International Institute of Business Analysis™

IIBA A.B.C Series - Discover to Deliver: Agile Product Planning and Analysis

Presenters: Mary Gorman and Ellen Gottesdiener, EBG Consulting

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Maureen: Welcome to IIBA's ABC Series, Authors, Books, and Conversations. I'm very excited to have Mary Gorman and Ellen Gotensteiner from EBG Consulting. They're going to be talking about their book, *Discover to Deliver: Agile Product Planning and Analysis*. It's a very hot topic, and this is their focus on business analysts.

IIBA is a not for profit professional association dedicated to the profession of business analysis, the development of standards around business analysis, and the certification of its practitioners.

The ABC series promotes our online library, which is a member's only benefit and has hundreds of books dedicated not only to business analysis, but also to other professional development topics like communication, influence, project management, software development, and other books dedicated to business and business analysis.

Today, just some light housekeeping. I'll get to introductions. I'll be taking your questions as you type them into the questions box. Those will be answered at the end of the session, and then we'll get to the presentation.

I'm really excited about having Mary and Ellen presenting with us today. Mary is the Vice President of Quality and Delivery at EBG Consulting and has extensive knowledge of not only a business analyst, but a facilitator, coach, and trainer. She was instrumental in developing the IIBA Business Analysis *Body of Knowledge*, and the certification exam.

Ellen is the Founder and Principle of EBG Consulting and is internationally recognized as a facilitator and coach. She is an expert in agile and lean, and traditional requirements. As you know, Mary and Ellen are the co-authors of *Discover to Deliver: Agile Product Planning* *and Analysis*, and the *Requirements by Collaboration* and the *Software Requirements Memory Jogger*.

I'm so excited to have them. We had them present at the BBC Conference last year, and they got rave reviews.

I'm your host for today. I'm the Head of Learning and Development for IIBA. I have extensive experience in business analysis. My main focus is process, and I've worked in a number of different industries, but I'm very, very excited to be working for IIBA and helping to provide you with the information you need to develop your career.

Without further ado, don't forget. Type in your questions in the question box. We will be taking them up at the end of the session. I am now going to turn over my screen to Mary Gorman, who will be presenting.

Mary: Ellen, would you get started, please?

Ellen: Hi, everyone. I'd be happy to get started. We're thrilled to be here today, and to talk about our book, give you a little background.

On the next slide you'll see a picture of me. I was the one who was shorter in the prior picture. In the next picture you will see Mary.

Before we actually get started, we want to mention to the tweeters out there – if you tweet, use #DtoD for *Discover to Deliver*. There's our taglines. What we're going to do is we're going to do a book giveaway. We'll look at the Twitter stream throughout and for an hour after our webinar today. Mary and I will be available on the tweet stream to respond to any additional things that come up afterwards. With Maureen's help, one person will be selected from the tweet stream to win a book when we're done.

What we're going to cover with you today is first we're going to talk a little bit about our experience, which led us to writing the book. Then, we'll talk about the big concepts, the general book concepts from a big picture point of view. We want to then talk about some of the highlights in the book and then take your questions.

You may be wondering why did we write this book? What motivated us? It took us over three years, countless hours, three major releases, many iterations, many countries that we wrote the book in. We co-located as well as distributed.

What we did was took our experiences across a variety of organizations and industries, working with agile teams. I'm talking healthcare and pharma, scientific research, financial services, energy, cyber security, publishing, etcetera.

Before we get started, I just want to say something about the word agile. We're not going to spend time on what is agile and how it works, but generally speaking, when we use agile, we mean the family of practices for building software intensive products using iterative and incremental development.

Lean is also another term that's mixed in there, and that's the practice of focusing on customer value while minimizing waste. For our purposes today and in the book, we use agile as an umbrella term to incorporate both agile and lean.

We want to let you in on some truths. They're not so dirty, but they are very human; real things happening on teams transitioning to agile. What we have observed is really a plethora of issues and things that didn't work so well. What we want to do is focus on the big ones, beginning with analysis or inadequate analysis. Teams would start to deliver and realize that they didn't know what not to build, and some teams we saw were abandoning analysis completely in a pendulum swing to agile. They were trying to go so lightweight that they went no weight as far as agile went.

The other thing that we observed was that teams were wasting a lot of time planning and in meetings without having a good shared understanding of what they were going to build. The planning was taking too long, or the team started doing their work thinking they had sufficient information and they didn't.

