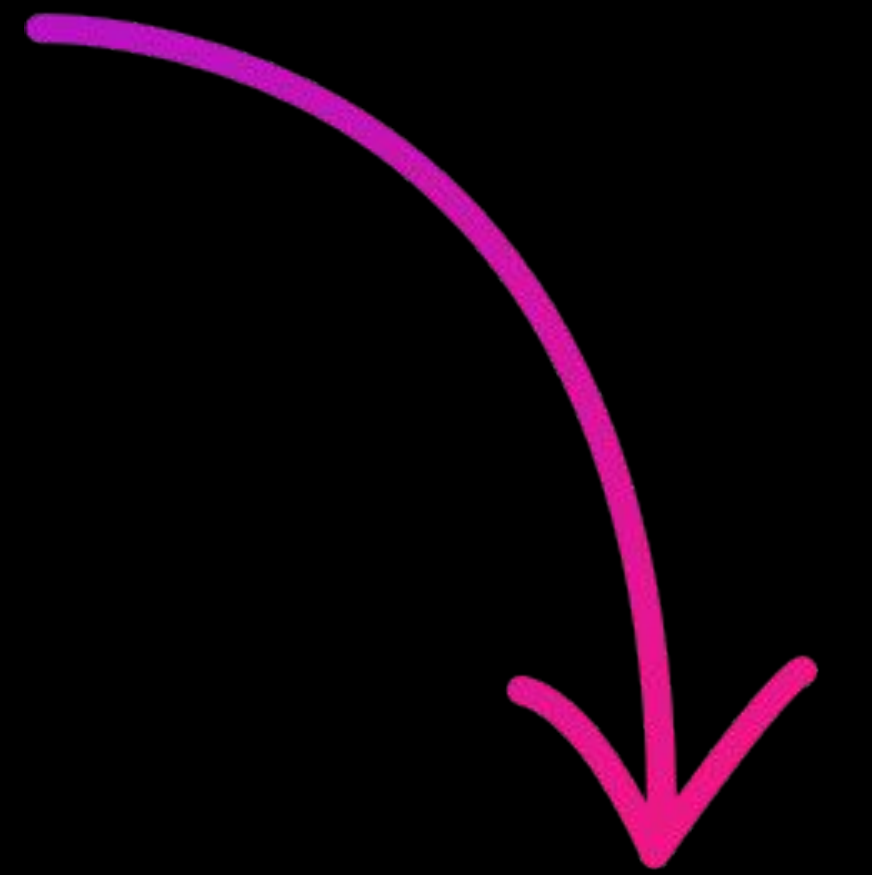


**BUILD THE RIGHT
THING.**

HIT YOUR DATES.

I'm Maggie 🙋



You're over the estimate by 3x.

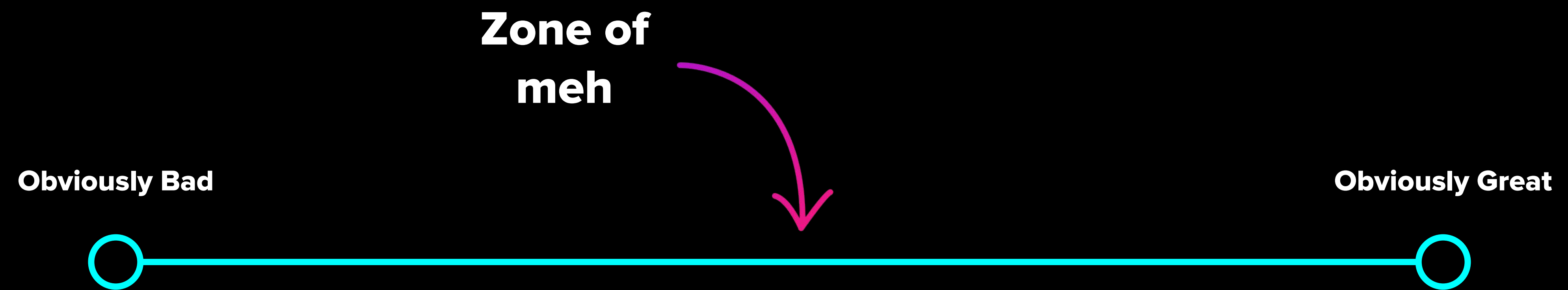
Customers give you an 8/10 but still churn.

You're just working on the backlog.

Obviously Bad

Obviously Great





How did we end up here?

Typical process

1. Know the “big goal”

- a. More customers
- b. Different customers
- c. Happier customers
- d. More \$\$ from customers

2. Look at your product, or the feature(s) you own

3. Work on the problem your product has that matches best with that big goal

Easy to do.

Already have a design.

High confidence you can do it.

It's on the backlog.

An exec loves the idea.

Sales asked for it once.

It looks nice.

Missed a step

1. Know the “big goal”

- a. More customers
- b. Different customers
- c. Happier customers
- d. More \$\$ from customers



**Who are they?
Why isn't this already
happening?**

2. Look at your product, or the feature(s) you own

3. Work on the problem your product has that matches best with that big goal



@maggiecrowley

N

DRIFT

TODAY:

Get to know your customer (really).

Hit timelines with missions & dates.

Use a process to make it repeatable.

First: understand your customer



“Users get confused on this screen.”

“We see a big drop off on this page.”

“Customers are asking for more options on this page.”

