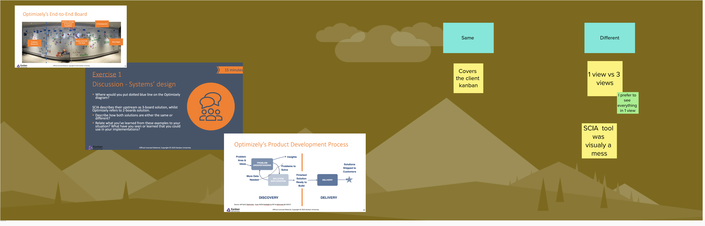
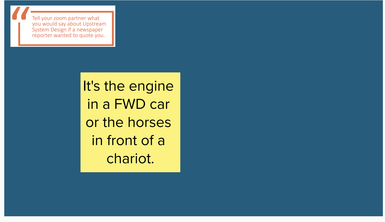
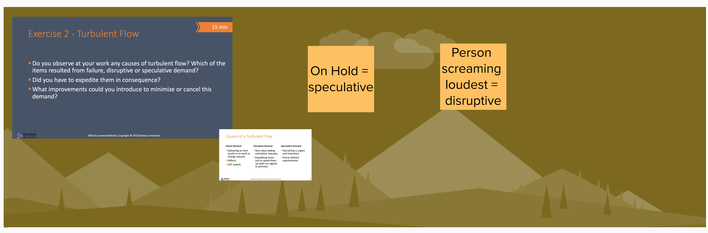
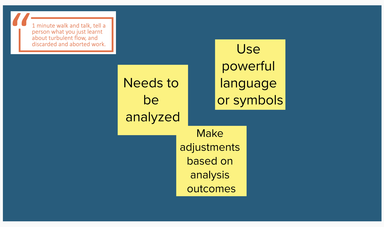

Optimizely's End-to-End Board
Exercise 1
Discussion - Systems' design
15 minutes
Same
Different
Covers the client kanban
1 view vs 3 views
Confer to see everything at once
SCIA tool was visually a mess
Optimizely's Product Development Process
DISCOVERY
DELIVERY

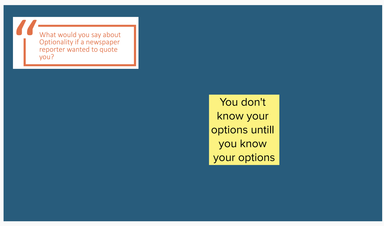

Tell your zoom partner what you would say about Upstream System Design if a newspaper reporter wanted to quote you.
It's the engine in a FWD car or the horses in front of a chariot.

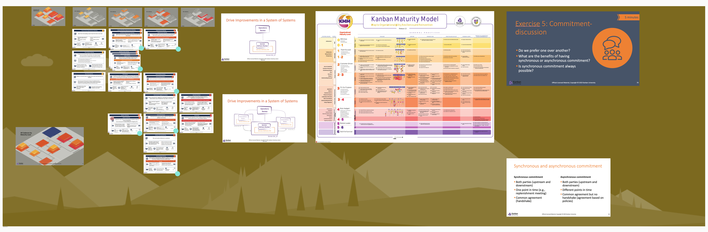

Exercise 2 - Turbulent Flow
15 min
Do you observe at your work any causes of turbulent flow? Which of the items resulted from failure, disruptive or speculative demand?
Did you have to expedite them in consequence?
What improvements could you introduce to minimize or cancel this demand?
On Hold = speculative
Person screaming loudest = disruptive
Causes of a Turbulent Flow

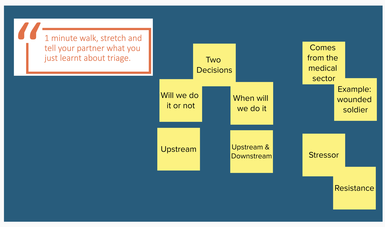
Exercise 3 – Discarded and aborted work
15 min
Trace back to the Practice Map and mark down the practices talking about discarding and aborting items.
What maturity level are they?
What can you do at the maturity level you are now?
What value would that bring to your organization? How could you use this knowledge?
Kanban Maturity Model
Discarded Work
Analyse Aborted Work

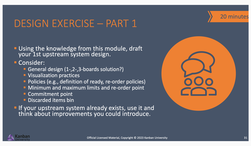

1 minute walk and talk, tell a person what you just learnt about turbulent flow, and discarded and aborted work.
Needs to be analyzed
Use powerful language or symbols
Make adjustments based on analysis outcomes

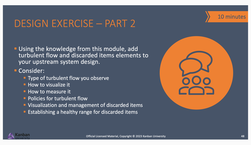
Exercise 4 – Roles
15 min
Does the role of Flow Manager or Service Request Manager (SRM) exist in your organization today?
If not, would it be easier to introduce them or stick with existing roles, responsibilities & job titles?
Who would play the Flow Manager or SRM role?
What is their current title? Which responsibilities and what policy ownership do you envisage for them?
Typical functions of a Flow Manager
Typical functions of SRM

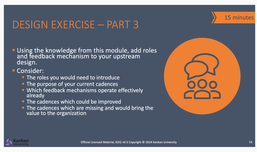

What would you say about Optionality if a newspaper reporter wanted to quote you?
You don't know your options untill you know your options

