Rethinking Process

Implementing Product Process Change in a Mature Organization

CHRIS AVORE
VP DESIGN, DILIGENT

Implementing product process change in a mature organization

Implementing product process change to mature your organization

Meta

Diligent

DOWNLOAD THE DECK NOW

WHAT IF?

- You better understood why you were starting a new project?
- Your teams had greater awareness what other possibly useful work was underway?
- Your stakeholders had a better understanding of what was underway and what would come next?
- Any status reporting was actually read, useful and applied?

WHAT IF?

- Designers operated with more intentionality and deliberate purpose, while also trusted to work independently?
- Product managers connected work to corporate goals instead of identifying features to build by arbitrary dates?
- Engineers felt like they could apply their product and business expertise early when it makes the most impact?

And what if we could do all that at scale?

Across teams...

entire product portfolio?

CONSISTENTLY over time?

TODAY'S TALK

- Will require collaboration and partnership to be successful
- Is no one person's job or title
- May include recommendations that will take time to implement
- And progress may be initially difficult to measure

HYPOTHESIS

By improving key moments of the product development lifecycle with structured, consistent, artifacts and activities...

Teams will operate more effectively and efficiently, which will create more opportunities for innovation, sustained growth and ultimately increase enterprise value.

OUR AGENDA

- Why process gets a bad rap
- Activities and actions you can put to work throughout that lifecycle
- How this emphasis on process yields tremendous upside to the broader company's goals and makes you look like an high performing operator.

PART 1

Why process gets a bad rap

“

THe Process can become the thing.
The process is not the thing…
it’s always worth asking…
do we own the process, or
does the process own us?

