about the expected date of delivery!
 - Will you be able to meet relevant milestones and deadlines, or is there a yellow or red light showing up right away?
- Find out if your and your client’s expectations are within an overlapping range of budget and schedule.
 - If not, don’t waste time into the next ORDER phases while you will never have a chance to win this contract!

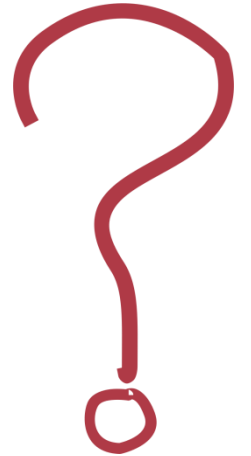


Now, how do we „start“?

- First: **Find out the „real need“** behind your client's description of the „pain or gain“
 - Check if there is any „hidden agenda“!
 - No Accepting - No Telling – No Guessing!
- A „face-to-face“-meeting is a very good choice for clarifying the main goals of the planned project.
 - Use techniques like the „quick-list“ to structure the conversation!
- Ask questions and listen open minded, don't guess!
- Find out the answers for all questions of the phases O-R-D!
- Then decide if the phase „Exact Solution“ makes sense or if the opportunity is not suitable for you and your team / company.

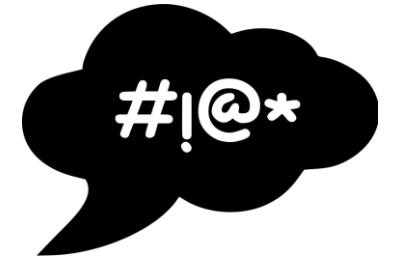
Exciting questions...part I

- From the field of Systemic Consulting you can adopt some exciting types of **questions which bring more dynamic into your meetings and workshops**:
 - **Whose problem** is this? Who will be affected?
(...relevant environments...)
 - **How do others see the problem** / need / scope?
(...partiality; who will be winners or losers?)
 - **Why now?**
(...hidden deadlines...)
 - **Why did you ask me / us?**
(...did somebody recommend us; how did you find us?...)
 - **Which approaches** of solving your problem **did you try out before?**
(...avoid “more of the same”!)
 - **How does the problem appear?**
(...when, who, how, when more / when less...)



Exciting questions...part II

- Types of **questions which bring even more dynamic** into your meetings and workshops (called “paradox questions”):
 - **What's all that in aid of? Whom does problem help, what does it support?**
(...hidden players...hidden enemies...expected backlash...)
 - **Who benefits most because the problem does exist?**
 - What can I do to **intensify** or **emphasize the problem?** (“scaling”)
 - What are the “**non-goals**” of the project?
 - **Which questions may not be asked?**



Always bear in mind to check if there might be a hidden agenda behind to opportunity?
This will be guessing first, but it's ok as long as you ask questions to proof or falsify your assumptions.

Do you understand why guessing is a bad idea?

What are you client's goals – and „who“ is your client? Does the client have the same goals as the later users of the software? What is the budget? When do we have to be finished – and what does “finished” mean for the current project? Why must it be finished exactly then? What happens if we can not fulfill that schedule? Why did they ask us? Why now? How will they decide who wins the order / project? Did they also ask others? If yes, may we know whom they asked? Do we know these competitors? When will they decide? Who should we be able to talk to during the pre-project on the client's side? Are there any constraints about the technology? Do we have to cooperate with other project partners? Any interfaces which must be interconnected? Can they tell us the requirements on a top level already or maybe also on a detailed level? Did the client already prioritize which features are most important?

Etc. etc. etc.

Mahan Khalsa's „Quick List“ Technique

- Meet with your client(s) and use a flipchart!
- Make a quick list!
 - Make sure the quick list is complete!
 - Which issues are most important?
 - Go into detail!
- Summarize!
- Prioritize!