Another frequent observation was these frazzled product champion; frazzled, overwhelmed, time pressured, over stressed. When we use the term product champion, what we mean is the person who makes decisions about what to build and when to build it. If you're familiar with the scrum method, the agile method scrum, that person is referred to generally as the product owner.

These poor people were struggling, trying to balance their strategic, product related responsibilities with their day to day, tactical responsibilities. They had to balance obtaining the voice of the customer, managing up, managing the portfolio, the roadmap, etcetera. Then, day to day, the team had many questions and they needed to participate in planning and demonstration and prototypes, looked at the work that was being completed, manage the backlog, which in agile terms is the baseline of requirements. Frazzled, frazzled people.

Another thing that we noticed were bulging backlogs; teams with monster, huge backlogs of requirements, often in the form of user stories, and these backlogs had every possible story or option for building the product. It was really weighting them down and sort of breaking the basket, and damaging the good eggs, if you will, the higher value work that needed to be done.

We also saw that some teams were acting according to their formal role. For example, some would write stories, some would test, some would develop. They didn't share any responsibilities and they also didn't share a way to communicate or understand product needs. A pattern that we sometimes observe is that teams were stuck and they were just blocked. They were unable to move forward, they were on hold, they were moving at a snail's pace, clogged.

This was interesting because even teams that we were working with that already had in house, so to speak, an agile product management tool that was supposed to be helping them stay organized and efficient, they were still getting clogged up and stuck.

Another thing we noticed was around estimates; estimates that were bigger than they thought. They might have estimated on the left, as you see in that picture, something smaller, but the work was much more than that. They were way off. This was an observation where a team had been already doing three or four iterations or time boxes of work.

Typically most of the teams that we work with are using two week iterations. Even after three or four of those, they still weren't able to stabilize their estimates. Really, an agile team should be able to do that after three or four iterations. Often it was because they didn't notice the complexity in the work they were doing around business rules or data details.

[reference point 0:10:06]

This contributes to the next observation that we have, is that traveling stories. A traveling story is one that was planned to be done in a given iteration or release but couldn't be. Many of you probably are familiar with what a story is. It's the product need expressed as a user goal. Many teams use that format as a user role – I need to so and so, so that some value. That's the canonical form for a user story.

Why were they travelling? Occasionally, but not frequently, it was because of unexpected technical issues, but more often it was because the stories were just too big to fit into their timeframes or there were undiscovered interfaces or regulations that had rules they forgot about, data dependencies, etcetera. Ultimately what was happening is these stories were traveling from release to release or iteration to iteration for additional analysis and planning.

We saw a bunch of oops. For example, we would hear during demos or prototypes something like this, an oops like, "Oh, that looks okay, but it's so slow," or, "You forgot about," or, "Woops, something wasn't legal. We missed some regulations, some business rules," or, "That's nice, but that's not really what the customer needed."

The worst thing was finding out that the teams were delivering fine, but not delivering the right thing. We don't have a silver bullet. There's nothing really like that sic symbol that you see there to summon help. What we have found is a set of principles and practices that do work, and that's what we want to share now.

What works well? Many of you might have heard of card conversation confirmation, which originated with Ron Jeffries and his co-authors when they talked about user stories as part of planning. We're going to borrow Ron's three Cs because we have found that agile product planning and analysis means attending to context conversation and collaboration, and I'm going to briefly share the underlying principles and then how we integrated them into our book, *Discover to Deliver*.

With regard to context, context defines the circumstances surrounding the product and all the conversation, all the discourse about it really counts. It must be shared. To deliver a great product, we need to know the end game. Where are we going? What is that roadmap leading to that vision, and what is the vision? What's the answer to the big why; why are we creating this product and by the way, who cares? Who are the stakeholders, as we call them, the product partners? What are the boundaries? What are the outcomes we seek?

We have found that building and sustaining a shared context matters a lot. Then, the next thing that we want to mention is around conversations; having shared language, specificity, and transparency. Good conversations are the basis of shared meaning, and the way we talk about the same thing is really crucial. We notice that having a visual focus and using walls for everyone to see was really helpful. Using visual models and symbols that transcend native languages or geography. We work globally, and there are many teams that have people who speak different languages. We often need visual languages, many times user stories are not enough. We need to mix in a variety of models, and that includes, of course, a shared glossary and a shared language.

When it comes to specificity, good conversations, well structured ones are clear and precise. Clarity and meaning really is enabled through specificity. Knowing what to deliver on your team is not based on plastering a bunch of user stories onto a wall. Using examples to make things very concrete we have found to be incredibly useful, and these examples end up serving as tests. They test our models, they test our understanding, they become verification criteria; in other words, actual acceptance tests.

