

Creating A Successful Project When You Don't Know How to Define Success

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Our Agenda

- Every project has a fuzzy front end
- We'll answer these questions
 - What problem does this project solve?
 - What do the customers expect as part of their project?
 - How do you know when you're done?

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Project Demands

- You get a mandate
 - “We must ship this product by June”
 - “We must have <blatz> feature
- Everyone has a different opinion of priorities
- We may not remember to discuss implicit assumptions
 - These assumptions are typically different for everyone
- Our biases create a product different from the one our customers want to buy



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Mandates

- Demands are a surrogate for a problem definition
- What do you normally do when you get a mandate?
 - Common answers:
 - Look for the highest titled person, do that mandate
 - Perform the mandate without asking more questions

Resist taking a mandate at face value. First, discover the business results your management wants to achieve

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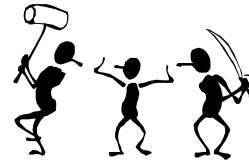
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Different Opinions of Prioritization

- Requirements are supposed to be a way to bring the owner of the problem together with the potential solution-provider
- What happens when (well-meaning) people disagree on what the system should provide?
 - What's essential to the product's success?
 - What else would we want to do, if we could?
 - What makes this system desirable to its users?



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Implicit Assumptions

- We're human, we make assumptions
- How do you find out what other people are thinking?
 - One way is to ask meta questions:
 - What haven't I asked you about yet?
 - What else haven't we discussed?

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Context Free Questions

- What does success look like?
- Why are these results desirable?
- What is the solution worth to you?
- What problems does this system solve?
- What problems could this system create?

- Ask Why without asking why
 - Who, What, When, Where
 - Use How with care (avoid design decisions)
 - Asking Why might put people on the defensive

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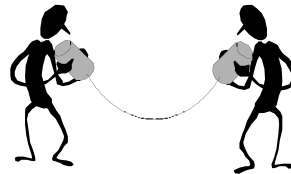
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Creating Open-Ended Questions

- Use your inquisitiveness, curiosity
- Ask about the business context
- Ask about the problem this product is supposed to solve
- During the interview, avoid rapid-fire questions
 - This isn't an interrogation, this is a conversation



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Example 1: Mandate

- You receive a mandate from your management:
 - “I want this system out by June 1. It has to do electronic signatures, and enough other stuff so our customers will want to buy this version.”
- Problems with this “requirement”:
 - 2 mandates: delivery date and one specific feature
 - 1 implicit assumption: we all know what the “other stuff” is



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Resolving Requirements From a Mandate, Part 1

- Define the business context
 - How does this product help the company make money?
 - What does success look like?
 - How do we know when we've gotten there?
 - What is the solution worth?
 - What's the solution worth to you?
- Define the business problem
 - What problems does the business have?
- Define the users (not just the buyers, all people affected by the product)
 - Who are all the users, and who's more important?
 - How do we know?

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Resolving Requirements From a Mandate, Part 2

- Define the customers' problems
 - What do the customers need?
 - What are they willing to tradeoff to get this?
- Define the “other stuff”
 - Go back to the business problem:
 - Use a meta question, such as: “Tell me more about the results you desire”

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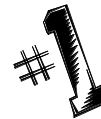
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Example 2: Prioritization

- Sometimes, instead of a mandate, you have problems prioritizing the work to be done. How many times have you heard this conversation:
 - “Our current customers are most important.”
 - “No, our new customers are most important.”
- How do you define which *is* most important?



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Resolving Prioritization Problems

- Define the business context
 - How does the company make money now?
 - How do we want to make money in the future?
 - What does success look like, and how do we know when we've gotten there?
- Define the business problem
 - What problems does the business have?
 - How will this system fix those problems?
- Define the users
 - Who are all the users, and who's more important?
 - Which customer set do these users belong to (current/new customers)?
 - How do we know?

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In Both Examples, Issues Arise

- What problems does this system solve?
- What problems could this system create?



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Interviewing Management Using Open-Ended Questions

- Context free questions create a conversation
- If you get a brain dump of what's wrong now, you're lucky
 - That may be the most valuable information you can get
- You use this conversation to ask about the system
 - What's the business context?
 - What's the customer/problem?
 - Is this different from the user problem?
 - Do you have one customer or multiple customers?
 - Which set of users are you speaking with now, or are being represented now?
 - Some users are more favored than others
- Generate questions in advance and use a pen and a notebook to gather the information

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Practice Context Free Questions

- Get into groups of 3: Interviewer, Interviewee, Observer
- Take index cards from the end of your row
- Interviewer: Ask interviewee:
 - What does a successful conference look like for you?
 - Why is this desirable?
 - What is the conference worth to you?
 - What problems does your being here solve?
 - What problems could your being here create?
- You'll have 4 minutes to ask questions
- Observer: debrief to your team: What did you notice? What did you expect to see?

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You've Moved From Mandate to Problem

- Congratulations!
- Now, it's time to define your project tradeoffs
- Not only does the product have requirements, the *project* has requirements
 - I don't buy the traditional 3-legged stool: cost, schedule, quality. It's more involved than that...