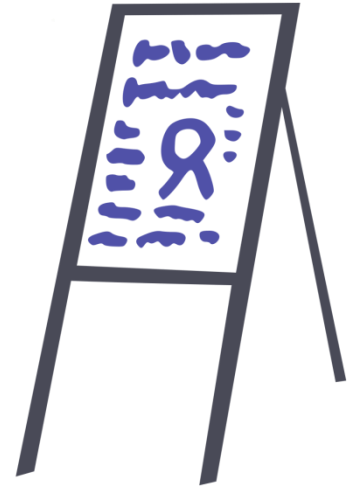


„Structure the conversation“ means
„leading the dance!“



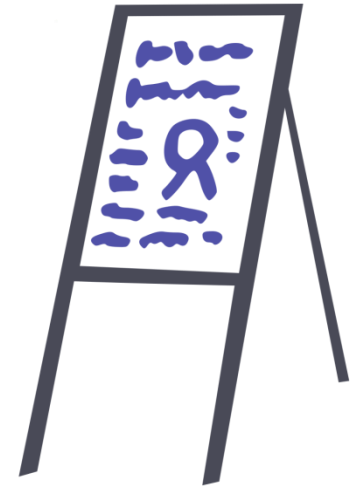
Mahan Khalsa's „Quick List“: some hints...

- Structure the conversation:
 - The client is the expert for the problem.
 - We are the experts for identifying what the client really needs and how to find that out (and sometimes we are also the experts for the technical solution).
 - Ask a few (1-2) open questions and then listen: be prepared for discovering “messages between the lines” and for interpreting gestures!
- Start on a top level first. Later go into detail.
 - Find out the “key issues” first. Don’t get stuck at certain problems!
 - Write down key words! Like the chapter headings of a book.



Mahan Khalsa's „Quick List“: some hints...

- “What Else?!”
 - Did we forget something (important)?
 - Search for “pain & gain”!
 - Search for a problem or result!
 - And always ask if something is still missing on the quick list.
- When the list is completed:
 - Go into detail: Collect evidence & impact!
 - Always summarize the learnings and findings.
- Prioritize what matters most (MVP, MLP)!



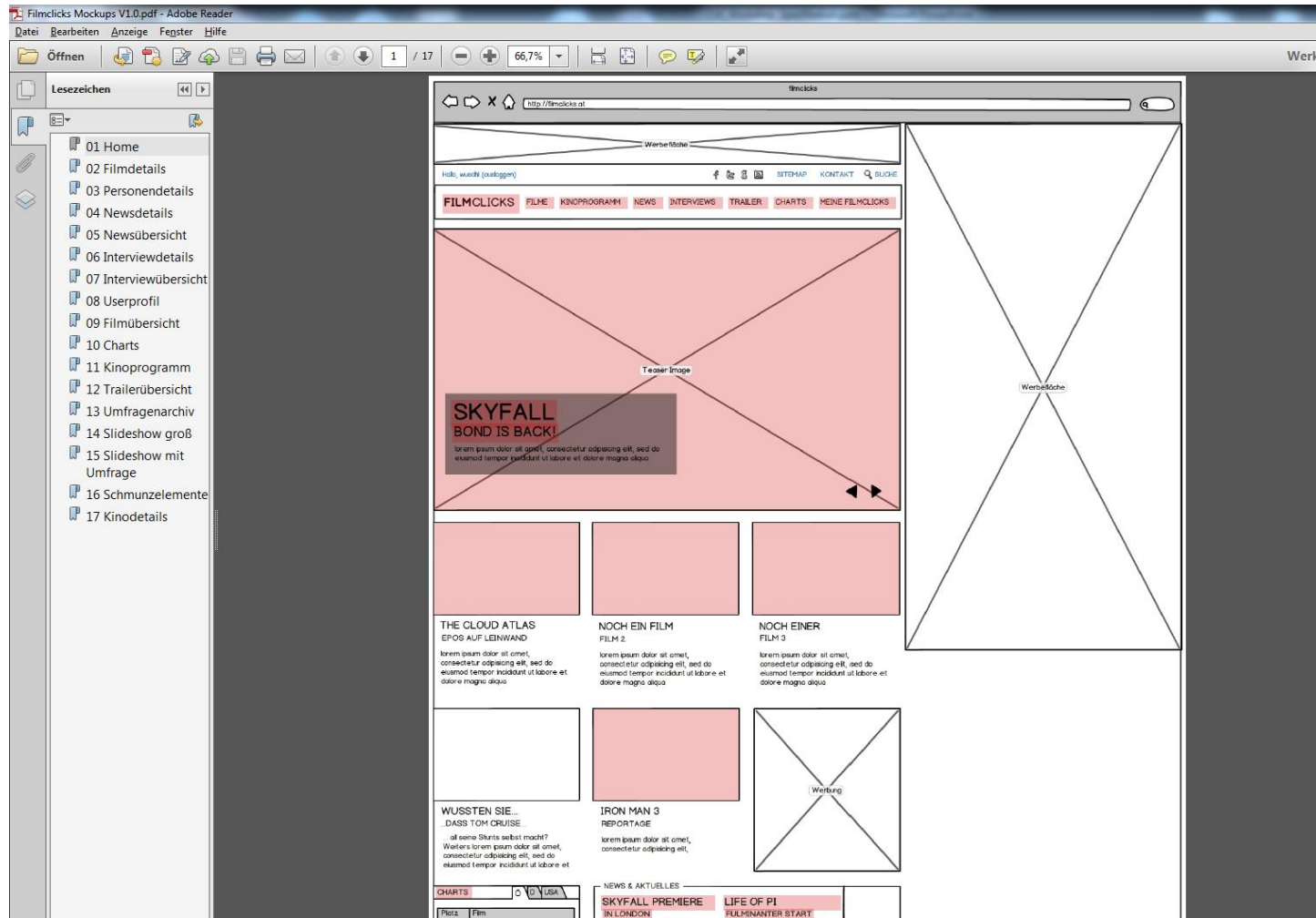
Mahan Khalsa's „Quick List“: some hints...