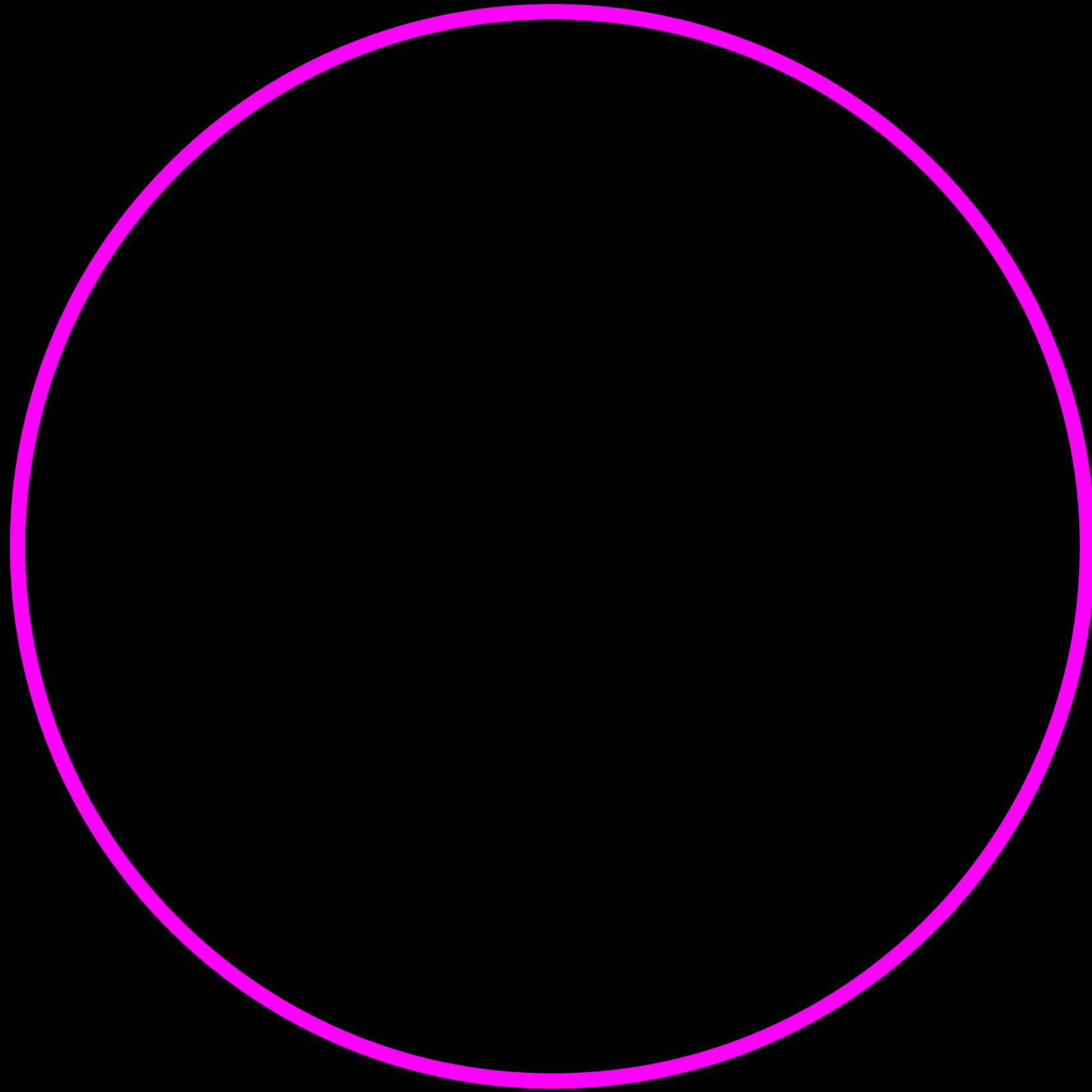
“Users get confused on this screen.”

“We see a big drop off on this page.”

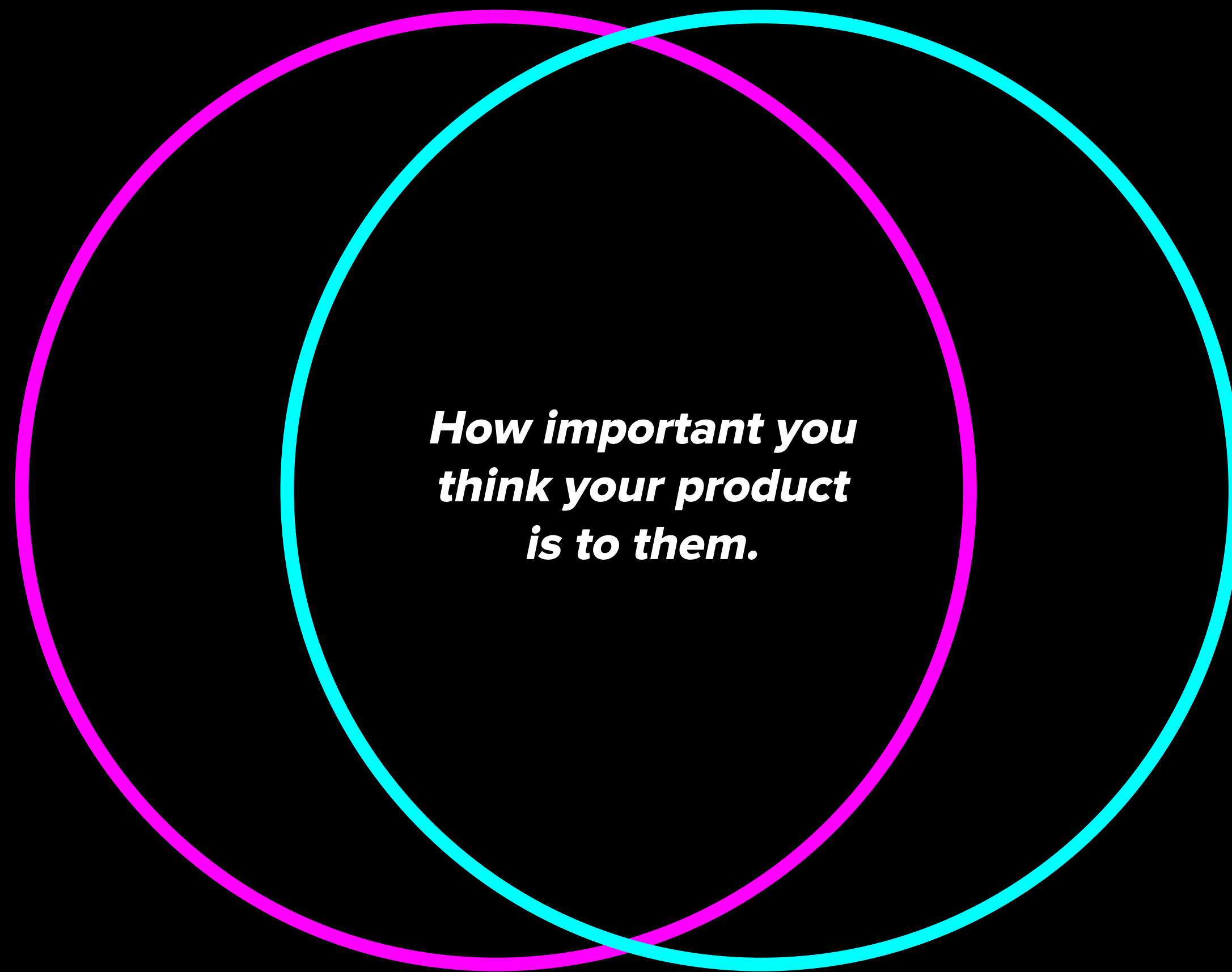
“Customers are asking for more options on this page.”

**True customer understanding has
nothing to do with your product.**

Your customer's day:



