

# Business Value Assessment

## Alignment Workshop Planning Guide

### Purpose and Outcome

The purpose of the Business Value Alignment Workshop is to surface a common vision of business success for a team or organization. At the end, you should expect to have a comprehensive sketch of the measures of success, capabilities, key personas, user scenarios, and a few 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 and curiosity to the discussion, and are prepared to learn 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 initiative?
- How is the initiative funded?
- Why is this a better use of funds than a morale event to Hawaii for the team?
- In 6/12/18 months, how will we measure the return on investment? Specifically, what measures will they use to recognize success?
- For the most important success metrics, 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 metrics?
- 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 software release, strategic initiative, business goal, organizational purpose, or product launch. Ideally, we'll establish a durable framework to inform decisions about the initiative and quickly assess the implications of changes in priority or the impact of newly discovered insights.

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### Who should be there?

In short, the project leadership team. This includes the business leaders, product managers, business and technical architects, engineering leads, process specialists, and project managers.

### When should it happen?

Before project kickoff, product launch, or budgeting is ideal, but this work can help to align diverse stakeholders and streamline prioritization at any point in the delivery lifecycle.

### 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, but four hours is a good duration to plan for.

### 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 often means leaving passionate preconceived 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 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, every team can benefit from additional clarity. The whole session will be most effective if you plan on engaging deeply for the full four hours.

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

We'll run the workshop by video conference and use a digital whiteboard to solicit and record notes. A good mic, reliable internet, and cameras on for all participants will increase the amount of information we exchange with each other and facilitate a better collaborative experience.

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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>.