Portfolio Delivery System

A nimble and sustainable approach for turning strategy into value-delivering execution.

Portfolio Delivery System
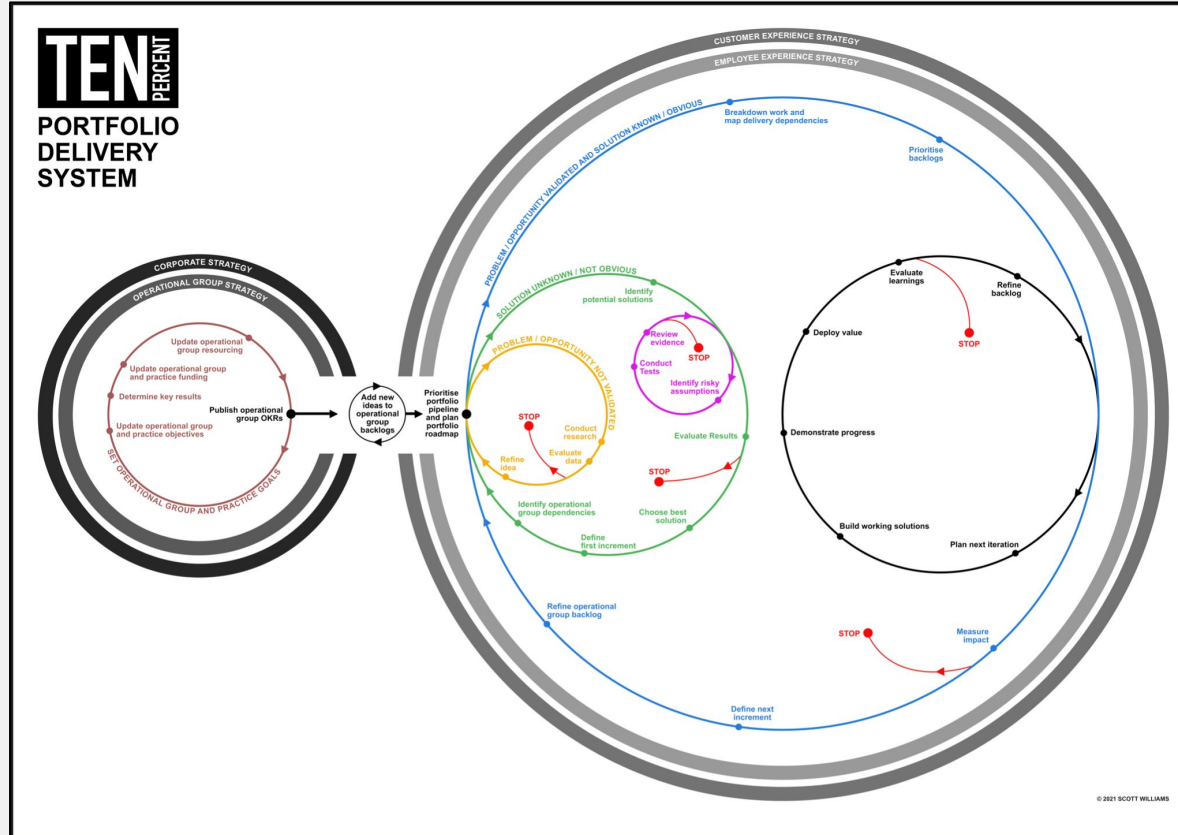
Overview

The Portfolio Delivery System is a sustainable mechanism for creating, managing and delivering a pipeline of the most important work that creates meaningful value for your customers, employees and business.

It's a critical component of an operating model that promotes agility and alignment in an ever-evolving business landscape.

Key System Principles

Embedded strategic alignment
Built-in connection to your customer, employee and business strategies to ensure everything you do is in support of your vision of the future.

Objective-based funding
Distribution of financial investment into persistent value streams based on the short-term impact they intend to deliver against your long-term goals.

Coordinated prioritisation
Continuous alignment and communication of the importance and sequence of all the work that needs to be performed next across each value stream.

Capacity-based planning
Realistic allocation and visualisation of the effort required from all your people for prioritised research, design, delivery and deployment activities.

Just-in-time solutioning
Delaying solution identification, design and delivery-related activities until you are ready to act on them according to your priorities, plan and capacity.

Data-informed decision-making
Ensuring that you are making choices about what to do (and not do) next which are informed by contextual and timely facts and evidence.

TEN PERCENT

How to use this guide

The purpose of the information that follows is to describe what each process (and each step in that process) is meant to achieve, and why it's important.

Recommendations on how those outcomes might be best achieved are also included, however there may be other specific methods techniques which would produce the intended results.

A few tips

You may have more than one portfolio
The larger your organisation, the more likely that you could have separate portfolios to manage. When that happens, each portfolio would adopt the complete system to manage their own work. A primary determining factor in the number of independent portfolios will be the level of dependency between operational groups throughout the organisation.

Each step may represent multiple activities
The steps throughout each process in this system represent the type of information or knowledge that you should have at that time to make a decision about what to do next. It is possible, however, that each step may consist of multiple activities to gain that knowledge. It's also likely that multiple steps may be combined into the agenda of a single, larger forum or ceremony. It's the information obtained and the order in which you obtain it that is most important...not the way you perform the steps.

The owner is not necessarily the facilitator
For each step in the processes contained within this system, an owner is recommended. This is the person or role that is accountable for ensuring that part of the process is completed with a quality outcome. That owner may decide, at their discretion, to delegate on-the-ground facilitation of that activity...with the delegate assuming all of the authority to make informed decisions and act on the owner's behalf.

TEN PERCENT

Define strategies

Before your organisation can successfully adopt any delivery system, you must have a clear set of documents that provide a long-term view on what the business stands for and where it wants to go. These strategies are what allow the people responsible for that delivery the autonomy to produce tangible outcomes while remaining aligned to a common cause.

Corporate strategy

Your corporate strategy is an inspirational and holistic representation of your company's long-term aspirations.

It's a key enabler of the Portfolio Delivery System to ensure that all the work produced by the value streams remains aligned to your company's purpose and vision of the future.

When
Annually

Owner
Chief Executive Officer

Key Participants
Group executives, practice leads, operational group leads

Outputs
- Corporate purpose statement
- Corporate vision statement
- Corporate strategy

How
Describe how to facilitate this part of the process, including typical activities and techniques.

TEN PERCENT

Operational group strategy

Operational group strategies translate your corporate strategy into a more detailed set of executable choices for specific areas of the business.

