Creating Alignment with The Product Wall Release Planning Workshop

Agile 2016 – 25 July 2016

Presented by
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Created By Everyone
Prominent, Visible Location
Continuous Collaboration
Why Plan This Way?
Common Costly Misalignment

Product Release

Success
Establish Valuable Alignment

Product Release

Success
HOW: Conditions and Participants

• Release time frame of six months or less
• Schedule 2-3 days
• 30-100 people
  • Working on same product, same code base or otherwise linked
• Agile Teams – **All** Members
  • Product Management
• Subject Matter Experts
  • Marketing, Leadership, Operations, Support, Others
• **Users**
Expected Results

- Clarity of product purpose
- Dependencies visible
- Shared ownership of results
- Shared understandings
- Ready to use Sprint Plans
- Connections between functional skills and departments
- View of product possibilities
- Refined backlog

- Fun
Why?

30-100 people for 2-3 days!
Workshop Incorporates a Complete Agile Product Ecosystem
5 Levels of Agile Planning

- Product Vision
- Road Map
- Release
- Sprint
- Daily
Product Ecosystem

- Product Strategy
- Ongoing Feedback
- Product Delivery
- Customer Research
- Product Planning
- Product Discovery
- Product Development
Product Strategy

What are the problems we are solving?
Who are our customers and what are their needs?
What are the outcomes we need to achieve?
What is the minimal viable product for outcomes?
What is the work needed to build our product?
When will we deliver product increments?
How will we stay focused and coordinated?
All In One Workshop

- Customer Research
- Product Strategy
- Ongoing Feedback
- Product Delivery
- Product Development

Product Vision
- Road Map
- Release
- Sprint
- Daily
Product Wall Release Planning Workshop Activities
Workshop Activities

- Product Strategy
- Customer Research
- Ongoing Feedback
- Product Development
- Product Discovery
- Product Planning

Vision Creation
Workshop Activities

- Product Strategy
- Customer Research
- Ongoing Feedback
- Product Delivery
- Product Development
- Product Discovery
- Product Planning

Vision Creation

Business Model Canvas
Workshop Activities

- Product Discovery
- Product Planning
- Product Development
- Product Delivery
- Ongoing Feedback
- Customer Research

- Vision Creation
- Business Model Canvas
- Road Map Creation
Workshop Activities

- Product Strategy
- Customer Research
- Ongoing Feedback
- Product Discovery
- Product Planning
- Product Delivery

Activities:
- Vision Creation
- Business Model Canvas
- Road Map Creation
- Persona Creation
Workshop Activities

Product Strategy
Customer Research
Ongoing Feedback
Product Delivery
Product Development
Product Discovery
Product Planning

Vision Creation
Business Model Canvas
Road Map Creation
Persona Creation
Release Vision Creation
Workshop Activities

- Product Strategy
- Customer Research
- Ongoing Feedback
- Product Development
- Product Planning
- Product Discovery
- Vision Creation
- Business Model Canvas
- Road Map Creation
- Persona Creation
- Release Vision Creation
- User Story Mapping
Workshop Activities

- Product Strategy
- Customer Research
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- Vision Creation
- Business Model Canvas
- Road Map Creation
- Persona Creation
- Release Vision Creation
- User Story Mapping
- Product Wall Creation
Workshop Activities

- Product Strategy
- Customer Research
- Ongoing Feedback
- Product Delivery
- Product Development
- Product Discovery
- Product Planning
- Vision Creation
- Business Model Canvas
- Road Map Creation
- Persona Creation
- Release Vision Creation
- User Story Mapping
- Product Wall Creation
- Sprint Story Planning
Activity: Vision Creation
“A computer on every desk and in every home.”

Bill Gates, 1980
For movie lovers who enjoy sharing and discussing movies, MovieHub is a social media site that allows users to come together by discovering similar tastes. Unlike Netflix, Facebook, or Vudu, our solution integrates all movie sharing services.
FOR <target customer>
WHO <statement of the need>
THE <product name>
IS A <product category>
THAT <key benefit>
UNLIKE <primary competitor>
OUR PRODUCT <further differentiation>

From Geoffrey Moore, Crossing the Chasm
HOW: Vision Exercise

• If a product vision already exists, use it!
  • Have CEO or a Product Management leader present it
  • 20 minutes, at most

