AGILE PRODUCT DELIVERY IN THE PANDEMIC’S REMOTE WORK ENVIRONMENT

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INTRODUCTION

I work for Thoughtworks Inc., a global technology consultancy as a Principal Consultant.
I have over 20+ years of progressive experience in technology consulting, digital transformation and product development in a variety of domains.
I love helping clients solve business problems by leveraging technology as best as we can.
A BIT OF CONTEXT...

THE CLIENT

Cloud based financial services product platform for the financial operations of all types of small and medium businesses
Sales are primarily through referrals made by their accounting/bookkeeping partners
Partners are not exclusive i.e. they work with competitors as well
Partners are incentivised through a loyalty program offering tiered discounts, commissions and service levels

THE PROBLEM SPACE

Referral sales have been stagnating for the last few years
Customer research showed that the current loyalty program was not working
Partner employees had a limited understanding of the platform capabilities
There was very little ongoing motivation to continue referring
Client required a complete re-imagination of the loyalty program to motivate referrals
OVERVIEW OF OUR METHODOLOGY
DISTRIBUTED PRODUCT DELIVERY JOURNEY

Begins with an intensive, co-located 2 to 4 week discovery and inception

Leverages collaborative facilitated workshops using lo-fi techniques to encourage discussion, brainstorming and idea generation

Bases successful delivery on the common understanding, priorities and relationships built during the inception

Includes smaller in person interactions at key milestones of the engagement

Provides multiple forums to visualise things together and revise our assumptions

Allows clients to exploit cost advantages by optimally combining onsite collaboration with offshore delivery horsepower
PANDEMIC ERA CHALLENGES
AN UNEXPECTED NEW SET OF PROBLEMS

Closed borders meant that we could no longer assume an in-person discovery and inception, or have ongoing travel.

A 4-hour time difference made getting all stakeholders together a logistical nightmare.

Stakeholders faced Teams/Zoom fatigue as day-to-day operations shifted to an entirely virtual way of working.

Understanding the complex business domain of a foreign client became a challenge for the team in Thailand.

Defining the product roadmap, building and validating product hypotheses required a great deal of joint whiteboarding and collaboration.

Building the right user experience required several iterations of design and user research.

Pace of delivery and responsiveness to feedback had to be a lot faster due to the sudden criticality of online tools for partner accounting and bookkeeping firms.
SOLUTIONS
FIGURING OUT A NEW WAY OF WORKING

Validating hypotheses and prioritising product features using Miro

<table>
<thead>
<tr>
<th>Feature hypothesis</th>
<th>Pain Point Addressed</th>
<th>Desirability</th>
<th>Viability</th>
<th>Feasibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer self service capability to understand loyalty tier, benefits, expiration etc.</td>
<td>Partners demonstrate low awareness and uptake of benefits</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Earn loyalty points for completing educational courses on the products</td>
<td>Partners demonstrate low awareness and uptake of benefits</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Offer self-service to improve visibility of earned benefits and ease of use</td>
<td>Partners demonstrate low awareness and uptake of benefits</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Average points earned by size of the practice to level the playing field</td>
<td>Must referrals come from larger practices and very few from 1-3 member practices</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>Offer specific course content for bookkeepers</td>
<td>Bookkeepers show a lower level of engagement than accountants</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
</tr>
</tbody>
</table>

Using story maps to break down the implementation of prioritised features
**FIGURING OUT A NEW WAY OF WORKING**

Iterating through the user experience using Figma

Conducting user research online using Maze and Dovetail
FIGURING OUT A NEW WAY OF WORKING

Leveraging data analytics to drive quicker decision making

<table>
<thead>
<tr>
<th>Referral sales count ranges</th>
<th>Count of practices referring in the range</th>
<th>Total referrals in the range</th>
<th>Average referrals in the range</th>
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</thead>
<tbody>
<tr>
<td>0 - 99</td>
<td>24, 124</td>
<td>35, 526</td>
<td>1</td>
</tr>
<tr>
<td>100 - 199</td>
<td>42</td>
<td>5, 490</td>
<td>131</td>
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<tr>
<td>200 - 299</td>
<td>5</td>
<td>1, 109</td>
<td>222</td>
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<tr>
<td>300 - 399</td>
<td>7</td>
<td>2, 456</td>
<td>351</td>
</tr>
<tr>
<td>500 - 599</td>
<td>1</td>
<td>558</td>
<td>558</td>
</tr>
<tr>
<td>600 - 699</td>
<td>1</td>
<td>675</td>
<td>675</td>
</tr>
<tr>
<td>800 - 899</td>
<td>1</td>
<td>866</td>
<td>866</td>
</tr>
<tr>
<td>1200 - 1299</td>
<td>1</td>
<td>1, 295</td>
<td>1, 295</td>
</tr>
<tr>
<td>Grand Total</td>
<td>24, 182</td>
<td>47, 975</td>
<td>2</td>
</tr>
</tbody>
</table>
RESULTS
THE HARD WORK PAYING OFF

Identifying and leveraging our most engaged and knowledgeable stakeholders and customers

Running virtual wireframing sessions efficiently

Built a trusting work relationship between the client stakeholders and the Thailand based team overcoming language and work style differences

Built a data driven measurement and feedback loop for quicker decision making

Released multiple incremental improved versions of the loyalty program; both the user experience and the underlying mechanics

Built the right things, with the highest business value and customer impact
REPLICATE OUTCOMES, NOT TECHNIQUES

To make virtual collaboration effective, we need a lot more upfront preparation before sessions.

There are a lot of virtual tools out there and it is easy to quickly get overwhelmed. As a team, we need to identify the leanest set to help us meet our collaboration goals.

While the execution might have changed, the underlying principles of Agile product development still hold water and are highly effective.

Despite our best efforts, remote working can never be successful without the continued and patient support of our clients in adapting to the new normal.
I’M GRATEFUL TO...

My team members for their ongoing support and proactiveness to try new solutions

My employer Thoughtworks for this enriching opportunity

Last, but certainly not least, my shepherd Siva for his pragmatic advice and guidance to help me shape this experience report
THANK YOU

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