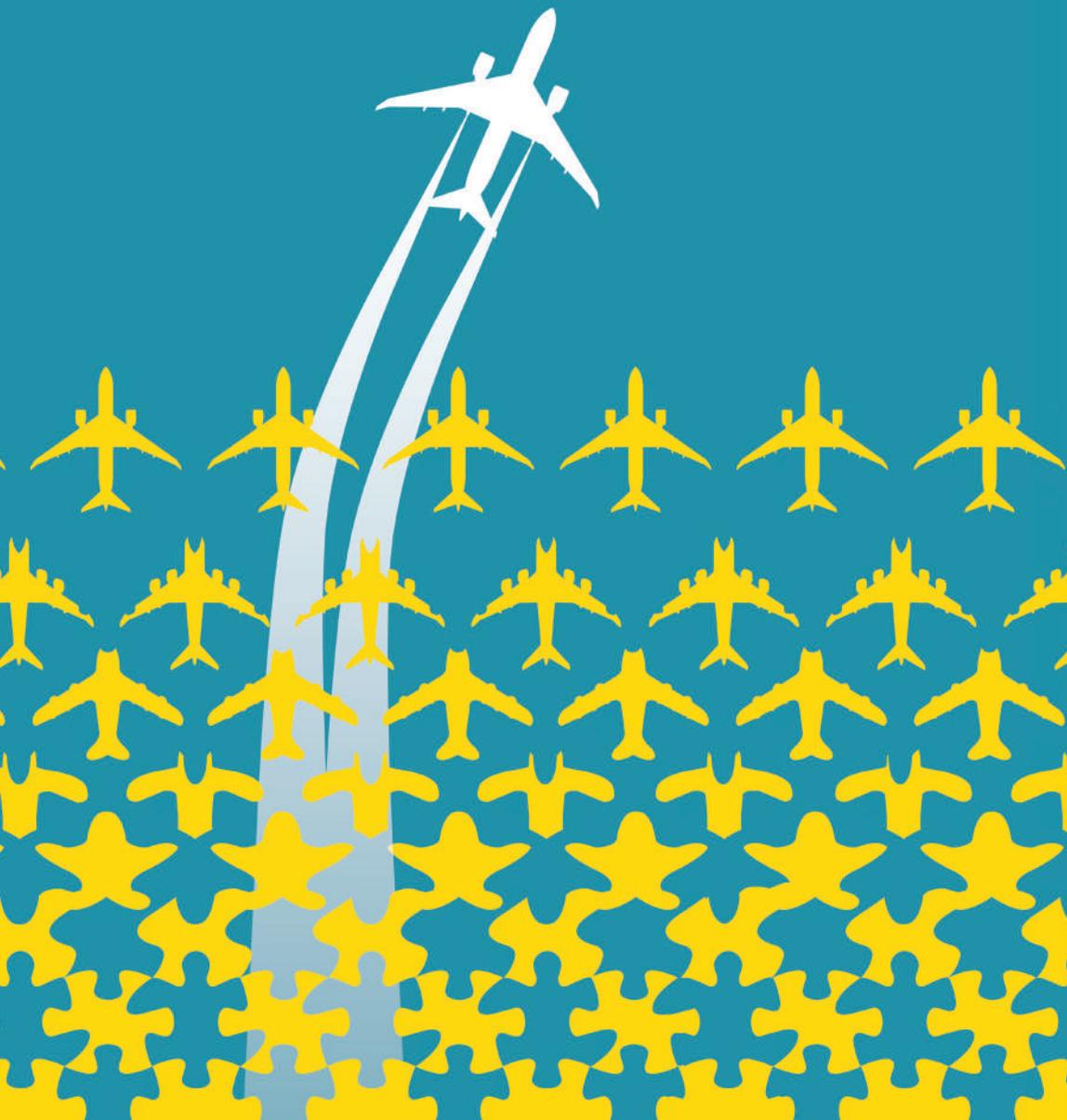


VALUE STREAM CANVAS

EXERCISE

PROJECT TO PRODUCT COMPANION

DOMINICA DeGRANDIS and CARMEN DeARDO
with MIK KERSTEN



VALUE STREAM CANVAS EXERCISE

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A Companion Exercise to

PROJECT TO PRODUCT: *HOW TO SURVIVE AND THRIVE IN THE AGE OF DIGITAL DISRUPTION WITH THE FLOW FRAMEWORK*

Dominica DeGrandis and Carmen DeArdo
with Mik Kersten

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Purpose: To help teams visualize problems that occur during hand-offs as work flows across a value stream. In other words, how to make important and necessary connections visible to provoke necessary conversations for change. Provide practical learning experience for how teams can start applying concepts from the Flow Framework™, a framework created by Mik Kersten.