They are a critical component in the portfolio delivery system for granting autonomy to those who work within it to deliver against an agreed set of aligned objectives.

When
Annually

Owner
Value Stream Leads

Key Participants
Subject matter experts, operational group team members

Outputs
● Operational group strategy

Customer experience strategy

Your customer experience strategy is what will ensure that, no matter what work is being performed or by whom, it's design purposefully contributes to creating the type of experience you intend your customers to have when interacting with any part of your organisation.

How
Bring together all of the key participants in a workshop where everyone can contribute their ideas for the type of experience you want your customers to have.

Typical workshop agenda:
- Brainstorm ideas on what the desired customer experience will be and how to achieve it
- Group like ideas and debate which ones to include

Post the workshop, the owner should refine the overall strategy, circulate with trusted advisors for feedback and publish it to the broader organisation.

Customer Experience Strategy Template

When
Annually

Owner
Group Executive, Customer

Key Participants
Customer-related practice leads

Outputs
- Customer experience strategy

TEN PERCENT

Employee experience strategy

Your employee experience strategy ensures that everything you deliver, whether it's internal or external facing, contributes to the creation of a working environment for your people that allows them to do their best work and prepares them for the customer and business needs of the future.

How
Bring together all of the key participants in a workshop where everyone can contribute their ideas for the type of experience you want your employees to have.

Typical workshop agenda:
- Brainstorm ideas on what the desired employee experience will be and how to achieve it
- Group like ideas and debate which ones to include

Post the workshop, the owner should refine the overall strategy, circulate with trusted advisors for feedback and publish it to the broader organisation.

Employee Experience Strategy Template

When
Annually

Owner
Group Executive, People

Key Participants
Employee-related practice leads

Outputs
- Employee experience strategy

TEN PERCENT

Set operational group and practice goals

Bringing your long-term strategies to life require a collection of nearer-term targeted milestones that indicate whether the organisation is on the right path for realising its vision. These objectives and key results (OKRs) are what you measure to inform and direct future ideation, prioritisation and delivery activities.

Update operational group and practice objectives

Setting a specific and targeted list of medium-term objectives (the "O" in OKRs), gives everyone working in the system a set of goals to help focus ideation efforts and delivery activities.

They are the starting point for deciding how much funding to invest in each operational group based upon those agreed goals.

When
Every 12 weeks (with a 12 month view)

Owner
Operational group leads / Practice leads

Key Participants
Operational group team members, chapter leads, chapter members

Outputs
- Objectives for each operational group and practice

How
Part 1: Ask each operational group and practice lead to, with their relevant support teams, translate their strategy into a specific list of objectives they intend to work towards.

Part 2: Bring all of those leads into a workshop to present and coordinate their objectives to ensure they all align to the company's holistic goals.

Typical workshop agenda:
- Each lead presents their objectives and visually maps where they relate to the overall corporate strategy / vision
- Collectively review the objective map to ensure there is appropriately balanced coverage across the corporate strategy
- Debate and modify objectives as necessary to clarify overlaps and/or fill any gaps

TEN PERCENT

Determine key results

Agreeing a set of key results (the "KR" in OKRs), tells everyone what short-term impacts you want to make against the list of agreed objectives.

They are the primary component in determining exactly how much funding to invest in each operational group and practice to achieve the expected customer, employee and business returns.

When
Every 12 weeks (with a 12 month view)

Owner
Operational group leads / Practice leads

Key Participants
Operational group team members, chapter leads, chapter members

Outputs
- Target key results for each operational group and practice objective

How
Each operational group and practice lead will bring their relevant support teams together in a workshop to identify the key results they intend to achieve against their objectives.

Typical workshop agenda:
- The lead presents their objectives to the wider team and how they align to the corporate strategy
- Brainstorm potential key results for each objective
- Group, discuss and agree the one or more key results to target for each objective

Post the workshop, the lead should refine and document the list to inform funding and resourcing discussions.

TEN PERCENT

Update operational group and practice funding

Allocating a fixed investment to each operational group and practice for salaries, systems, partners and other expenses helps control your overall costs.

Rather than distributing funding based on the collection of work to be delivered, you are investing in the objectives and key results each team is expecting to impact.

When
Every 12 weeks (with a 12 month view)

Owner
Operational group leads / Practice leads

Key Participants
Finance chapter leads, portfolio management chapter leads

Outputs
- Capped funding amount for each operational group and practice

How
Finance chapter leads conduct a workshop with portfolio, operational group and practice leads to review OKRs, discuss specific funding needs that have changed and decide how much of the total budget will be invested in each value stream and practice to deliver against their objectives.

Typical workshop agenda:
- Each lead presents their finalised OKRs and specific needs
- The group discuss and agree what portion of the overall budget to invest in each operational group and practice

TEN PERCENT

Update operational group resourcing

Reviewing where people are allocated on a regular basis helps keep a balance between the effectiveness of persistent teams and the need to shift in response to market trends and demands.

The goal is to ensure you always have the right people focused on the right things at the right time.

When
Every 12 weeks (with a 12 month view)

Owner
Operational group leads

Key Participants
Portfolio management chapter leads, other relevant chapter leads

Outputs
- Required people allocated to each operational group

How
Each operational group lead to hold a workshop with all the relevant chapter leads to review any required updates in future people and skill needs.

Typical workshop agenda:
- The operational group lead presents their objectives, agreed funding and require people / skills needs
- Discuss as a group where there are gaps and agree what people / skills will be allocated from each chapter
- Create and align on a plan for each chapter to fill people / skills gaps (immediate needs vs future needs)

TEN PERCENT

Publish operational group OKRs

Empowering your people to make decisions and deliver their best work means making them aware of the collective goals your organisation is trying to achieve.

This visibility and understanding of the objectives is what will keep different teams aligned and working towards a common vision of the future.

<u>How</u>
Operational group leads, supported by portfolio chapter leads, should publish their updated OKRs to a centralised system available for review by everyone in the organisation. These will be used for ongoing ideation, prioritisation and and planning activities at all levels.

<u>When</u>
Every 12 weeks (with a 12 month view)

<u>Owner</u>
Operational group leads

<u>Key Participants</u>
Portfolio management chapter leads

<u>Outputs</u>
- Communication of value stream objectives and key results

TEN PERCENT

Add new ideas to operational group backlogs

Delivering against your OKRs means constantly measuring the impact of previous work and collecting updated market insights to help steer your search for, and maintain relevant lists of, potential future work. These ideas, from the smallest tweak to the grandest concept, are what you will consider, prioritise and plan for future delivery.