• If creating one, introduce the elevator pitch format
  • Have Product Management lead discussion to fill in the format
  • 20 minutes, at most
Activity: Business Model Canvas
<table>
<thead>
<tr>
<th><strong>BUSINESS MODEL CANVAS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>KEY PARTNERS</strong></td>
</tr>
<tr>
<td>Software Design</td>
</tr>
<tr>
<td>User Experience</td>
</tr>
<tr>
<td>Key Value Proposition</td>
</tr>
<tr>
<td><strong>KEY ACTIVITIES</strong></td>
</tr>
<tr>
<td>Software Design</td>
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<tr>
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</tr>
<tr>
<td>Key Value Proposition</td>
</tr>
<tr>
<td><strong>VALUE PROP</strong></td>
</tr>
<tr>
<td>World Class Design</td>
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<tr>
<td><strong>CUSTOMER SEG.</strong></td>
</tr>
<tr>
<td><strong>CHANNELS</strong></td>
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<tr>
<td>Tablet</td>
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<tr>
<td>Social Media</td>
</tr>
<tr>
<td>Mobile Web App</td>
</tr>
<tr>
<td><strong>KEY RESOURCES</strong></td>
</tr>
<tr>
<td>Big Data</td>
</tr>
<tr>
<td>Access</td>
</tr>
<tr>
<td><strong>COST STRUCTURE</strong></td>
</tr>
<tr>
<td>Fixed Costs</td>
</tr>
<tr>
<td>Variable Costs</td>
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<tr>
<td><strong>REVENUE</strong></td>
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<tr>
<td>Monthly Return</td>
</tr>
<tr>
<td>Gross Margin</td>
</tr>
</tbody>
</table>
The Business Model Canvas

Key Partners
- Who are our key Partners?
- Who are our key customers?
- Which Key Resources are we acquiring from partners?
- Which Key Activities do partners perform?

Key Activities
- What Key Activities do our Value Propositions require?
- Our Distribution Channels?
- Customer Relationships?
- Revenue Streams?

Value Propositions
- What value do we deliver to the customer?
- What are the customer's problems we are helping to solve?
- What bundles of products and services are we offering to each Customer Segment?
- Which customer needs are we satisfying?

Customer Relationships
- What type of relationship does each of our Customer Segments expect us to establish and maintain with them?
- Which ones have we established?
- How are they integrated with the rest of our business model?
- How costly are they?

Customer Segments
- For whom are we creating value?
- Who are our most important customers?
- What type of relationship does each of our Customer Segments expect us to establish and maintain with them?
- Which ones have we established?
- How are they integrated with the rest of our business model?
- How costly are they?

Key Resources
- What Key Resources do our Value Propositions require?
- Our Distribution Channels?
- Customer Relationships?
- Revenue Streams?

Channels
- Through which Channels do our Customer Segments want to be reached?
- How are we reaching them now?
- How are our Channels integrated?
- Which ones work best?
- Which ones are most cost-efficient?
- How are we integrating them with customer routines?

Cost Structure
- What are the most important costs inherent in our business model?
- Which Key Resources are we acquiring from customers?

Revenue Streams
- For what value are our customers really willing to pay?
- For what do they currently pay?
- How are they currently paying?
- How would they prefer to pay?
- How much does each Revenue Stream contribute to overall revenues?
What are the elements that make up a business model?
Customer Segment

“For whom are we creating value?”

Source: Adapted from Alex Osterwalder
“What value do we deliver to the customer?”

Source: Adapted from Alex Osterwalder
Channels

“How do we deliver the value we create to the customer?”

Source: Adapted from Alex Osterwalder
Customer Relationships

“How do we create & maintain relationships with our customers?”

Source: Adapted from Alex Osterwalder
Revenue Streams

“How much will these customers pay for the value we create?”

Source: Adapted from Alex Osterwalder
Cost Structure

“How much will this cost to create and maintain?”

Source: Adapted from Alex Osterwalder
Key Resources

“Who and what will we need to create this value?”

Source: Adapted from Alex Osterwalder
“What will we do with these resources to build value?”

Source: Adapted from Alex Osterwalder
"Who would we partner with that will provide us with Key Resources or Key Activities?"

Source: Adapted from Alex Osterwalder
HOW: Build BMC Exercise

• Prepare a large, blank Business Model Canvas in advance and tape to the wall
• Tell the story of each box
• Solicit sticky notes to put in each box, either by voice or by writing their on an placing them on the canvas
• Fill in every box
• Use different colors, marks, etc. as needed
• May take an hour to complete
• Could have smaller representative team do it before main workshop
Activity: Road Map Creation
## Road Map Creation

