PRODUCT KICKSTART PLANNING GUIDE

COMPANY:

NAME:

DATE:

✖ Modus Create

FOREWORD

This workbook condenses lessons learned from ten years of product development consulting. It outlines five core aspects of lean and agile adoption spread across a five day program intended for development of an actual product.

Introducing new ways of working is difficult at scale. This approach sets out to create positive momentum and a sense of urgency and helps focus on risks and assumptions. By creating an environment where healthy constraints drive priorities and decisions, this framework yields weightings that reflect real world constraints: what is desirable from a customer and revenue perspective, and what is achievable from a development perspective.

As with most products, we fully expect kickstarts to evolve beyond the publishing of this workbook.
Check out **moduscreate.com/kickstart** for updates and case studies.

Patrick Sheridan
CEO

INTRODUCTION

FOR YOU

This workbook gives you a broad canvas on which you can view your enterprise and product opportunities and a structured way to introduce new thinking complete with a deliverable and planning approach. The daily structure gives context to meetings and offers a way to incorporate new approaches into current work.

FOR YOUR TEAM

Use this workbook to help advocate and educate your team about Lean methods. This workbook helps your colleagues clarify their thoughts and focus each day's activity on planning aspects of the product that matter at an early stage.

For more information on Product Kickstart
moduscreate.com/kickstart

PRODUCT KICKSTART IS

Five days of facilitated product discussion.

A framework for feature **prioritization.**

A focus on **assumptions, constraints,** and **KPIs.**

A **deliverable based** way to codify information.

A way to estimate **scope** to **plan** an MVP or product release.

KICKSTART FRAMEWORK OVERVIEW

Kickstart is a **"DIVE IN"** approach to

improving the way **product teams work.**

Living every phase of a product lifecycle

in 5 days sets expectations and pacing

for the entire release cycle to follow.

WHY KICKSTART?

Create **urgency** and **momentum.**

Create **shared understanding.**

Catalyze **process** and organizational change.

Introduce new technology.

Increase scope and budget **confidence.**

Execute with confidence.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
GOAL ALIGNMENT	USER ANALYSIS	DESIGN PATTERNS	SCOPE AND COMPLEXITY	PRIORITIES AND PLANNING
BUSINESS ARCHITECTURE	USAGE CONTEXT	DOMINANT PATTERNS	USER ICEBOX	HEALTHY CONSTRAINTS
PORTFOLIO ANALYSIS	TASK AND WORKFLOW	MARKET LEADERS	NATIVE / HYBRID / MOBILE WEB	RELEASE THEMES
SUPPORTING TECH	CANDIDATE USER STORIES	COMPETITOR APP ANALYSIS	BUSINESS VALUE WEIGHTING	INFRASTRUCTURE TOOLS
	MOBILE FIRST CASES	CANDIDATE USER STORIES	COMPLEXITY WEIGHTING	