Add new ideas to operational group backlogs

Having accessible and connected places for capturing new ideas creates a holistic view of all the work your teams could perform in the future, no matter the size.

They establish a bottom-up mechanism for anyone in the organisation to suggest future work and are the key input into portfolio prioritisation and planning.

When
Continuous

Owner
Operational group leads

Key Participants
Anyone in the organisation

Outputs
- Problem and opportunity statements
- High-level solutions (when known / obvious)
- Next solution increment designs (when known / obvious)

How
Everyone in the organisation should be encouraged to actively seek out new problems to solve and opportunities to explore. Any person with an idea should attempt to complete (or update, as appropriate) as much of a Delivery Canvas as they can, without making assumptions, and enter that potential piece of work into a centralised idea management system.

Typical idea sources:
- Ongoing OKR / KPI impact reporting
- Solution increment delivery learnings
- Customer feedback
- Market insights / trends
- Competitor activity
- Unplanned system faults
- Technology developments / plans
- Ideation events / programs

TEN PERCENT

Prioritise portfolio pipeline and plan portfolio roadmap

Your lists of potential future work can't help you achieve your long-term goals unless you keep them organised and aligned. The regular, bottom-up consolidation and sequencing of the most important work across all operational groups ensures that the right people are focused on the right things at the right time.

Prioritise portfolio pipeline

Establishing a combined operational group prioritisation process ensures that all the potential work is considered and coordinated across that portfolio.

The goal is to prioritise the most important problems and opportunities to focus on, instead of the solutions you want to deliver.

The portfolio chapter leads facilitate workshop with all necessary participants to identify and agree on the problems / opportunities to address over the next 12 weeks across all operational groups.

Typical workshop agenda:
- Each operational group lead presents the top priorities from their backlog, how they align to their OKRs/KPIs and the effort they need from other operational groups to pursue those priorities
- Participants negotiate effort conflicts and dependencies, and agree the holistic list of problem / opportunity statements that are most important to focus on in the next 12 weeks

It may be helpful to use the prioritisation chart to help visualise the the most important things to focus on next across all operational groups.

This is often conducted as part 1 of a single workshop which includes the Plan Portfolio Roadmap step.

Key inputs typically come from the Refine Operational Group Backlog step.

When
Every 4 weeks

Owner
Portfolio management chapter leads

Key Participants
Operational group leads, product owners, solution architects, senior engineers, business SMEs

Outputs
- Prioritised list of the problem and opportunity statements that the operational groups will focus on in the next 12 weeks

TEN PERCENT

Plan portfolio roadmap

Creating a consolidated visualisation of where all operational group effort will be focused creates transparency and alignment for everyone.

The objective is to map team dependencies and decide how much of each teams' capacity will be committed to research, design and delivery activities according to the agreed portfolio priorities.

When
Every 4 weeks

Owner
Portfolio management chapter leads

Key Participants
Operational group leads, product owners, solution architects, senior engineers, technical SMEs

Outputs
- Visual representation of where each operational group will commit their capacity and effort, when, and for how long, over the next 12 weeks

How
The portfolio chapter leads facilitate workshop with all necessary participants to sequence and align on where each operational group will dedicate their capacity over the next 12 weeks.

Typical workshop agenda:
- Participants sequence their work and populate the roadmap with where and when they will allocate effort from their teams according to the agreed portfolio priorities and dependencies

Use a digital tool to create a Portfolio Roadmap that is accessible to everyone across all operational groups.

This is often conducted as part 2 of a single workshop which includes the Prioritise Portfolio Pipeline step.

TEN PERCENT

Problem / opportunity not validated

Delivering any prioritised idea without evidence that the problem or opportunity is real and matters to the target customer or user is extremely risky. For ones where that data doesn't already exist, dedicating effort to collecting it will prevent you from wasting time on things that may not produce any real value.

Conduct research

Ensuring that the target customer (even if internal) cares if you solve a problem or address an opportunity gives everyone more confidence in where they are spending their time.

The goal is to collect just enough data to convince you the investment of time, effort and money required for future delivery is worth it.

When
As per the portfolio roadmap

Owner
Product Owners

Key Participants
Designers, subject matter experts

Outputs
- Interview verbatims
- Workshop outputs
- Market insights
- Test results

How
The product owner and key participants collect information as quickly as possible using a method that is appropriate for the situation, is as close to the customer as they can get and indicates that the problem or opportunity being pursued is real.

Typical research methods / data sources:
- Customer interviews
- Focus groups
- Contextual inquiry
- Diary studies
- Market trends
- Existing insights
- Government statistics

TEN PERCENT

Evaluate data

Being realistic about whether your effort has a chance of producing value that matters to someone helps filter noise out of the delivery system.

The objective is to identify early any potential work that actually shouldn't happen so you can focus on more important things.

How
The product owner and key participants review and analyse the information collected and make a decision that there is enough information to proceed, more information needs to be collected or the data indicates that this problem or opportunity should no longer be pursued.

When
Once sufficient research has been conducted

Owner
Product Owners

Key Participants
Designers, subject matter experts

Outputs
- Decision to continue, pivot or stop addressing the problem or opportunity

TEN PERCENT

Refine problem / opportunity

Being clear about actual problem or opportunity being pursued is critical to identifying and selecting the best way to address it.

These statements are what you will prioritise and plan in your portfolio for future solution design and delivery activities.

<u>When</u>
Once the data has been analysed

<u>Owner</u>
Product Owners

<u>Key Participants</u>
Designers, subject matter experts

<u>Outputs</u>
- Updated problem or opportunity statement

<u>How</u>
The product owner updates the corresponding Delivery Canvas with the refined problem or opportunity statement, the evidence collected that supports it, how the refined statement aligns to the corporate and value stream strategies and the OKRs / KPIs that are being targeted.

TEN PERCENT

Solution unknown / not obvious

Sometimes, especially when addressing a problem or opportunity for the first time, there may be more than one way to produce the outcomes that a prioritised idea represents. Allocating effort from the right people to explore and test multiple solution options before delivery means that you have the best chance of creating the intended value in the most effective way.

Identify potential solutions

Bringing people with different perspectives and expertise together to co-design possible ways to address a problem or opportunity is how you drive innovation.

The objective is to actively seek out and consider creative solutions without assuming you know the answer up front.

When
As per the portfolio roadmap

Owner
Product Owners

Key Participants
Operational group team members, subject matter experts

Outputs
- Competitor analysis
- Workshop outputs
- List of potential solutions options

How
The product owner facilitates a workshop with key participants to identify and consider different ways that the problem or opportunity could be addressed. As an input to this workshop, the product owner should bring 1) any obvious options and 2) what competitors (or potential competitors) are doing.