When it comes to transparency, an interesting thing that's very human that we have to think about is clear decision making. On agile teams, you're delivering progressively and quickly so the decisions the team makes are vital. Teams need to be very transparent about those decisions. What we've found the key here is, is to be very clear about assumptions around value.

Another thing that we noticed around conversations is that rather than categorizing product requirements along the lines of functional and non-functional, we converse holistically about the dimensions that encapsulate functional and non-functional requirements. It has really been very powerful because it works regardless of your planning horizon, whether you're working on immediate work or whether you're planning in the long term. Conversations are enabled via using discovery workshops that may be more or less formal and these workshops and conversations also make heavy use of walls.

Collaboration – collaborating teams are powerful. They build and sustain a shared understating of the product. Healthy collaboration really requires a safe environment based on trust. It's never going to go away. The soft stuff is the hard stuff, and good collaborating teams are able to address difficult issues that may be controversial, but they can address them without adversity.

It may sound all happy and woo-woo and all that, this collaboration stuff, but there really is art and science underlying good collaboration. Conversing well about the topic of everyone's work, in other words the product needs, goes a long way toward engineering healthy collaboration.

I mentioned earlier that silos don't work. We want to make optimal use of skills and understand people's interdependencies so developers get a good understanding of the business, businesspeople learn about technical concern, the whole community comes together, closer to the voice of the customer. It really is about the goal, not the role.

Mary and I wrote an article some years ago called "It's the Goal, Not the Role". We hope you take a look at that. That's our sort of rallying cry about that part of the collaboration issues.

Mary: Thank you, Ellen. What we would like to do now is to provide an overview of some of the book concepts. These reflect our ongoing work with a wide variety of organizations to improve their product development. Ellen and I felt we needed to organize our thinking to codify the work and the result is the book, *Discover to Deliver*. We expect that you'll find that it really does amplify the best of both good analysis and planning, and certainly honors the principles of sound product management.

We're going to explain the key concepts you're going to find in the book. Right on the cover, we're using this infinity symbol because we know great products are not the result of divine intervention. They really are the result of committed people discovering and delivering high value products.

Ellen and I chose this infinity symbol because we think that especially from an agile perspective, we need to represent that you are continuously discovering what to build and when to build it, and then after you've built it, you're cycling back to use that feedback from every delivery because you're going to shape your discovery for the next delivery cycle with that information.

We use the symbol of a product box because we want to represent that that product has to provide value to its stakeholders. The product isn't always a box. Typically it's software or it could be a system. It could be a device. We've worked with clients that are building medical devices. It could even be a service. It could be developed for internal use, or it could be a product that you're building for commercial sale.

We realize that over a period of time, the product is going to evolve and this interwoven activity of discovery and delivery keeps delivering more value. One of the things that Ellen mentioned that works really well is knowing the context of your product.

Some of the questions we would ask here is what's the product's vision, and what's the answer to the big why? Why are we bothering to create this product? Who cares about the product?

That leads us to this concept of product partners, another aspect that is necessary for good collaboration. We need to know who we're going to collaborate with, who's going to be involved, who's impacted by those decisions Ellen mentioned about what to build, when to build it. How do we know that we're going to build the right thing and deliver it?

Typically, the phrase that's used here is called stakeholders. We prefer to call them product partners because these people have a shared common purpose. We like to think of them in three different types.

At the top, you can see there's the customer. This is the person who would use the product and/or buy the product.

Then, there's the business perspective. This could be representing the business community, certainly the sponsor, and as Ellen mentioned, the product champion.

Then there's the technology perspective. These are the folks who will build the product.

[reference point 0:20:37]

The three different types have to collaborate throughout discovery and delivery. We have to identify who they are and understand their value.

Forming a sustaining, healthy relationship is really essential for collaboration, and we believe that it's essential that all three representatives of these partners participate in analysis.

Let's define value. Let's say it's a fair return in exchange for time, money, goods, or services. When we look at the value a product provides, it could be tangible, which might be to increase revenue or even market share for the organization. It often may be intangible. Maybe it's to grow customer loyalty or product appeal.

In our book, we provide a straightforward value model, and that value model incorporates the product partners, what we call value considerations, because as we know, value is often in the eyes of the beholder.

In agile, when we have this goal of quickly delivering high value products, it's really essential that those decisions on what to build have to be grounded in the vision, goals, objectives, and certainly the partners' value considerations.

