Discovery & framing

Process building

Insights into how I build process.

Introduction & context

- Built research process for FreshBooks, TouchBistro, Wave, and Vetster

- I kept hearing that folks "did not have time" to run research

- **Problem to solve:** How can we run effective and quality research in a lean manner?

- Pitched the idea of research sprints to executive teams to get full buy-in

Discovery & framing sprints, process insights

"There are several situations where I recommend a discovery sprint. One is when the team has something big and critically important and/or difficult to tackle. Another situation is when the team is just learning how to do product discovery. Another is when things are just moving too slow.
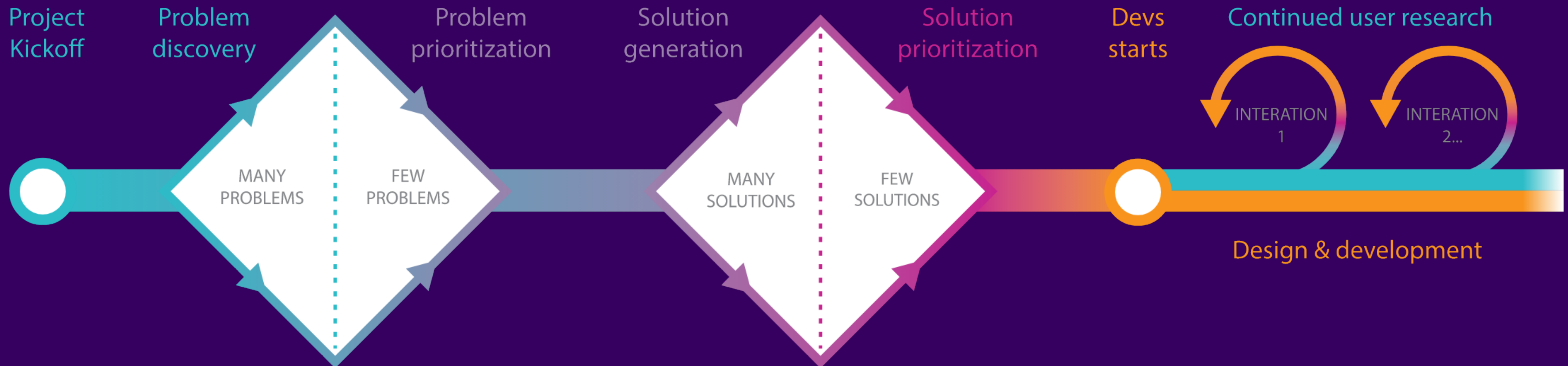
Marty Cagan, Silicon Valley Product Group

How do we want to work?

Discovery
of problems

Framing
of solutions

Iterations
of solutions

Project
Kickoff

Problem
discovery

Problem
prioritization

Solution
generation

Solution
prioritization

Devs
starts

Continued user research

MANY
PROBLEMS

FEW
PROBLEMS

MANY
SOLUTIONS

FEW
SOLUTIONS

INTERATION
1

INTERATION
2...

Design & development

What are they?

- We use Discovery Phases to discover untapped value

- The team focuses on exploring existing product and identifying its impact to the user

- Tasks ranging from stakeholder interviews to user interviews, from personas to journey maps

- Its purpose is primarily to audit and recommend, not necessarily to build and implement

Goals of D&F sprints

- Validate the assumptions that you made about the product

- Have validated user stories before spending time and effort to build

- Build an MVP which is small enough just to validate your product value proposition

- To ensure that you are building the **right** product before wasting time building it.

Discovery activities

- Internal stakeholder lightning talks (around one or two specific questions)

- Facts vs. assumptions workshop

- Prepare user interview questions

- Synthesis user interview results

- The Discovery part is to go broad for **exploratory research**

Framing activities

- Persona analysis to find users' goals and needs

- How Might We statement creation

- Idea generation and 2x2 feature prioritization

- Define MVP

- Build and validate wireframes with real users.

- Write user stories (up to this point, the user stories are validate)

- The Framing part is to narrow down based on all findings to **find a solution** and the road map

Rolling process out

- Created a "research working group" of internal stakeholders

- We ran an information session for the delivery team two weeks before the launch date

- Ensured we were adding an extra week to all estimations

- Provided documentation, a walkthrough of my typical process, and introduced them to the working group

- Offered office hours for the first 4-6 weeks, so that folks could ask any questions or air any grievances

Discovery & framing sprints, process insights

Measuring success

- The "research working group" identified several metrics to help measure the success of the project:

  - Number of tested assumptions per sprint (throughput)

    a. What is the feature / change / improvement?

    b. What is the value that we expect to gain from it?

    c. How have we measured success?

    d. What was the result?

  - Shipped measured value per week (quality)

    a. What was the assumption / hypothesis to be tested?

    b. How did we test it?

    c. What was the result?

    d. Did the result validate or invalidate our assumption?

Process impact

- Strengthened our collaborative approach to product discovery

- Engineers, Designers and Product Managers all started contributing to the product decisions being made

- Created a culture of rapid experimentation and collaborative learning

- There was a threefold increase in the number of experiments each team ran per sprint

- Steady increase in the amount of measurable value that we were able to deliver to our customers

> Discovery is about understanding problems and opportunities in small, feasible, iterative increments. […] and gather the information necessary to make good decisions about next steps in the pursuit of value. To succeed with discovery in Agile; <u>scale it, don't skip it.</u>

Anna Kaley, Nielson Norman Group

Questions? 🙋🏻

Thank you!