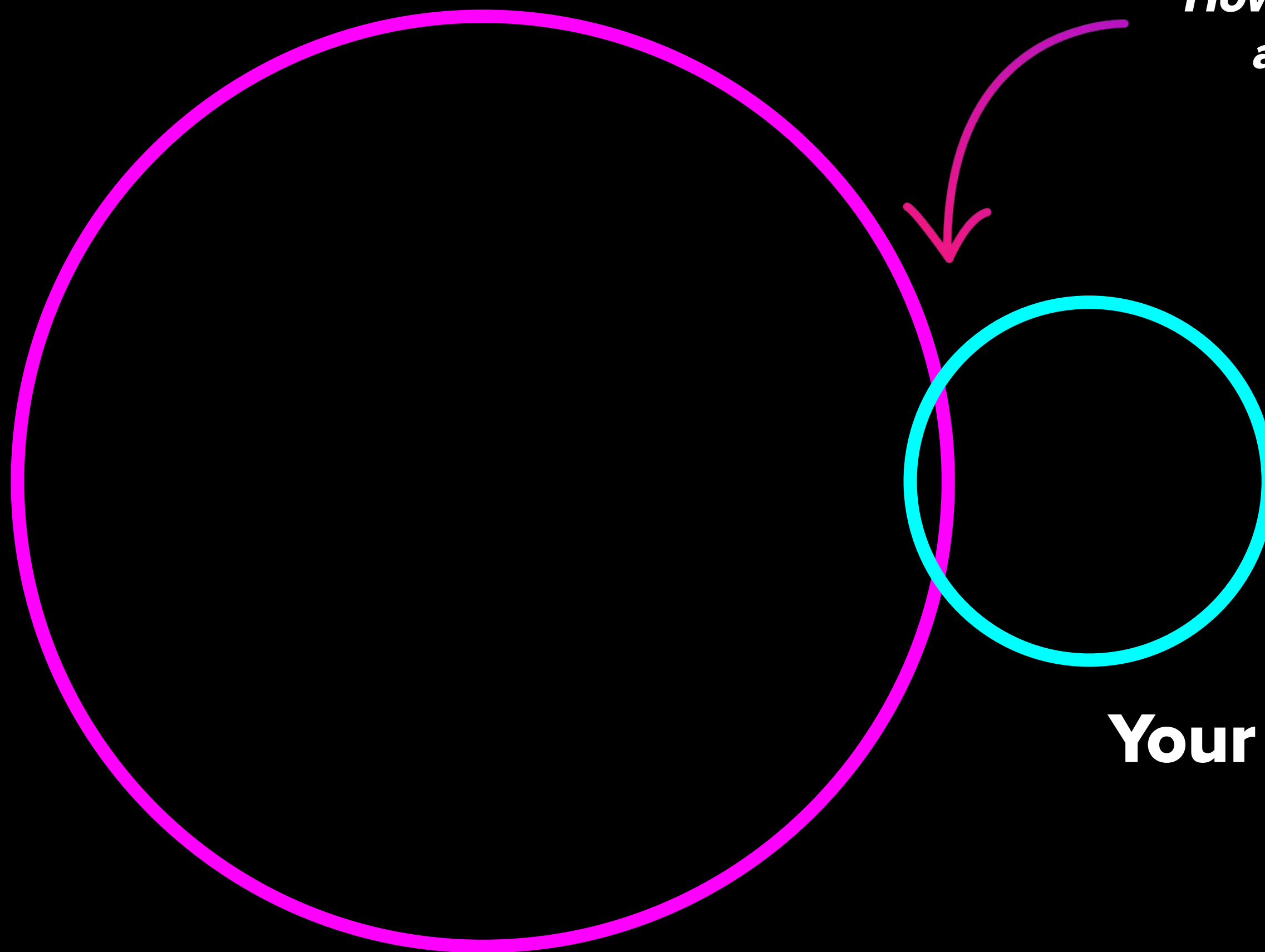
Your customer's day:



Your product

Your customer's day:

*How important it
actually is.*



Your product

For (target customers)

Who must (solve a specific problem)

Our product (is a new)

That provides (key benefit)

Unlike (competitor)

We have (product)

👉 *Geoffrey Moore's positioning framework*

For (target customers)

Who must (solve a specific problem)

Our product (is a new)

That provides (key benefit)

Unlike (competitor)

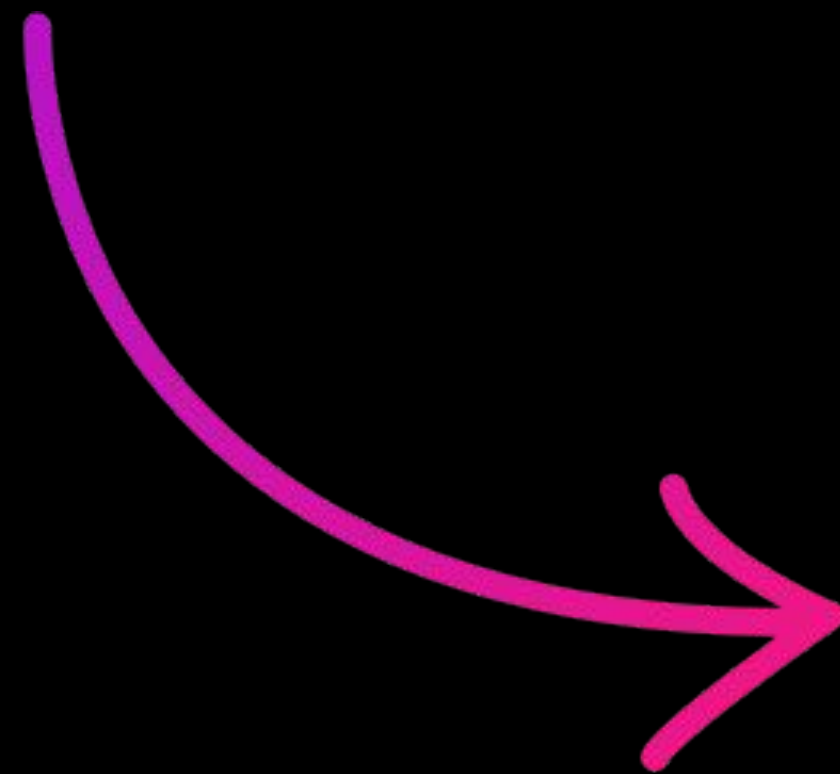
We have (product)

Start here

👉 *Geoffrey Moore's positioning framework*

First: who are you building for?

First: who are you building for?



Whoever understands the customer the best, wins.

Two parts: company & person

COMPANY

- Size
- Industry
- Org structure
- Specific roles, teams
- Tech stack
- Global? Specific markets?
- Growth rate
- Funding structure
- Business model

Two parts: company & person

COMPANY

- Size
- Industry
- Org structure
- Specific roles, teams
- Tech stack
- Global? Specific markets?
- Growth rate
- Funding structure
- Business model

PERSON

- Title
- How they fit within the org
- Job description
- Top 3-5 workflows they do daily, weekly, monthly, quarterly
- Performance criteria: how are they evaluated?
- What do they need to do to get promoted? And, what's the next job?
- Top 3-5 current concerns (personally, within their business)

Two parts: company & person - **B2C**

EMPLOYMENT

- Types of roles they have (boss? middle management? IC? Gig?)
- Working style
- Company examples
- Industries
- Hours worked
- Work-stress level

PERSON

- Top 3-5 workflows they do daily, weekly, monthly, quarterly - still applies, think about what they DO in their lives
- Hobbies, activities, how they spend their time (weekdays, weekends)
- What do they care about? What are their goals? Where do they want to be in 5 years?
- Biggest challenges: what keeps them up at night?

**The only way to get this information is
to talk to your users.**

The details:

1. 5-10 interviews per customer/user type - I try to do one of these **EVERY WEEK**
2. Record each interview so you don't have to take notes
3. Prep a list of specific questions plus conversation starters
4. LISTEN TO WHAT THEY ARE SAYING
5. Everyone on your team has to listen to the interviews (yes, engineers too)

The questions I use:

- Tell me what a typical day looks like for you. What tools do you use along the way? Would you mind sharing your screen so I can see?
- What are the top activities you have to do each week and month as well?
- What are your team's goals this year?
- What are your top three priorities right now?
- What are your biggest concerns about the next (month/quarter/year - right now I'm asking about 2H 2020)?
- What metrics are you measured on in your annual performance review?
- What number or metric would we have to move for you to be blown away?
- How far would we have to move it to be the best purchase you've ever made?
- What's the best piece of software you've ever purchased at work? Why?