Just a little bit more about discovery. These words that are listed here, this is all about knowledge acquisition. We need these skills; analyze, elicit, learn, value plan to fully participate in agile planning and analysis. These are all ways that we can contribute to the work of discovery.

Ellen talked about that shared language and using symbols for communication. We've taken the product and we want to look at what we typically call functional and non-functional requirements in a different way. We've split these into what we call seven product dimensions.

Most importantly, we know that no single dimension or two or three of them combined is sufficient. Each one of the seven is essential, and we have to understand how they related to one another because they are interdependent.

I'd like to just take a minute and give you an overview of these seven. I'll start with the user. The users interact with the product, and the users could be people or they could be other systems.

The interfaces connect users to the product. The actions are capabilities that the product provides. The data is what the product needs to support the actions, and the controls are policies or rules that the product must enforce. Then, there are the environment aspects; where the product is actually used and what hardware and software would be used to develop the product itself.

The last one on the list here, quality attributes. Sometimes we call these the -ilaties, things like usability, availability. These are predefined levels of service for the product itself.

Whether you call them functional and non-functional or you call them the seven dimensions, we know that from our client work that we have to analyze all seven dimensions regardless of the size of the product need, whether we're analyzing a feature, whether we're analyzing use case, whether we're analyzing a story. We need to be able to explore all of these.

The idea that we look at a product and many of the products we work on are extremely complex, so there are lots of options. These alternatives or choices are possibilities for each one of those seven product dimensions.

Let me give you just a quick example. Say we have a retail application. We would explore options for the user, and some options might be there's the individual buyer, there could be an organizational buyer, we could have a loyal buyer, we could have a new buyer. All of these would be possibilities.

From an actions perspective, some of the options might be they want to be able to purchase a product, they want to return a product, they want to exchange a product. The environment that they use the product, it could be in the store or it could be online.

How do we manage these options? We believe that the structured conversation is a way to help us, and we've been using this for several years. This structured conversation, you can consider it sort of a lightweight metaphor. It's really woven all throughout our book, *Discover to Deliver*. We often describe it as a systematic way and a very efficient way to be able to explore, evaluate, and confirm the product options.

Let's walk through each one of these, remembering that we're going to go through this three part cycle, explore, evaluate, and confirm, for every one of the product dimensions.

Thinking about exploring options, first let me pick on the action option I mentioned before. We would explore to find out that someone could purchase, possibly return, or exchange. Then, remembering that we have the three different types of partners conversing together, remember it's the customer, business, and technology that are exploring, they're going to evaluate those options and they're going to have to pick a subset.

They can't do all of this in their next time horizon possibly, so they're going to look at what would be higher value, and certainly understanding dependency. They're going to use that value as a filter, as a way to select the high value options for their next planning horizon.

Say they decide that the option of returning a purchase is more important than exchanging the purchase product options. Then, after they've evaluated all seven dimensions, remember the user, interfaces, action, data, controls, environment, and quality attributes, they're going to pull those together into a cohesive set. The way they may document them might be to specify those details of the feature, or possibly a minimum marketable feature could be a story, depending on what planning horizon they're working on.

We say jokingly, but actually seriously, that the conversation, the doors are locked, you can't leave, the conversation's not over until the partners have confirmed their understanding of that set of options, and they need to specify their acceptance criteria. It's a way of verifying, validating the product they're going to build.

We use a lot of different techniques to do this. One of our favorites is given, when, than. Actually, in November Ellen and I posted to the IIBA website's Quick Tips for Better Business Analysis a quick tip called

"Using Given, When, Than to Discover and Validate Requirements". You can check it out on the website for more details.

I want to emphasize confirm as a way of specifying. Ellen talked about how essential that was, having concrete examples. This really is a form of validated learning, which is really powerful to both verify and validate that we are building the product right, and we build the right product.

Of course, in agile we can't waste time. Our structure conversations really need to be having a very clear scope so it's just enough that we're talking about, and talking about it just in time. We also weave into the conversation those lightweight analysis models Ellen referred to; things such as process diagrams or state diagrams or even data models and sometimes even prototypes. The conversation is quick, rich, and very bounded.

Another way of helping us to manage our work is to consider what view we're dealing with, what planning horizon we're considering. We consider the big view a long term view, and it gives us that general high level view of a product. It's usually looking two years out or longer.

The preview is potentially looking out about two months, and the now view is from today up to two months. Obviously, when we're finished with our now view, we should have our discovered requirements in a detailed and testable form that can be used for development.

