

# Business Engagement in Real Life

By Ricardo Tomé

# What I do?



**Agile Coach @ HSBC**

- **Agile Leadership**
- **Applying Agile in the Real World (with Lego)**
- **Kanban Management Professional I**
- **Kanban Management Professional II**
- **Agile Innovation**

**Founder & Trainer @ Knowledge Kata**



**Co-Founder @ Lean Product Delivery**

**Speaker @ Where people want me**



# Expectations & Topics

Abstract

IT vs Business: Problems

Value

Outcomes

PBI Types

Boards

Decomposition Factor

Dashboards & Information Radiators

Product Owner Vs Innovation Disruptor

Concrete

# Sound familiar?



# Problems...

- Build what is not needed
- HIPPO wins
- Outcomes are not explicit and clear

“Of course we know what we are doing. We just created a 1600 page document with requirements”

“My main goal for 2017 is to improve the UI!”

“Business Value? What is that?”



“We are not an innovation team!”

# Why becoming more Agile?

## Goal

Innovate more than our competitors

## Problem

“Becoming” too slow

# How to innovate more?

## Reduce delivery lead time

- Shorten feedback loops length
  - Therefore, learn faster what customers really want/need
- Create value sooner
  - Therefore, get ROI sooner
- Reduce amount of unwanted/unused products/features
  - Therefore, reduce amount of bad investment
- Reduce complexity
  - Therefore, easier control mechanisms and less dependencies



**Innovation Premises**

# What is Value?

## Business Value

- Increase Revenue
- Protect Revenue
- Reduce Costs
- Avoid Costs
- Competitive Advantage
- Competition KO