Example: role descriptions

Demand Generation: Demand generation is ultimately responsible for deploying programs to get prospects in the market interested in their offering and to drive qualified leads. Demand gen pros use search engine marketing / ads, content marketing / syndication, social media, and more to drive interested prospects to their website. Once on the website, the goal of demand gen is to keep the prospect interested enough to fill out a form to request a demo for the solution they're selling.

Sales Development Representative (SDR): This role typically reports to marketing especially within large, ENT sales teams, is responsible for processing MQL's and turning them into Sales Qualified Leads (SQL). They come to work every day with a list of MQLs that get assigned overnight and their goal is to have a conversation, typically via phone, with the MQL to determine if they are qualified for a demo with the account executive. Every SDR uses Salesforce, phone, and email, but over the past several years many of them have adopted Sales Engagement Platforms to execute consistent workflows to ensure they made every attempt to contact and qualify the MQL into an SQL. SDR's will process the SQL's by converting the MQL in Salesforce to an opportunity and will schedule the demo meeting for their Account Executive (AE).

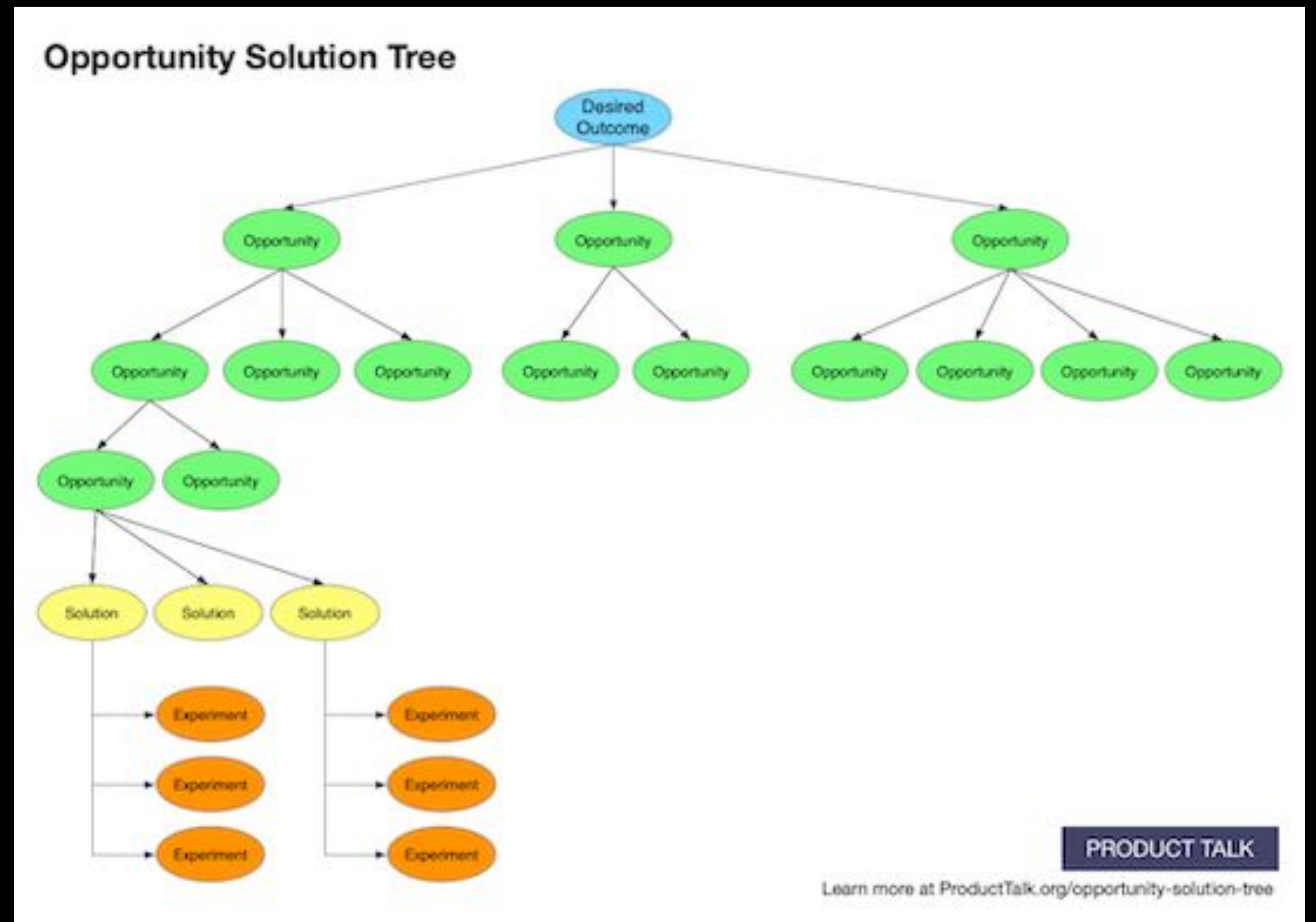
Second: what problem should you solve?

**This cannot be a problem created by
your product.**

First, you have to know what they do

Then, pick areas of opportunity

Map the ideas you have back to the outcome they could create for customers to stay in the problem space.



👉 **Teresa Torres' Opportunity Tree**

This is where the “art” part comes in.

What to consider when deciding:

- Company ✓
- Role/person ✓
- Top workflows ✓
- Competitors: current offerings
- Competitors: possible future moves
- Adjacent players: who could move in?
- Business model constraints
- Trends: B2B, consumer, outside your industry
- Company strategy
- Company goals
- Competitive advantage (company, team)
- Technical advances available to your team
- Your team or product area's mission, goals, priorities
- Current customer challenges, feedback
- Stuff you've already promised various people (hey, it happens)

