Portland Meet Up Group

AGILE

SCRUM
my lean ux journey...

Over 20 years crafting innovative experiences delivering B2B & B2C and entertainment results
From design agency’s serving fortune 500 company brands and interactive strategies
To in-house global enterprise UX Studios for software & device products, to global media corporations
Sinclair Broadcasting, Getty Images, Microsoft, Adobe’s PictureIQ, Warner Bros, Sony Pictures & Cendant Software
I have struggled with Agile + LeanUX at Gettyimages, Microsoft and dmt Synergi
Currently I serve as the Sr. Creative/UX Director for a well funded start-up Experience Focused Engineering division for Sinclair Digital – a division of Sinclair Broadcasting Group. Our mission is to deploy Agile + Lean UX in a highly collaborative and creative world to transform the way News, Weather, Sports, Entertainment is delivered to local and national audiences.
Lean UX in a XFUNCTIONAL
disclaimer

The things shared here are in no way reflective of the companies views. They reflect my own personal experience and opinion's.

Dave Landis (dslandis@outlook.com)
quick framing
SAME PAGE
Process Puzzle

How do you understand these relate to each other?

Agile

Lean UX

Lean Startup
Process Puzzle

How I have come to grasp the not so obvious

Agile
Lean UX
Lean Startup

Lean UX / Startup
Applied principles
How I have come to grasp the not so obvious Process Puzzle

Both are iterative cycles for designing experiences

Lean UX
Application of User Experience Design methods into product development, tailored to fit Build-Measure-Learn cycles.
Design united with business and development.

Agile UX
An attempt to integrate User Experience Design and Agile Software Development Methodology
UX Design team & Dev team working together.

Try Lean UX & Agile UX in UXPin - The UX Design App (http://uxpin.com)
What is “Lean UX”...

“Lean UX is the practice of bringing the true nature of our work to light faster, with less emphasis on deliverables and greater focus on the actual experience being designed.”

So says Jeff Gothelf
What is “Lean UX”...

Gets to “make” faster

Iterative (continual improvement approach)

A little scary (at first)

Liked by management (feels like more stuff faster)

About creating (validated) customer value

A practical tactical keen focus on the experience
What “Lean UX” is NOT...

Just more stuff faster

Void of user feedback

Blind exploration (guess work)

A lack of process (or controls)

Building more stuff nobody wants

Lots of deliverables and stacks of specs
What is “Lean UX”...

The set of principles

Lean UX is a learning journey of guiding principles.

01: Cross-Functional Teams
02: Small, Dedicated, Collocated
03: Progress = Outcomes, Not Features or Services
04: Problem Focused Teams
05: Remove Waste from the Process
06: Small Batch Size
07: Continuous Discovery
08: GOOB: The New User Centricity
09: Shared Understanding
10: No Rockstars, No Gurus, No Ninjas
11: Externalizing Your Work
12: Make over Analyze
13: Learning over Growth
14: Permission to Fail / Learn
15: Getting out of the deliverables business

7 Wastes of Software Development

1. Overproduction – Extra Features
2. Inventory – Requirements
3. Extra Processing – Extra Steps
4. Motion – Finding Information
5. Defects – Tests Misses
6. Waiting – Ditto
7. Transportation – Hand Offs
Engineering Disciplines

**Waterfall**  a business focused process predicated on extensive documentation handoffs

**Design Thinking**  UX Designer Discipline from IDEO a world class design firm

**Agile**  Development Discipline *articulated* in 2001 by the “Snowbird” meet up in Utah

**Lean Startup**  Development focused lean principles – from Eric Ries

**Lean UX**  Design and Development merged principles – from Jeff Gothelf
How do they align?

<table>
<thead>
<tr>
<th>Method</th>
<th>Aligns to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waterfall</td>
<td>Identifies the Business Needs</td>
</tr>
<tr>
<td>Design Thinking</td>
<td>Discovers Customers Needs</td>
</tr>
<tr>
<td>Agile</td>
<td>Discovers a Solution</td>
</tr>
<tr>
<td>Lean Startup</td>
<td>Discovers a Problem</td>
</tr>
<tr>
<td>Lean UX</td>
<td>Discovers Efficiencies</td>
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</tbody>
</table>
Water Fall – Focuses on Business Wants