## Customer Value

- Features of services/products to create business value

## Operational Value

- Investment to create customer value

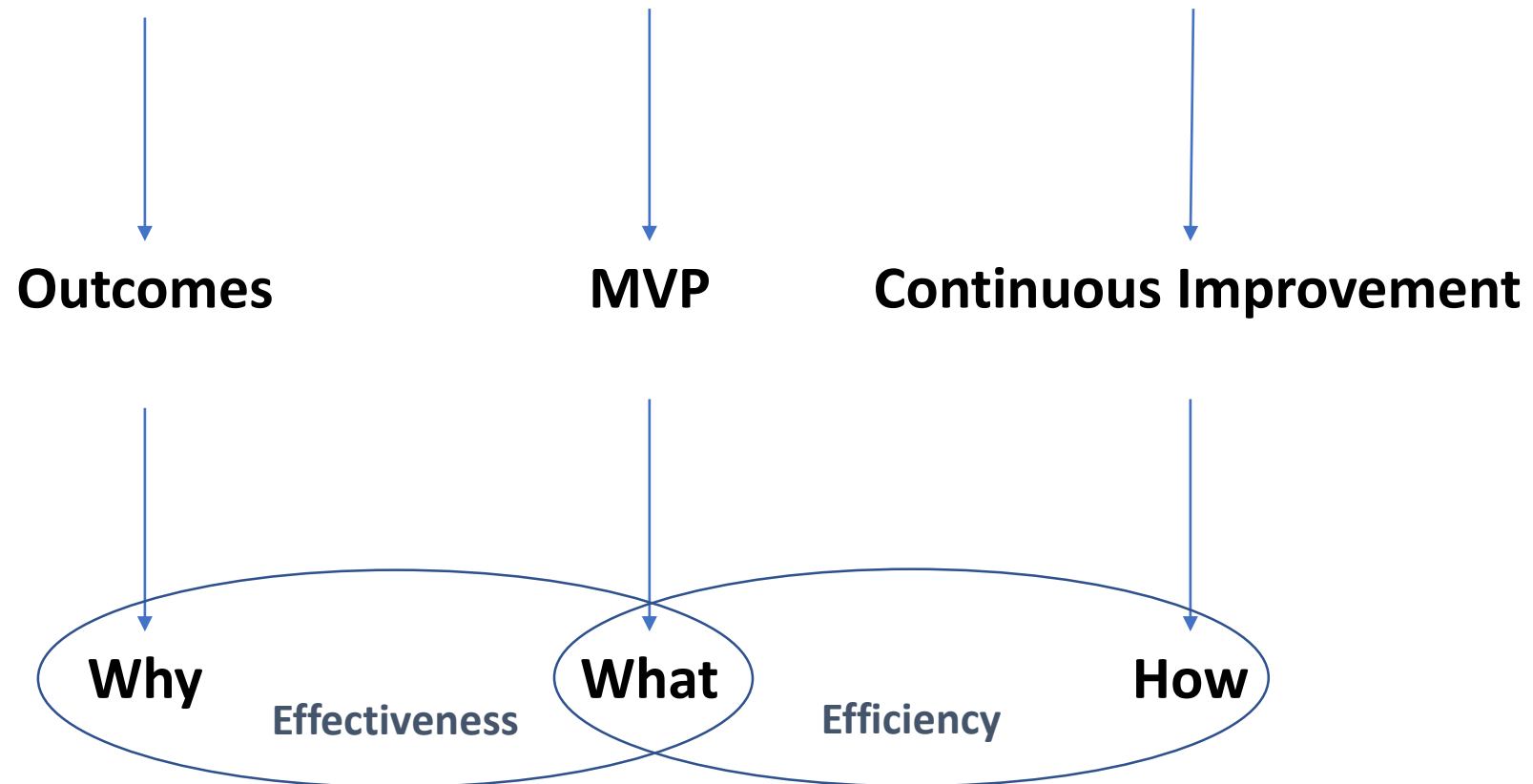
**Very expensive**



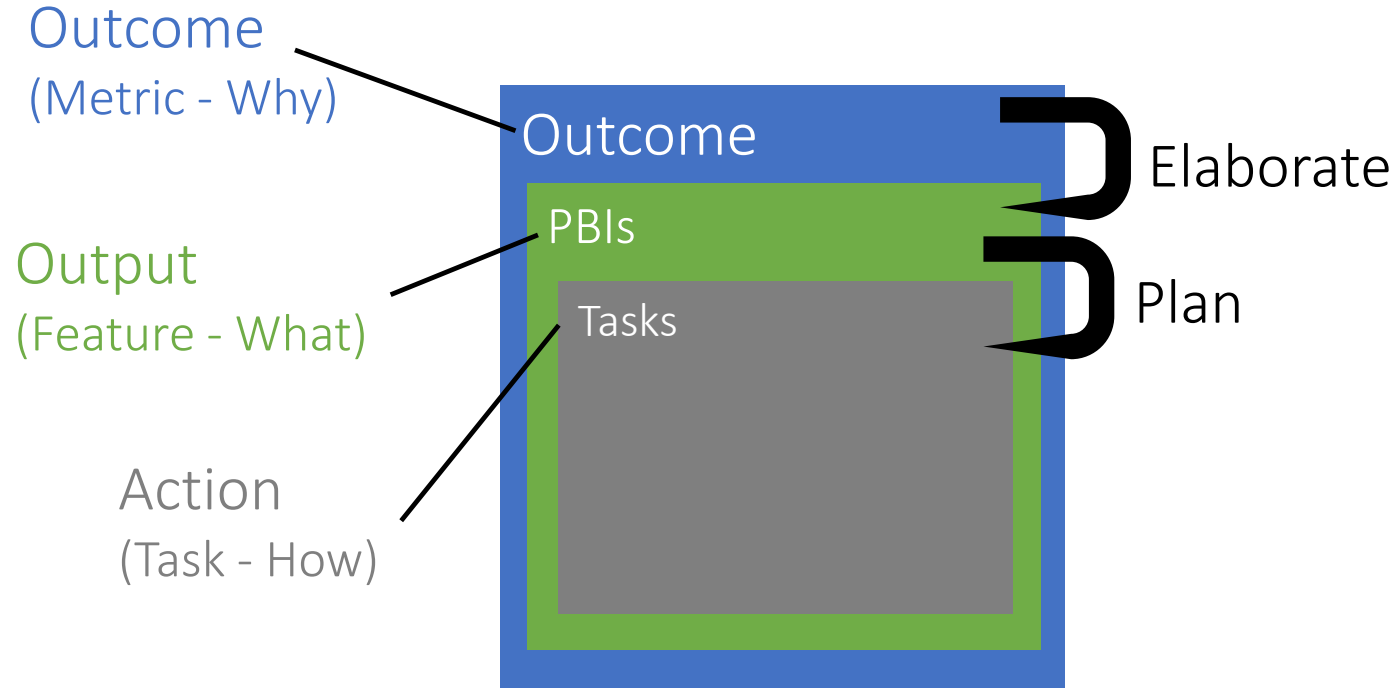
$$\text{Value} = \text{Business Value} - \text{Customer Value} - \text{Operational Value}$$

# Why, What and How

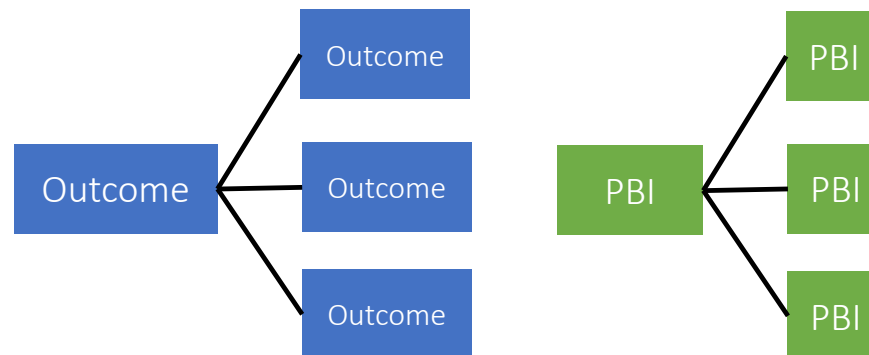
**Value** = Business Value – Customer Value – Operational Value