Timeframe: 60–120 min.

Total time depends on the size and complexity of the value stream.

Materials: *Project to Product: How to Survive and Thrive in the Age of Digital Disruption with the Flow Framework* book, whiteboard if co-located or drawing tool if remote, quality video conference facility.

Participants: People who do the work; people who participate in the activities currently necessary to provide business value. Ideally, you want representatives from across the whole value stream to participate in this exercise.

Before You Start:

- Consider how information gets somewhere—via emails, phone calls, internal chats, etc. Do not think only about the tools here.
- Picture all the interactions that currently occur even if that interaction is something that you want to change. The chart that you create with this exercise should accurately reflect the current state of your workflow because this is the reality of the situation. Start where you are to make it easier to get to where you want to be.

Instructions:

Two important components of the Flow Framework are the Activity and Integration Models discussed in Chapter 9 of *Project to Product*, which identify each of the specific activities performed in the value stream

and the associated work items. For this exercise, we will focus on the activities related to two common scenarios.

1) Start with Production

Why? Because production comes first. When production is down or unstable, it creates the biggest risk to customer satisfaction and business well-being. Discuss how a typical production issue arrives. How does the issue get detected?

For example, does an alert arrive via a monitoring tool? Does someone then create an incident or a problem work item? Whatever the work item type (incident, problem, defect, etc.) draw a box on your whiteboard to identify the work item and how its arrival was communicated. Below we specify incident and problem work item types.

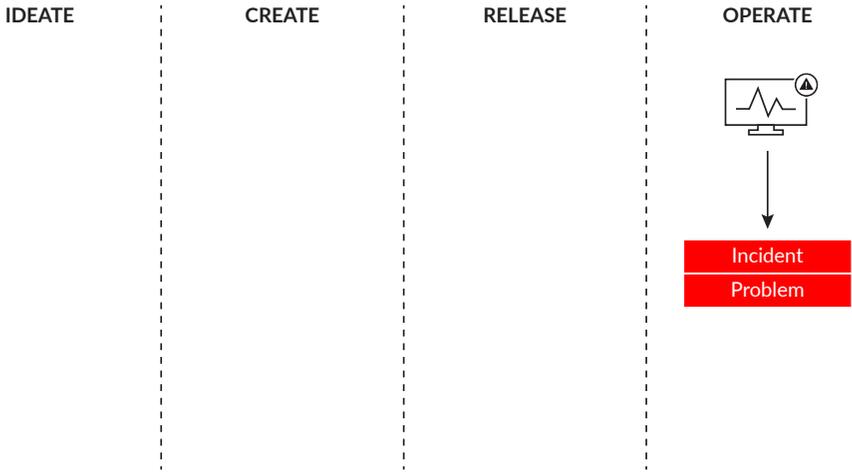


Figure 1: Getting Started

If needed, add an arrow showing how the notification communication occurred. For example: An operator looking through a log file discovers the issue and manually creates an incident in an ITSM tool. Or the problem is automatically detected in a monitoring tool and automatically generates an alert. Or a customer service representative responds to a customer complaint and notifies operations.

Whatever the tool, write in the name(s) of the tools that the work items reside in. Listing the tools and how they are connected begins to form the Tool Network as shown in Figure 9.3 of *Project to Product*.

Discuss What Happens Next

How is information communication when the issue (or incident) is escalated because changes are needed from development? How is the info analyzed? What additional work items (if necessary) are created? What other communications occur?

For example: Does an Operations engineer (e.g., a support person or incident/problem manager) ping a developer through an internal chat channel to inform them of the problem (since Ops will be impacted with the need to change some code)? Extend your drawing to include this information.