ANALYZING YOUR APP PORTFOLIO
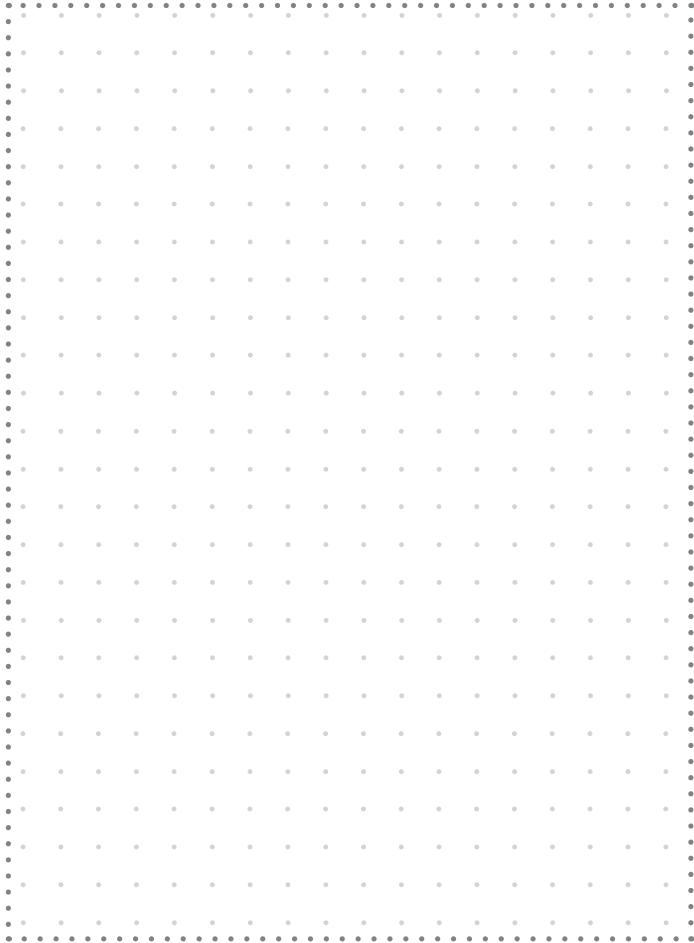
B2C ·

B2B2C ·

B2B ·

DMZ ·

B2E ·

SKETCH

Instructions: *Sketch out the depth and breadth of your application portfolio. Segment apps by end user focus: internal employees, partners and affiliates, business customers, white labeled offerings, and direct to consumer.*

SUPPORTING TECHNOLOGY

TECH PORTFOLIO

PRESENTATION TIER

WEB TIER

APPLICATION TIER

3RD PARTY INTERGRATIONS / APIs

DATA STORAGE

Instructions: *Describe the current state of each tier of your technology infrastructure. The idea here is to identify the technologies that drive your core business. If you are not sure about a particular technology, mark down a person who can answer this question for you.*

IDENTIFY THE TARGET APP

PROJECT NAME: .... ☐ NEW ☐ EXISTING

BUSINESS OWNER: .... *who ultimately controls the line of business?*

PRODUCT OWNER: .... *who manages the execution of the product vision?*

PRIMARY USERS: .... *who engages with and buys the app and ultimately determines the app's success or failure?*

SECONDARY USERS: .... *who indirectly interacts with the app and may influence the behavior of primary users?*

USER TYPES	KEY SUCCESS METRICS	ASSUMPTIONS ABOUT THE APP	FEEDBACK LOOPS
			BETA CUSTOMERS:
			INTERNAL USERS:

PRIMARY REASON FOR MOBILE	SUCCESS AS DEFINED BY THE BUSINESS	ASSUMPTIONS ABOUT THE BUSINESS	
			CHAMPIONS:

CONCEPT OF OPERATIONS / BUSINESS ARCHITECTURE

MONDAY: GOAL ALIGNMENT

BUSINESS GOALS

PRODUCT GOALS

Mark down key features, enhancements, UX improvements, and bugs. For mobile apps, note target devices, platforms, and key device integrations.

Example:
Tangible (measurable) Outcomes
Revenue Target
KPI

Identify any technical debt items that should be addressed this release. Consider system upgrades, performance, and scaling concerns, as well as platform change decisions and major architectural changes.

Example:
Existing Roadmap Items
Existing User Feedback
Potential for Assumptions Here

MONDAY: GOAL ALIGNMENT

TECH GOALS	TEAM GOALS	NON – GOALS

Note: *Any items that could strengthen the product and delivery team, such as technical or process training.*	*Example:* **Upgrade Forum. Implement API for Invention Management.**	**Note:** *Any items that could strengthen the delivery team having technical or process training.* **Move from iOS to HTML5.** **Our developers need training.**	*Call out anything that is NOT a priority for this release and could be a distraction to the release goals.*	*Example:* **We are NOT developing for tablet in this release - phone only.**

TUESDAY: USERS

INTERNAL

Internal users exist inside the building. In many cases, there can be direct line employees, managers, and reporting users.

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EXTERNAL

External users are those outside the building, meaning those not directly employed by the business.
For example: partners, suppliers, or customers.