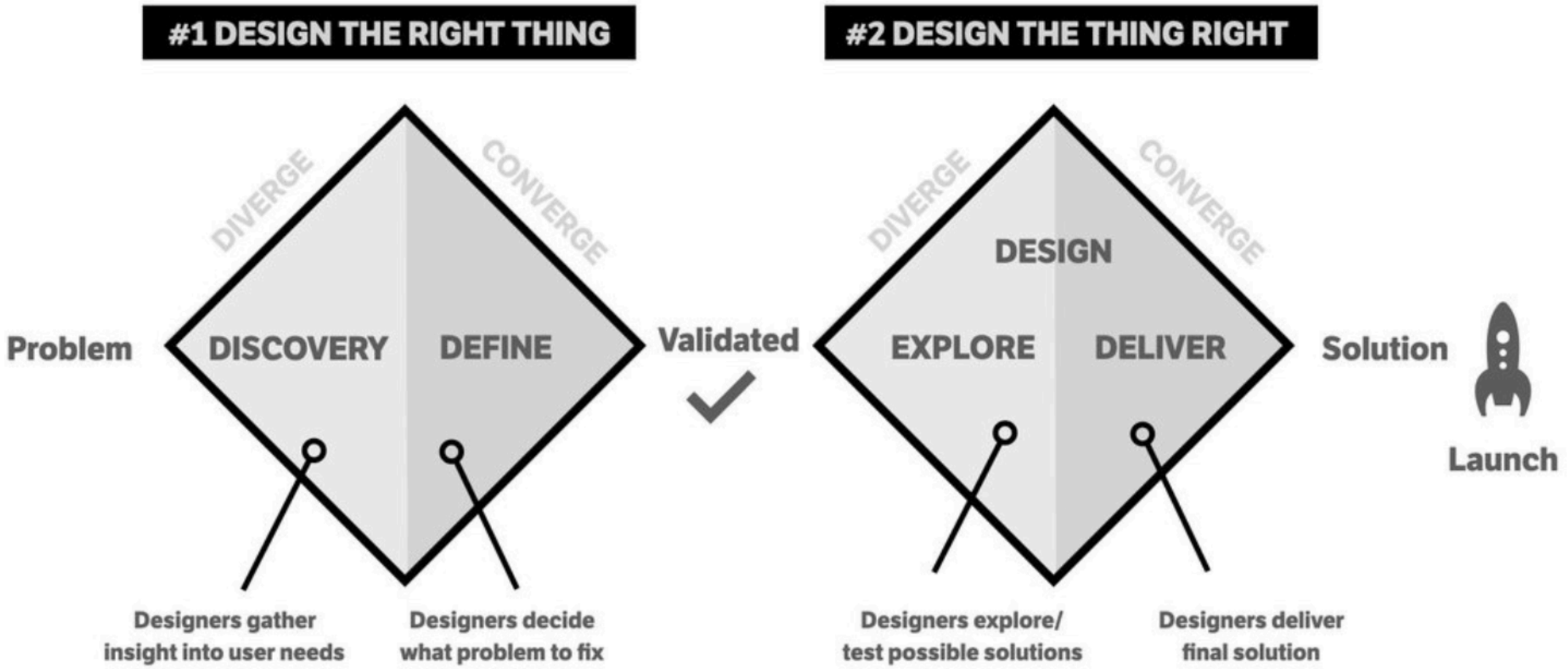
JEFF BEZOS

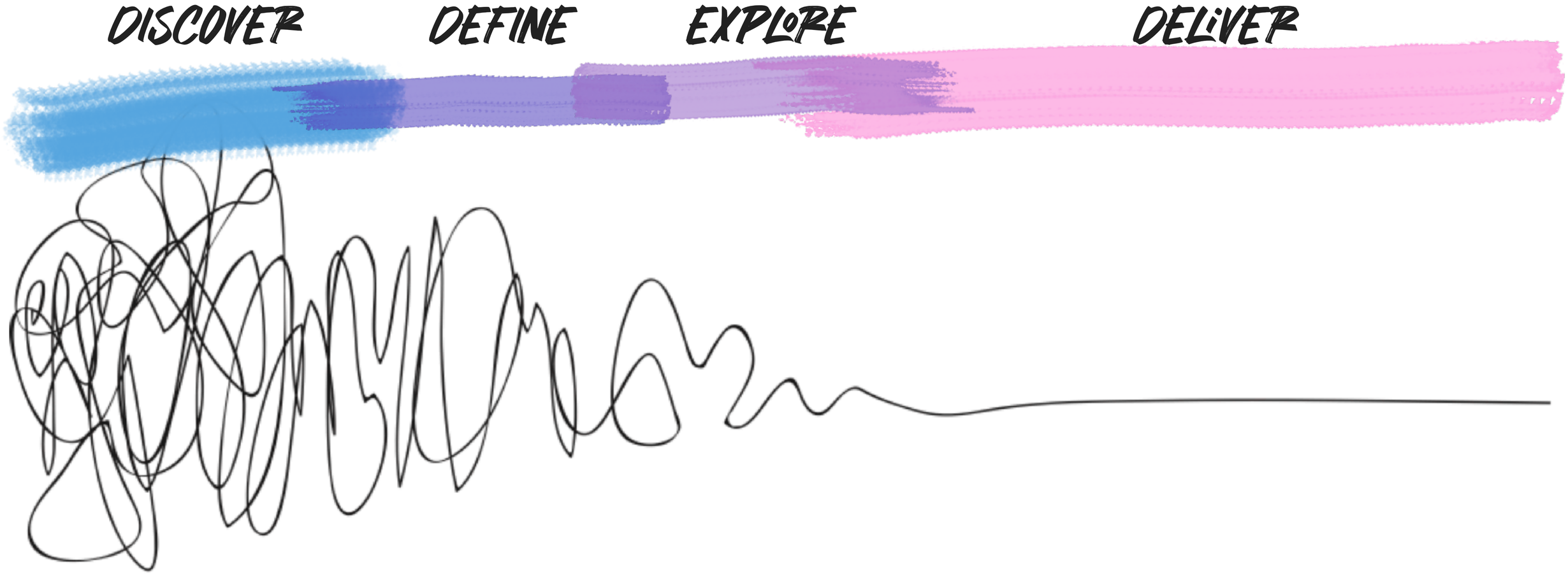
“

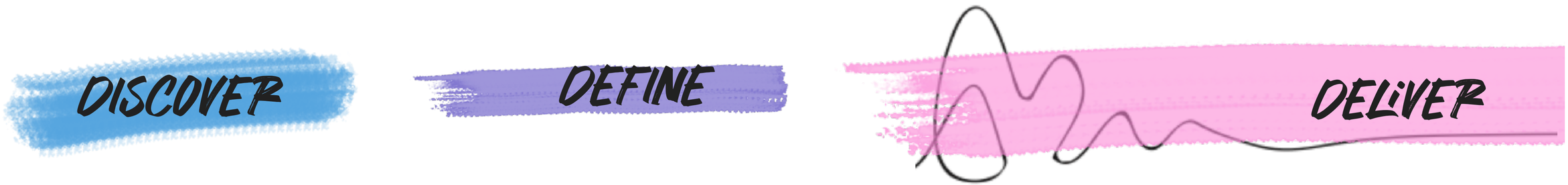
…Netflix
has a culture that
values people over process,
emphasizes innovation over efficiency,
and has very few controls…

REED HASTINGS

The Traditional "Designer Centric" Double Diamond




DISCOVER
DEFINE
EXPLORE
DELIVER


DISCOVER
DEFINE
DELIVER

Symptoms of an immature product development process

DISCOVER

- Unable to answer fundamental questions such as Why? So what?
- Confirmation bias
- Little shared acknowledgement of what ‘done’ looks like

DEFINE

- Just prioritizing features
- Lacking alignment across teams of what to do and why
- Unclear how work ladders up to bigger priorities or goals
- Problem may have been solved elsewhere in the company

EXPLORE

- Explorations are limited to surface-level options
- Little evidence of vastly different ways to solve the problem and no discussion on tradeoffs
- Unclear on where to converge or diverge

DELIVER

- Deadline-driven
- May redo/undo solved problems
- Teams don’t know what’s coming or what to expect from Design or Eng
- Little alignment on evaluating the quality of the work
- One bite at the apple: little appetite for iteration

Most managers have been either explicitly or implicitly trained to think in terms of accomplishing fixed goals, tasks, and deliverables in a predictable world…

AMY EDMONSON
HARVARD BUSINESS SCHOOL

…We all know we’re not in that kind of world — and yet the fundamental mindset and skills of management work best for **fixed, understandable, reasonably predictable deliverables.**

AMY EDMONSON
HARVARD BUSINESS SCHOOL

EVOLVE OUR MINDSET

to embrace the ambiguity and complexity of the unknown

Benefits of a strategic, outcome-focused Product Development process

DISCOVER

Clearly defined intent cataloging assumptions, the operating hypothesis and questions to answer and how those answers will shape the work ahead.

DEFINE

- Clear framing of what problem to solve
- Tightly aligned point of view on what the most important problem to solve is and why it will benefit the organization.

EXPLORE