- Be aware that sometimes your client(s) will tell you their most important issues and needs at the end of the conversation!
 - Sometimes you will get a very important info only because you asked “What else?” 20 times 😊!
 - When you are lazy with asking the right questions, you might miss the most important issue!
- Don't waste too much time talking about comfortable topics instead of focusing on the really important stuff!

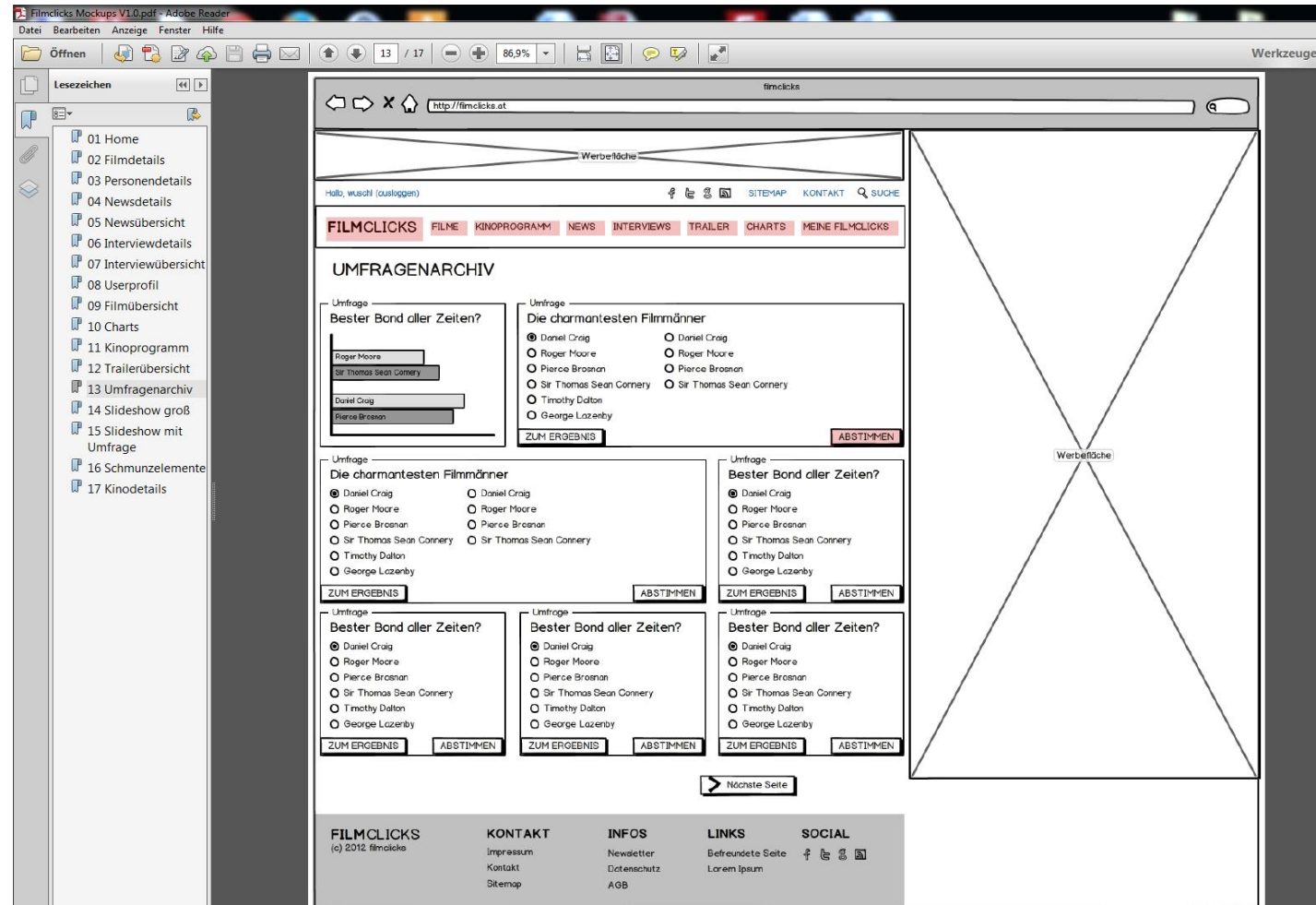


Mockups & Screen Prototyping

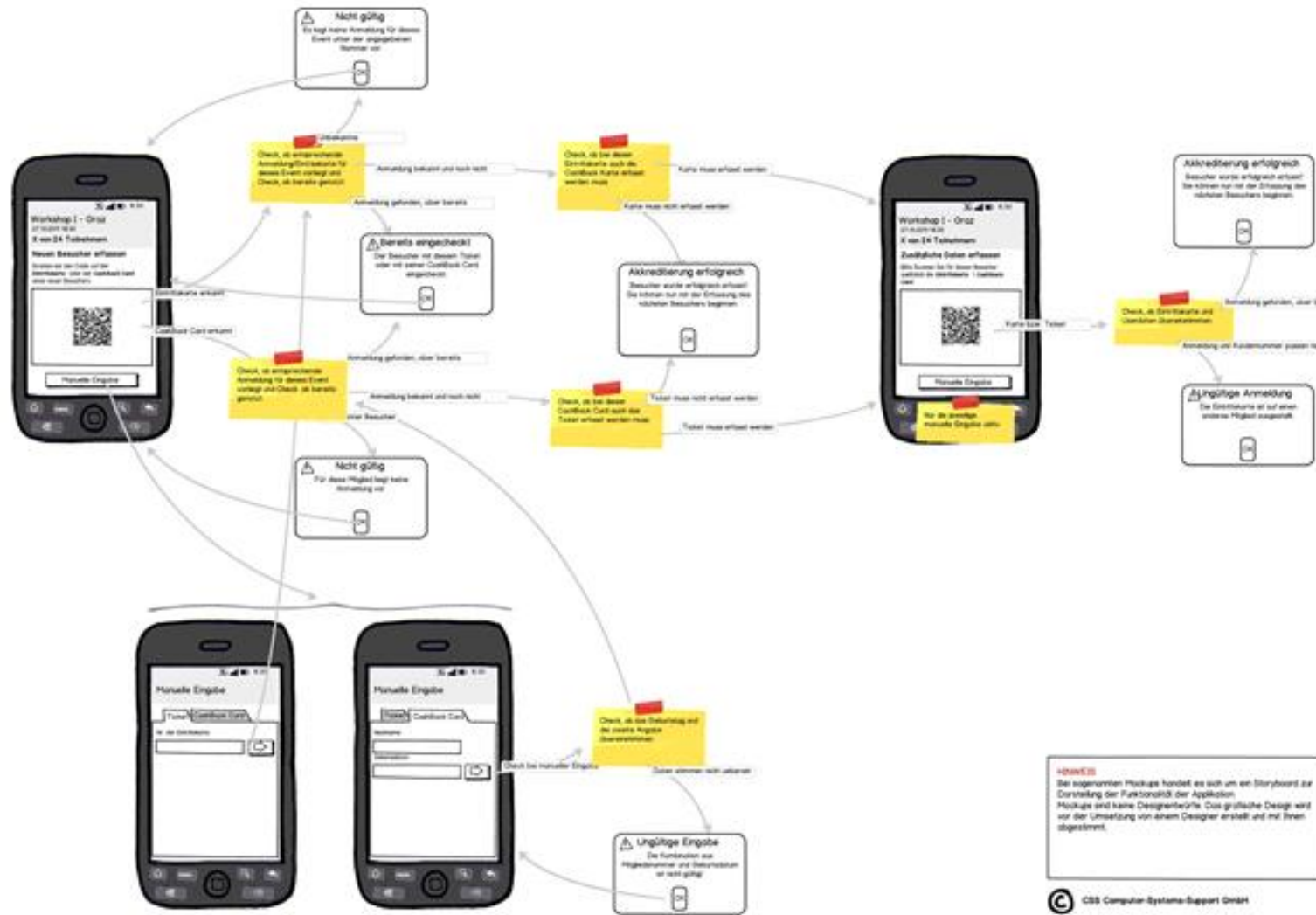
Mockups: Avoiding misunderstandings...