A typical situation could be that an issue is found via a monitoring system and an incident is created in an ITSM tool (e.g., Jira Ops, BMC Remedy, or ServiceNow). Many times the incident (or underlying problem) requires a software change to address the underlying cause. In this case, a defect may need to be created to trigger the code change and track the work progress. This defect should then flow into the backlog of the development team so that it can be prioritized and pulled forward into the work iteration when capacity is available.

At this point, the work item (defect) goes through the process of being developed, tested, and released. The state of the defect work item should be updated to reflect this progression through the value stream until it is marked done and released into production. Examples of state transitions for various work items including defects are shown in Figure 9.6 of *Project to Product*.

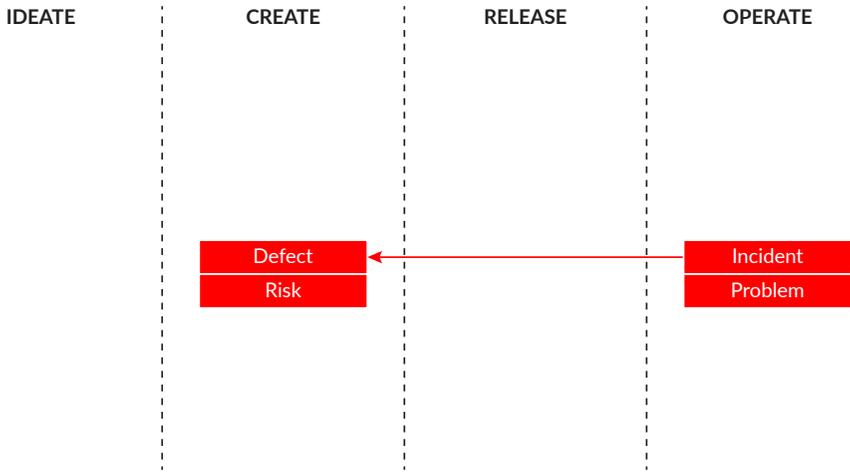


Figure 2: Handing Off Work from Production to Development

Continue discussing what happens next. What other activities occur to enable the change/defect to be specified, designed, built, tested, and delivered to production? Add this information to the drawing. Figure 3 shows an example of what a production incident workflow might look like.

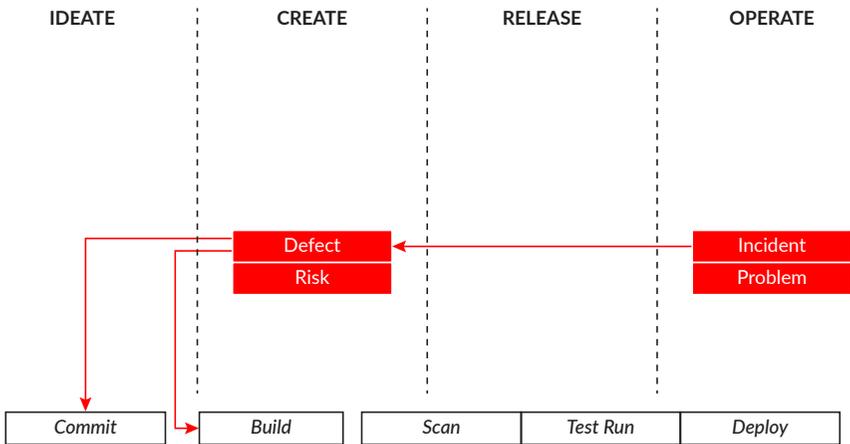


Figure 3: Production Incident Value Stream Example

2) Next, Consider a Feature Request from the Business.

Discuss how a typical business request is handled starting with the work intake process. How does the feature arrive? For example:

- Do features arrive via some work intake tool?
- Do you have a project management organization that plans high-level initiatives that trickle down to development?
- Do you have a product management organization that plans work for a portfolio of products that flows to product development teams? How does your business plan and manage the work?
- Does the account management/sales team communicate a new feature request on behalf of the customer?
- Can customers request changes themselves?
- Where does this happen? Email? Salesforce? Then what? Does someone create a work item?

Whatever the work item type, draw a box on your whiteboard to identify the feature request and how its arrival was communicated.