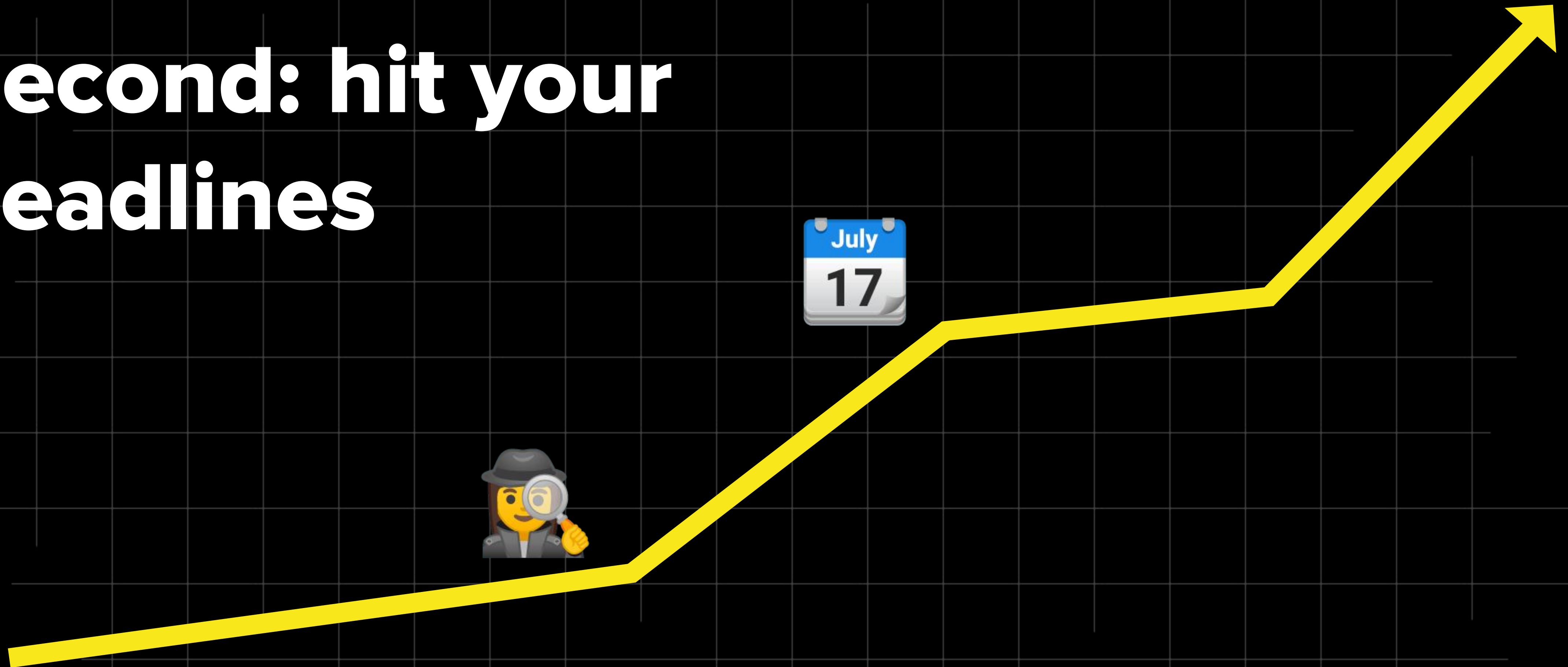


CHAMPIONS #YNWA

DRIFT

Managers: ask questions 🤔

Second: hit your deadlines



First, the mission



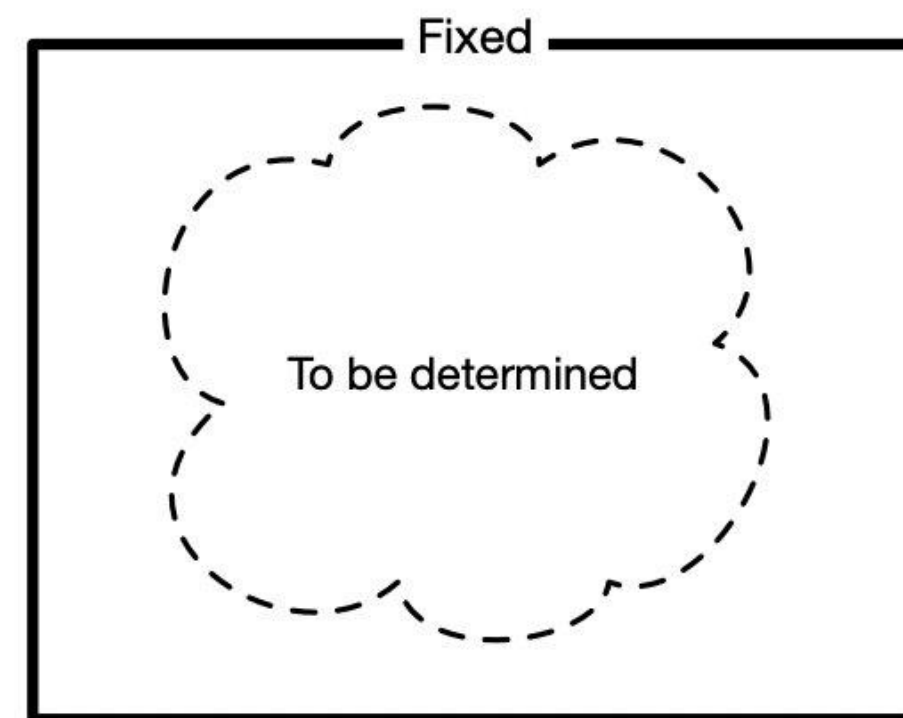
You have your mission.

Now you need to pick a date.

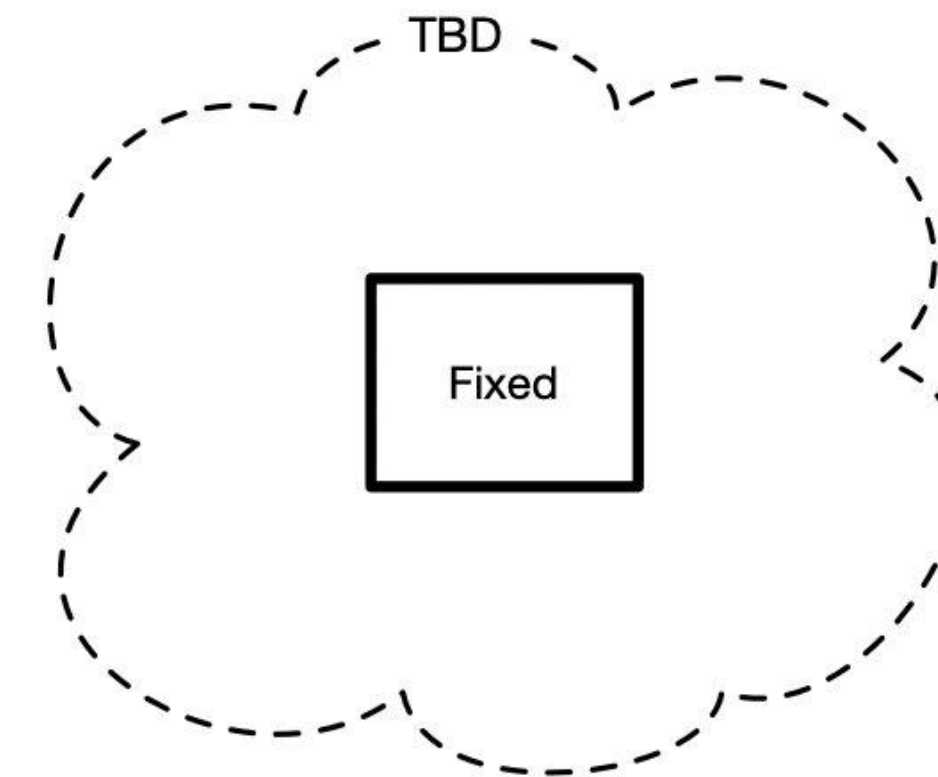
“Whether we’re chomping at the bit or reluctant to dive in, it helps to explicitly define how much of our **time and attention the subject deserves. Is this something worth a quick fix if we can manage? Is it a big idea worth an entire cycle? Would we redesign what we already have to accommodate it? Will we only consider it if we can implement it as a minor tweak?”**