Typical workshop agenda:
- Participants brainstorm different potential solution options
- Group similar options together and briefly discuss
- Participants document their favourite idea in a Solution Worksheet

Post the workshop, the product owner will review the solution options and select the one (or ones) that they think might to best address the issue.

TEN PERCENT

Identify risky assumptions

Until a solution is delivered, all you have is an assumption that it will produce the intended value.

The goal is to identify any critical things about a particular solution option that must to be true for it to address the problem or opportunity, and for which you don't already have any evidence supporting it.

The product owner facilitates a workshop with key participants to identify any guesses that are being made about the selected solution options which need to be validated before making a final selection.

Typical workshop agenda:
- The product owner presents the solution options to the group and clarifies any questions
- Participants brainstorm any assumptions that they think would cause the solution to completely fail if untrue

This is often conducted as a single workshop in combination with part 1 of the Conduct Tests step.

When
Once potential solutions have been identified

Owner
Product Owners

Key Participants
Operational group team members, subject matter experts

Outputs
- List of risky assumptions for each solution option being explored

TEN PERCENT

Conduct tests

Quickly validating the riskiest assumptions around a solution greatly reduces the risk of putting effort into the wrong things.

The purpose is to design and run a set of experiments that, with as little effort as possible, indicate the solution will work as intended and produce the outcomes you are looking for.

How
Part 1: The product owner and key participants design and experiments to test the riskiest assumptions for each selected solution option.

Typical workshop agenda:
- Participants identify and plan how they will test each risky assumption for all solution options
- Each experiment to be conducted is documented in an Experiment Board

This is often conducted as a single workshop in combination with the Identify Risky Assumptions step.

Part 2: The product owner and relevant participants conduct the experiments in according with their plan and record the results.

When
Once the riskiest assumptions have been identified

Owner
Product Owners

Key Participants
Operational group team members

Outputs
- Experiment designs for each risky assumption
- Experiment plan
- Test results

TEN PERCENT

Review evidence

Measuring the outcomes of each experiment and comparing them to what you expected is what indicates if your assumptions are likely to be true.

The purpose is to use that data to refine and repeat your experiments until you have just enough information to convince you that the guesses you made are valid or invalid.

How
The product owner and key participants review the data collected from each experiment and decide if any experiments need to continue, need to be redesigned and run again or if enough information has been collected to choose a solution option.

When
As test results are collected

Owner
Product Owners

Key Participants
Operational group team members

Owner
- Updated experiment plan
- Decision to continue, pivot or stop exploring any or all of the solution options being explored

TEN PERCENT

Evaluate results

Taking a critical look at the outcomes of all your experiments will indicate whether any of the solutions options being tested are likely to produce the intended value.

The objective is to evaluate each solution option using the data collected to decide if any are worthy of consideration for delivery.

Outputs
- Decision to continue, pivot or stop addressing the problem or opportunity

How
The product owner reviews all of the results collected from each experiment. If the riskiest assumptions for all solution options are proven invalid, the product owner can decide to stop pursuing the problem or opportunity, or return to the Identify Potential Solutions step.

This is often conducted as a single activity in combination with the Choose Best Solution step.

Choose best solution

Selecting the right solution will prevent you from wasting precious time and, when appropriate, actively promote innovation in the business.

The goal is to choose the solution with the fewest remaining assumptions that can be delivered in small chunks to produce value quickly.

How
The product owner uses the results from all experiments to choose a solution (or combination of solution options) that they think will best address the problem or opportunity. They will then update the overall solution section of the Delivery Canvas to reflect their choice.

This is often conducted as a single activity in combination with the Evaluate Results step.

When
Once test results are analysed

Owner
Product Owners

Key Participants
Operational group team members, subject matter experts

Outputs
- Decision on which solution option will best address the problem or opportunity

TEN PERCENT

Define first increment

Reducing work batch sizes will keep things flowing and improve the ability of the organisation to react quickly to an evolving business landscape.

The purpose is to define the smallest possible chunk of the overall solution that you can deliver now to produce the most important value and create learnings which inform future iterations.

How
The product owner facilitates a workshop with key participants to design the smallest possible version of the overall solution that can be delivered now and still produce value for the target customer (even if internal).

Typical workshop agenda:
- The product owner presents the problem/opportunity, overall solution, strategy alignment and target OKRs/KPIs
- Participants identify, discuss and choose the components (or parts of components) of the overall solution that should be delivered first, along with the people / skills needed and systems impacted

Post the workshop, the product owner will update the next increment section of the Delivery Canvas.

This is often conducted as a single workshop in combination with the Identify Operational Group Dependencies step.

When
Once a solution has been chosen

Owner
Product Owners

Key Participants
Operational group team members, subject matter experts

Outputs
- Design of the first version of the solution to deliver
- Proposed delivery timebox of the first version

TEN PERCENT

Identify operational group dependencies

Being clear and aligned when multiple teams need to work together to deliver part or all of a solution will improve overall productivity and stress.

The objective is to figure out which teams need to be involved in doing the detailed design, planning and delivery of the next solution increment.

How
The product owner facilitates a workshop with participants to identify all of the operational groups (or other teams / partners / 3rd parties) that need to be involved in delivering the defined first (or next) increment of the overall solution.

Post the workshop, the product owner will document these in the delivery dependencies section of the Deliver Canvas.

This is often conducted as a single workshop in combination with the Define First Increment step.

When
Once the first increment is defined

Owner
Product Owners

Key Participants
Operational group team members, portfolio management chapter leads

Outputs
- List of all operational group needed to deliver the first increment of the solution

TEN PERCENT

Problem / opportunity validated and solution known / obvious

When you can clearly articulate what to do, why it's important, how to address it and when to start, then you are ready to deliver. Empowering teams to breakdown work and produce small increments that iterate over time generates the feedback and learnings necessary to keep your delivery efforts headed towards your long-term vision and goals.

Breakdown work and map delivery dependencies

Bringing all the teams required for delivery of the next increment together to coordinate their work means each can better plan their individual effort.

The purpose is to collectively identify the pieces of work each team will need to do, agree when they will intend to do it and align on any delivery dependencies between them.

<u>When</u>
As per the portfolio roadmap

<u>Owner</u>
Product Owners

<u>Key Participants</u>
Operational group team members

<u>Owner</u>
- List of features and user stories for delivering the solution increment across all operational group teams
- Alignment of the delivery dependencies between required operational group teams

<u>How</u>
Part 1: The product owner(s) conduct a workshop with the operational group teams required to deliver the next increment to create a delivery roadmap and plan.