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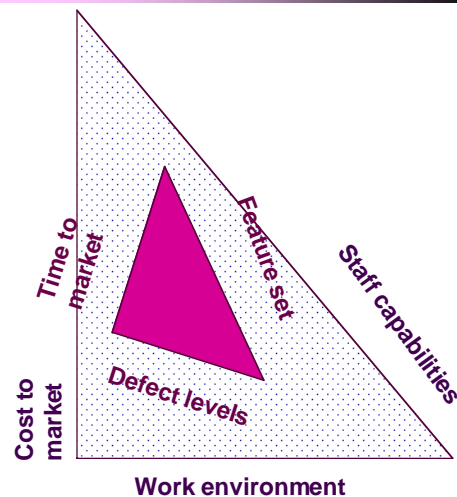
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Possible Project Requirements

- Every project has requirements and constraints
- What do your customers care about the most?
 - Time to market
 - Feature set
 - Defect levels
- Internal Perspectives or Constraints: Your customers don't care about these. You do.
 - Cost to market
 - People and their capabilities
 - Work environment



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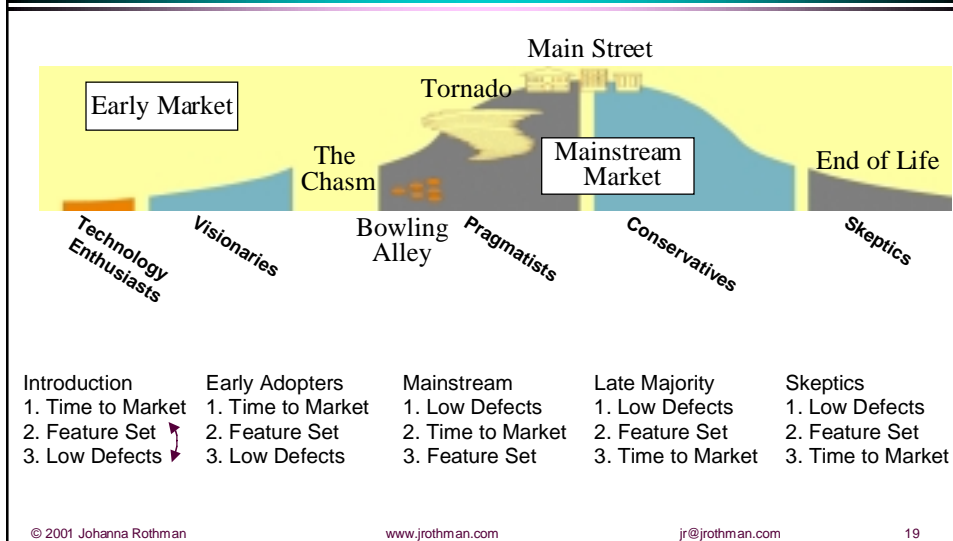
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All Projects Have Different Customer Pressures and Tradeoffs



Customers Have Expectations

- Not all your customers will share the same expectations and pressures
- Your job is to choose a lifecycle that helps you plan a reasonable project that still meets enough of their expectations



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Activity

- Take a few seconds to think...
- Consider the screw-in halogen light bulb
- Where is that lightbulb in its lifetime?
- Why do you think so?

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Release Criteria

- Help define what “done” means
- What’s critical to the success of the project?
- Make release criteria reasonable
 - Discover assumptions and fears
 - Allow you to resolve those assumptions and fears before you release the product
- Agreed to by entire project team and SMART
 - Specific, Measurable, Attainable, Relevant, Trackable
- If you define release criteria well, you will surface assumptions and fears



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Release Criteria Help Illuminate Testing and Product Goals

- Must we meet this requirement by the requested release date?
- What is the effect on our customers if we do not meet this requirement by the release date?
- Do we need to test this part completely? What are the consequences if we do, if don't?

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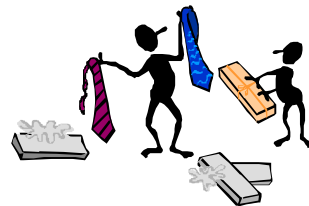
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Define Release Criteria

- As a PM, I draft release criteria, and get buy-in from the entire project team
- I then present the release criteria to senior management, to make sure we're on the same wavelength
- If not, where's the disconnect?
 - I misunderstood what someone told me
 - No consensus among senior management
 - Things have changed...



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Possible Release Criteria

- Specific functionality frozen, tested, with no critical defects
- Specific date
- Specific performance or reliability scenario tested and passed
- Other corporate groups have their deliverables complete
- Documentation tested

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Activity

- Take two cards
- At the top of each card, write down:
 - Release criteria did not work. Why?
 - Release criteria did work. Why?
- You'll have 2 minutes
- Debrief

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Summary

- It can be hard to get started on a project
- Context-free questions are a powerful tool in eliciting and defining the project's problem statements
- Once you know what problem you're trying to solve, you can define the project's requirements
- Use release criteria to define in advance when you're done



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