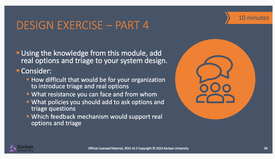

Kanban Maturity Model
Exercise 5: Commitment-discussion
15 minutes
Do we prefer one over another?
What are the benefits of having synchronous or asynchronous commitment?
Is synchronous commitment always possible?
Synchronous and asynchronous commitment

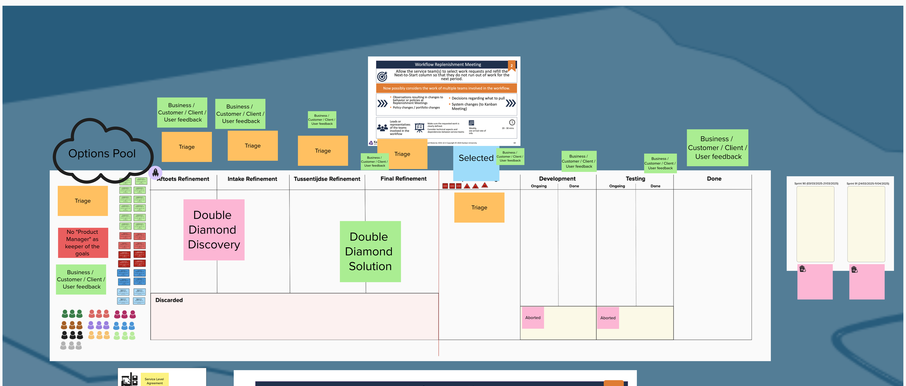

1 minute walk, stretch and tell your partner what you just learnt about triage.
Two Decisions
Will we do it or not
When will we do it
Upstream
Upstream & Downstream
Comes from the medical sector
Example: wounded soldier
Stressor
Resistance


DESIGN EXERCISE – PART 1
20 minutes
Using the knowledge from this module, draft your 1st upstream system design.
Consider:
General design (1-,2-,3-boards solution?)
Visualization practices
Policies (e.g., definition of ready, re-order policies)
Minimum and maximum limits and re-order point
Commitment point
Discarded item lane
If your upstream system already exists, use it and think about improvements you could introduce.


DESIGN EXERCISE – PART 2
10 minutes
Using the knowledge from this module, add turbulent flow and discarded items elements to your upstream system design.
Consider:
Type of turbulent flow you observe
How to visualize it
How to measure it
Policies for turbulent flow
Visualization and management of discarded items
Establishing a healthy range for discarded items


DESIGN EXERCISE – PART 3
15 minutes
Using the knowledge from this module, add roles and feedback mechanism to your upstream design.
Consider:
The roles you would need to introduce
The purpose of your current cadences
Which feedback mechanisms operate effectively already?
The cadences which could be improved
The cadences which are missing and would bring the value to the organization


DESIGN EXERCISE – PART 4
10 minutes
Using the knowledge from this module, add real options and triage to your system design.
Consider:
How difficult that would be for your organization to introduce triage and real options
What resistance you can face and from whom
What policies you should add to ask options and triage questions
Which feedback mechanism would support real options and triage


Options Pool
Triage
No "Product Manager" as keeper of the goals
Business / Customer / Client / User feedback
Backlog Refinement
Intake Refinement
Tussentijdse Refinement
Final Refinement
Selected
Development
Testing
Done
Ongoing
Done
Double Diamond Discovery
Double Diamond Solution
Discarded
Aborted

DESIGN EXERCISE – PART 5
Using the knowledge from this module, improve your upstream system design.
Consider:
Which feedback mechanism(s) would support managing real options
Which feedback mechanism(s) would support making an investment/discard decision
Do you need to add or improve any feedback mechanism(s) to support triage? If so, which and how?
How would you identify the point of diminishing returns?
Think about any additional policies for your upstream system. Revisit the questions from 2 summary slides.
What should we decide?
How much should we invest before we reach a decision point?
How much would I pay to know [this piece of information] or [the answer to this question]?

DESIGN EXERCISE – PART 6
20 min
Complete the following activities and prepare to report your results.
Review your design
Does it seem the typical "dominant" activities in upstream workflows from your chosen domain(s)?
Or all ideas or customer requests need to move through the same workflow steps? If not, why?
Did you detect the point of diminishing returns?
Recognize that at the point of diminishing returns from an activity it is time to make a decision
Collect potential decision points and their characteristics
What information is missing, made and how would you model them?
On what foundation?
Design upstream policies
Describe the role(s) which would help you in managing upstream system
how would you introduce them? You can use the „introducing roles" slide to support your decision.

Service Level Agreement
Kanban Meeting
2
Involve the teams in a collaborative conversation about the status of the work, queues between stages of the options workflow and problems that affect the flow of work.
Supports cross-team collaboration.
Commitments
Decisions about new initiatives and capacity allocation
Policy changes
Shared understanding of how to best to flow current work
Improvement suggestions
SRM, immediate group or team doing the work (4-50 people)
Scope: End-to-end workflow of options
The identified issues are resolved after the meeting by team members with relevant knowledge and skills.
Weekly, depending on coordination cost
10-20 mins