The last concept I'm going to share with you right now is around a plan. Ellen shared earlier that poor planning wastes time when teams don't have a shared understanding of what they need to do. Enabled to work well, these partners need to collaborate. They're going to allocate high value product options across time horizons.

That little quick example I shared earlier about the purchase and the refund and the exchange, it might be that the purchase and refund options go in the first release, and the exchange would go into the second release. We also want to be really aware that in agile, planning and analysis are interwoven. We have to be ready to adapt our plan based on feedback from validation. In other words, validated learning.

Ellen?

[reference point 0:30:18]

Ellen: Great. Now what we want to share with you, Mary did a beautiful job giving you the idea of some of the big concepts. I want to share with you some highlights of the book itself, after all, the book really is a product. Mary talked about the product and that symbol.

We used our book concepts to build the book. Let me give you some specific examples. We created a vision, we set boundaries; for example, the book is not aimed to be a primer on agile or lean. We're not describing all the good elicitation techniques or foundational information about product management, project management, product design, and so forth. That's part of our boundaries.

We consistently reviewed our values to decide what not to do, because we certainly had more in our backlog of possibilities than what we wanted to deliver. Over the three plus years of working on the book, this was really vital. Mary and I were constantly conducting retrospectives of our client engagements to draw out our own learning and crystallize our thinking.

We also did analysis of our users of the book by doing things like creating an empathy map, we created personas for our primary readers, we wrote stories to explore what our book users would want. We used wall work continually, many times we had the book literally up on the wall. We have actually some photos back in some older blog posts of the book up on the wall in Mary's house. We created the book as a storyboard, and many, many prototypes we went through for the images and for the text.

We had three major releases. We had many demonstrations, and then many micro iterations. We even did something that some of you may have heard of called a Pomodoro, which are 25 minute time boxes of writing followed by a demonstration and a mini retrospective. We wrote creating acceptance criteria for small portions of the book and sliced out many, many, many pages based on our value considerations.

To manage our work, we used con-bon and task boards and we constantly [inaudible 0:32:46]. Another thing, of course, that we had to do was drink some wine and had many wonderful meals together because we were working very hard when we were able to be co-located. The result is a book we hope for people that will be able to use it to collaborate, to build and enhance and maintain products that their customers value.

I want to just hit some of the usability features, and then go on with some useful features, we think. When we designed the book, we did a lot of analysis on usability of a book. When it comes to navigation, we wanted readers to be able to read the book their own way, because we found different personas would want to do that. You might want to start with the second section, the concepts section, then move into the story or the case study, for example.

What we did was designed a navigation bar at the top, across each page, so you could know where you were in your journey in reading the book. That lets you go in and out, dip in and out.

As far as the visual language, we used symbols. You saw some of those when Mary was covering concepts. This language, really visual language crosses our cultures and roles and organization boundaries and the language we use to speak. We also used the symbols for the seven product dimensions as Mary showed you, and we used color to distinguish the seven dimensions. Color is used semantically.

You get 25 illustrations in the book. Of course, we have to have a glossary, right, to have shared understanding. There are 226 terms in the glossary, and we built and released a website which contains our visual language, the recommended readings and resources, samples, media, and we're going to continually release more. We really, really want your feedback on it.

I think it was last week that we just released a whole bunch of samples and media on the site. As far as what we think are useful features, we really hope you can use these features and what you learn from the book directly in your planning and analysis.

We have a case study that recreates a typical team's conversations as they explore, evaluate, and confirm their product options, and that case study is woven throughout the book. As far as examples go, just as agile practices that we mentioned are so important, we have a lot of examples, literally 80 examples, and they're based on the integrated case study and they flow throughout all sections of the book.

We all have to adapt our practices for the project at hand, so we've provided a section on how you could plan your structured conversation and adapt it according to team and product factors and how you might harmonize it with your particular delivery method, such as if you are using flow base like con-bon or time based like scrum or even traditional practices, how you could adapt.

If you're going to purchase or integrate a commercial off the shelf software cots product or how you would adapt your documentation or how you adapt these practices to regulate a product. All of that is in the adapt section.

The other thing that we hope is going to be very useful is the tools and techniques section, one per page so it's very light but precise, with a definition, description, an explanation of the usefulness of that tool or technique, and an example from the case study.

One of the things that we have found over and over again is the importance of good focus questions. Creative, collaborative teams that create great products constantly ask good questions that are crisp, that are concise, that are compelling. We've found these to be essential for structured conversation so we've integrated them throughout the book. They're in the big concepts as well as down deep in the seven dimensions.