- Ryan Singer, Shape Up

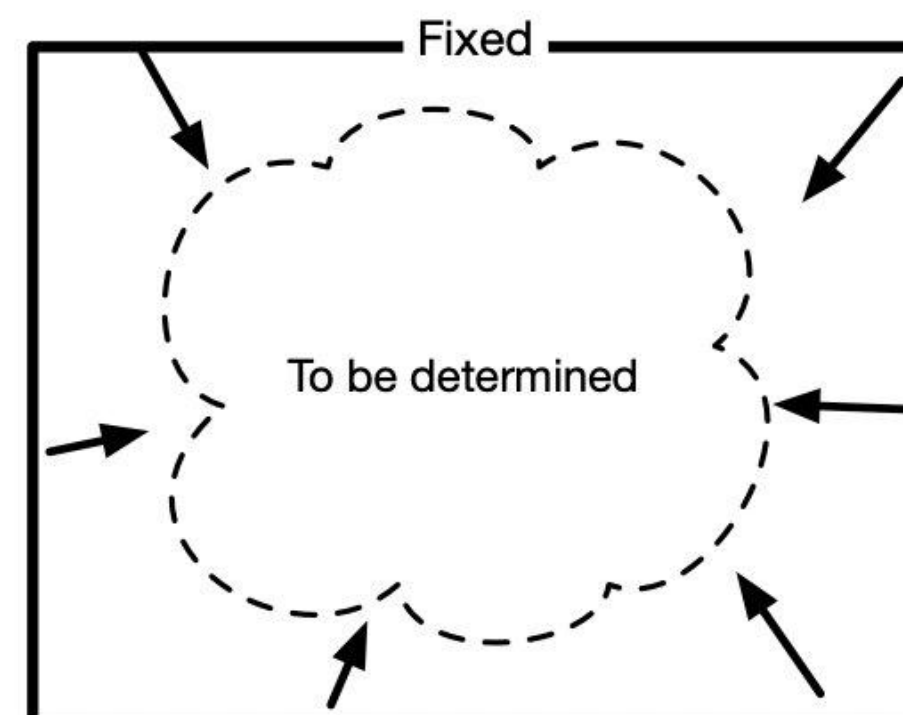
**All you need is a date and a mission
that is an **outcome**, not a feature.**



Hard walls, soft middle

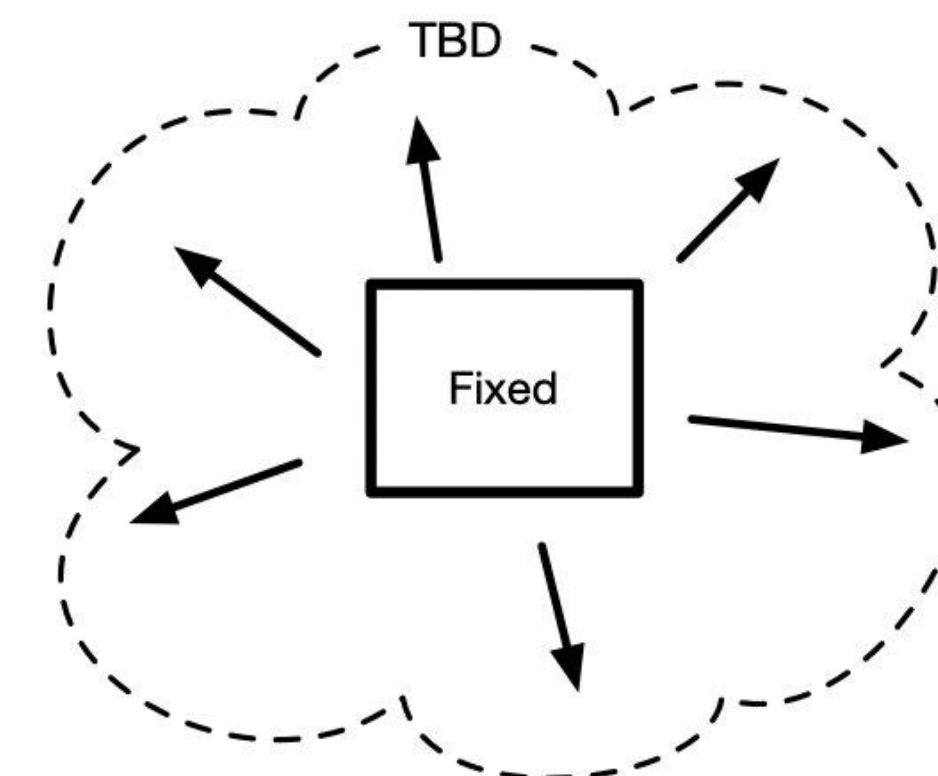


Hard middle, soft walls



Scope is limited from the start

Clear constraints,
More latitude for designers



No outer boundary on scope

Less latitude for designers,
Scope grows out of control

👉 **Ryan Singer, Head of Strategy @ Basecamp**

Example: reporting

Customers need to understand how a feature is working/performing so they can (whatever your product helps them do).

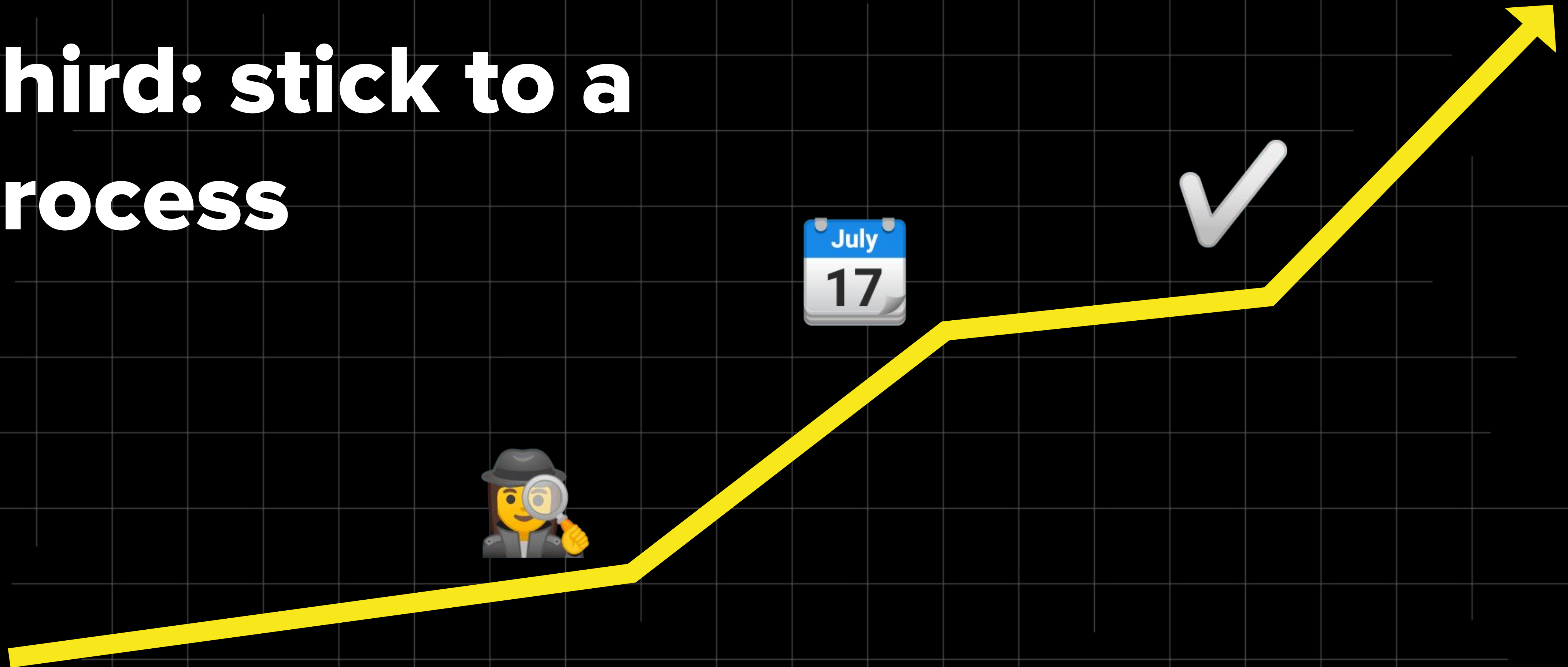
This is probably a **REPORT**.