Typical agenda:
- The product owners present the Delivery Canvas to team members and describe the intended customers, employee and business outcomes
- Team members break the next increment down into features that they can deliver independently which contributes to the first increment
- Operational teams agree identify dependencies and agree the sequence in which they will work on those features

Part 2: Each operational group team writes and documents the user stories and technical tasks that need to be completed to deliver each feature.

TEN PERCENT

Prioritise backlogs

Visually representing the small pieces of work that each team intends to deliver next ensures that everyone has visibility and alignment on the most important thing to to do next.

These constantly updated lists contain the value-aligned tasks that team members will complete during delivery.

How
The product owner selects and sequences the top priority user stories and technical tasks from their complete backlog that the team should work on next, in accordance with the portfolio roadmap. They may seek the advice of team members as needed.

When
Continuous

Owner
Product Owners

Key Participants
Operational group team members

Outputs
- Sequenced list of user stories that each value stream needs to deliver the solution increment

TEN PERCENT

Plan next iteration

Regular planning in small timeboxes means that teams are focusing on the most important tasks to do now while remaining flexible when new information causes the need to change.

This activity is where the team will agree the specific tasks from their overall backlog that they intend to complete within the next 2 weeks.

When
Every 2 weeks

Owner
Product Owners

Key Participants
Operational group team members

Outputs
- List of user stories that each operational group team will deliver in the next 2 weeks
- Details of exactly how each operational group team intends to deliver those user stories

How
The product owner presents their priorities for the upcoming iteration and negotiates with team members on which ones they agree can and should be delivered next.

Typical agenda:
- The product owner presents their goals for the upcoming iteration and the value to be delivered
- Team members select and agree the user stories and technical tasks they will work on in the upcoming iteration
- Team members plan how they intend to deliver the agreed stories and tasks

TEN PERCENT

Build working solutions

Focusing on creating working components of solutions in small chunks means that if priorities change in the future, the chance of losing the benefits of previous effort is lower.

The goal, whenever possible, is to deliver work in such a way that it produces some amount of value on its own even if future work is stopped.

How
The operational group team members execute their delivery plan that was created in the Plan Next Iteration step.

When
Continuous

Owner
Operational group team members

Key Participants
Product Owners

Outputs
- Usable components of the solution increment being delivered

Demonstrate progress

Regularly showing the results of your work as it is happening helps to boost the confidence of stakeholders by actively engaging them in the delivery process.

The goal is to ensure that things are on the right track, and create the opportunity to catch it early when they are not.

When
Every 2 weeks

Owner
Operational group team members

Key Participants
Product owners, business stakeholders

Outputs
- Learnings and feedback on the usable components built so far

How
Operational group team members presents the results of their work during the iteration to the product owner and other business stakeholders to demonstrate progress towards the intended increment outcomes.

Typical agenda:
- Team members present their work from the iteration
- Attendees discuss and agree what, if anything, has changed in the environment that might impact what they should do next

TEN PERCENT

Deploy value

Giving the target user (even when internal) access to the working solutions as they are being created is the best way to learn if they are working.

The objective, when it makes sense to do so, is to continuously release work product to accelerate the realisation of benefits by both the customer and the business.

How
Operational group team members publish their completed and releasable work into the appropriate production environments.

It may not be appropriate or possible to release completed work into production inside each individual iteration. It may be necessary to wait until the entire increment is complete. That determination should be discussed and agreed with the product owner(s) of the involved operational group teams.

When
As appropriate

Owner
Operational group team members

Key Participants
Product owner, business stakeholders

Outputs
- Usable components available in production environments and available to the target customer / user
- Data and learnings about solution effectiveness

TEN PERCENT

Evaluate learnings

Responding to new information obtained by the use of recently completed work is critical to refining a solution to produce the most value.

These learnings are what teams will use to update solution designs and prioritise the set of tasks which are most important to work on next.

How
The product owner reviews all learnings collected during the iteration to determine what, if any, work needs to occur next. Based upon their analysis, the product owner can decide to stop delivery of the increment or return to the Identify Potential Solutions step.

This is often conducted as a single activity in combination with the Refine Backlog step.

When
Once value has been deployed

Owner
Product Owners

Key Participants
Operational group team members

Outputs
- Decision to continue, pivot or stop working on the solution increment

TEN PERCENT

Refine backlog

Constantly managing and re-prioritising the small pieces of work that each team intends to deliver next means that your delivery decisions are informed by up-to-date information.

The purpose is to add, update and/or remove tasks based on new learnings and shift your priorities when things need to change.

<u>How</u>
The product owner selects and sequences the top priority user stories and technical tasks from their complete backlog that the team should work on next, in accordance with the portfolio roadmap. They may seek the advice of team members as needed.

<u>When</u>
Every 2 weeks

<u>Owner</u>
Product Owners

<u>Key Participants</u>
Operational group team members

<u>Outputs</u>
- Sequenced list of user stories that each operational group team needs to deliver the remaining components of the solution increment

TEN PERCENT

Measure impact

Assessing ongoing delivery impact against OKRs and KPIs informs additional solution increment designs and future portfolio priorities / roadmaps.

Continuously monitoring this data is critical to keeping the whole organisation pointed in the direction of your ultimate long-term vision.

How
The product owner monitors the impact of the deployed increment against the target OKRs / KPIs. Based upon their analysis, the product owner can decide to stop delivery of future increments or return to the Identify Potential Solutions step.

This is an ongoing activity and it may not be possible to measure the impact of delivered increments immediately. When appropriate, the Define Next Increment step may need to wait until a sufficient amount of data is collected.

When
Once the planned increment has been completed

Outputs
- Decision to continue, pivot or stop addressing the problem or opportunity

Owner
Product Owners

Key Participants
Operational group team members

TEN PERCENT

Define next increment

Continued solution iteration means using what you have learned from previous releases to inform what, if anything, you should deliver next.

The objective is to define the smallest possible chunk of the remaining overall solution that you intend to deliver next if the previously releases perform as expected.

When
Once impacts have been measured

Owner
Product Owners

Key Participants
Operational group team members

Outputs
- Design of the next version of the solution to deliver
- Proposed delivery timebox of the next version

How
The product owner facilitates a workshop with key participants to design the smallest possible next version of the overall solution that can be delivered now and still produce value for the target customer (even if internal).

