

# The Agile Research Team

Doing *less* to achieve **more**

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# Objectives for today

1

Describe the advantages of an Agile team

2

Identify the key mindsets and tactics to get there

3

Identify areas of focus for our “unconference” tomorrow. Tomorrow’s goal is that you will leave with an actionable next step to try for yourself!

# Who's the nerd?



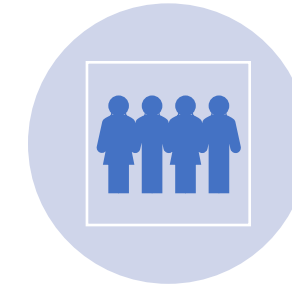
I “learned Agile” as a coach in the innovation/startup space helping teams do rapid, very intensive primary research



I found that getting teams working this way supported the outcomes of the consumer research work they were doing



At Amfam, I use the Agile mindset and various supporting tools to help teams of all kinds do less, more often, to achieve more



The profoundly positive impact that working this way has on the people doing the work is my passion

# Two forms of waste



- When you get down to it, there's really two barriers to value delivery:
  - *Building the wrong thing*
  - *Overbuilding the right thing*
- Research work is no different: it's a product; that is, its purpose is to drive a value proposition to a customer.
- What if you could build just enough of what your customer needs?
- What if you never wasted more than a few days going in the wrong direction?

# Agile?

- It's a mindset
- It's a decision that you make about how you will approach your work



YouTube: "Wedding Cake Video"

<b>Waterfall (traditional)</b> 	<b>Agile</b> 
Static, detailed plan up-front to produce a very specific output	Outcomes are identified up-front. Timing and output are flexible
Team works in phases (cake layers)	Team works in iterative sprints
Each work item is done	Plan work in a sprint
Customer is presented with work product at the end of the project	Customer provides "demos" of working product and gives feedback on quality and fidelity
Customer is presented with work product at the end of the project	Work until the customer says, "it's good enough"

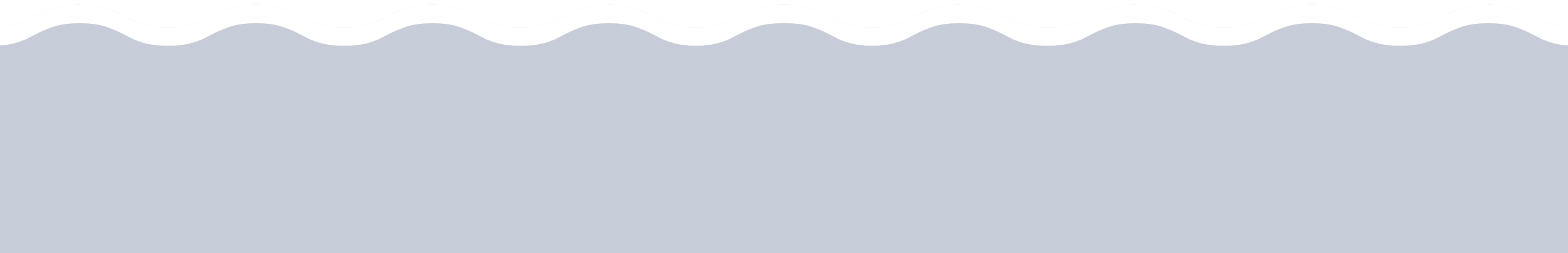
**Great for building houses**

**Great for discovering new value**

# The impact of approaching work this way

- Clearer objectives
- Shorter engagements
- Increased capacity
- Happier team (doing important work that matters/impactful/appreciated)
- Happier customers (getting just what they need, faster)
- More repeat business (high NPS)

5 concepts to  
ponder for our time  
tomorrow...



# #1 Optimize your team

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- Small size (4-6) to run fast
- Structured for speed (cross-functional, “T-shaped” people) to minimize outside dependencies
- Focus on customer value (outcomes)
- Scrappy, not crappy (good enough = great)

**Mindset #1: Free up  
the team to run fast  
and focus on value**

**Tactic #1: Team  
make-up and  
communication  
system**



# #2 Understand your customer

- A customer is anyone you seek to drive value to
- Customers are notoriously bad at describing their needs, but...
  - they're great at telling you what they want
  - it's only in the limited context of what they know is possible or exists
- You know the whole world of possibilities
- Your intake process should optimize for this

**Mindset #2: Thinking  
in terms of outcomes,  
not outputs**

**Tactic #2: Intake  
process, translation  
of wants to needs**

# #3 Manage the work

- Use a workflow management model in a sprint cadence (1-2 weeks/sprint)
  - Scrum
  - Kanban
  - Elements of both?
- This supports
  - Focus on customer value (outcomes)
  - Breaking the work down into value chunks
  - Communication of team, sponsor, and customer

**Mindset #3:**  
**Intentionality in how**  
**we work defines our**  
**success**

**Tactic #3: Use a**  
**workflow system to**  
**stay focused on value**

# #4 Build, test, learn, deliver

- What is the smallest output that could test your theory of customer value (outcome)
- Produce that working/usable/prototype product during the sprint– no carry-over allowed
- Demo it to your customer for on-the-spot feedback on value
- Watch for good enough, be ready to be surprised (scrappy, not crappy)

