Lean Discovery & Inception
TriAgile 2018
Introduction

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• I’ve been doing technology since I was a teenager
• I found Agile in 2001 while I was a developer
  • Being part of high performing teams is awesome
• Now I consult with companies, lead programs, coach teams
• I love helping teams find performance
• I love applying culture and performance ideas in other places
Roadmap

• What is this Agile Inception thing?
• Why would I use it?
• Basic pieces
• Real world example
“Should we really build this thing?”
“We’ve been told we must build this thing. Do we have enough time, enough budget, the right team, and can we identify the risks?”
What is an Agile Inception?

- What are we building now? *(Release Plan)*
- What are we doing first? *(Prioritization)*
- How do we get started? *(Next Steps)*

- How big is this thing, how long will it take, and how much will it cost? *(Estimation)*
- Do we have enough Budget, the right Team, and enough Architectural Runway for success? *(Risk Management)*
- Is it worth the investment? *(Business Plan)*

- Do we really understand the problem?
- What do users really want?
- What should we really build?
You might do an Inception when...

• Making a business plan for a new product
• Prioritizing your Product budget
• You need to evaluate options
  • Time to market? (Sooner vs. Later)
  • Budget? (More vs. Less)
  • Outsource? (We have the capacity and skill vs. Get outside help)
  • Risk tolerance? (Mission critical vs. Good enough for now)
• Kick starting a new team
• Validating that you have the right team
how much is uncertain in your product idea?

Cone of Uncertainty

- foresee 20% of features can struggle
- foresee 50% of features agile at limits
- foresee 80% of features agile works well

Lean Prototyping

Agile Planning
Lean Inception

If uncertainty is high, start with time-boxed rapid prototyping then do an accelerated planning and estimation session.
Rapid Prototyping

“A method of testing new ideas that decreases development time and cost by prioritizing early user feedback.”

- Tom Chi created and led the user experience team for Google X
- TED talk @ TEDYouth 2012
- “Rapid prototyping Google Glass”

Frame -> Build -> Measure -> Learn

Frame and Ideate
Listen and Gather Feedback
Quickly Create an Experience
Give a User the Experience

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Agile Inception

When you have more clarity on what to build start with an accelerated planning and estimation session
Agile Inception Goals & Outputs

• Internal Communication & Alignment
• Understanding of:
  • High-level Architecture
  • Roadmap & Core Features
  • Definition of Done & Acceptance Criteria
• Discover high-level Dependencies
• Prioritize the product backlog at the feature level & Identify the MVP
• Identify non-functional requirements (NFRs)
• Account for:
  • Unknowns and Risks
  • Hardening & Deployment
  • Form/Norm (Sprint 0)
• Set a “Discovery Buffer”

✓ Initiative/Feature Map with MoSCoW priorities
✓ Solid definition of MVP
✓ Prioritized Product Backlog
✓ Story Map with Estimates
✓ Estimated Velocity
✓ High-Level Release Plan Estimate
✓ Team Design for MVP
✓ High-level Architecture sketch
Optional:
✓ Estimated Budget for MVP (extrapolated)
✓ Plan and Budget options for creating the MVP
How does it work?
Agile Inception - Participants

• Typically the entire Agile team attends this event
  • Product Owner
  • Scrum Master
  • Development Team

• If the effort is new and the backlog can’t be represented by the product owner, then
  • Customer or Internal Business Owner
  • UX Lead

*Note: Must have participants that can describe the value needed to be created and that can also prioritize the intended outcomes for the team.*
Agile Inception - Preparation Checklist

• Schedule 2 day session with participants in a room with plenty of wall space and a projector

• Items Needed
  • Clock/Timer
  • Full Post-it Easel Pads w/lots of wall space
  • Sharpies (Black)
  • Whiteboard & Markers
  • Post-it Pads (Different Colors & Sizes)
  • Projector
  • Name Tags (if folks are new)

• Get documented Initiatives & Features if possible
  • Note: Assumes taxonomy of Initiative/Feature/Story, sometimes also represented as Objective/Epic/Story
Agile Inception – Setup the Room

• Posters to Create (recommended)
  • Risk/Dependency ROAM Board
  • Planning Board Key (Taxonomy and Risk/Dependency/Spike/Sizing Color Code)
  • INVEST Definition
  • End in Mind
    • Prioritized Initiatives, Epics, Architecture Capabilities
    • Known constraints
    • MVP Story Map
    • Release Plan Checklist
  • Release Plan Checklist
  • Retrospective (Less/More/Start/Stop/Continue)
  • Capturing Stories from a User Flow Considerations
  • Personas
  • Definition of Done (Initiative, Feature/Epic, Story)
  • Parking Lot
## Typical Agenda (Day 1)

<table>
<thead>
<tr>
<th>Approx. Time</th>
<th>Topics</th>
</tr>
</thead>
</table>
| 60 Min       | Introduction (Goals, Big Picture, Taxonomy, and Strategy)  
               Current Business/Application Challenges |
| 60-90 Min    | Architecture & Technical Constraints Review  
               UX Review (Personas, Mockups, Workflows, etc.) |
| 120 Min      | Feature Mapping & Acceptance Criteria |
| 45-60 Min    | Review Outputs  
               Prioritized Initiatives  
               Prioritized Features (MoSCoW) with Acceptance Criteria  
               Prioritized Architecture Capabilities  
               Review Known Constraints (Scope, Schedule, Resources)  
               Align on Definition of Done |
| 120 Min      | Story Mapping & Sizing (T Shirt Sizes) |
| 15-30 Min    | Review Outputs & Next Steps |
# Typical Agenda (Day 2)

<table>
<thead>
<tr>
<th>Approx. Time</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Min</td>
<td>ROAM Risks and Dependencies</td>
</tr>
<tr>
<td>120 Min</td>
<td>Finish Story Mapping &amp; Sizing (T Shirt Sizes)</td>
</tr>
<tr>
<td>60 Min</td>
<td>Rapid Story Point Estimation</td>
</tr>
</tbody>
</table>
| 60 Min       | Est. Velocity Exercise Release Plan Logistics  
|              | Team Design  
|              | Sprint 0  
|              | Hardening and Deployment  
|              | Discovery Buffers |
| 60 Min       | Build the High Level Release Plan Estimate |
| 60-90 Min    | Present Plan and Iterate Based on Feedback, Fist of Five consensus |
| 30 Min       | Rate and Retrospect |
Story Map with Points

Compile and Calculate

Table of Pointed Stories
Agile Inception “in the wild”
real world case study
Introduction

• Chad Gallant
  Director, Agile Center of Excellence
  Lumeris
cgallant@lumeris.com

• SPC4, CSM
• Successful agile transformations
  • Scottrade
  • US Air Force

• Lumeris
• Market leader in value-based care
• “Best in KLAS” three years in a row
Next steps

• Reach out (If you have questions we’d love to chat)
• Veracity will bring
  • passion
  • facilitation & guidance
  • estimation methods and tools we’ve created
  • training to do this yourself
• We love passionate agilists
  • we welcome new ideas
  • join our team
  • Old school thought leader?... we welcome you
  • Getting started?... a great place to come and grow
Thanks

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