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Sketch out the different people who will interact with the app. It is often helpful to identify users by job title or primary usage behavior (ex: District Manager, single purchase one-time user).

TUESDAY: USERS

USAGE CONTEXTS

USER GOALS

TUESDAY: EXAMPLE USER PERSONA TEMPLATE

NAME, OCCUPATION

Sally Superuser, Engineer

Age	*38*
Income	*$110,000*
Education	*Bachelors of Engineering*
Family	*Husband and 2 kids*
Years of Experience in the Industry	*15*
Level of Tech Savviness	*High*
Tech Preferences	*Apple phones and tablets*
Tolerance for Risk	*Low*

BEHAVIORS

Impulsive Buyer

Early Adopter of Electronic Gadgets

Hates Watching Sports

Listens to Talk Radio

Early Riser, Exercises Before Work

STORY:

Write a story about a specific problem this person has that you are trying to solve.

Sally doesn't cook, but she wants to eat out or order for delivery less often. She wants an easy way to eat healthier and spend less money.

NEEDS / GOALS

Efficiency

Minimal Use of Email or Texting

Instructions: *Use the example above as inspiration in filling out the blank user template. Copy the template as needed for multiple personas.*

TUESDAY: USER PERSONA TEMPLATE

NAME, OCCUPATION

[SKETCH]