- Deliberately unique approaches to solving the problems prioritized in the Define phase with methods to gain conviction to move forward
- Intentional means of identifying and mitigating risks to the product.
- Prioritizing the outcomes to call the product a success.

DELIVER

- Teams understand what's being delivered, how, and why.
- Success is measured ahead of time based on outcome-driven success criteria, not only dates or budget.
- Plans are already in place for iteration and contingencies in place if KPIs are missed across several thresholds.

PART 2

Change how we work

DISCOVER

- Establish role clarity among teams and people so everyone knows who is doing what.
- Set constraints for how long the period will last to gain conviction
- Capture intent of Discovery in Product Brief and Design Brief

DISCOVER

1

Product Epic Brief

- First step in capturing the intent of the effort and possible direction
- Authored by Product to reflect their point of view and how they understand the Business/Corporate goals
- Meant to establish clarity, scope, assumptions and questions to explore
- Emphasizes problems to solve, limitations, what the team knows.

2

Design Brief

- Only expected for highly ambiguous work
- Design responds to the Product Epic brief to establish their understanding of the effort at hand
- Call out risk and other assumptions that could threaten the effort
- Propose activities and artifacts that may address the problem or advance the work
- Identify any existing research or other work that could inform the effort

DISCOVER

Author: Design Lead, Senior Designer, AD Design, SD Design

When to author: At the start of a project. Not intended to be living doc, but revisited to understand how decisions have been made or new information has been acquired over time

Audience: Senior Design and Product leadership

Purpose: Establish Design's point of view and level of shared understanding of the project and Product's perspective on the effort. In many of these cases, the purpose is not for Design to DEFINE or CREATE this point of view, but to read back what they've read, ingested, and understand in the project to be able to identify risk or lack of alignment early and provide ample time for course correction.