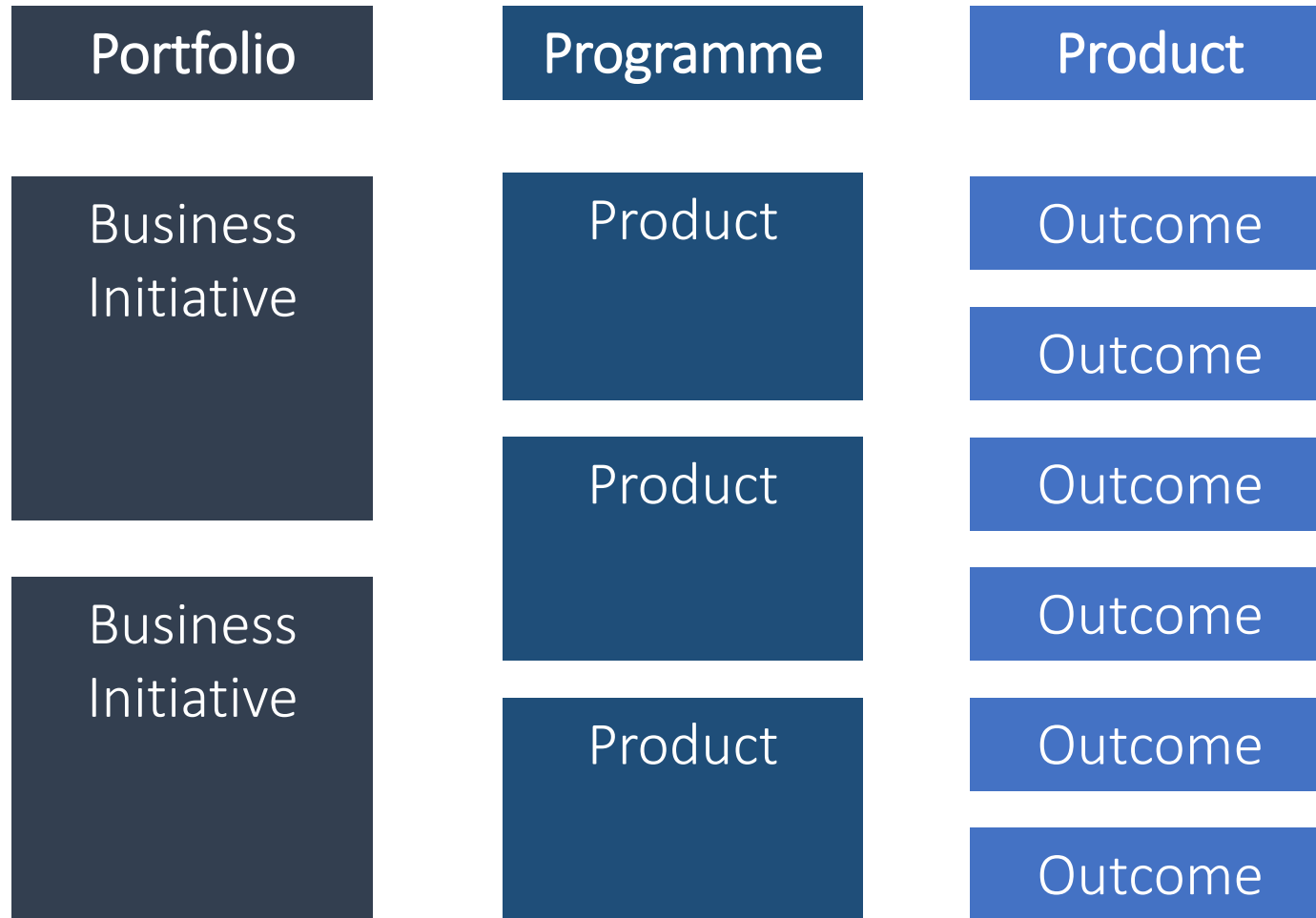
# Why, What and How: Second Round



## Decompose



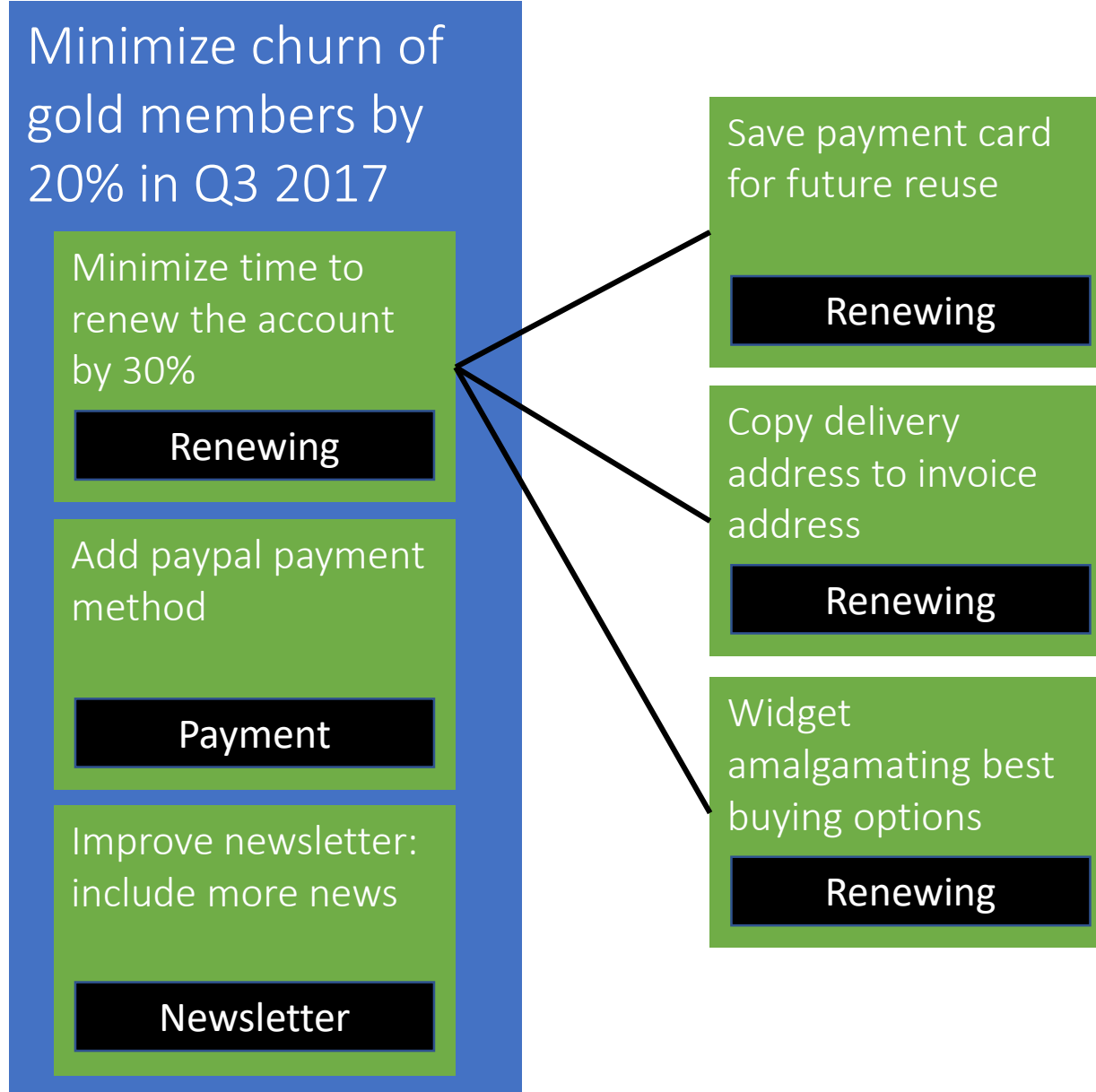
# Why, What and How: Third Round - Scaling