Age

Income

Education

Family

Years of Experience in the Industry

Level of Tech Savviness

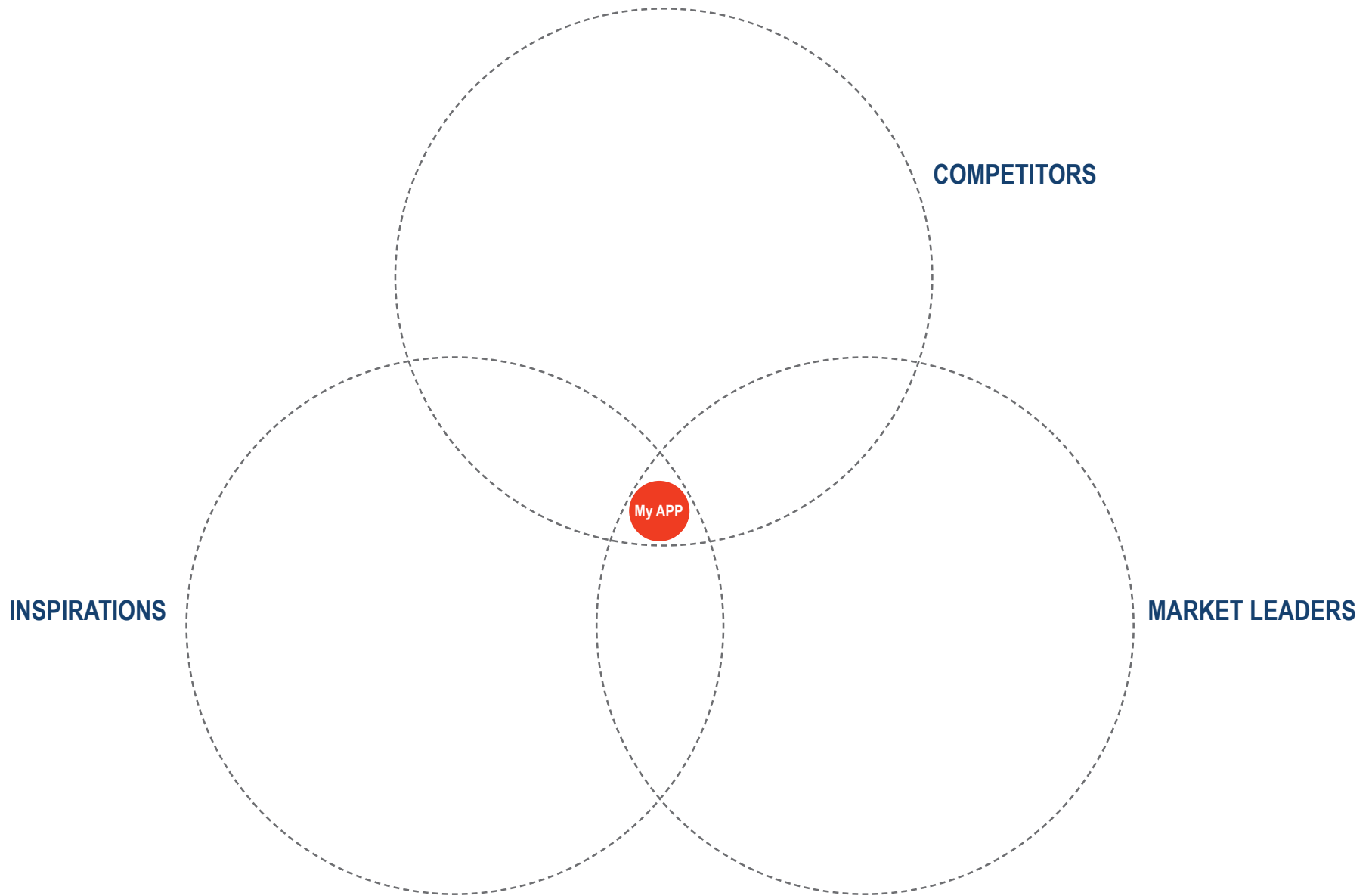**Tech Preferences**

Tolerance for Risk

BEHAVIORS

STORY:

NEEDS / GOALS

Instructions: *Base your personas on target users. Bring any information that you have about target users to the session: their needs, goals, or known pain points, as well as customer feedback and help desk requests.*

WEDNESDAY: DESIGN PATTERNS

COMPETITORS

My APP

INSPIRATIONS

MARKET LEADERS

Instructions: *Identify applications related to your app that are in the same problem domain or could serve as inspiration because they do something in a way your app could do as well. For example, for an ordering application, Amazon's shopping cart might be in the "Market Leaders" section of the diagram.*

WEDNESDAY: DESIGN PATTERNS

DOMINANT PATTERNS

PRIMARY WORKFLOW

DELIGHTERS

SECONDARY WORKFLOW

MOBILE VALUE ADD

Instructions: *Categorize the workflows and interactions that define the user experience. Consider how a mobile framework could augment or constrain the user experience.*

THURSDAY: USER STORY TEMPLATE

TITLE: ....

DESCRIPTION: ....

AS A ....

I WANT TO ....

SO THAT ....

GIVEN: ....

Describe the pre-existing conditions that must be in place (eg: given I am logged in to the system)

AND .... *'AND' and 'OR' are optional qualifiers*

OR ....

WHEN: ....

Identify the primary VERB that drives the action of the story

AND ....

OR ....

THEN: ....

Describe the post-conditions created when the story action is fulfilled (ex: after completing an online purchase, THEN an email confirmation is sent to the buyer, AND a fulfillment order is sent to the warehouse, AND the inventory system is updated.)
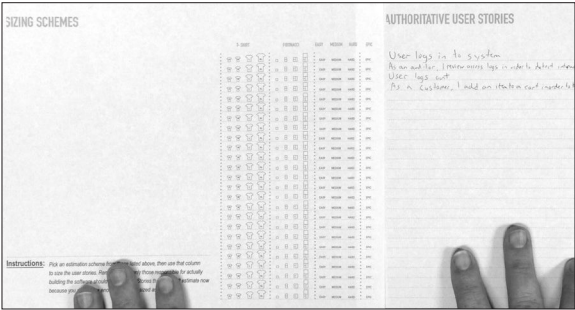
AND ....

OR ....