### ABC Corporation 2012 Product Roadmap

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
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<tbody>
<tr>
<td>January/February/March</td>
<td>April/May/June</td>
<td>July/August/September</td>
<td>November/December/January</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Q1</strong></th>
<th><strong>Q2</strong></th>
<th><strong>Q3</strong></th>
<th><strong>Q4</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Service Portal for Employee Benefits and PTO</td>
<td>Additional Employee Self-Serve Features based on Feedback</td>
<td>Holiday Shipping Programs</td>
<td>新增功能</td>
</tr>
<tr>
<td>1/29/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Customer Claims Processing and Tracking System</td>
<td>Additional Claims Features based on Customer Feedback</td>
<td></td>
<td></td>
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<tr>
<td>2/26/2012</td>
<td></td>
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</tr>
<tr>
<td>Mobile Services for Claims Processing and Tracking</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>3/30/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Green**: Committed Plan, Dates & Work.
- **Yellow**: No Requirements, Committed Plan or Date. Subject to Change Based on Business Need and/or Priority.
HOW: Create The Road Map

• Before the workshop, help Product Management define main “Epics” or feature groups desired for the release
  • These are at a high level not too much detail
  • Based on market research, customer interviews, etc.
• At the workshop the desired feature groups can be presented and refined
• The Road Map includes current and next 2-3 releases
Activity: Persona Creation
Data Persona

Name: Jean Paul the Techie
Age: 42
Income: $80K+

Quotes:
I love Arnold movies!

Background:
Grew up watching Arnold movie w/ his dad.

Maria the Social Butterfly

Maria:
23 years old
College student, class president
Income: $15/hr

Maria: "I never have time for movies, I'm too busy"
Maria: "Sometimes I'll invite myself over to friend's house to watch"
Maria: "Sometimes I'll go out with friends to watch movies"
Empathy Map

Think and Feel?

Hear?

See?

Say and Do?

Pain

Gain
HOW: Create Personas

• If you already have personas, use them
  • Existing personas can be explained and refined
• Split into ad-hoc persona teams, one persona per team
• Build the Empathy Map for each persona within the ad-hoc teams
• Regroup and present creations to entire group
• All takes up to 1.5 hours
Activity: Release Vision Creation
FOR <target customer> WHO <statement of the need> THE <product name> IS A <product category> THAT <key benefit> UNLIKE <primary competitor> OUR PRODUCT <further differentiation>

From Geoffrey Moore, Crossing the Chasm
HOW: Create Release Vision

• Product Management references the Road Map to give feature groups to each team
  • Collaboratively decide which team will likely work on which feature group
• Split into your defined Agile Teams
• Looking at their feature group, each team writes and elevator pitch for that feature set
• Come back together and present Release Visions to each other
• Takes 45 minutes
Activity: User Story Mapping
User Story Mapping
Identify releases in a Story Map by slicing horizontally.

Source: Jeff Patton. “An Introduction to User Story Mapping”
Above the line, or not
HOW: Create Story Maps

• Each team uses their “Epics” or feature groups desired for the release
• Convert the feature groups to user goals by asking “What is the user trying to accomplish with this new feature?”
  • These goals are the top row of the Story Map
• Start making actions the user will take to accomplish each goal
• Have an experienced Story Map facilitator!
• This mapping takes several hours
Activity: Product Wall Creation
Product Wall Creation
Teams, Dependencies, State
Product Wall Build
Product Wall Grid

Sprints

Feature Group or Epic Lanes

Lanes

Product Wall Grid
HOW: Create The Product Wall

• Each team pulls actions from the Story Map or writes large stories from the Story Map
• Each team, all at the same time places these cards on The Product Wall
  • Placement into Sprints is a “gut feel” guess at this point.
  • Just lay them out, making and changing cards as they go.
  • Tag the cards to indicate owner team and dependencies
• Review to each other the end result
Activity: Sprint Story Planning
Sprint Story Planning
Sprint Story Planning Cycle
HOW: Sprint Story Planning

- Each team references the large stories in The Product Wall Sprint 1 column
- Each team plans Sprint 1 in their usual way
- Each hour, all teams return to The Product Wall to update the contents of Sprint 1 and the Story Maps
- Continue this cycle until Teams have Sprint 2 planned
- Now plan Sprint 2, then 3 until time runs out
- The Product Wall Release Workshop ends with teams performing this cycle
Finish With Ready Sprint Plans

- Product Strategy
- Customer Research
- Product Discovery
- Ongoing Feedback
- Product Development
- Product Planning
- Product Delivery