Typical workshop agenda:
- The product owner reviews the problem/opportunity, overall solution, strategy alignment and updated target OKRs/KPIs
- Participants identify, discuss and choose the components (or parts of components) of the overall solution that should be delivered next, along with the people / skills needed and systems impacted
- Participants identify any other operational group teams that need to be involved in delivery of the next increment

Post the workshop, the product owner will update the next increment section of the Delivery Canvas.

Refine operational group backlog

Constantly updating and managing the overall operational group backlog ensures that everyone is focused on the most important work.

The purpose is to always have a prioritised list of activities that the operational group intend to focus on next, which also forms the basis of future portfolio prioritisation and planning sessions.

When
Every 4 weeks

Owner
Operational group leads

Key Participants
Product owners, portfolio management chapter leads

Outputs
- Sequenced list of the problems and opportunities and / or solution increments that the operational group intends to focus on next

How
The operational group lead facilitates a workshop to discuss and agree the problem / opportunity statements that they intend to work on next to impact their OKRs / KPIs.

Typical agenda:
- Operational group lead presents measurements on how they are tracking against their OKRs / KPIs
- The product owner of each team presents what they recommend as next priorities
- Attendees discuss and agree the problem / opportunity statements that the operational group should focus on next

It may be helpful to use the prioritisation chart to help visualise the the most important things to focus on next.

The results are a key input into the Prioritise Portfolio Pipeline step.

TEN PERCENT

Governance

Alignment and autonomy doesn't eliminate the need for a clearly defined set of policies and guidelines for how the system should function day-to-day. It is the purpose of good governance to protect the integrity of the system itself, and the experience of the people in it, to maintain a constant flow of the most important value with limited noise or distraction.

Delivery Governance

Operational Group Delivery Sync: This is a recurring session where Scrum Masters from different operational group teams who are working together to deliver a solution share progress, risks and blockers to keep the work flowing and promote inter-team transparency (*sometimes referred to as a Scrum of Scrums*).

Product Owner Sync: This is a recurring session where Product Owners from different operational group teams who are working together to deliver a solution share insights and priorities to keep everyone aligned and promote inter-team transparency (*sometimes referred to a PO Sync*).

Team Sync: This is a recurring session where members of a single operational group team align on what they are working on now, what they intend to do next and anything preventing them from completing their work to keep everyone aligned and promote intra-team transparency (*sometimes referred to a Daily Scrum or Stand Up*).

Delivery Progress Reporting: This is the publication of the status of all work in progress, including research and experimentation activities, and is typically done through a delivery work management system (the purpose is to be transparent about all work and share progress beyond the Demonstrate Progress step).

OKR / KPI Impact Reporting: This is the ongoing measurement and publication of the impact being made to the operational group OKRs and KPIs, and is used to inform the Add New Ideas to Operational Group Backlogs, Prioritise Portfolio Pipeline and Refine Operational Group Backlog steps.

TEN PERCENT

For more information, contact us at
Contact@TenPercentLabs.com

Sample Tools & Templates

Customer Experience Strategy Canvas

PURCHASE EXPERIENCE
Describe the purchase experience that the customer will have with the organisation.

CORPORATE STRATEGY ALIGNMENT
Describe how this customer experience strategy aligns to and supports the overall corporate strategy.

SERVICE EXPERIENCE
Describe the service experience that the customer will have with the organisation.

PURCHASE NEEDS
Describe the needs of the customer as it pertains to their purchase experience with the organisation.

SERVICE NEEDS
Describe the needs of the customer as it pertains to their service experience with the organisation.

PURCHASE ACTIVITIES
Describe what the business will do to create the purchase experience that the customer will have with the organisation.

PURCHASE CHANNELS
Describe the channels that the customer will use to be made aware of and purchase from the organisation.

THE CUSTOMER
Identify the customer group(s) for whom this experience strategy is being defined.

SERVICE CHANNELS
Describe the channels that the customer will use to be made aware of and receive service from the organisation.

SERVICE ACTIVITIES
Describe what the business will do to create the service experience that the customer will have with the organisation.

MOMENTS THAT MATTER
Describe the moments that have the biggest impact on the customer's engagement and service experiences.

PURCHASE METRICS
Describe how the business will measure that you have actually created the intended purchase experience for the customer with the organisation.

ENGAGEMENT METRICS
Describe how the business will measure that you have actually created the intended service experience for the customer with the organisation.