Too Long
Too much waste
Too many misses for the customer
Must use for extreme life threatening and National Security projects

How come no one is using it?
Breaking it down quadrants

CONCEPT

DIRECTION

PAIN POINT

RESOLVE

CUSTOMER EXPERIENCE
Agile Discovers a Solution

- Concept Direction
- Pain Point
- Resolve
- Customer Experience
- Agile

EXPLORE
Lean Startup Discovers a Problem

- Lean Startup
- Agile
- Customer Experience
- Explore
- Learn
- Build
- Measure
- PAIN POINT
- RESOLVE
Design Thinking Discovers the Need

**Concept**
- Design Thinking Discovers the Need
- Clear Need
- Research Observe
- Prioritize Insight
- Brainstorm Concepts
- Hypothesis
- Brainstorm Concepts
- Hypothesis

**Direction**
- Brainstorm Concepts
- Prioritize Insight
- Research Observe
- Clear Need
- Revise Hypothesis
- EXPLORE
- BUILD
- LEARN
- MEASURE

**Pain Point**
- Customer Experience

**Resolve**
- Design Think
- Lean Start Up
- Agile

**C T U S T O M E R  E X P E R I E N C E**
Who does what?
What is your core team make up?

- Executive Decision Maker
- Marketing / Sales
- BI / Business Analyst / Planners
- Program Manager
- Project Manager
- Product Owner
- Information Architects
- Interaction Designers
- UX Researchers / Analysts
- Visual & Brand Designers
- Front End Developers
- Back End Programmers
- QA / Testing
Who owns what

01: Who is responsible for the Vision of what is invested in?
02: Who determines if it is good for business?
03: Who determines if the customers want it?
04: Who determines if it can actually be built & delivered?
05: Who owns the experience?

Here are some example models that I have worked with...
DEVS RULE.
DESIGNERS DROOL.

BUSINESS [VIABLE]

TECHNICAL [FEASIBLE]

DESIGN [EMPATHIC]

DEV DRIVEN RESULT

usable

desirable

useful

Lean UX in a XFUNCTIONAL
DEVS DO THEIR THING.
DESIGNERS DO THEIR THING.
BUSINESS DOES THEIR THING.
Is it good for business?  Can we deliver it?  Do customers want it?

**BUSINESS** [VIABLE]

**TECHNICAL** [FEASIBLE]

**DESIGN** [EMPATHIC]

Start Here

**EXPERIENCE**

- desirable
- usable
- useful

Lean UX in a

XFUNCTIONAL
Who approves?

BIZ
Marketing
Branding

TECH
Programing
Platform

Working Team

developer
research
design

PO, PM, CXM

PRODUCT

Interaction
Visual
UX

acceptance

Lean UX in a
XFUNCTIONAL
UX Design Team
Reflecting their Experience with Agile

NEGATIVE EXPERIENCE LOW MORALE
Lean UX in a XFUNCTIONAL
Practical Tactical
Challenge: Getting everyone on the Same Page
GETTING EVERYONE ON THE SAME PAGE

How is the Vision crafted?  [the Hypothesis comes from where]

How is the Vision cast?  [consumed by the head and heart of the team]

How do you GOOB?  [get in the customer head/heart]

How do you expose your progress against the Vision?
Key consumer promises, the product essence, which matches the emotional & rational bond between the product's soul and the customer's needs. This is our inspirational North Star for the team, our partners and customers.

2 or 3 high level experiences, phrased as user benefits, that the product will consistently deliver on across several releases. These are long term investments that help deliver a defensible set of experiences.