- Business defines the **why**
- Business and Development Team negotiate the **what**
  - Development Team defines the **how**



# Outcomes: Example



## Outcome Statement

- Direction
  - Minimize (or increase)
- Unit of measure
  - churn
- Object of control
  - of gold members
- Expected benefit
  - 20%
- Expected “date”
  - in Q3 2017

# PBI types

(User) Story

User feature we are **sure** the customer wants

Hypotheses

User feature we **assume** the customer wants, therefore needs to be experimented first

Technical Story

**Big** piece of **technical work** required to support the development of users stories or hypotheses (needs to be decomposed as well)

Spike

**Technical investigation** to decrease uncertainty when developing a user\technical story or hypothesis (time-boxed)

Refactor

Technical development to **reduce maintenance** effort **or improve development efficiency** (decrease technical debt)

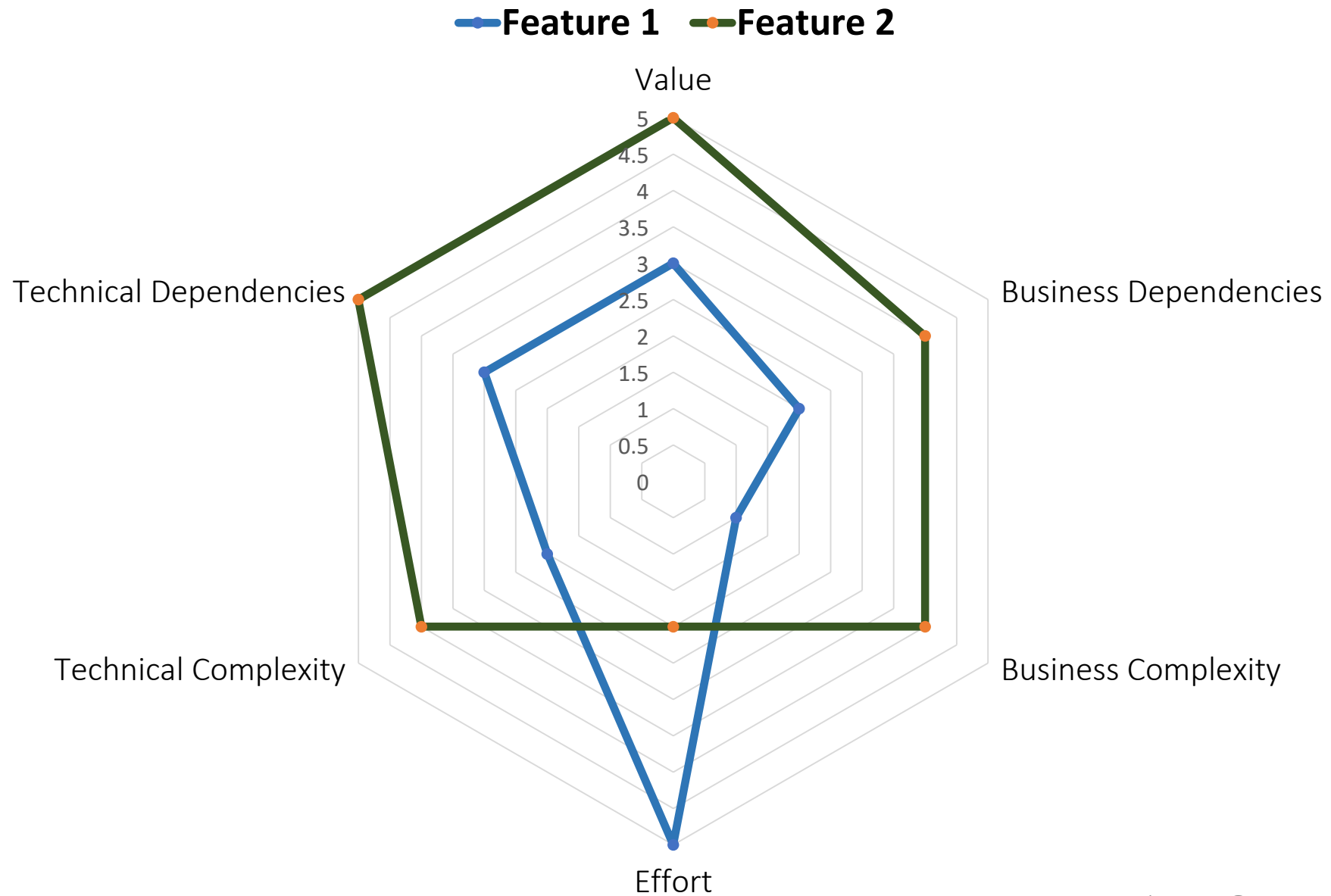
Integration Test

**Test** to be performed **after** a set of stories, technical stories, hypothesis, spikes or refactors are done

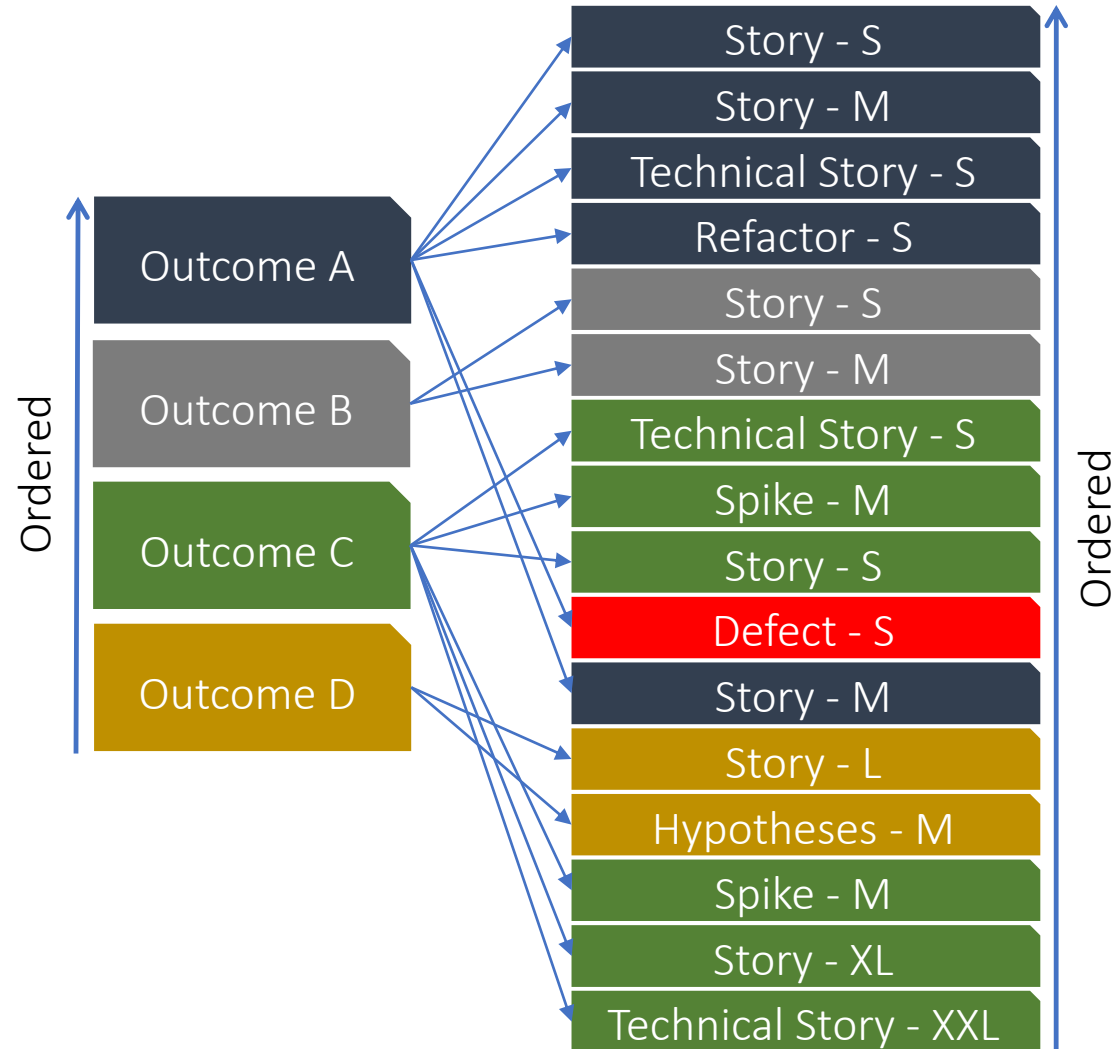
Defect

An output that is **not expected** (a different behaviour is not a defect)