**Mindset #4: Iterative design, good enough**

**Tactic #4: Build small, demo regularly, stop when good enough**

# #5 Have a sponsor/PO

- Sponsor/PO “owns” the team’s output
- Advocates for the team, clears obstacles, procures resources
- Helps keep the team connected to the customer
- Partners with the team to help de/refine scope
- Connects/communicates on behalf of the team to other stakeholders
- Mentors the team (has all the right questions, not all the answers)

**Mindset #5: Reduce team distractions, so they can focus on the work, not administrative details**

**Tactic #5: have a sponsor/PO to mentor and advocate for the team**

# Tomorrow's outcome:

Everyone leaves with at least one useful tactic that supports the Agile mindset to try at home

- This is inherently “agile”
- Output is flexible, outcome is not!
- As my customer, consider what you “want” to learn tomorrow, but think in terms of outcomes to better describe what you “need”
- Consider the mindsets and tactics discussed today
- Use this format on the supplied stickies: “I want \_\_\_\_\_, because I need \_\_\_\_\_”

## **Example:**

*“I want to learn more about intake”*

## **becomes...**

*“I want to learn more about intake because I need to get better at focusing my customers on what they want to achieve with my team’s research products”*



**Place your stickies on the easel pad outside the door by 5pm. Thank you!**



My team and I will prepare the top three requests



We'll put a light outline together around the topic to get the conversation started



The one-hour session tomorrow will be broken into two 20 min. sessions to design a tactic you can take back to your team



All three topics will run concurrently in different parts of the room



Pick a topic to start, stay until you've seen enough and move to another topic (the rule of two feet)



We'll officially rotate twice (two sessions @ 20 minutes each)



In the last 15 min, each topic area will report on their findings, with emphasis on actionable next steps to take home

# Format for tomorrow's unconference



YouTube: "Unconference 101 Video"

# Q&A



## Reach out

I'm not really that passionate about this stuff, but I'll fake it if you really want to talk about it.

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## *Tomorrow's session facilitators*

**April Collins**

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**James Baetz**

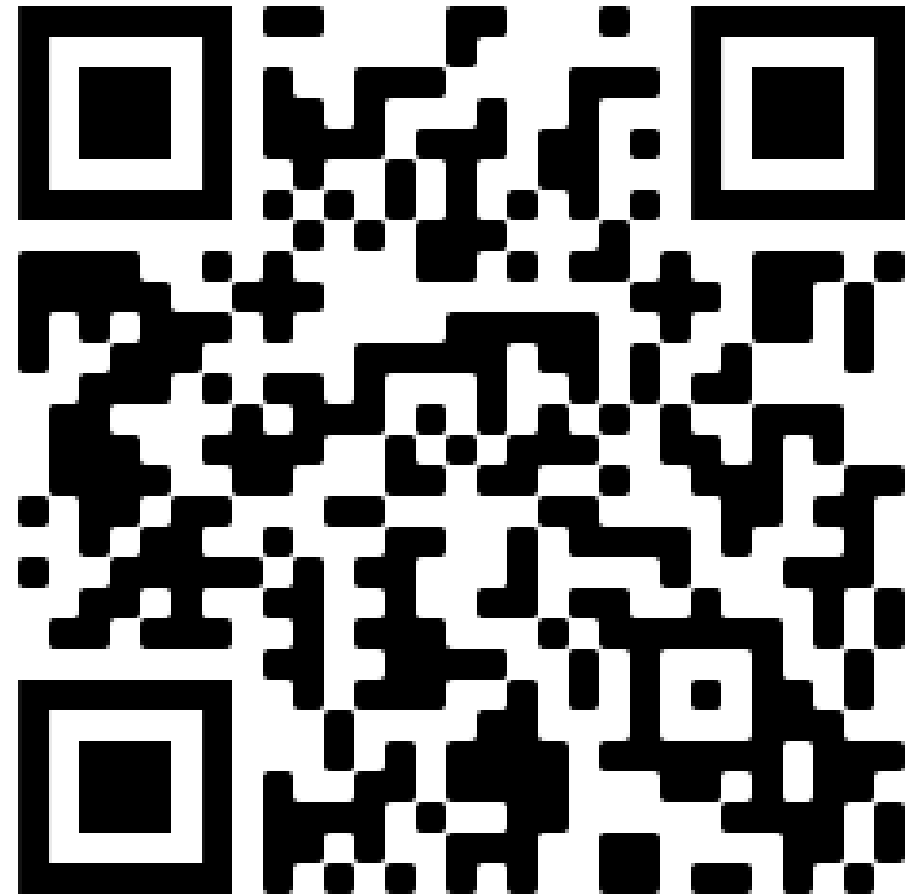
**123.456.7890**

**jbaetz@amfam.com**

Provide your feedback  
on both sessions

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Thank you!