How to use: The author(s) should consult the Business Requirements Document as a baseline for addressing each of these topics via a Design-centric lens to see if there are gaps or inconsistencies in understanding. After this document is created, Design will share the doc with Product and Design leaders to ensure alignment and a shared path forward.

Benefits:

- Tighter alignment between Product and Design
- Identify any lack of clarity or necessary information
- Greater intentionality and context when making design decisions.

Granularity:

- This should be at the project or epic level for ambiguous or ambitious efforts, particularly when Design teams are comprised of people across different tracks or pods. Design briefs are likely not useful for rudimentary incremental work.

Design strategy brief

- Problem to solve
- Project Goal(s)
- Proposed team (including practitioner levels)
- Anticipated impact, including any connections to AIP or other broader goals
- Hypothesis
- Success metrics
    - Ideal and feasible KPIs
- Users/audience
- Other teams needed or impacted
- Constraints
    - Tech, timing, dependencies, etc
- What is needed to start (if applicable)
- Open questions Design needs to know
    - Including referencing existing research or insights
- Important/relevant links
- Scope: what's in, what's out
- Rough timeline of design activities

DISCOVER

Designers show up as better partners

Generally speaking, the design teams that initially resisted writing Design Briefs struggled the most with understanding the problem, and operated with less intentionality in their actions, and had a weaker point of view when proposing design recommendations.

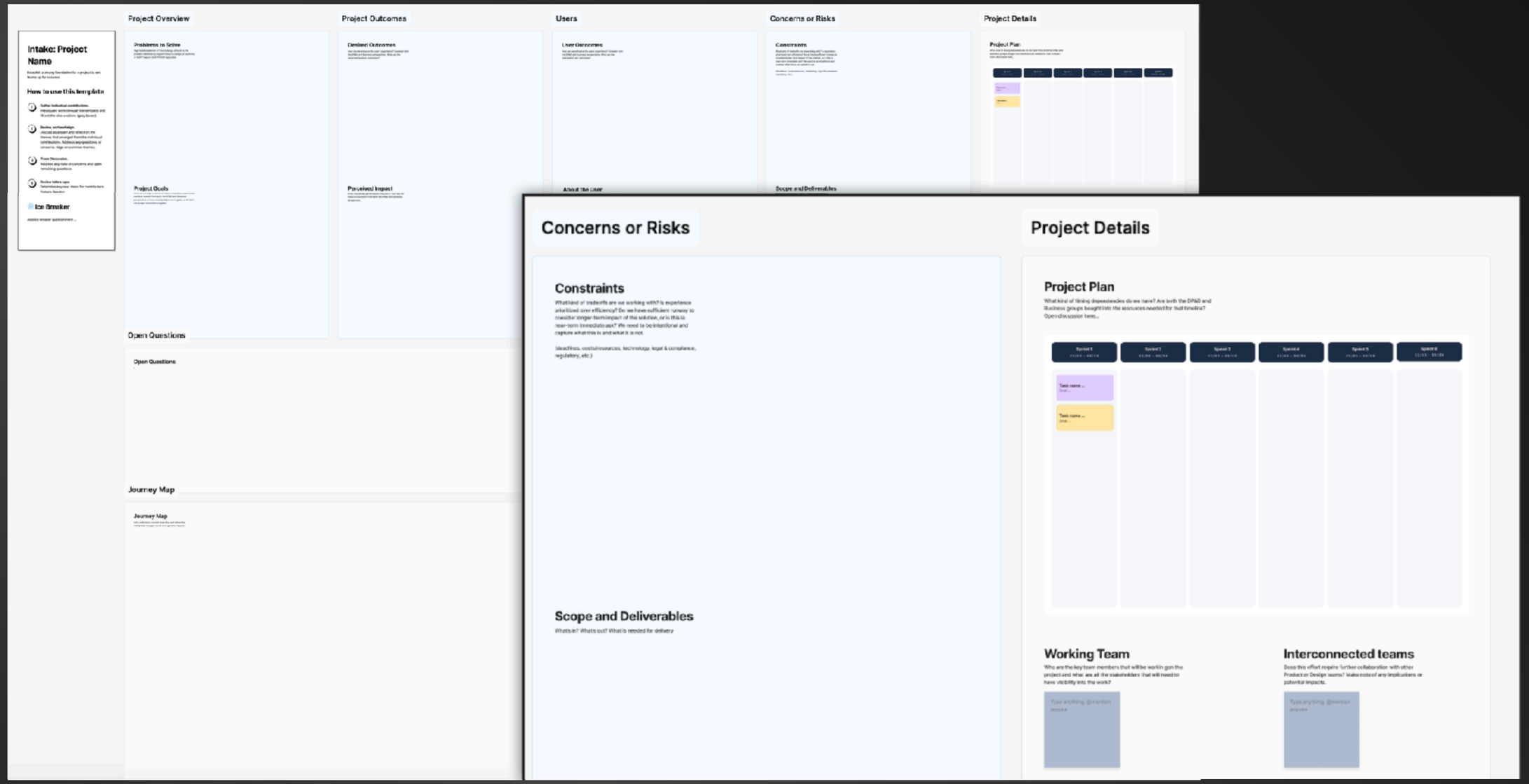
Identify lack of alignment and course-correct sooner