used tool for this example: balsamiq mockup



used tool for this example: balsamiq mockup



used tool for this example: balsamiq mockup



Writing User Stories for building a Backlog

Syntax of a correctly written User Story

As a <type of user>, I want <some goal> so that <some reason>.

Sample for "Search and find content quickly"

„As a website visitor, I want to find information about recent used car special offers easily so I can look at my future dream car at home.“

Exaples for Epics and User Stories

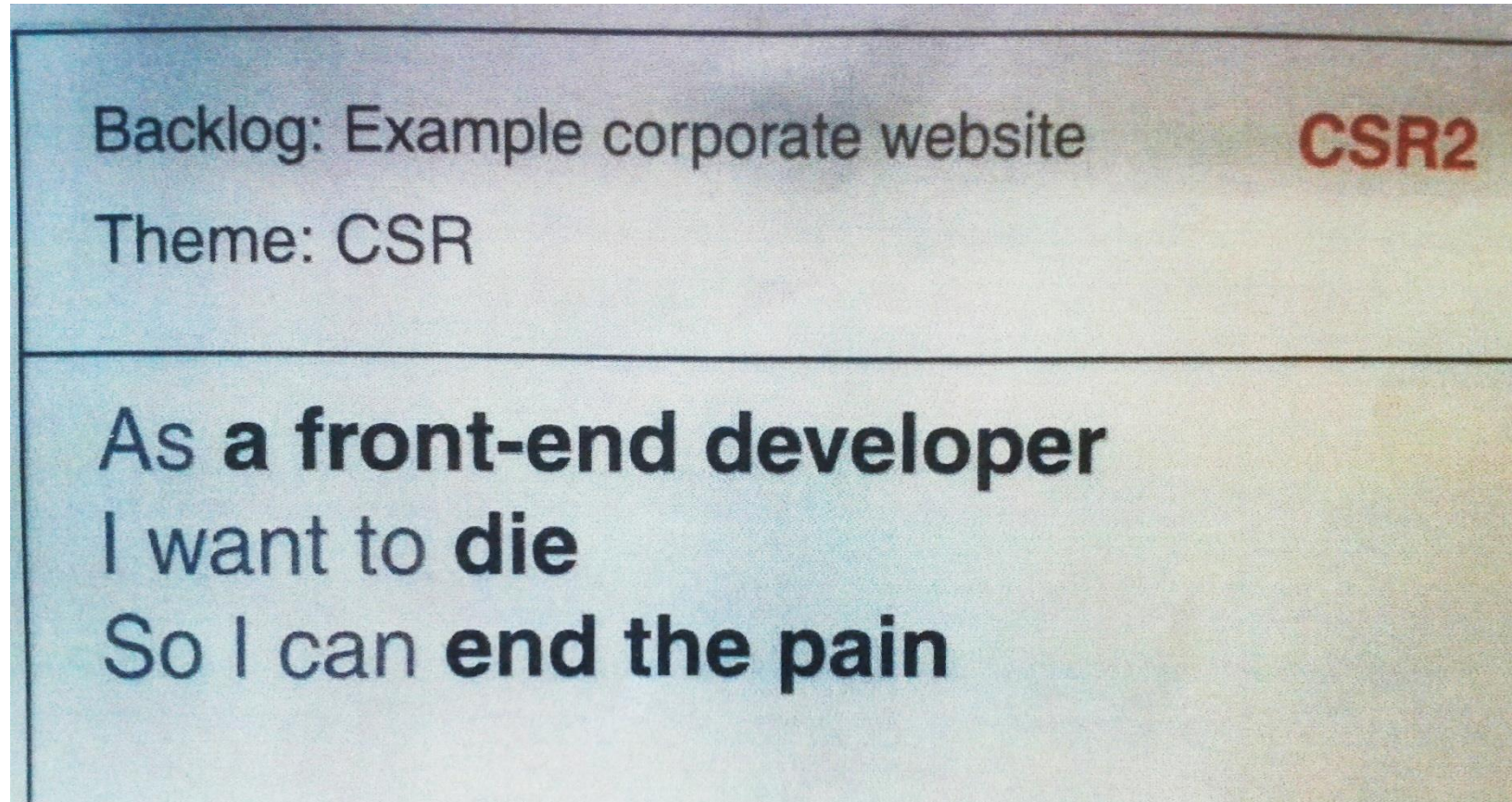
Sample for **Corporate Phone Book** (Epic no1)