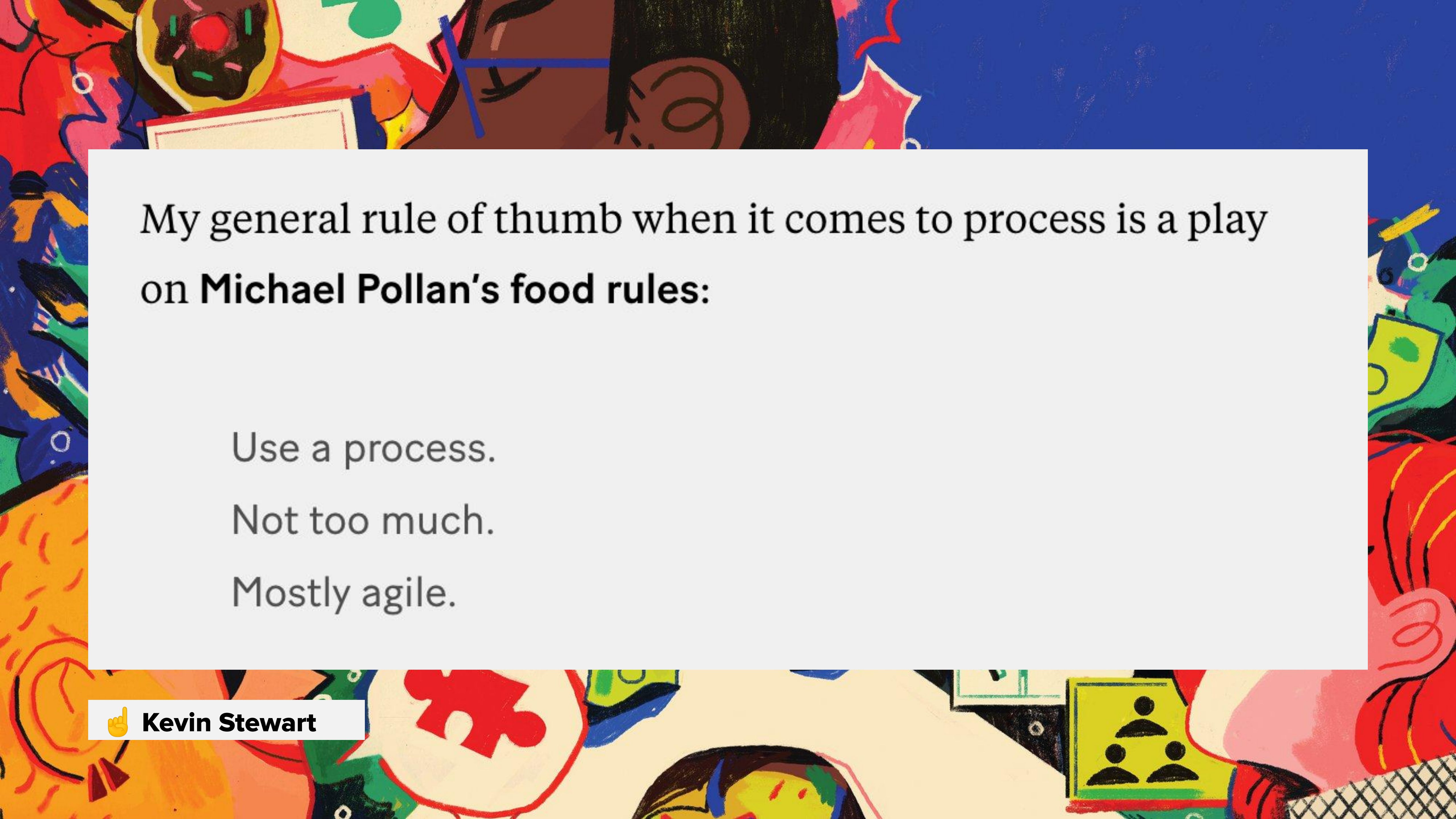
Should you build a filterable, searchable, customizable dashboard?

Or, run a SQL query and email them a number?

A note on autonomy 🌴

Third: stick to a process





My general rule of thumb when it comes to process is a play
on **Michael Pollan's food rules**:

Use a process.

Not too much.

Mostly agile.

What happens when you don't



trun 5:47 PM

V2 not having a clear idea of what success looked like, and then being content to just pick superficial milestones rather than validate assumptions / learnings

I suppose that could boil down to us settling for lower standards in the goal setting process



Maggie 6:37 PM

Yeah fair. The obvious prob was also the lack of JTBD/one pager/storytime, if I remember correctly we wrote that up with a specific solution in mind and skipped some steps



trun 6:37 PM

Yup.

I think as leadership were sometimes quick to move on with the process, and we don't have good built in checkpoints / back pressure to know when to revisit decisions

Skipped the first, most important part: understanding the problem.

At the time, we didn't use the gates that we had set up to validate our OWN work.

What happens when you don't



trun 5:47 PM

V2 not having a clear idea of what success looked like, and then being content to just pick superficial milestones rather than validate

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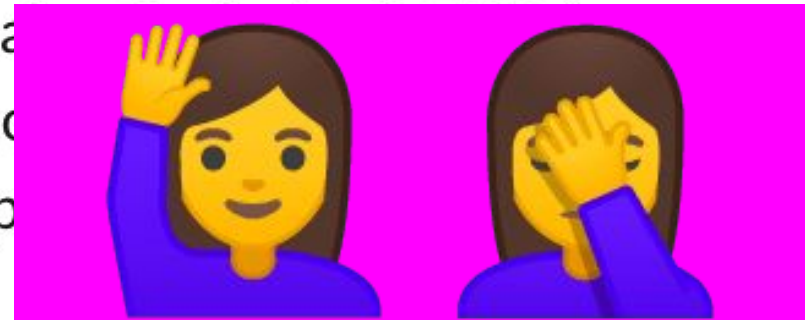
trun 6:37 PM

Yup.