The combination of the product and design briefs together improves the transparency of the work, the depth and breadth of questions to ask, and empowers teams to recommend activities tailored to the problem at hand.

DEFINE

- Conduct clear prioritization and sequencing activities
- Challenge and validate assumptions raised in Discovery
- Illustrate Design's hypothesis via multiple low-fidelity renderings
- Involve engineering partners to estimate possible complexity or duplicate/complimentary work

DEFINE


Project Overview
Project Outcomes
Users
Concerns or Risks
Project Details
Intake: Project Name
How to use this template
Ice Breaker
Problems to Solve
Desired Outcomes
User Outcomes
Constraints
Project Plan
Project Goals
Perceived Impact
About the User
Scope and Deliverables
Open Questions
Journey Map
Concerns or Risks
Project Details
Constraints
Project Plan
Scope and Deliverables
Working Team
Interconnected teams

DEFINE

Focus and clarity from the beginning

Including or adapting primary aspects of the Design Brief into the Explore phase helps designers focus on the work at hand and connect their work to the foundational intent of the project.

Appropriate feedback at the right time, right altitude

Product and Engineering partners can ask questions, add risks, and better understand sequencing instead of just commenting directly on the renderings, mockups, prototypes, or components to ensure appropriate altitude and framing of what they need to communicate.

EXPLORE

- Don’t commit to what fidelity is necessary until the work is almost underway
- Expect to design multiple ways to approach the same problem. Use process to mandate at least 2 for high-ambiguity projects.
- Trace every design decision back to Product and Design brief
- Emphasis on learning: experimentation, pilots, heavy measurement.