THURSDAY: DRAFT USER STORIES

TITLE	TITLE	TITLE

THURSDAY: DRAFT USER STORIES

TITLE	TITLE	TITLE

THURSDAY:

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THURSDAY: ESTIMATING SIZE AND COMPLEXITY

Even experienced software developers have difficulty estimating software complexity and size. Agile practitioners have found that imprecise estimates of complexity are usually good enough to plan software projects. Given that, we use relative sizing metrics, such as story points, instead of precise measures, such as person hours. Only engineers responsible for implementing the stories should give estimates; defer estimating complexity if you are not a software developer yourself.

EPICS

An epic is a story that is too big to implement in a two week iteration or really should be broken up into multiple stories. If you can't estimate how big a story might be, you should make the story an epic.

EASY / MEDIUM / HARD

The easiest way of estimating relative size is just to use easy, medium, and hard as imprecise quantifiers.

T-SHIRT SIZE

One way of simplifying sizing is to think about stories as having the same size scale as T-Shirts: small, medium, large, and extra large.

RELATIVE SIZING WITH STORY POINTS

Assigning numbers to story sizes allows you to do simple math with the results. Even though the numbers may be arbitrary, they are still useful for estimating effort. Mapping easy, medium, hard to 1, 2, 3 is a simple story point scheme.

FIBONACCI SEQUENCE

This geometrically increasing sequence (1,2,3,5,8,...) yields a good scale for story point sizing because it forces people to recognize that as story sizes get bigger, it is harder to be precise about estimates.

VELOCITY

Velocity is the number of story points the team completes in an iteration. Measuring planned and actual velocity lets you understand the pace of software development and project how much work can be done by a team in a finite amount of time.

THURSDAY: SIZING SCHEMES

T-SHIRT				FIBONACCI				EASY	MEDIUM	HARD	EPIC	
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	1.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	2.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	3.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	4.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	5.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	6.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	7.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	8.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	9.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	10.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	11.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	12.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	13.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	14.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	15.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	16.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	17.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	18.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	19.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	20.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	21.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	22.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	23.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	24.
S	M	L	XL	☐	☐	☐	☐	EASY	MEDIUM	HARD	EPIC	25.

Instructions: *Pick an estimation scheme from those listed above, then use that column to size the user stories. Remember that only those responsible for actually building the software should assign sizes. Stories that you can't estimate now because you don't know enough should be sized as epics.*

THURSDAY: BUSINESS VALUE WEIGHTING

Business value weight reflects the voice of the customer. Adding business value weight helps prioritize work and delivery milestones based on actual custom commitments and features most directly tied to revenue.

OPPORTUNITY WEIGHT

This is a specific dollar amount tied to a contracted sale or renewal effort.

REVENUE WEIGHT

More abstract than opportunity weight, revenue weight is tied more to a percentage gross revenue target which is set by the business for a defined feature set.

Instructions: *Consider the weighting schemes above and pick the one that is most relevant to your application. Then use that scheme to evaluate the relative business value options to the right for each user story. Try to assign no more than 1/6 of the total stories as the highest value category, and no more than 1/3 as the next highest value. This approach will help you prioritize the most important stories.*

THURSDAY: BUSINESS VALUE WEIGHTING

CUSTOMER EXPERIENCE WEIGHT

As opposed to feature development, customer experience (CX) weighting refers to the impact of workflow and productivity enhancements on the overall customer experience. CX is typically tracked against metrics like conversion, subscription renewal, upsell, and cross-sell.

FEATURE WEIGHT

Typically identified through the success of a competitor, feature weighting identifies a glaring hole in the current product and can be quantified by lost sales to competitors directly related to the existence of the feature.

$	$$	$$$	
$	$$	$$$	1.
$	$$	$$$	2.
$	$$	$$$	3.
$	$$	$$$	4.
$	$$	$$$	5.
$	$$	$$$	6.
$	$$	$$$	7.
$	$$	$$$	8.
$	$$	$$$	9.
$	$$	$$$	10.
$	$$	$$$	11.
$	$$	$$$	12.
$	$$	$$$	13.
$	$$	$$$	14.
$	$$	$$$	15.
$	$$	$$$	16.
$	$$	$$$	17.
$	$$	$$$	18.
$	$$	$$$	19.
$	$$	$$$	20.
$	$$	$$$	21.
$	$$	$$$	22.
$	$$	$$$	23.
$	$$	$$$	24.
$	$$	$$$	25.