You'll find those woven throughout the book at a high level. For example, let's take the data dimension. There are questions like, "What data do users need from the product?" or, "What data does the product receive from where? What data must the product store?" and there are four more questions.

At a more detailed level with the data dimension, we have questions on things like, "What data is CRUD?" as we affectionately call it, which stands for create, read, update, delete. "What are the relationships among data options? Are there unique types of data options?" and there are many more. Each focus question in the book is also accompanied by an example using the case study.

Mary?

Mary: Another aspect about the highlight of the book is the alignment with other aspects in the industry right now. We wanted to be really clear on where and how our book fit in the context of these industry standards and resources on planning and analysis. I imagine many of our viewers right now are familiar if not users of the *BA Body of Knowledge* and possibly the agile extension to the *BABOK*.

I imagine some are conversant with the Project Management Institute Body of Knowledge as well as the PMI's Agile Certified Practitioner Handbook. I bet even many folks might have Ellen's second book, *The Software Requirements Memory Jogger*.

This alignment we've focused on mapping to these eight *Discover to Deliver* concepts, and we took these and considered how they reflected, how they fit with these industry resources. I'm just going to share a couple with you right now.

These are just a little sample here, and you can actually download these from the website from this location right here. The D to D concepts align with the *BA Body of Knowledge*, both the knowledge areas as well as the underlying competencies. You can't see them, they're off the page to the right.

What we wanted to be clear and sort of coordinate with is when we were working on the *Body of Knowledge* many years ago, we knew that the *BABOK* was never meant to be a how to guide. Where could you turn to get information about how to do some of these very good analysis practices?

If you wanted to learn more about business analysis planning and monitoring, you can see in that particular column that you could turn to *Discover to Deliver*'s concepts like adapt, plan, and partners, and those topics would help you round out your understanding about business analysis planning an monitoring.

It's interesting; when Ellen and I were analyzing these connection points, we found that all of the *Discover to Deliver* concepts were needed for the knowledge area requirements analysis. No surprise, as well as the core competency of analytical thinking and problem solving. Also, the D to D value concept is used by all of the *BABOK*'s knowledge areas.

[reference point 0:40:17]

As far as alignment to the agile extension to the *BA Body of Knowledge*, say you wanted to learn more about the technique of think as a customer. You'd find a lot in *Discover to Deliver* about the topic. You can scan down and see that.

We also found it interesting to note that the extensions technique of avoiding waste is covered in all of the book's concepts. The *Discover to Deliver* structured conversations is applicable to all seven extension techniques.

Ellen?

Ellen: We hope that you will find our book useful and apply these practices. You see here that the IIBA has generously worked with us to provide a discount. The hyperlink will show up when you see a PDF of this deck that will be posted shortly after the webinar. How you navigate to get to the bookstore to get the 20% off there with the code.

There may be some listeners who aren't IIBA members. First, we want to encourage you to become a member. For those who aren't, but are subscribers to our newsletter, there's a 15% off. I hope you will find our book a very useful tool in your day to day work.

I'll also mention that we provide training and coaching in these practices. We've worked with teams globally to make these practices work. You can find more in the PDF that you'll see later.

Maureen, thank you for this.

Maureen: No problem at all, and thank you so much. It was so interesting, and there are quite a few questions.

I thought I'd break them down. First, let's talk a little bit about the book. One question was, "Is it available as an e-book?"

Ellen: Not yet. Not, it's not available as an e-book. That will probably happen sometime in the summer or early fall.

Maureen: [inaudible 0:42:20 – 0:42:28] I apologize for the background noise.

Does the book talk about the traps you mentioned earlier on in the presentation?

Ellen: Does it talk specifically about the traps? No, it doesn't get into the problems. What we focused on is what works. As we talked about some of our observation, and then we found what works. The book describes what's a result of these observations.

We don't want to focus on what doesn't work, we wanted to focus on what does work. Mary, do you want to add something to that?

Mary: No, I think just taking that positive approach was our emphasis.

Maureen: Yeah, exactly, and providing some guidance and application. I think, as you were saying earlier on, you have an area in one of your slides that says adapt. Each organization has a slightly different approach and different challenges. You couldn't possibly cover all of that in your book. I really enjoyed the book and I found it really helpful.

There are a few questions about roles. One person says that in her organization, the scrum master does a lot of the planning. How did the BA contribute? Maybe we're getting hung up on titles, but maybe you could take that on. How does a BA help in planning and so on?