Key consumer facing experiences that we want to reflect that the consumer will care about. These narrative arcs should be told from the point of view of our target personas experiencing the product.

Specific concepts capture the heart of the core experiences. They illustrate what we are building without going into the "how". These will serve as our compass when we wander off the track.

Describes the functional and emotional criteria consumers use to judge the desirability of our product. They are built and prioritized based on consumer insights, and describe the desired ends, not the means. They have measurable criteria that defines what's the bar is for "shipping it."

Features become the specs and drive how the team is organized, so if you’ve done everything else leading up to this well, the features will land successfully.

The horizontal hardware, software, content and service investments that we need to put in place so that we can build the experience. (think of engines, systems, catalogs).
Small Business Advisor

**VISION**

Equip store employees to engage with Business decision makers

**WHY**

1. Getting to know the customers, 2. Ways to engage, 3. Rich drill downs into insights

**WHAT**

- **CONCEPT AREA’S**
  - RICH INTRODUCTION
    - Introduction and overview of small business and education issues and interest
  - CONVERSATION STARTERS
    - Offerings that no one else has
    - Challenges and Resolutions
  - GUIDANCE AND RESOURCES
    - Videos of real world customers
    - Filed Playbook, Index of resources

**WHEN**

I can rapidly get up to speed with the Business customer. While leveraging the surface’s rich app experience

- **CONCEPTS**
  - Learn
    - Understanding what
  - Engage
    - Setting an agenda
  - Tools
    - Everything one needs to know along the way

**WHAT IF**

I am confident how to approach the Business customer and can start up a conversation with them

- **FEATURES**
  - Permission based CMS. Supporting landscape view only. Leverages the devices log on authentication.
  - Accordion menu, Rich Video player – all gesture based navigation.
  - Embedded PDF that has hyper links throughout. Access to all sites, videos and documents from the touch screen.

**HOW**

- **ENABLERS**
  - Code. C#, Script Sharp, Java Script, DOM, HTML 5, Target Win8.1 Surface Pro devices
  - Leverage current HTML 5 and C# work from Sky Drive and Dot Net Nuke for CMS
  - Integrate the current cloud technologies and infrastructure into the CMS
Team Challenge:

Human’s are narrow sighted

“What’s happening now is the way it will always be”
PROVIDING PERSPECTIVE

How do you help your team over the rough spots?
How do you build trust? Hope? Confidence to press on?
How do you help their perspective?
Xfunctional Team Challenge

Setting and keeping perspective

TEAM MATURITY MODEL

- Forming
- Storming
- Norming
- Performing
- Transforming

Less waste to create optimum viable experiences

Transforming

Less time to make collaborative decisions

Proven trust

Stable trust

Confused trust

No trust

Forming

Storming

Norming

Performing
XFunctional Team Challenges

TRUST ISSUES

Management over Core Team

A. View – Team is not able (I have to do it all)
B. View – Team is enabled to be empowered

Core Team with Management

A. Do they have my back – or will they stab my back
B. They “Say” I am empowered but then veto all my directions and research

What are some Trust Builders that you have seen are affective?
Microsoft UX Design
ATTITUDE an ACCELERATOR for CULTURE
RED
Research
Experimentation
Design

Do
Epic shit

Doers
Not Talkers

The Cult
Of DONE

+Do
-Talk
THE CULT OF DONE

There are three states of being. Not knowing, action and completion. Accept that everything is a draft. It helps to get it done. There is no editing stage. Pretending you know what you're doing is almost the same as knowing what you are doing, so just accept that you know what you're doing even if you don't and do it. Banish procrastination. If you wait more than a week to get an idea done, abandon it. The point of being done is not to finish but to get other things done. Once you're done you can throw it away. Laugh at perfection. It's boring and keeps you from being done. People without dirty hands are wrong. Doing something makes you right. Failure counts as done. So do mistakes. Destruction is a variant of done. If you have an idea and publish it on the internet, that counts as a ghost of done. DONE IS THE ENGINE OF MORE.
Closing Thought
For the challenge ahead
Deep Change OR Slow Death

INCREMENTAL CHANGE
Usually the result of rational analysis and planning process.
There is a desired goal with a specific set of steps for reaching it.
Incremental change is usually limited in scope and is often reversible.
Incremental change usually does not disrupt our past patterns.
Most important: We feel we are in control.