Customer Experience Strategy Canvas

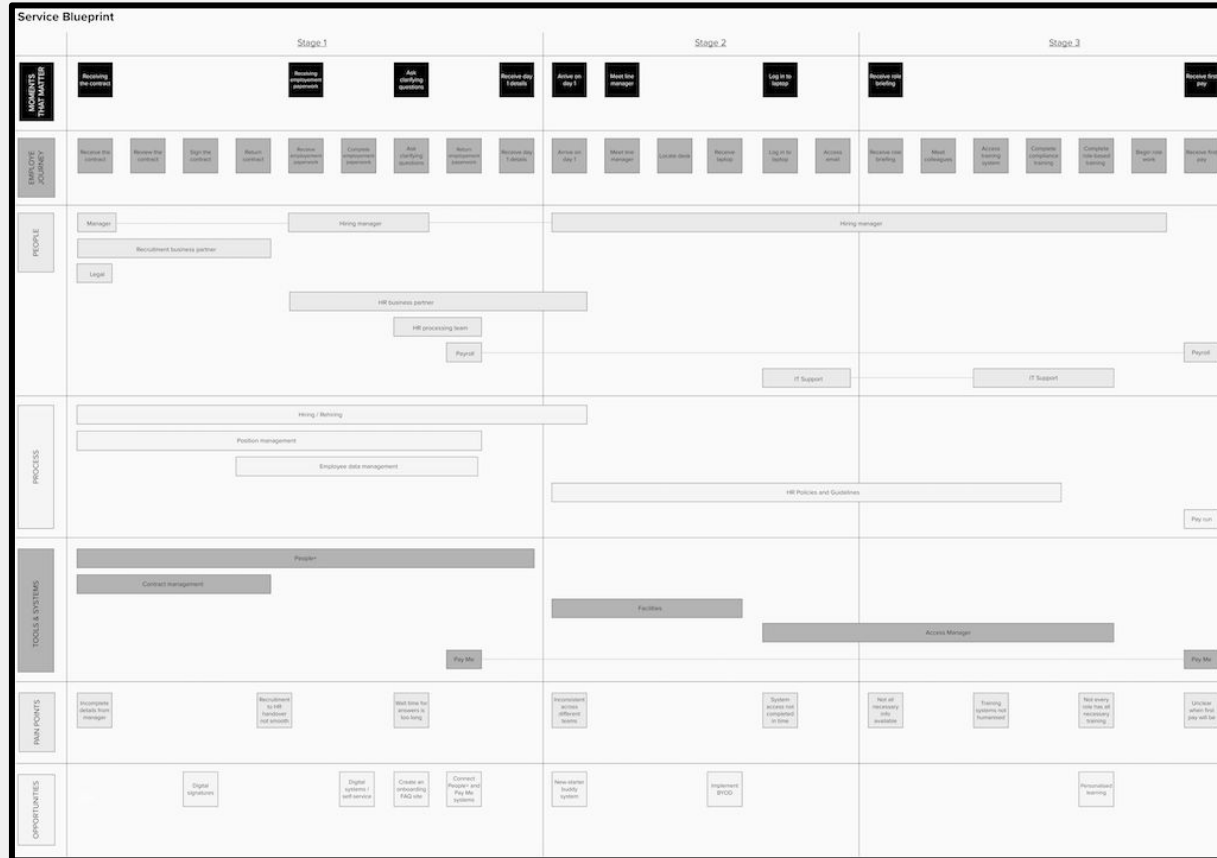TEN PERCENT

Employee Experience Strategy Canvas

WORKING EXPERIENCE
Describe the working experience that the employee will have inside the organisation.

CORPORATE STRATEGY ALIGNMENT
Describe how this employee experience strategy aligns to and supports the overall corporate strategy.

LEARNING EXPERIENCE
Describe the learning experience that the employee will have inside the organisation.

WORKING NEEDS
Describe the needs of the employee as it pertains to their working experience in the organisation.

LEARNING NEEDS
Describe the needs of the employee as it pertains to their learning experience in the organisation.

WORKING ACTIVITIES
Describe what the business will do to create the working experience that the employee will have inside the organisation.

WORKING CHANNELS
Describe the channels that the employee will use to be made aware of, and engage with, the working experience they will have in the organisation.

THE EMPLOYEE
Identify the employee group(s) for whom this experience strategy is being defined.

LEARNING CHANNELS
Describe the channels that the employee will use to be made aware of, and engage with, the learning experience they will have in the organisation.

LEARNING ACTIVITIES
Describe what the business will do to create the learning experience that the employee will have inside the organisation.

MOMENTS THAT MATTER
Describe the moments that have the biggest impact on the employee's working and learning experiences.

WORKING METRICS
Describe how the business will measure that you have actually created the intended working experience for the employee in the organisation.

LEARNING METRICS
Describe how the business will measure that you have actually created the intended learning experience for the employee in the organisation.

Employee Experience Strategy Canvas

TEN PERCENT

Service Blueprint
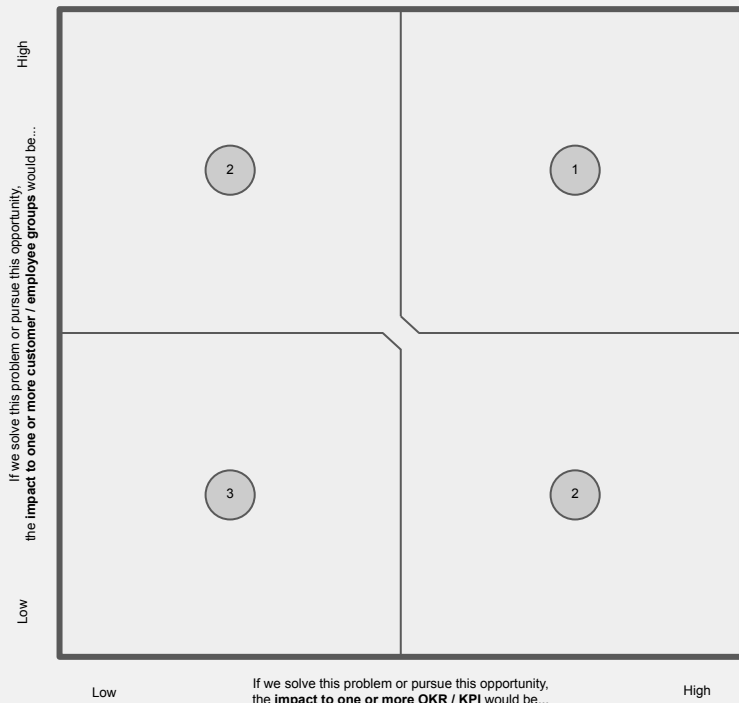
Opportunity Board

Title: _____ Contact: _____

Components that need to exist

Works Very Well

What is in place today

Does Not Work Well

Where we can get more information

Opportunity Board

TEN PERCENT

Prioritisation Chart

High

If we solve this problem or pursue this opportunity,
the **impact to one or more customer / employee groups** would be...

Low

(2)

(1)

(3)

(2)

Low

If we solve this problem or pursue this opportunity,
the **impact to one or more OKR / KPI** would be...

High

While a chart like this will help you organise ideas to get you started, you will also need to sequence your priorities to accommodate the reality of your current business situation so that everyone is clear on where to allocate their effort. That sequencing could involve overriding where a problem or opportunity falls on the chart to "force-rank" effort from what would otherwise be a lower priority.

Some sequencing considerations:
- Impact to OKRs / KPIs from previous work
- Current market conditions
- Competitor activity
- Government or regulatory requirements
- Necessary platform or system maintenance / upgrades
- People or skill-set availability