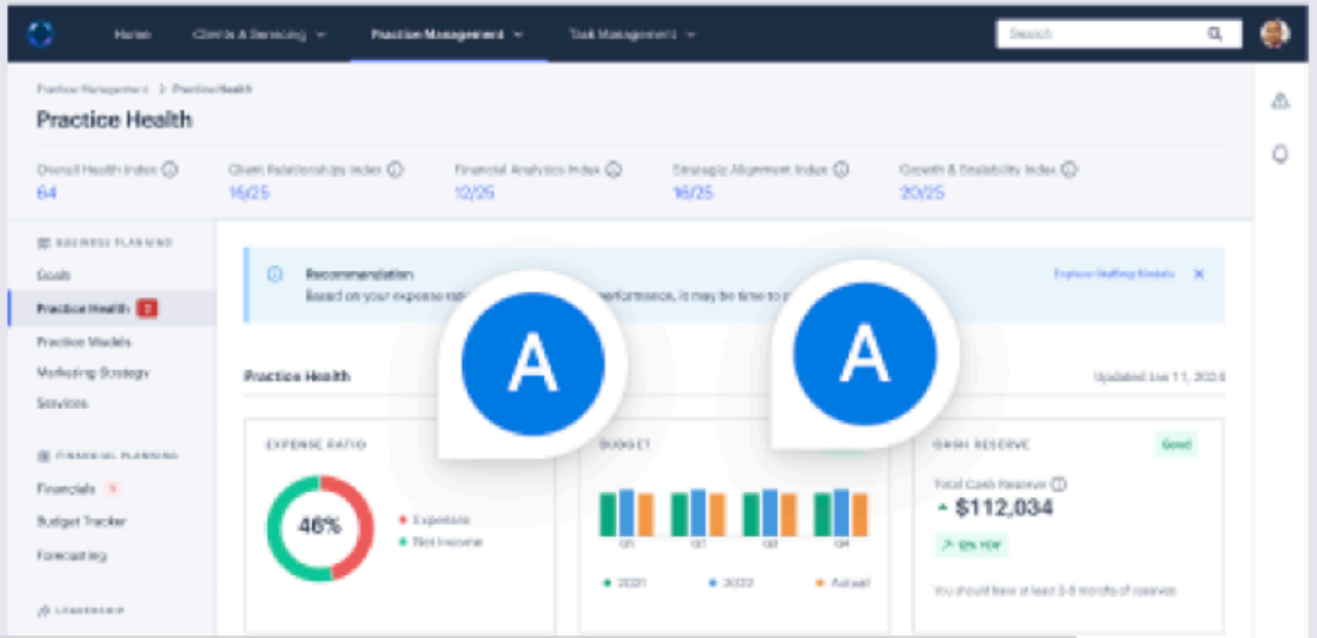
EXPLORE

Solution

Practice Management Hub

We aim to create a unified practice management experience that guides advisors through strategic planning and business operations. Advisors can quickly assess the status, progress, and performance of their practice through highlighted key metrics, recommended actions, and practice modeling tools.

Side navigation allows for quick navigation between business planning, teaming, and tracking tools.



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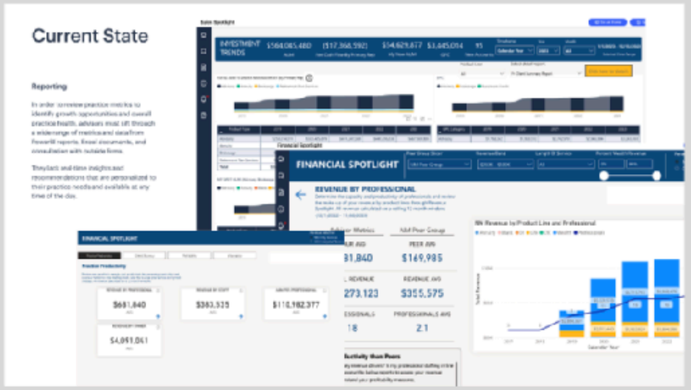

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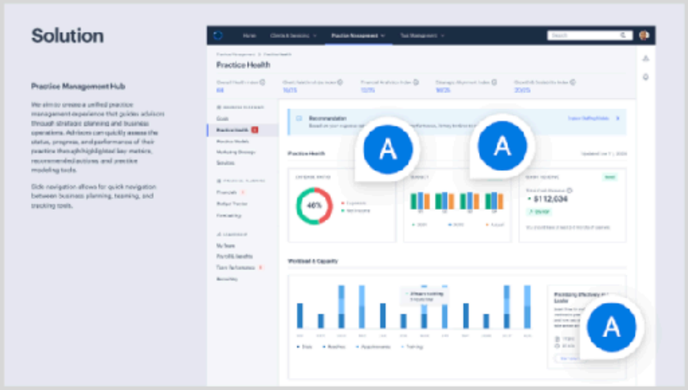