FRIDAY: CONSTRAINTS

HEALTHY CONSTRAINTS:

Healthy constraints are part of every software effort. There is an old adage that says two core constraints can remain fixed if one is flexible.

When considering time, cost, and quality, it is beneficial to have an honest assessment of where the flexibility exists in our effort.
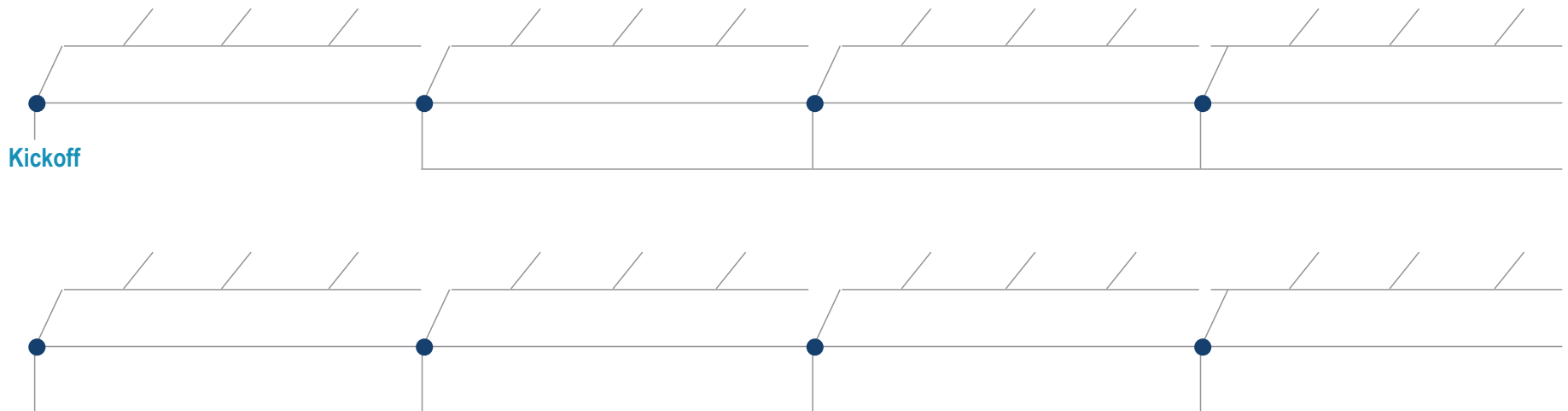
Scope: Fixed | Firm | Flexible

Resources: Fixed | Firm | Flexible

Schedule: Fixed | Firm | Flexible

Note:

Mark only one of the items in the primary constraints list as 'FIXED', one as 'FIRM', and one as 'FLEXIBLE'.

DELIVERY TIMELINE & CRITICAL DATES

Kickoff

Instructions: *Fill in the most important milestones that come to mind in planning the product release. Think about the weight and the frequency of individual iterations.*

Enter the date above the timeline and give a name to each milestone under the timeline.

FRIDAY: THEMES

KEY FEATURE DEVELOPMENT

KEY UX ENHANCEMENTS

KEY SYSTEM AND THIRD PARTY INTEGRATIONS

PERFORMANCE, LOAD, SCALABILITY, DEV OPS

Instructions: *Project themes are helpful in planning release iterations and key delivery mile-stones. Identifying themes keeps the 'big picture' in mind and prevents the harder work from being avoided until the end of the release.*

Example: performance and load testing are important in any app development, but are of particular concern when a massive user crush is expected.