„As an ACME employee, I want to have access to all contact data of my international coworkers within one Corporate Phone Book located in the ACME intranet.“

Sample for **Corporate Phone Book**
(e.g. User Story no17 of Epic no1)

„As an ACME employee, I want to find the mail address of one coworker by name search within the Corporate ACME Phone Book so I can contact her.“

Don't take this one for serious...



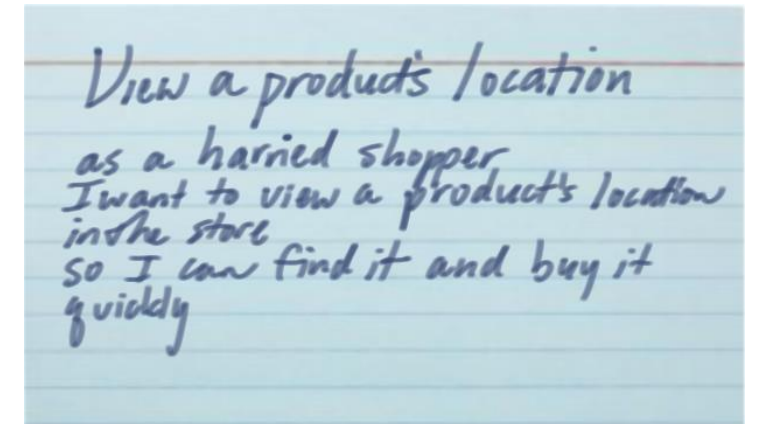
© <https://www.pinterest.com/pin/383228249515195485/> Murat Purc

Stories gain detail over time

- Start with a title
- Add a concise description often using this useful template:
- As a [type of user]
- I want to [perform some task]
- so that I can [reach some goal]
- Add other relevant notes, specifications, or sketches
- Before building software write acceptance criteria (how do we know when we're done?)



Remember –
that's just a thinking
template. No need to write
all your stories this way.



