

Foundations of Business Value

Business Value Workshop Planning Guide

Purpose and Outcome

The purpose of the Business Value Workshop is to create a clear vision of business success for a project or program team. At the end, we expect to have a comprehensive sketch of the measures of success, capabilities, key personas, user scenarios, and some representative process requirements. This framework can be used to guide higher quality decisions, increase accountability for results, and enhance collaboration among team members.

The workshop consists of a structured set of discussion points designed to surface key assumptions and expectations. The best results are produced when teams commit their undivided attention to the discussion and are prepared to learn something new from other participants.

Agenda

- Review workshop goals
- Define business value and measures
- Define capabilities
- Break
- Identify “canary” personas
- Imagine a future scenario
- Brainstorm high-level business requirements

Guiding Questions and Discussion Points

- How much money are we going to spend on this project?
- Who is giving you the money?
- Why is this a better use of his/her funds than a morale event to Hawaii for his/her team?
- In 6/12/18 months, how will they know that they got a good return on their investment? Specifically, what measures will they use to judge success?
- For each measure, what is the value today and what would we expect it to be in the future?
- What capabilities do we believe need to be improved in order to move those dials?
- Whose experience will be improved as the best evidence that the capability is improving?
- What will their experience be like in the future when our work is done?
- What abilities will they need to have in order to realize this vision of the future?

Scope of Discussion

Depending on the stage and size of the project, the discussion could cover a single release, but more often it makes sense to address a program as a whole, irrespective of any specific release. This is useful because it establishes a durable framework to inform decisions about the project and creates more consistency across independent releases.

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Who should be there?

In short, the project leadership team. This includes the business leaders, solution management, business and technical architects, UX leads (assuming you have such a thing) and other key engineering leads. If you have a Scrum Master or dedicated Project Manager, they should attend also. Some experienced teams have opted not to include the business. Instead, they sketch out the work during the workshop, develop it further afterwards, and then present the results in a separate business meeting. This seems to work pretty well also, but it does seem to take more time, and the business almost always appreciates the opportunity to participate in the initial session anyway.

When should it happen?

Before kickoff is ideal (or before sprint 0, if you are tracking that way).

How long does it take?

It depends on how many people attend and how much thought has already gone into answering the questions ahead of time. Getting the right people is more important than focusing on a specific number, but we find that once we get over 18 active participants, things can begin to slow down. Four hours is usually sufficient to get through the work. Occasionally, it may happen quicker (this is unusual), but assuming reasonably cooperative participants, we can limit the duration to four hours.

What kind of preparation is required?

Ideally, none. The more prep that happens, the less learning typically happens in the workshop. The intention is to arrive at a common understanding, which inevitably means leaving some passionate beliefs behind and adopting new insights from other participants. It's best to show up having thought about things a little, but PowerPoint decks and other documents rarely contribute any value to the discussion.

What if we've already done this work?

Then you'll be that much further along. Maybe we can finish early. Keep in mind, however, that 90% of project teams that do this workshop believe they have already done the work, but in our experience, only 2% actually have. The whole session will be much more effective if you plan on engaging deeply for the full four hours.

What sort of facilities do we need for the actual workshop?

The most important thing to have is enough whiteboard space. 3'x8' is about the minimum. Flip charts don't work very well because they aren't erasable, but if you have limited whiteboard space, we can use them for part of the work. Plan on arranging the seating so that everyone can easily talk to each other. The workshop is about creating dialog, not a presentation.

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What should I say in my email to invite the team to attend this workshop?

It's a question we get a lot. Here is some text you could use to start with:

I'm writing to invite you to special working session to help set the foundation for <your project name here>. One of the most important predictors of a project's success is how clearly we define and communicate its goals. Clear goals and agreed upon measures of success promote stronger collaboration, innovation and help us prioritize scope to maximize the business value we get from the project.

We've invited a company that specializes in this work to facilitate the discussion and translate the outcome into an actionable charter and decision-making framework to keep the project on track throughout the delivery cycle.

Your voice is essential to this work. The primary value of this workshop lies in the discussion itself and the sharing of different perspectives in order to surface hidden assumptions. Therefore, no preparation is required for this. Simply show up, ready to engage.

Thank you for setting aside time to support this work. Let me know if you have any questions. I look forward to seeing you on <date>.