I think as leadership were sometimes quick to move on with the process, and we dont have good built in checkpoints / back pressure to know when to revisit decisions

Skipped the first, most important part: understanding the

We had to restart



At the time, we didn't use the gates that we had set up to validate our OWN work.

The DRIFT JOB framework

J

JOB TO BE DONE

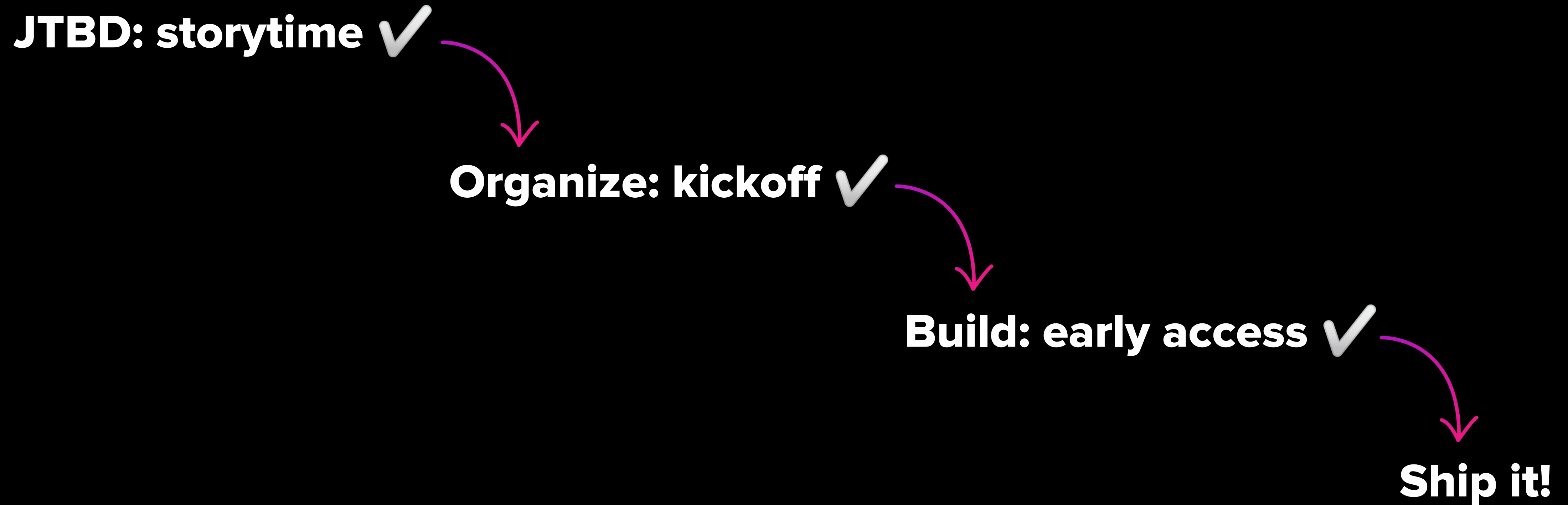
O

ORGANIZE

B

BUILD

Each step has a gate



Failure is ok, even expected

JTBD: storytime ✓

Organize: kickoff ❌

**Needs more
definition**

JTBD: one piece of the mission

**Which problem can you solve
that will have the greatest
impact on the mission?**

One Pager Template



The Story / Job To Be Done

Tell a story about the job that your user is trying to achieve. Where possible, this should not be technology or Drift specific.

Background / Insight

The PM is responsible for sharing all context learned here, in a concise manner.

- The background story & shared info
- Insights from prior releases and customer conversations
- Market data or analysis
- What brought us to the point of considering this thing? How are customers solving this today?
- Anything else you think will be helpful to the team

Goals

List the goal(s) on how you will measure success.

Requirements & Constraints

Minimum requirements & maximum requirements (constraints)

Timebox

Is there a deadline or expected time where this is valuable?

Concepts / References

Visuals, mockups, competitive solutions, etc.

The template



We're still in the problem space.

Gate: storytime

What questions need to be answered in order to solve for this JTBD?

Gate: storytime

1. Everyone has to have read the one pager to start
2. The entire build team is in the room: PM, design, developers, other people with context
3. PM takes the room through the story, the background, customer examples (bonus points for video clips)
4. Group discussion to generate open questions: what do we need to know in order to solve this problem? **Everyone has to speak.**
5. End the meeting by assigning open questions, with deadlines

Organize: figuring out the solution



kristin 9:13 AM

The designer's role in this phase is to produce a customer-validated, production-ready solution for the user problem. There are many activities that help us arrive at that solution, including role model research, ideation, prototyping, and testing with customers. To avoid long feedback loops and feasibility discussions too late in the process, we frequently share our work and learnings with the team along the way.

Gate: kickoff

1. 30 minutes or less
2. Run by the dev team
3. Devs describe exactly what they're going to build, including the areas where they will need to make new decisions
4. Devs propose the first “in production” date, including things that might put that date at risk
5. Team **COMMITTS** to the date

**Open questions?
Kickoff failed, go back
to the organize phase.**

Build: deliver the solution



Bernard Kiyanda 4:40 PM

"The Build phase is where all that team momentum is harvested into customer value. The goal is defined, the Tech Lead drives the work breakdown, how we resolve is up to our engineers, we ship incrementally, we measure, we improve and ship again."



jeff 3:46 PM

i think basically the job is to ensure the work is broken down to the point where it can be predictably communicated/managed/acted upon

so milestones, project plan, identifying areas in need of decisions, how to hold the players accountable throughout

and it's not always the job of me/the TL to do the breaking down, but whoever is doing it needs to show their work so that when it comes time to digest, it's not out of the blue



Fiona 4:06 PM

Describe it - the build phase is where engineers finally get get our hands dirty; it's the culmination of the pre work we've done, the knowledge we've built in our investigation, and the turning point from "I have an idea of how to fix this customer pain" to "I'm actively working to resolve this customer pain, and I'm confident in my direction"

Roles

TL only

- review any outstanding technical questions
- confirm milestones (not sure if you'd count that pre or post kickoff, we tend to do them all at once
- Get ahead of potential blockers for development, like dependent work

DRI - dev or TL

- communicate to any technical stakeholders, such as TLs and eng leads, that the work is beginning, and set expectations with them.
- receive feedback and iterate as early as possible, whether that's from the person who first reported the pain or people I have quick access to like our design team and CSMs.

Gate: early access program (EAP)

Why Early Access is Better than Beta



Beta implies...

- Buggy
- Unfinished
- Prototype that needs testing
- Might not ship



Early access implies...

- Exclusivity
- First look!
- Special preview
- Shape the future

Early access = easiest, lowest risk, cheapest, fastest way to learn from highly engaged customers without alienating them.

#lessonslearned by *fyi*

usefyi.com

 *Hiten Shah*

The point isn't the process.

The point is **accountability: to create a structured way to evaluate your progress along the way.**

That's it! 🥵

Get to know your customer (really).

Hit timelines with missions & dates.

Use a process to make it repeatable.

Everyone can do this.

Get to know your customer (really).

Hit timelines with missions & dates.

Use a process to make it repeatable.

“Product is hard”

– *Talk title from Marty Cagan*

THANK YOU 🙏

What questions do you have?