Indicative Scale

Customer / Employee Impact
Low: Limited impact to a small number of customers / employees
Medium: Incremental impact to all customers / employees
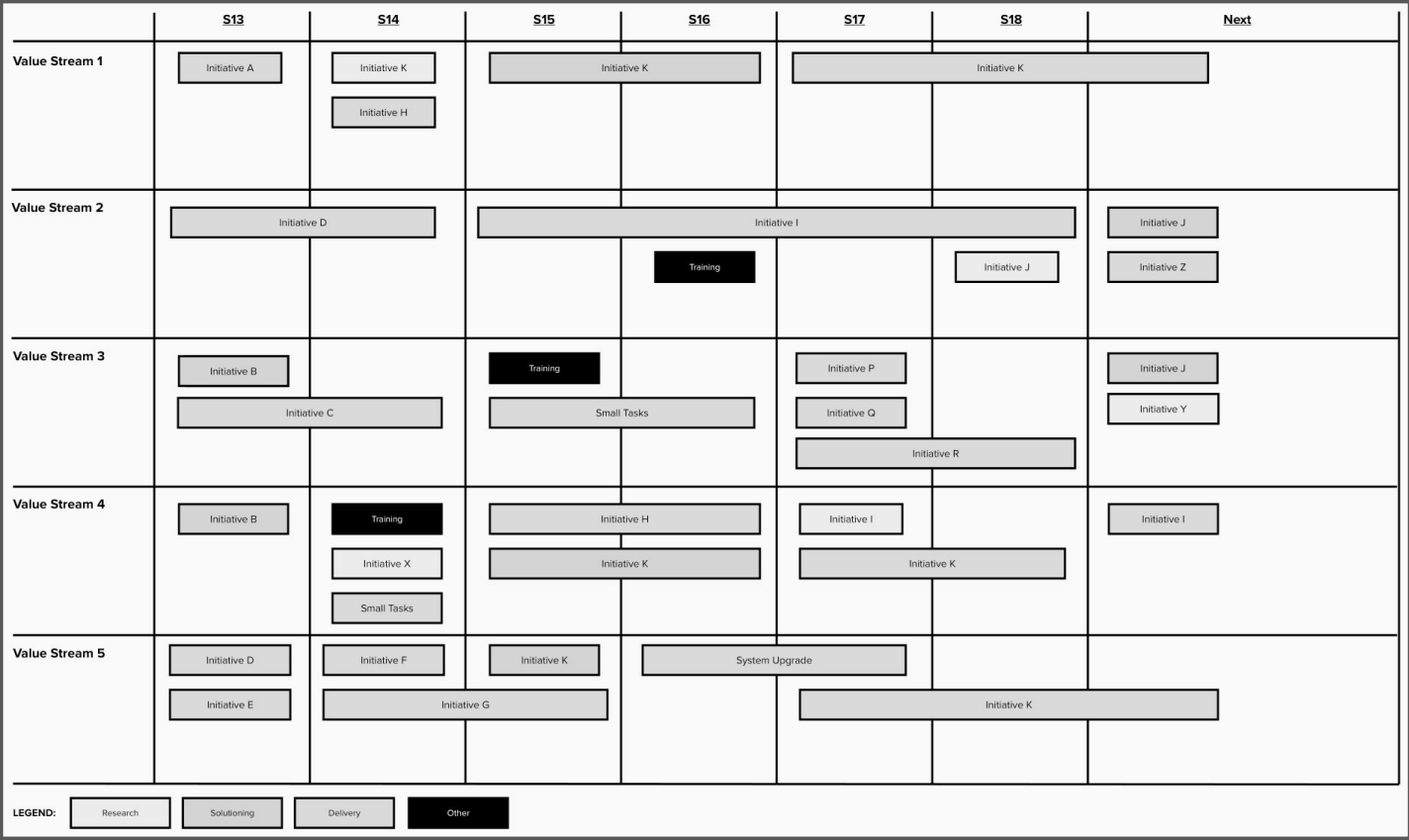High: Radical impact to all customers / employees

OKR / KPI Impact
Low: Has limited impact to one business metric
Medium: Has an incremental impact to one or more business metric
High: Has a radical impact to more than one business metric

TEN PERCENT

Portfolio Roadmap

	S13	S14	S15	S16	S17	S18	Next
Value Stream 1	Initiative A	Initiative K / Initiative H	Initiative K		Initiative K		
Value Stream 2	Initiative D		Initiative I	Training	Initiative J	Initiative J	Initiative J / Initiative Z
Value Stream 3	Initiative B / Initiative C		Training / Small Tasks		Initiative P / Initiative Q / Initiative R		Initiative J / Initiative Y
Value Stream 4	Initiative B	Training / Initiative X / Small Tasks	Initiative H / Initiative K		Initiative I / Initiative K		Initiative I
Value Stream 5	Initiative D / Initiative E	Initiative F / Initiative G	Initiative K	System Upgrade	Initiative K		

LEGEND: Research | Solutioning | Delivery | Other

Solution Worksheet

Solution Title:

Description:

Sketch:

Problem / opportunity being addressed:

Why this solution is better for the customer:

How we will know if it's working:

Benefit to the business if we do this:

Project Name:

Author:

Date:

Solution Worksheet

TEN PERCENT

Experiment Board

Title:		Contact:		
Assumptions	Riskiest Assumption	Method of Testing	Success Criteria	Round 1 Results	Round 2 Results

Experiment Board

Delivery Canvas

Title:
Value Stream: *Owner:*   *Last Updated:*

Customer / User
A list of the customer / employee / partner groups that will directly benefit by solving the problem or taking advantage of the opportunity.

Problem / Opportunity
The specific problems that we want to solve or opportunities we intend to exploit by delivering the overall solution.

Each increment should address one or more of these problems / opportunities either partially or in full.

Supporting Evidence
An overview of the data and facts collected that prove the problems or opportunities identified above are real and addressing them matters to the target customer / user.

Strategy Alignment
The components of your corporate, value stream, customer experience and employee experience strategies to which the overall solution aligns.

Target OKRs / KPIs
The OKRs and/or KPIs that you intend to impact by implementing the overall solution.

Overall Solution
A high-level description of the overall solution that will eventually be delivered and address the problems / opportunities for the target customer / user.

Each increment should deliver a valuable working piece of the overall solution. As each increment is delivered, learnings collected will help to refine the overall solution, which will be updated here and guide the definition of future increments.

Supporting Evidence
An overview of the data and facts collected that prove the overall solution will directly address the problems / opportunities in a way that aligns to the corporate strategy, customer experience strategy and employee experience strategy.

Next Increment
A detailed description of the next increment to be delivered which produces measurable value and addresses part or all of the problems / opportunities identified for the target customer / user.

The next increment should represent the minimum amount of work possible to deliver the most important value in a way that is aligned to the customer and employee experience strategies.

OKR / KPI Impact
The specific OKRs and / or KPIs that delivery of the next increment is designed to directly impact, and by how much.

Proposed Timebox
The amount of time you are willing to invest to deliver the next increment.

Timing Considerations
Any information that might inform prioritisation or delivery deadlines for the next increment, such as regulatory requirements, market commitments, competitor activity or loss of value if delayed.

People / Teams / Partners
The identification of all the people and / or teams, internal or external to your organisation, that need to be involved in the delivery of the next increment.

Platforms / Systems
The identification of all the technology platform and / systems that will be used in or impacted by delivery of the next increment.

Delivery Dependencies
The identification of any other pieces of work on which the successful delivery of the next increment is dependent, or where the next increment is a dependency for the delivery of future known work.

DELIVERY CANVAS

TEN PERCENT