Mary: We have written an article about that, and the ability for the business analyst to participate depends upon the product owner. We really like to think about the product champion who will be making decisions. The scrum master certainly is involved, but having the product champion who will know intimately the business and the business value as well as coordinate and collaborate with the other partners to make those decisions.

If you have the role or responsibility to assist in making those decisions, then the business analyst would participate in that form.

Ellen, a little bit more on that?

Maureen: Yeah, the other thing is it sounds like maybe what's happening on that team is maybe some legacy behavior is happening. A "scrum master" and we're using scrum terminology for the person who's the facilitator of the team. The scrum master does not do the planning, the team does the planning. That's a big sign that there's some smell going on.

The planning and analysis is a team activity. If you're using scrum vernacular, typically the scrum "master", that team facilitator, is facilitating the activity. The people doing the work, the analysis work, the testing work, the building, the deploying, the documenting, etcetera, they are all part of planning.

Maureen: That's really helpful.

Someone asks, and I'm kind of combining a few questions. For those people out there who don't hear the exact question, I'm kind of paraphrasing these. Teams that are very well versed in waterfall, how do you start to introduce something like *Discover to Deliver* and agile?

Mary: We actually have many folks who are using these particular concepts in a more waterfall like fashion and getting really excellent results, and start moving in the direction of agility.

One of the core aspects that we find is around value; making sure that whatever is being analyzed has clearly defined values. Engaging those three different types of partners, customer, business, and technology, to be able to jointly determine the value of certain product options.

When they can make this very transparent, oftentimes the business will recognize that they don't need all of those options or they can't defend going to the development of low value options. That's really a way of moving in that direction of being able to more quickly deliver the higher value business needs.

Maureen: So a big focus on value, picking up these techniques like the conversation, using some of the techniques in the book will help to transition into and perhaps even suggesting breaking down the high level scope into a series of stories. Would that work?

Mary: Yes, and as Ellen mentioned, our adapt section of the book has specific information about folks who are working in a traditional environment, how they could adapt the structured conversation to fit that particular way of developing.

Maureen: Excellent.

Here's a good question because you talk about using the wall, as it were. Any recommendations for discovering requirements when teams and customers are geographically distributed and travel is not considered affordable?

Ellen: This is not an uncommon issue when we have distributed teams. The first thing that we find is really important is that people come together for that context work to get the partners together, to understand what the value is, who are the partners, what is the big view. You can even do this at a release level for the preview for release planning if you don't have a product roadmap.

Having people in the same time, same place for that midlevel planning, at least, is really important. It really does give you a return on investment very, very quickly. That's one thing that we recommend.

I know a lot of organizations resist that because they say, "We don't want to pay that money upfront." Some of the teams that we work with actually do this wall work in different locations and make use of media like cameras and will show walls with each other, to each other. They key there is to try to replicate the wall in each location and have a designated facilitator for each location.

The distributed work is possible, but you actually have a lot more infrastructure and planning and technology to make it work, so there is a price to pay. In general we do know that you can certainly use agile in distributed teams and get high performance teams, but you don't get that throughput, you don't get that productivity right away. It takes a lot of time and energy to learn how to set your infrastructure in place. This is why the teams coming together to have working agreements and figuring out how to work together well at the same time, same place helps accelerate that.

Mary, do you want to add something to that?

[reference point 0:50:08]

Mary: No, that was great. Thank you.

Maureen: Yeah, that makes a lot of sense. You have to balance the cost benefit of travel versus elaborate technology. Thank you for that.

This is a question on one of the concepts. Could you talk a little bit more about the empathy map and what value it provides?

Ellen: The empathy map is a tool, it's maybe been around for three or four years. It's actually something very visual that helps you get into the head of your customer. What I'll do on the Twitter stream is I'll provide a link to some information about that.

Essentially, if you can picture, just draw a circle with a head with eyes and an ear looking to one side. I don't want to describe all the elements of it, but the pieces have you think about what your customer would say, what would they see, what are they thinking, what are they feeling?

We actually did this for some of our primary readers of the book. As I mentioned before, we tried to do a meta if you will and use all the concepts that we described in the book. One of the empathy maps was actually Barry the BA. That was quite an interesting, deep and emotional in some ways, exercise for Mary and I going through that.

Barry the BA was the BA that we described who was working in a traditional or waterfall world and would be reading the book. It got us to think about what they would need in the book. That was helpful to understand what was going to be valuable to them. For example, an analyst working in a traditional environment would value seeing that many of the tools and techniques that they were familiar with, like visual models in particular, were actually really crucial to doing good analysis on an agile team.