- Vision Creation
- Business Model Canvas
- Road Map Creation
- Persona Creation
- Release Vision Creation
- User Story Mapping
- Product Wall Creation
- Sprint Story Planning
Sample Agenda
<table>
<thead>
<tr>
<th>Time</th>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 - 3:00</td>
<td>Business Model Canvas</td>
<td>Invited participants create the canvas for presentation tomorrow</td>
</tr>
<tr>
<td>3:30 - 4:30</td>
<td>Preparation for tomorrow</td>
<td>Room prep, materials, etc.</td>
</tr>
<tr>
<td></td>
<td>Product Owner Epics/User Goal Review</td>
<td>Review backlogs, dependencies, remaining planning for tomorrow</td>
</tr>
</tbody>
</table>
## HOW: Sample Workshop Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 - 9:15</td>
<td>Opening</td>
<td>Introductions. Schedule and objectives for the day. Review of the release cadence (sprints) and iteration calendar, planning rules and expectations.</td>
</tr>
<tr>
<td>9:45 - 10:15</td>
<td>Review Business Model Canvas</td>
<td>Present and review the Business Model Canvas created by Product Management</td>
</tr>
<tr>
<td>10:15 - 10:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:30 - 12:00</td>
<td>Persona workshop</td>
<td>Review current personas with any updates</td>
</tr>
<tr>
<td>12:00 - 12:45</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:45 - 1:30</td>
<td>Team Roster Review</td>
<td>Discussions about team rosters and needs. Definition of Done and Team Agreements</td>
</tr>
<tr>
<td>1:30 - 1:45</td>
<td>Above the Line</td>
<td>Peer accountability improvement</td>
</tr>
<tr>
<td>1:45 - 3:15</td>
<td>User goals / Road map</td>
<td>Present the goals the user wants to accomplish with each product area. This is the top line of the User Story Map</td>
</tr>
<tr>
<td>3:15 - 3:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:30 - 3:45</td>
<td>Introduce User Story Maps</td>
<td>Brief training (a review for most) of User Story Mapping, emphasize Definition of Done</td>
</tr>
<tr>
<td>3:45 - 4:45</td>
<td>Build User Story Maps</td>
<td>Appropriate and volunteer groups take each User Story Map area.</td>
</tr>
<tr>
<td>4:45 - 5:00</td>
<td>Review the day</td>
<td>Review the accomplishments of the day. Preview of tomorrow. Handle questions</td>
</tr>
<tr>
<td>Time</td>
<td>Subject</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>9:00 - 9:15</td>
<td>Opening</td>
<td>Schedule and objectives for the day.</td>
</tr>
<tr>
<td>9:15 - 9:45</td>
<td>Vision and Persona review</td>
<td>Evaluate if the vision still fits and makes sense. Check the personas and empathy maps</td>
</tr>
<tr>
<td>9:45 - 10:45</td>
<td>Build User Story Maps</td>
<td>Continue work of previous day</td>
</tr>
<tr>
<td>10:45 - 11:00</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>11:00 - 12:00</td>
<td>Adjust user activities for importance and define release content slices</td>
<td>Adjust the vertical information of the maps to define importance of actions</td>
</tr>
<tr>
<td>12:00 - 12:15</td>
<td>Review User Story Maps</td>
<td>Highlights of each map are reported to the whole group</td>
</tr>
<tr>
<td>12:15 - 1:00</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:00 - 1:15</td>
<td>Introduce Product Wall</td>
<td>Brief training on creating and using a Product Wall</td>
</tr>
<tr>
<td>1:15 - 2:00</td>
<td>Build Product Wall</td>
<td>Write epics/stories from User Story maps into the Product Wall</td>
</tr>
<tr>
<td>2:00 - 2:15</td>
<td>Confidence Check</td>
<td>Facilitator asks for fist of five &quot;confidence factor&quot; Definition of Done reminder</td>
</tr>
<tr>
<td>2:15 - 2:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>2:30 - 2:45</td>
<td>Intro to Sprint Story Planning Cycle</td>
<td>Describe how the User Story Map &lt;-&gt; Product Wall &lt;-&gt; Backlog Refinement &lt;-&gt; Sprint Planning will work</td>
</tr>
<tr>
<td>2:45 - 4:45</td>
<td>Sprint Story Planning</td>
<td>Individual teams start grooming backlogs, planning sprints, etc.</td>
</tr>
<tr>
<td>4:45 - 5:00</td>
<td>Review the day</td>
<td>Review the accomplishments of the day. Preview of tomorrow. Handle questions</td>
</tr>
</tbody>
</table>
# Workshop - Thursday