# Decomposition Factors



# Product Backlog



# Boards

## Outcomes Board

Discovery	To Do	Doing	MVP Done	Maintaining & Evolving
Outcome 1	Outcome 3	Outcome 2	Outcome 6	Outcome 8
	Outcome 4		Outcome 7	
			Outcome 9	

## Product Boards

### Elaboration Board

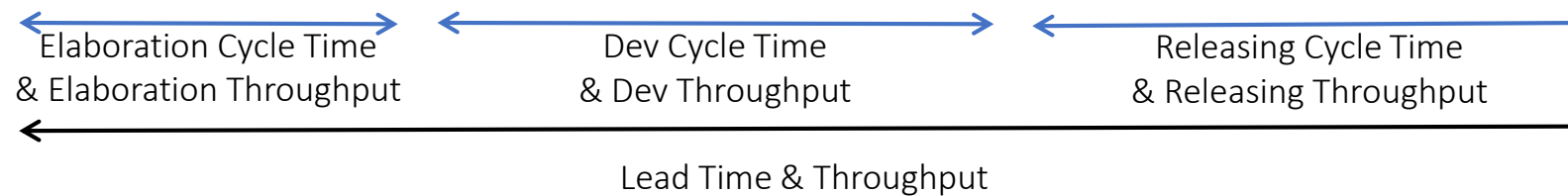
Idea	Analyse	Refine	Plan
PBI 1	PBI 2	PBI 4	PBI 6
	PBI 3		PBI 7
			PBI 9

### Development Board

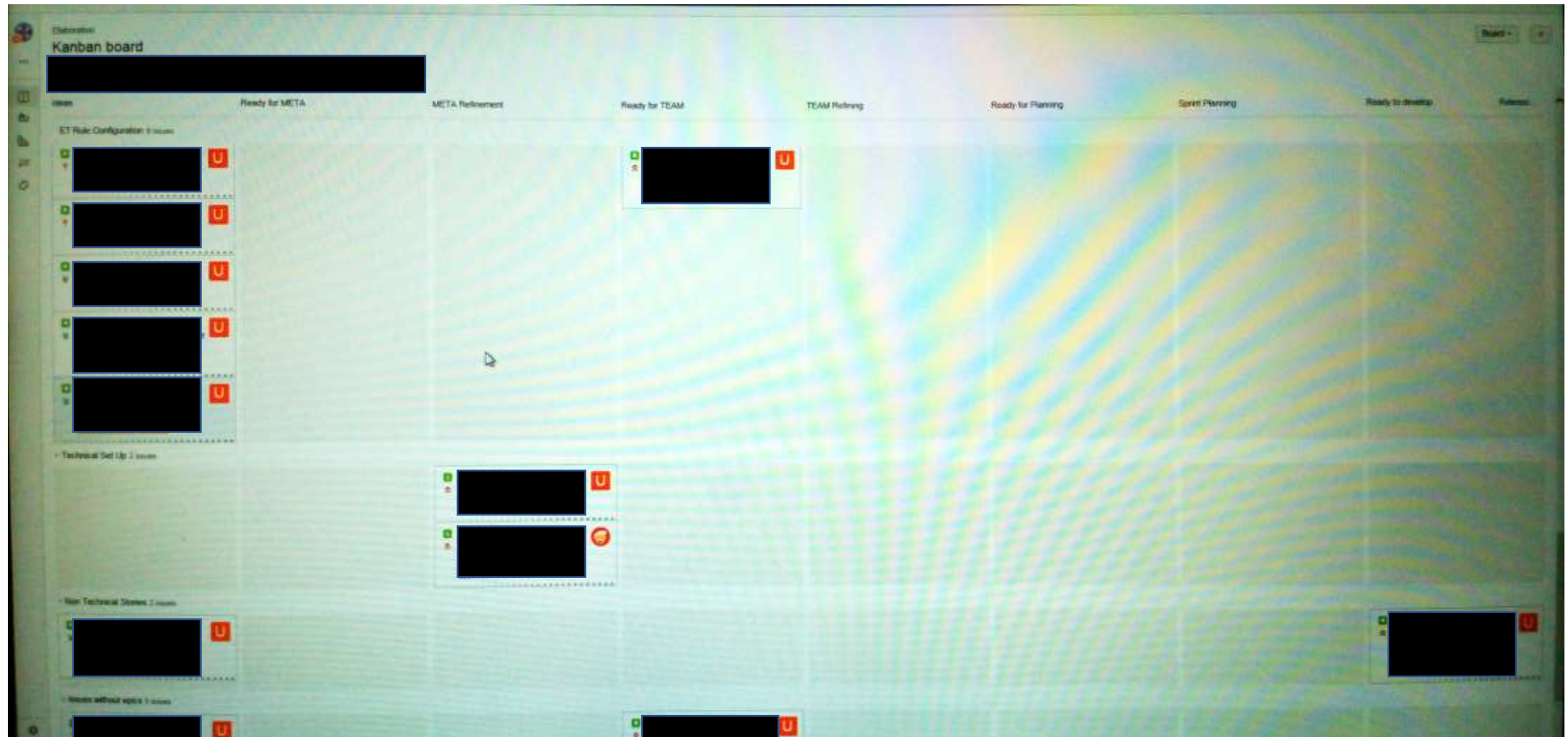
To do	...	Done
PBI 1	PBI 2	PBI 4
	PBI 3	PBI 7
		PBI 9

### Release Board

To do	...	Live
PBI 1	PBI 2	PBI 4
	PBI 3	PBI 7
		PBI 9



# Elaboration Board





# Business Value + Outcomes

The image shows a screenshot of a web application interface. At the top, there is a navigation bar with the text 'Calendars', 'Browse', and 'Create'. The main content area is a form with several sections:

- Description**: A text input field.
- Vision**: A larger text input field.
- Business Value**: A large text input field.
- Expected Outcomes**: A text input field.
- Achieved Outcomes**: A text input field.