DEEP CHANGE
Deep change is a much more difficult change process.
It requires new ways of thinking and behaving.
It is change that is major in scope, discontinuous with the past and is generally irreversible.
Deep change distorts existing patterns of action and involves taking risks.
It involves taking risks.
It means surrendering control.
Deep Change OR Slow Death

We build our identities around our knowledge and competence. We employ certain known techniques and abilities; deep change requires abandoning both and walking naked into the land of uncertainty.

Deep change happens at both an organizational level and a personal level.
Change Lifecycle

STAGNATION
FEAR UNCERTAINTY DOUBT
UNREALISTIC VISION

DEFINE
DESIRE / NEED
VISION
VALIDATION

DESIGN
EXPERIMENT
INSIGHT
PROTOYPE

DELIVER
MASTERY ROUTINE
GUIDELINES

DEVELOP
CONFIRMATION
SYNERGY
SYSTEM

CHANGE Excellence
SUCCESSFUL
Go make...
discussion time
appendix
2 Questions that haunt everyone...

**IS IT SAFE?**
- Safe to share
- Safe to be myself
- Safe to fail
- Safe to challenge

**IS IT SPECIAL?**
- Am I apart of something special

Let’s explore constructive contributors...
What creates successful XFunctional Teams?

01: Consistently high impact teams contain these

- Open truth sharing
- Accountability (Peer to Peer Responsibility)
- Deep relational bonds

02: Fascinating results from a current study
There is one constant factor that provided a measurable result to highly effective cross-functional technical teams.

Having a woman. on the team
This X Factor is believed to be due to the EQ contribution that was sorely missing from the needed relational bonding element
Dysfunctional Cultures

- Guarded Language and secrets.
- Distrust of other groups.
- Well-defined boundaries between groups; lots of discussion over who has a particular responsibility; management-driven.
- Blame and lack of respect for other groups.
- Skepticism of someone else’s new idea or approach or solution.
- Pressure to produce.
- Individual competition and survival are key issues.
- Looking good is the way to progress.
- Developers and managers feel powerless to change the organization.

Functional Cultures

- Honest open communication.
- Alliance and cooperation with other groups.
- Boundaries are mutually discussed and agreed upon between groups; participant-driven and before starting.
- Appreciation and effective use of differences between various groups.
- Group refinement of an individual’s idea.
- Careful evaluation, investigation and validation once the idea has been selected.
- Encouragement to improve.
- Flexibility available for situations that are unique or new.
### Dysfunctional Cultures

- Meetings are combative.
- Decision-making involves having things your way.
- During decision-making, distrust of ideas and approaches are applied to every unknown.
- Unwillingness to be vulnerable and genuinely open about their mistakes and weaknesses.
- Fear of conflict: inability to engage in unfiltered, passionate debate.
- Whack-a-mole approach to confrontation, handling errors, delays or expectations not being met.

### Functional Cultures

- Meetings are constructive focused on solving, not focused on complaints.
- High-quality results are the key issues for the team as a whole.
- Helping everyone look good is the way to progress.
- Developers and managers take action to improve their organization.
- Decision-making is collaborative - then responsible owner provides leadership.
- During decision-making, respect for and trust of colleagues’ skills/role is demonstrated.
Even when people with great super powers come together, if they don’t share the vision, or have hidden agendas, they can remain dysfunctional.
Better Together
Collaborative Reviews
CUSTOMER CENTRIC
Cross group collaboration
Keep everyone on the same page
More visible to boarder partners
Develop our CQ – drive direction & decisions from customer