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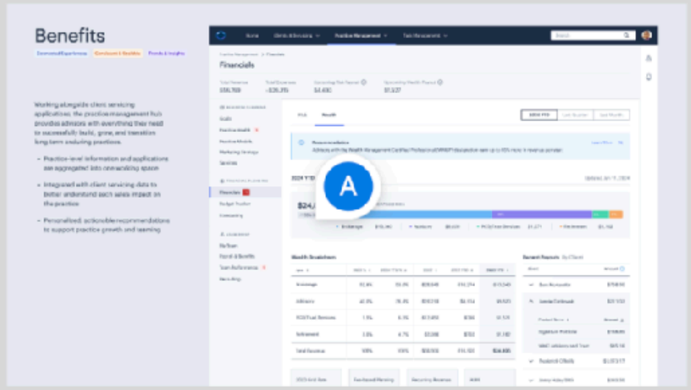
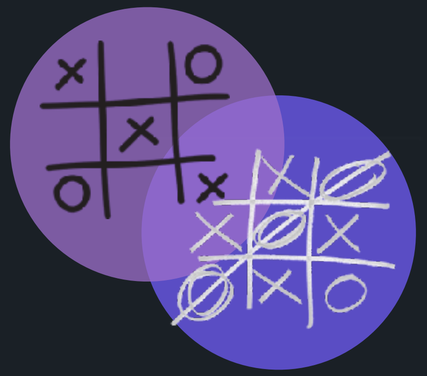


EXPLORE

Link the work to current problems and exceeding goals

Tightly coupling proposed solutions to the current state and the benefits of the new design reduces the need for one-off meetings to explain the work.



Multiple explorations provide multiple benefits

Showing many ways to address the same problem creates the opportunity for discussion, imagination, and exploration across product, engineering, and design while creating greater cross-team participation.

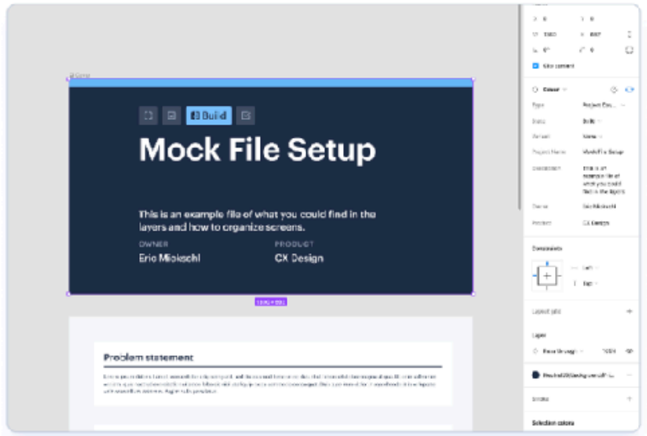
DELIVER

- Highlight certainty & ambiguity in prototypes and mockups
- Partner with Engineering to establish how to deliver work (where to find it, changes, etc)
- Add or update how success will be measured and confirm monitoring/measuring those actions is feasible.
- Work is scalable, easily updatable, data is readily shareable.

DELIVER

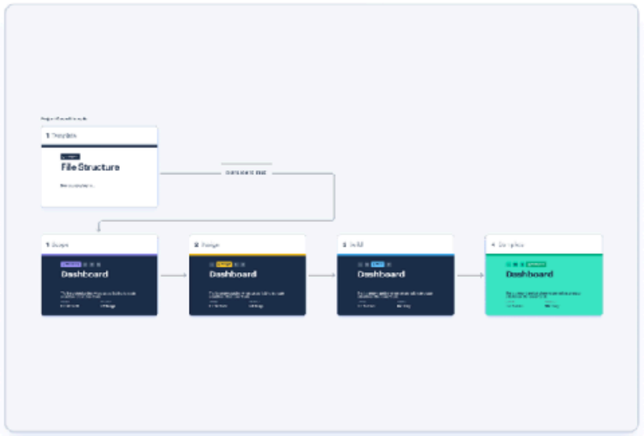
3_Organization / Layers / [Project Name] / **Cover pages**