The form is partially obscured by a large, bright, circular light flare on the right side of the screen.



# Business Value + Outcomes

Calendar | Browse | Create

## Description

### Vision

What is your motivation for creating the product?  
Which positive change should it bring about?

## Business Value

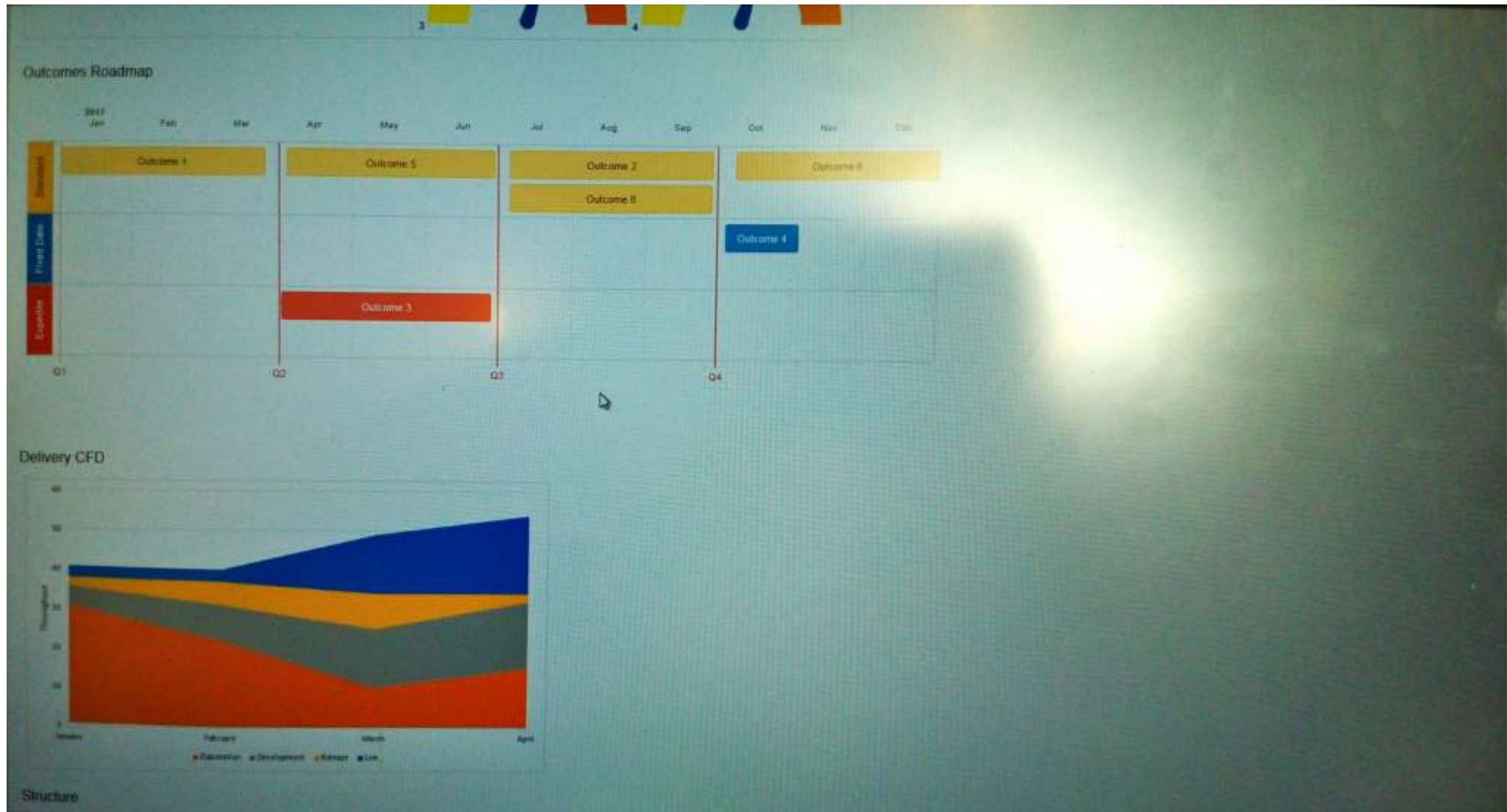
## Expected Outcomes

- 1 Minimize the likelihood of product liability litigation
- 2 Minimize churn of customers with current gold subscription by 20% until Q3 2017
- 3 Increase sales of equities for the XPTO market segment by 24% until Q4 2017
- 4 Must be compliant with XPTO Bank of England regulation by 03/09/2017

## Achieved Outcomes

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# Outcomes Roadmap + CFDs



# Teams Structure

The screenshot displays a Jira team structure page. At the top, under the heading "Structure", are the roles of Product Owner and Agile Lead, both assigned to Ricardo Amaral Tome. Below this, the "Pods" section is divided into two groups: "Dragon Ball" and "Ghost in the Shell". Each group contains a 2x3 grid of team members, all listed as "Developer" and assigned to Ricardo Amaral Tome. At the bottom, the "Other Roles" section lists two individuals with the role "XPTO", also assigned to Ricardo Amaral Tome. The interface includes a search bar at the top and a "Boards" button at the bottom left.