FRIDAY: PEOPLE

ACCEPTANCE FOCUSED

BUSINESS ACCEPTANCE	INTERNAL	EXTERNAL	USER ACCEPTANCE	INTERNAL	EXTERNAL
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐

REVIEW FREQUENCY

☐ WEEKLY ☐ BI - WEEKLY ☐ MONTHLY ☐ QUARTERLY ☐ AD - HOC

REVIEW FREQUENCY

☐ WEEKLY ☐ BI - WEEKLY ☐ MONTHLY ☐ QUARTERLY ☐ AD - HOC

Instructions: *Identify who needs to be involved throughout the development cycle to accept that features are built as expected, to give guidance and feedback, and to validate assumptions. Describe the type and frequency of reviews you anticipate having, for example, a user acceptance test (UAT) or release retrospective.*

FRIDAY: PEOPLE, TOOLS & INFRASTRUCTURE

DELIVERY FOCUSED

PRODUCT OWNER

SCRUM MASTER

CHIEF ARCHITECT

UX LEAD

DEV OPS

QA LEAD

Instructions: *Identify the key roles on the delivery team. It may be the case that these people are not known at this stage. Try to identify people who could take responsibility for driving different areas of the product development effort. The earlier you can identify the main point of contact for each role, the sooner you can identify cross project dependencies affecting your delivery timeline.*

FRIDAY: MANAGEMENT & COLLABORATION TOOLS

COLLABORATION

TASKING

DESIGN & PROTOTYPING

ANALYTICS

COLLABORATION	TASKING	DESIGN & PROTOTYPING	ANALYTICS
Google Drive	JIRA	UXPin	KISSMetrics
Dropbox	Pivotal Tracker	Balsamiq	Google Analytics
Confluence Wiki	VersionOne	Omnigraffle	New Relic
SharePoint	Rally	Visio	Comscore
Jive	Microsoft TFS	Codiqa	Splunk
HipChat	TeamForge	Sencha Architect	Webtrends
Skype	Redmine		Crazy Egg
Campfire			
GoToMeeting			
WebEx			

Instructions: *Identify your current tools AND identify opportunities to improve communication, collaboration, and coordination by improving logistical hurdles in the supporting tool chain.*

FRIDAY: DEVELOPMENT & INFRASTRUCTURE TOOLS

QA	VERSION CONTROL	DEVELOPMENT	INFRASTRUCTURE

QA	VERSION CONTROL	DEVELOPMENT	INFRASTRUCTURE
xUnit	Git	Eclipse	AWS
Cucumber	Github	Visual Studio	Rackspace
Selenium	Gitorious	IntelliJ	Colo
JMeter	Stash	RubyMine	Mainframe
Sauce Labs	Subversion	Sublime	Heroku
Neustar Website Load Testing	Microsoft TFS	Developer Hardware	Joyent
Test Hardware (phones, tablets)	Mercurial	Ruby on Rails	VPN
	Perforce	NodeJS	Chef / Puppet
			Jenkins

Instructions: *Pick candidates for the tools and infrastructure to support the product development effort.*

ACKNOWLEDGEMENTS

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Patrick Sheridan is co-founder and CEO of Modus Create, Inc.

Pat is an active mentor in the DC startup community and co-organizer of NoVa.JS and NYC.JS meetups. He is a 2011 graduate of MindShare, received his MBA from Georgetown University, and holds a BFA from the Corcoran College of Art and Design.

Richard Bullington-McGuire
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🐦 obscurerichard

Richard Bullington-McGuire is the COO of Modus Create, Inc.

Richard is a serial entrepreneur and versatile technologist with experience in agile processes, software development, system architecture, mobile computing, for-profit and non-profit start-up companies, and design. He is a member of both IEEE and ACM.

Geoff Bishop
Principal
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Geoff Bishop is the Vice President, Products at Modus Create, Inc.

Geoff has served in product leadership roles at AOL and PBS, with a history of bringing products to market on emerging and disruptive digital platforms.

Modus Create

Modus Create is a multi-disciplinary team of engineers, experience designers, and managers. We help our clients envision what is possible with emerging technologies. We help clients realize their product vision, and build in-house development capabilities. We are an Official Sencha Partner and recognized thought leaders in the community.

We're passionate about our craft, and love what we do everyday.

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