Update



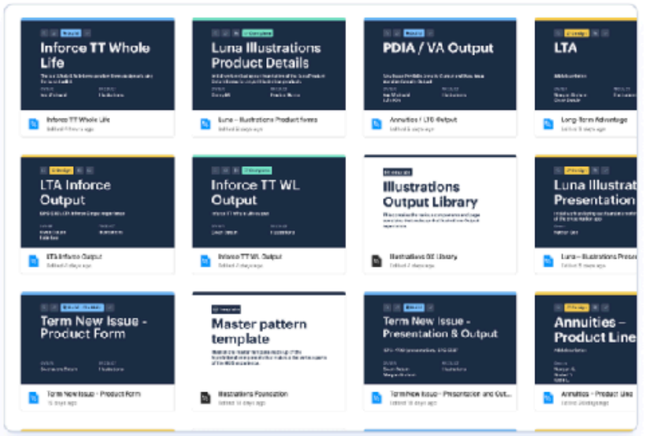
To reveal the properties in the panel, simply press the Command key and click on the Project Cover. Then, update the State to the appropriate phase of the project.

Clarity



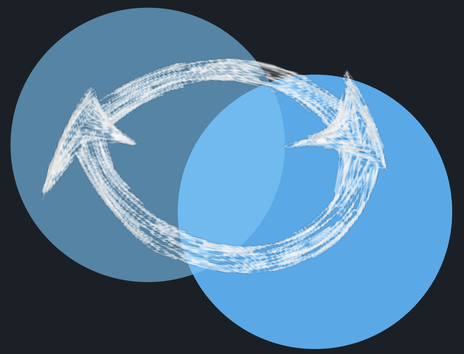
Observers can easily understand the progress of the work as the stages of the Project Cover are closely synchronized with the Design Lifecycle.

Organization



By utilizing the Project Cover page as the thumbnail, designers and other users can acquire a comprehensive and unified understanding of the work, name, owner, and product owner.

DELIVER



Improve mobility & onboarding time

Anyone—design, product, engineering— can move from team to team and not have to learn more local rituals or patterns.

Interview and survey engineering & QA teams

Don’t assume you know what your engineering, product, QA, or other teams think about how you deliver work: ask them.

Do they know what to expect? When? Where to find it? What they’ll get? Is it the same every time?

TOMORROW

- Do you know how decisions are made? How decisions are changed? Do your teams?
- Do you have traceability back to the hypothesis and the work underway today?
- Do people know what to expect & when?
- Have any of the above gotten better or worse over last 6 months?

PART 3

From **what if** to **so what**?

WHERE WE ARE
WHERE WE NEED TO BE

Top-down & inflexible

Driven by dates, budget, or # of features

Prioritize the process itself

Multiple meetings to do the same thing

Duplicative work across teams

More talking about the work than doing it

Teams decide how to work, creating silos or isolating themselves and thus limiting transfer of knowledge and ways of working

Mutually agreed upon by teams

Driven by applied outcomes

Prioritize what the team learns

Intentional meetings with clear purpose

Aligned and sequenced across portfolios not just projects

Effective documentation replaces need to talk about the work

Teams work similarly to each other so individuals can join mid-project and still contribute, creating better mobility, knowledge transfer and spread of information

WHERE WE ARE
WHERE WE NEED TO BE

WHERE WE ARE

WHERE WE NEED TO BE

Make sure all teams and partners have a shared vision of why you're doing what you all are doing.

Create a sense of urgency that the status quo is not okay and threatens success.

Use process to establish consistent ways of working to proactively address unpredictable and known threats to success.

Resist the urge to conflate process with meetings. Reference the process in the meetings you DO have.

Highlight in advance where to deviate from the process under multiple conditions

“

100% predictability
0% innovation

HENRIK KNIBERG

Predictable Artifacts

Unpredictable Content

Predictable Questions

Unpredictable Answers

Predictable Ways of Working

Unpredictable Results

By striking a balance between the predictable

And your ability to navigate the unpredictable

Product development professionals will be prepared to provide the tools and services that will exceed corporate goals and customer expectations while creating an environment where teams feel **capable, trusted, and empowered**.

How will you begin maturing your process?

Chris Avore
linkedin.com/in/chrisavore