PROJECT REVIEWS

Review Agenda

pm/po/cxm
frame up biz/cust/tech

customer outcomes, customer flow, pain, needs
and how the project is meeting or exceeding customers desires

Time: 07:00 – 10:00 increments

designer

next steps and key take-aways

designer
**Review Agenda**

Cross group collaboration

Keep everyone on the same page

More visible to boarder partners

Develop our CQ –drive direction & decisions from customer

*Time: 07:00 – 10:00 increments*
CUSTOMER CENTRIC

Cross group collaboration
Keep everyone on the same page
More visible to boarder partners
Develop our CQ – drive direction & decisions from customer

PROJECT REVIEWS

Time: 07:00 – 10:00 increments
appendix
Project Title

The key business objective that the project is tied to, goes here
What is the need

What is my hypotheses?
- We believe that person type has trouble/need/desire doing problem/opportunity.

How will I validate that hypothesis?

How will you assess success?
- We will know we have succeeded when qualitative and quantitative outcome. This will improve KPI Key Performance Indicators.
Why invest in the effort

Business Goals
• How does this mvf align to known business goals?
• Increase income, build customer loyalty, brand dominance, satisfy customers, other?
• Value Proposition, Business Investment area?

Customer Driver
• What will this feature solve, enhance, enable for the customer?

Technology Opportunity
• What are the key technologies that will be leveraged, what new technology will be part of the exploration, what are the constraints?
More on biz goals

Business Drivers
Identify how this project aligns to the Division’s Big Bets through the Team’s or projects business objectives with regard to Gettyimages > Site/Device > CXT > PM.

Customer Drivers
Identify how this project aligns to known (high level) customer issues, interests and desires with regard to Gettyimages > Site/Device > CXT > PM > CXDesign and Research. What are the top 3 things to keep in mind while designing for this project?

Technical Drivers
Identify how this project aligns to known (high level) technical issues, interests and how we are leveraging a new feature (set) with regard to Gettyimages > Site/Device > CXT > PM > CXDesign and Research. What are the top 3 things to keep in mind while designing for this project?
CXO Focus

CXO 1
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)

CXO 2
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)

CXO 3
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)
What is a CXO

**Good CXOs are:**

1. Customer benefit statements, free of references to products, features, or technologies
2. Supported by evidence that they matter to customers
3. Scoped to a level that engineering can act upon

**Examples:**

<table>
<thead>
<tr>
<th>Job</th>
<th>How Well</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find an image...</td>
<td>...more quickly than you can with current solutions.</td>
</tr>
<tr>
<td>Procure image...</td>
<td>...with less effort than you can with current solutions</td>
</tr>
<tr>
<td>Present images...</td>
<td>...with more control than you have with current solutions</td>
</tr>
</tbody>
</table>

**Questions you should be prepared to answer when presenting CXOs:**

Who’s your customer? In what context will they do the jobs described by the XOs?
What’s the evidence that these jobs matter to your customers?
How do people currently do these jobs?
How do you know you’ve prioritized the right jobs?
How do you expect to measure success? Through telemetry? In lab? Survey? Other?
Insight - Data or Comparison

Research Data Point
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)

Competitive Issue
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)

Catch up or Lead Position
- I need (want, have issue to resolve) to....
- Which will result in (Define the Happy State)
Next Steps

Conduct research
  • Lab study on... XX Date

Finish coding by XX Date

Next milestone is on target for XX Date

Key asks from sponsor for this project – We need more money, more resources and/or more clarity.
Takeaways & Asks

What we heard

Our Asks
Valuable Links

MVF and/or Business Planning Docs or CXM Ideation

- First Minimum Viable Feature direction doc
- Second MVF direction doc

Research

- Wireframe study summary
- Lab study findings

Design and Dev WIP

- Brainstorm artefacts
- Storyboards
- Wireframes
- Mock ups, etc.
- Prototypes