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Product owners prioritize stories into a backlog

- A collection of stories for a software product is referred to as the product backlog
- The backlog is prioritized such that the most valuable items are highest



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Story Mapping

- Story Mapping is an approach to organizing and prioritizing user stories first described by Jeff Patton.
- Unlike typical user story backlogs, so called Story Maps...
 - make visible the workflow or value chain,
 - show the relationships of larger stories to their child stories,
 - help confirm the completeness of your backlog,
 - provide a useful context for prioritization,
 - Plan releases in complete and valuable slices of functionality.
- If you are interested in using this technique, please see Jeff Patton`s website for more information: <https://www.jpattonassociates.com/> and <https://www.jpattonassociates.com/user-story-mapping/>

Story Maps

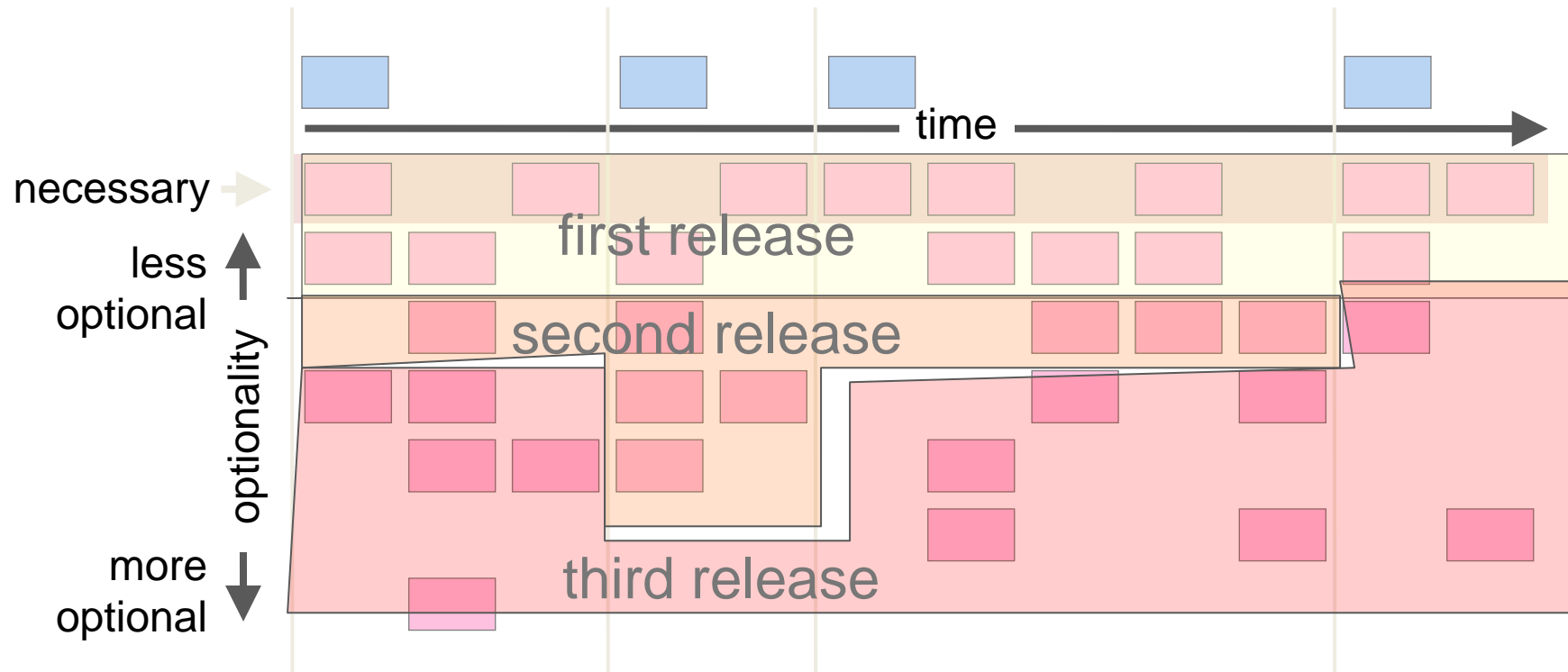
- A user story map contains two important anatomical features:
 - The **backbone** of the application is the list of essential activities the application supports.
 - The **walking skeleton** represents the software we build that supports the least number of necessary tasks across the full span of user experience.



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Story Maps are organized by necessity

- Choose coherent groups of features that consider the span of business functionality and user activities.
- Support all necessary activities with the first release.
- Improve activity support and add additional activities with subsequent releases.



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Credentials

- © ORDER Model: Mahan Khalsa; Book: Let's Get Real or Let's Not Play - Transforming the Buyer/Seller Relationship
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