The timing of when you do them and the depth and breadth is going to be quite different, but that, "Hey, my skills actually are really important and necessary to be able to accelerate the team's understanding."

That's just a brief overview to empathy map. Once again, I'll put something on the Twitter stream about that. Perhaps we can put something on LinkedIn as well, Maureen.

Maureen: Okay. I'm going to quickly put the hashtag, as well. It's #DToD, right?

Ellen: Right, #DToD.

Maureen: Excellent.

Ellen: You were going to add something, Mary?

Mary: Maureen, I'd just say that hand in glove with the empathy map with the persona. The empathy map is a little richer than that because it really gets into the thinking, feeling, seeing, hearing, but when you think about the gains that you're looking for in an empathy map, those would tie to the persona aspects, also.

Ellen: Right. The empathy map led us to the personas.

Maureen: Oh, excellent. I was always hesitant to use personas. I thought, "Ugh, do I really need to go through all that work? I've done a stakeholder analysis."

I actually sat down and engaged in that exercise with a team, and it was so helpful.

Ellen: Yeah, a lightweight persona, not one that's taking months and months and months.

Maureen: Oh, yeah, exactly. I can see how this empathy map can be so helpful in that process because I think it really uncovers a lot of things that you wouldn't have thought of.

Someone asked, "Can you clarify which of the seven product dimensions would be classified as functional versus non-functional?"

Mary: Sure. The functional would be the user, action, data, and control. The non-functional are the interfaces, environment, and quality attributes.

Maureen: Excellent. For each of the dimensions, these are inputs and outputs, so sort of like a process in a way?

Mary: No, they're not intended that way. They're meant, as we have in the book, we have very detailed questions that you'd ask about each dimension. Very importantly, it's also understanding how they fit together, if you will. Those aren't considered inputs and outputs, necessarily, but they are definitely interrelated.

Ellen: Yes, and if you go to the *Discover to Deliver* website, there are resources. Actually, some photos from some client work where we have what we call the options board. You'll see those dimensions laid out across the board, often to the left of the symbols of the dimension. We'll have the partners listed and their value considerations and often also risks.

We're looking holistically at the product across those dimensions, and you'll see sketches, lightweight sketches or lists so you're using either left brain or right brain or both thinking to quickly analyze across the dimension an option or make choices about the options using the value consideration.

That might be helpful to take a look at some of those photos, right Mary?

Mary: Absolutely.

Maureen: Yeah, that sounds good. We often think in process, but this is a much more apply-able approach.

We have time for just one more question, and it's about the team and balancing the discovery of new requirements and fine tuning of the requirements once they've been released.

There was another question around managing and getting to more detail in managing documentation. We've discovered, we've released the product in two week iterations. How do we fine tune that information, how do we manage the requirements?

Ellen: On an agile team, we have something called the backlog. The backlog often uses stories. It doesn't have to, it could have minimum marketable features or features and so forth. In general, those are very lightweight which will be traced and you'll have more rigorous traceability if you're in a regulated environment.

The managing of the requirements, the requirements that you're creating and analyzing and planning off of are part of the work in progress that the team is discovering in order to deliver the product. It is a form of documentation.

That sort of leads to your next question. One of the wonderful things about agile is that you take your decisions based on value. The question here is what documentation related to requirements is valuable to the team?

We actually in the book have a section about adapting your documentation practices. The documentation around requirements is part of your works in progress. The question is what is valuable to keep and how clean must it be?

If some of those lightweight analysis models, like you're organically, for example, building a data model which we find very useful on many agile teams, would just having a picture of it or having it on the wall with sticky notes be good enough? For many teams, it is. If you're doing handovers because you're distributed and you have other teams offsite, maybe you need to clean it up and put it some lightweight tool and be able to share it or have it on a wiki.

Does that help answer?

Mary: That was a very, very big question. I know we're running out of time, so we'll turn it back to you, Maureen.

Maureen: I think that really nicely answered it. I think that value statement was what was most important.

I can't thank you enough. This was fantastic. Don't forget to go to Tweet#DToD. You might get a chance to win the book. If you have a chance, come on to LinkedIn. We will be announcing the winner there, and I know they'll be announcing the winner on Twitter.

Thank you so much Ellen and Mary, and have a wonderful day. Thank you everyone for joining us today.

Ellen: Thank you, Maureen.

Mary: Thank you, Maureen.

Maureen: Bye now.

Mary: Bye.