*Feedback/NPS Form*



Day 2



# Agile Research Teams Unconference



## RULES:

1. START SOMEWHERE
2. ASK QUESTIONS, SHARE EXPERIENCES,  
HELP DEFINE TAKEAWAYS
3. MOVE BETWEEN TOPICS WHEN IT'S RIGHT  
FOR YOU



**ADMIT ONE**

**49229442005**

# *Un*conference format

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1. Find your top preferred topic
2. Framing questions (what and why?)
3. Discuss
4. Facilitator will help formulate tactical takeaways
  - Session 1: try to complete the task. Session 2: improve on session 1 work!
5. Move to another topic anytime if the one you're in isn't doing it for you
6. 20 minutes of topic discussion, then rotate to another topic
7. 3 minutes of share-out for each topic (at the end of the hour)
  - Session 2 participants are responsible for the share-out. 3 minutes.
8. 5 minutes of group discussion (retro)

**Go!**

# Your Topic

- Topic
- Why is it important? (1 min)
- Outcome desired (1 min)
  - What will change if we solve for this?
- Customer (1 min)
  - Whose behavior will have to change?
- Behavior required to get value (2 min)
  - What insights will help you design an offer that will trigger the behavior? Currencies?
- What is the offer? (5 min)
- How will we measure success? (2 min)
- What's next? (5 min)
  - What do I do next to make this happen?
  - What happens after the experiment?

## Share! (3 min)

- Topic
- Why is it important?
- Outcome desired
  - What will change if we solve for this?
- Customer
  - Whose behavior will have to change?
- Behavior required to get value
  - What insights will help you design an offer that will trigger the behavior?
- What is the offer?
- How will we measure success?
- What's next?
  - What do I do next to make this happen?
  - What happens after the experiment?



# Retro

Do more

Do less

Start  
doing

Stop  
doing

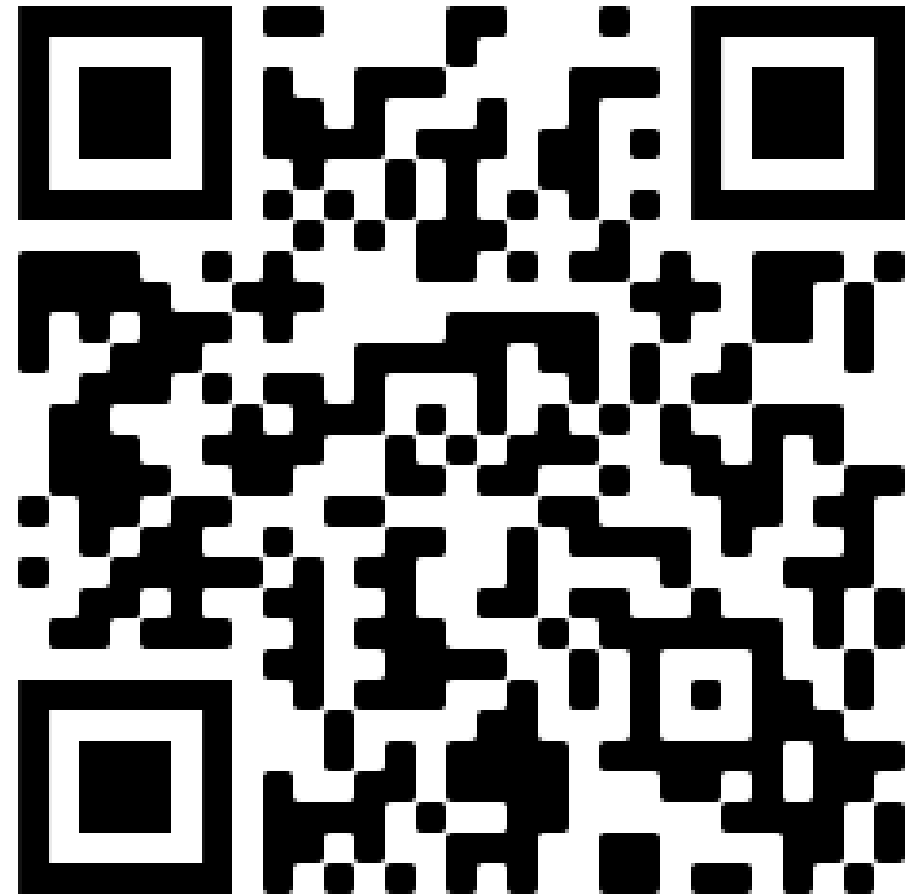
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# Experiment template

- Who is my customer? \_\_\_\_\_
- What is the behavior they need to be willing to engage in to get value?  
\_\_\_\_\_
- What insights will help you design an offer that will trigger the behavior?  
\_\_\_\_\_
- What offer will you make? \_\_\_\_\_
- What currency will your customer part with to get the value? \_\_\_\_\_  
\_\_\_\_\_
- How will you measure success? \_\_\_\_\_
- Hypothesis: If I do \_\_\_\_\_ (offer), (customer) will do  
\_\_\_\_\_ (behavior) for/because (reason) \_\_\_\_\_  
\_\_\_\_\_.

Provide your feedback  
on both sessions

Thank you!



*Feedback/NPS Form*