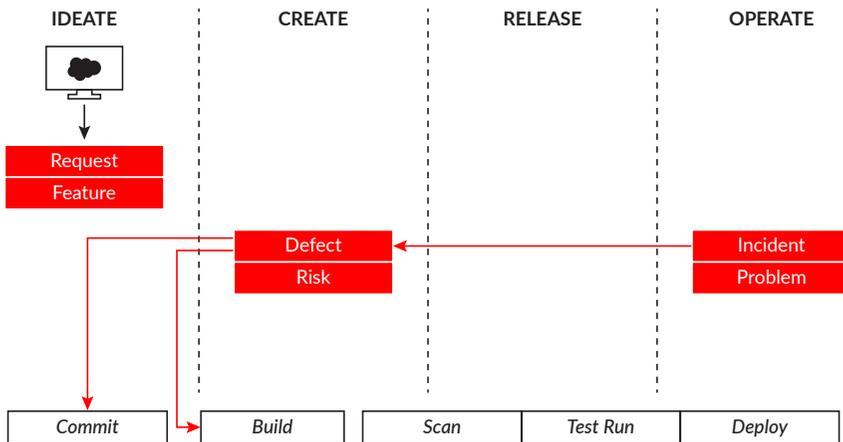


Figure 4: Business Request Intake Process Example

Discuss what happens next. How is information communicated, and what's the process to determine the impacted teams and then prioritized for development? What additional work items (if necessary) are created? What other communications occur? For example: how does the business engage a product owner to inform them of the feature and communicate the business need. Extend your drawing to include this information.

Feature requests may be entered (or automatically flow) into a system like TargetProcess or Planview for consideration. Business people may work with the impacted product owner to further scope the feature and determine if it should move forward. Once this determination is made, does a prioritization process occur to determine where the feature fits into the backlog?

The feature may then be analyzed and broken down further into stories to be developed by product teams. These stories can then be prioritized further, for example, by the product owner and Scrum master and placed into the appropriate development team's backlog. Based on priority, the story can then be pulled forward for development when capacity exists. See Figure 9.6 in *Project to Product* for an example of the types of activities and states that features and stories may transition through.

At this point, the story can go through the process of development, test, and release. Ideally, the state of the feature or story work items are updated in the tooling to reflect this progression through the value stream until it is marked done and released into production. Note: this may or may not be the same process a defect takes.

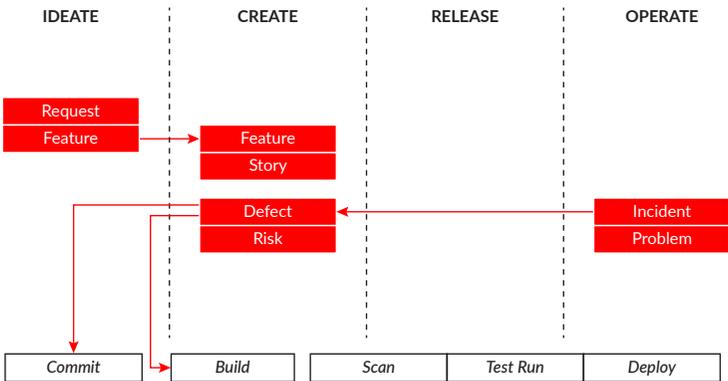


Figure 5: Business Request Workflow to Development Example

Continue discussing through the other activities that occur to enable the new feature to be specified, designed, built, tested, and delivered to production, adding this information to the drawing.

This information starts to tell a story now. A story of how work actually meanders its way across a value stream network (in this scenario, it is not a straight line.)