<table>
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<tr>
<th>Time</th>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 - 9:15</td>
<td>Opening</td>
<td>Schedule and objectives for the day. Have Sprint 1 tasked and ready!</td>
</tr>
<tr>
<td>9:15 - 9:45</td>
<td>Product Wall Review</td>
<td>Referencing the vision, personas, etc., review the Product Wall</td>
</tr>
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<td>Confidence Check</td>
<td>Facilitator asks for fist of five &quot;confidence factor&quot;</td>
</tr>
<tr>
<td>3:30 - 4:00</td>
<td>Update Product Wall and Present Sprint Plans</td>
<td>Each team presents their plans tasked out plans for Sprints 1-2 and stories for subsequent Sprints. Update the Product Wall accordingly.</td>
</tr>
<tr>
<td>4:00 - 4:30</td>
<td>&quot;Product Box&quot; Commitment</td>
<td>Commitment to the Product Wall items that can go &quot;on a Product Box&quot;</td>
</tr>
<tr>
<td>4:30 - 5:00</td>
<td>Retrospective of the workshop</td>
<td>Retrospective of the workshop. How did it work for us?</td>
</tr>
</tbody>
</table>
Ongoing (Constant) Feedback Using The Product Wall
Product Wall Location
Scrum of Scrums
Scrum of Scrums
HOW: Scrum of Scrums

• Two or more times per week a Scrum of Scrums takes place in front of The Product Wall
• Each team selects one person to represent the team at the meeting
  • Not always the same person, rotate
  • All members of all teams are welcome to attend, along with anyone else interested
    • Only the representatives speak
• Update cards, highlight dependencies
• The Scrum of Scrums lasts 15 minutes
Own and Improve
Increase Team Visibility
Tags to Color and Shapes
HOW: Own The Product Wall

• Talk about the vocabulary and rules of the wall
• Bring up improvement ideas
  • Keep it as simple as possible
  • Keep it as useful as possible
• Changes to the way The Product Wall works should be made collaboratively
• If people are not using it, that is an indicator that improvements are needed
• ScrumMasters watch for improvement needs
Acknowledgements

- **Vision**: Geoffrey Moore, Crossing the Chasm
- **Business Model Canvas**: Alex Osterwalder, www.businessmodelgeneration.com
- **Empathy Map**: Dave Gray
- **Product Wall**: Inspired by Tom Looy, agileatlas.org/articles/item/the-great-wall-scaling-agile-on-a-multi-team-project
- **Product Ecosystem**: Inspired by Skip Angel
- **Awesome clients** that build things!
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http://www.solutionsiq.com/author/adayley/
@DayleyAgile
http://plus.google.com/+AlanDayley
How to build a Business Model Canvas
“Let’s map out our existing business model”

tip: tell a story

Source: Adapted from Alex Osterwalder
“Who is our Customer Segment?”

Source: Adapted from Alex Osterwalder
“What need of theirs do we solve?”

Source: Adapted from Alex Osterwalder
“How do we deliver our solution to them?”

Source: Adapted from Alex Osterwalder
“How do we build relationships with them?”

Source: Adapted from Alex Osterwalder
“How do we make money delivering this value?”

Source: Adapted from Alex Osterwalder
“What does this cost us to build & maintain?”

Source: Adapted from Alex Osterwalder
“Who & what do we need to create this?”
“What activities do these resources perform?”

<table>
<thead>
<tr>
<th>kp</th>
<th>ka</th>
<th>vp</th>
<th>cr</th>
<th>cs</th>
</tr>
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<tbody>
<tr>
<td>kr</td>
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</tbody>
</table>

Source: Adapted from Alex Osterwalder
“Who do we partner with?”

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Source: Adapted from Alex Osterwalder
This can apply to **internal projects**!

<table>
<thead>
<tr>
<th>kp</th>
<th>ka</th>
<th>vp</th>
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<td><img src="images/r.png" alt="Images" /></td>
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</tbody>
</table>

Source: Adapted from Alex Osterwalder
This can be an Internal User or Stakeholder

Source: Adapted from Alex Osterwalder
This can be an Internal Product or B2B Solution.

Source: Adapted from Alex Osterwalder
These can be **Internal Costs and Metrics**.

Source: Adapted from Alex Osterwalder
These can be Internal Partnerships across Functional Departments

Source: Adapted from Alex Osterwalder
Bonus: Collaboration Principles
Principle: Diverge then Converge

Diverge
Brainstorming
Observations

Converge
Insights
Conclusions

Setup
Idea
Decisions
Goal
Principle: Small, Large, Small

- Individuals
- Small Groups
- Most Decisions
- Large Group
Principle: Multi-channel Interaction
Meeting self-organization is about:

• Allowing the attendees to decide ‘how’ the work of the meeting will be done
• Allowing the attendees to choose their work in the meeting, rather than pre-assign it
• Attendees decide how they will respond to their given objectives and environment
• Managers & Leaders can influence the objectives and environment of the meeting
Thank you!
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