**Structure**

**Product Owner**  
Ricardo Amaral Tome  
ricardo.a.tome@hsbc.com

**Agile Lead**  
Ricardo Amaral Tome  
ricardo.a.tome@hsbc.com

**Pods**

**Dragon Ball**

Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com
Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com

**Ghost in the Shell**

Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com	Developer Ricardo Amaral Tome ricardo.a.tome@hsbc.com
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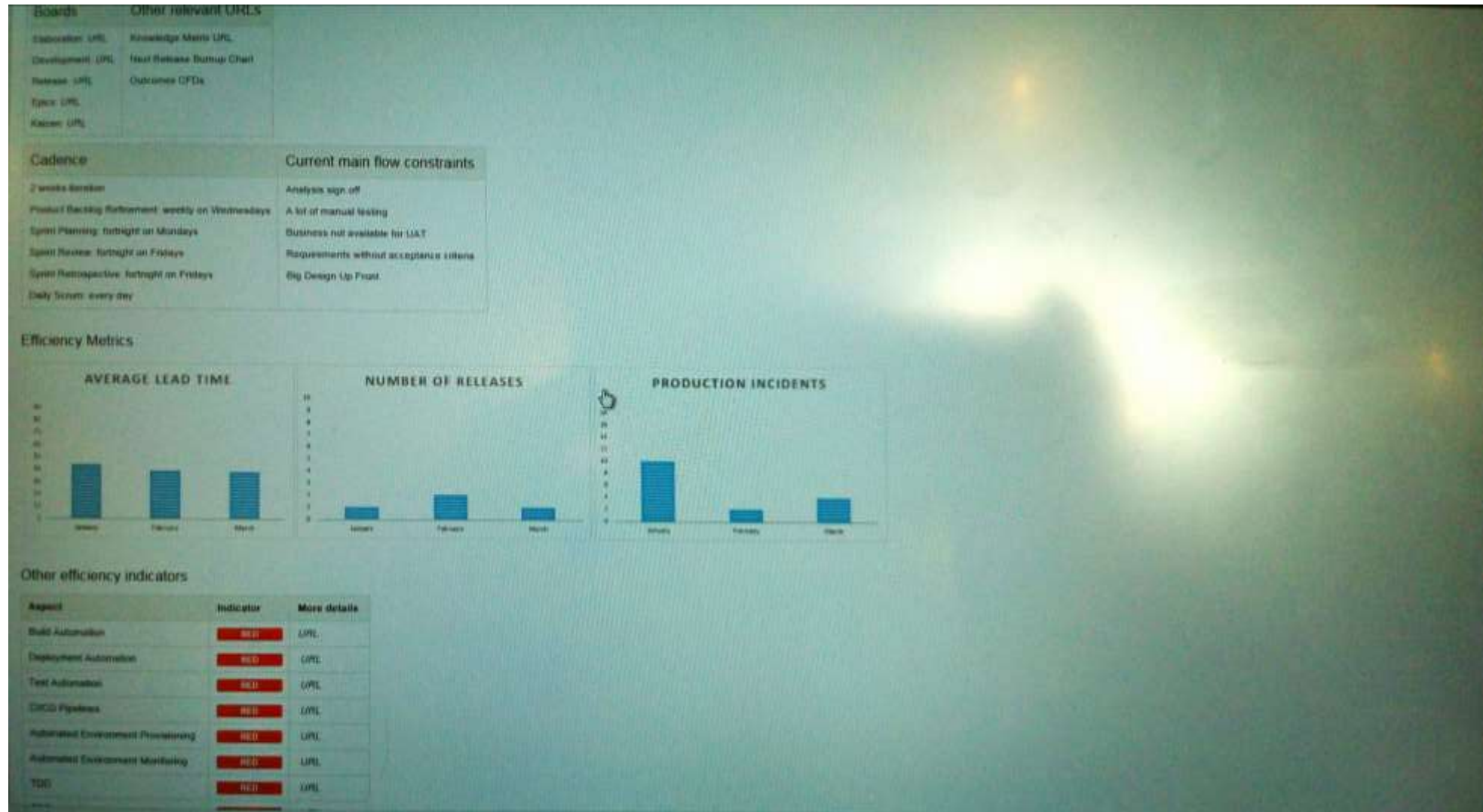
**Other Roles**

**XPTO**  
Ricardo Amaral Tome  
ricardo.a.tome@hsbc.com

**XPTO**  
Ricardo Amaral Tome  
ricardo.a.tome@hsbc.com

Boards    Other relevant URLs

# Efficiency Metrics



# Product Owner: Disruptor

- Master the business domain
- Be married (and faithful) to the customer
- Discover customers unmet needs (JTBD)
- Know the competitors inside out
- Articulate what are the expected outcomes
- Track the achieved outcomes
- Decompose big problems into smaller problems
- “IT guys” are like brothers and sisters

<https://www.youtube.com/watch?v=f84LymEs67Y>

You had enough quotes already, so I don't one for you...

THANKS 😊

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