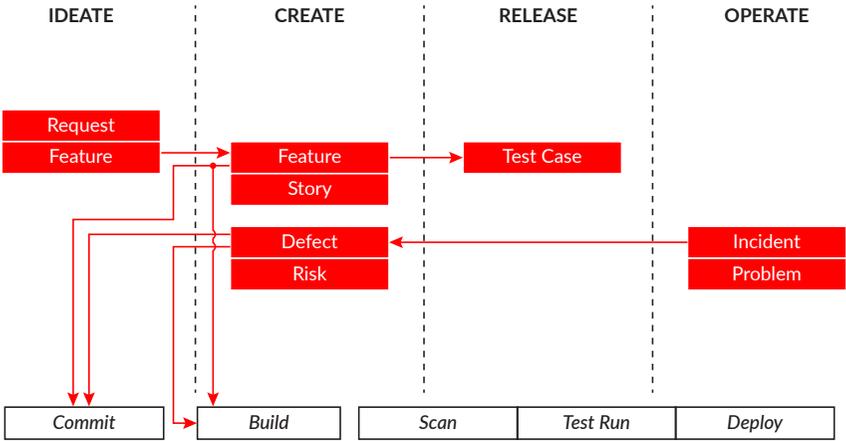


Figure 6: Value Stream Canvas Example

Keep in mind that this isn't a kanban. It's a visual representation of how and where work is handed off between different people, teams, functions, and/or tools across the value stream. The point here is to make connections from the handoffs visible. It's the handoffs that contribute greatly to a fragmented value stream.

The value stream canvas can be used in conjunction with one or more kanbans to increase visibility of the workflow and to take advantage of work-in-progress limits to improve the flow load on teams.

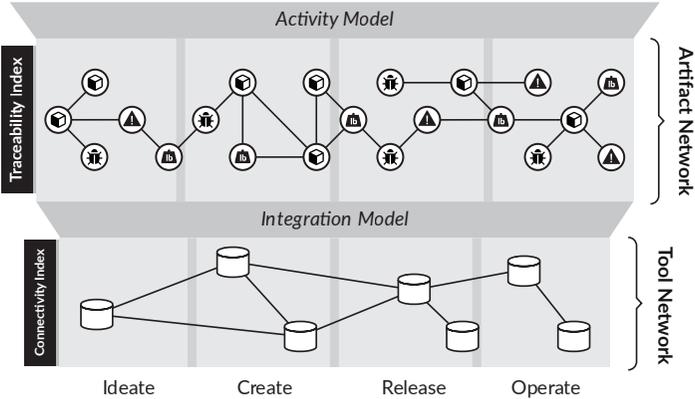
Benefits

This value stream canvas exercise represents the bottom portion of the Flow Framework (see Figure 7 below), where work items (referred to as

artifacts) are linked together to provide a visual representation of the value stream.

By starting with production and then business, you force the collaboration of people impacted by development of the business value that is ultimately delivered. People come to their own “aha” revelations just by the fact that they are in the same room discussing the value stream. People can better understand what role they play in the value stream and how what they do impacts others.

Listing the work items plus the tools used on your value stream canvas will enable you to begin to construct your tool and artifact networks which make up the bottom two layers of the Flow Framework as shown below. This lays the groundwork for being able to utilize the Flow Metrics as described in Chapter 4 of *Project to Product* to provide insights on where things are flowing and where they aren’t to help identify where bottlenecks exist.

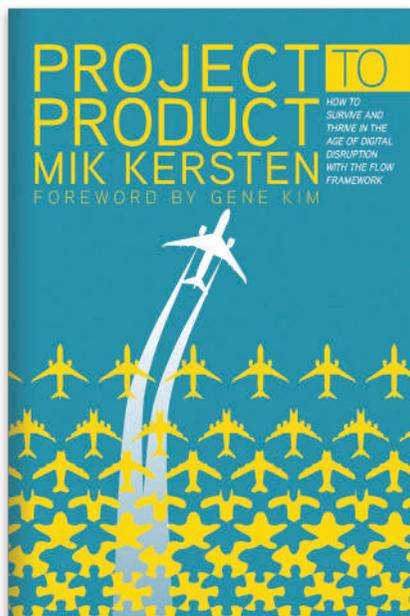


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Figure 7: Bottom Portion of the Flow Framework Showing Activity and Integration Model

Available Now!



As tech giants and startups disrupt every market, those who master large-scale software delivery will define the economic landscape of the 21st century, just as the masters of mass production defined the landscape in the 20th. Unfortunately, business and technology leaders are woefully ill-equipped to solve the problems posed by digital transformation. At the current rate of disruption, half of S&P 500 companies will be replaced in the next ten years. A new approach is needed.

In *Project to Product*, Value Stream Network pioneer and technology business leader Dr. Mik Kersten introduces the Flow Framework—a new way of seeing, measuring, and managing software delivery. The Flow Framework will enable your company’s evolution from project-oriented dinosaur to product-centric innovator that thrives in the Age of Software. If you’re driving your organization’s transformation at any level, this is the book for you.

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