OPAL
CONSULTING

Training & Workshop Offerings

2019-2020

Agility | Product | Innovation
Consulting & Training

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Leadership & Mindset

Agile 101

Prerequisites: None   4 - 8 hrs

OBJECTIVES	TARGET AUDIENCE
Level Set on agile mindset & org ecosystem	Anyone in a leadership/management position who is responsible for the introduction and establishment of agile methods and techniques in an agile organization/division.
High level overview of 2 agile frameworks	
How to cultivate high-performing teams	
How to grow and scale agile in an org	

Agile Leadership

Prerequisites: None   4 - 8 hrs

OBJECTIVES	TARGET AUDIENCE
Development of a common language	Anyone in a leadership/management position who wants to go further with their agile knowledge.
Understanding of core problems in Product and Software Development	
Professional introduction of agile techniques	
Role management plays in the agile organization	

Agile for Executives (Business Agility)

Prerequisites: None   4 – 16 hrs

OBJECTIVES	TARGET AUDIENCE
Why agile is important to your org's future	Agile Transformation Team, Executives, and Key Business Stakeholders
How to lead an agile organization	
What needs to change inside your organization for agile to succeed	

Lean PMO

Prerequisites: None   10 - 24 hrs over 3 iterations

OBJECTIVES	TARGET AUDIENCE
Visibility of entire IT Portfolio	Those impacted or involved with IT Portfolio Projects or Work Items
Alignment on priorities from a strategic view	
Proactive mitigation of risks and constraints	Prerequisite: Helpful to do in combination with Kanban training.

Product Mindset

Prerequisites: None   2 - 4 hrs

Overview: The Product Mindset is the link between the products we build and the culture of the organization that is building them. It's the foundation for operating in a digital economy and creating new insights for success. In this session, we will explore what the Product Mindset is and how to grow it within ourselves and in our organization. We'll identify the questions we can ask to go further than we have before to define value. We'll discuss how to develop products that resonate with our user's emotional needs. And we'll finish with a simple, interactive exercise that applies design thinking to product discovery that you can take back to use on Monday morning. No experience necessary.

OBJECTIVES	TARGET AUDIENCE
Participants will comprehend what a product mindset is and how to expand their own	Anyone interested in growing their Product Mindset or closing the gap between Project and Product Thinking. Great for leaders and practitioners.
Participants will examine a modern approach to defining value using a hierarchy of needs	
Participants will discuss how to use experiments to validate assumptions (OPTIONAL – need extra time for this if applying hypothesis and learning statements)	
Participants will practice a product discovery technique called **Opportunity Tree** to generate ideas and break the confirmation bias	

Innovation Strategy Workshop

Prerequisites: Decision Makers   8 hrs

Overview: Despite the buzz, innovation remains a frustrating pursuit. Why is it so hard to build and maintain the capacity to innovate? The answer is complex, from attracting and retaining the right talent to balancing the existing business needs with new sources of growth and the investment that is required. Not surprisingly, innovation strategies are not a one-size fits all. However, you may be surprised to learn that innovation is more about discipline than creativity. We will explore:
a) The difference between Disruptive Innovation and Sustaining Innovation
b) What we can do to encourage people to act more like entrepreneurs and intrapreneurs
c) A framework to develop an innovation strategy

OBJECTIVES	TARGET AUDIENCE
Fundamentals of Innovation – Industry definition then what it is in your organization	Those who are struggling with innovation while keeping up with current work demands
A taste of Ideation through hands-on exercises	
Who is best suited for Innovation Leadership where they fit in your organization	Decision makers who can take action after the workshop
What needs to change in your org and how to drive it	
Build out your Innovation Center	

Frameworks: Scrum and Kanban

Scrum 101

Prerequisites: None   (Certification: Scrum.org – Professional Scrum Master I) 2 Days

OBJECTIVES	TARGET AUDIENCE
Fundamentals to Scrum	Those who want a clear understanding of the Scrum Framework, the nuances in the roles, and how to build high-performing teams.
Scrum Framework: Understand the 11 elements of the Scrum framework and empirical process	
Introduce the roles and responsibilities of the Product Owner, Scrum Master, and Development Team and where they fit in your organization	
Learn how to plan large items with Scrum	
Explore complementary practices used in Scrum	

Scrum with UX

Prerequisites: None   (Certification: Scrum.org – Professional Scrum With UX) 2 Days

OBJECTIVES	TARGET AUDIENCE
Introduction of the Scrum framework	Those who work in a UX or Marketing environment who want a better understanding of closing the gap between Lean UX and development.
Overview of Lean UX practices	
Learn how to apply UX within the Scrum framework	
Explore complementary practices used in Scrum and Lean UX	

Scrum 201

Prerequisites: 1 year Scrum Experience or any Scrum Training   8 hrs

OBJECTIVES	TARGET AUDIENCE
Refresh your knowledge of the Scrum framework	Those who have a general understanding of the Scrum Framework but who want to go further in their practical application of Scrum.
Gain clarity on Roles and Responsibilities	
Learn how to plan large items with Scrum	
Explore complementary practices used in Scrum	

Scrum Product Owner

Prerequisites: None, but PSF Class or PSM helpful   Certification: Scrum.org – PO I) 16 hrs

OBJECTIVES	TARGET AUDIENCE
Product Management – Vision, Value, Validation	Those who want a clear understanding of the Scrum Framework, the nuances in the role of Product Owner, and how to plan and release high value products or services to the market.
Scrum Framework: Understand the 11 elements of the Scrum framework and empirical process	
Introduce the roles and responsibilities of the Product Owner, and where they fit in your organization and how to scale the role	

Learn how to plan large items with Scrum	
Explore complementary practices such as release planning and roadmap planning	

Scrum Product Owner II [2020]

Prerequisites: PO I   (Certification: Scrum.org – PO II) 16 hrs

OBJECTIVES	TARGET AUDIENCE
Product Management – Vision, Value, Validation	Those who want to go further in the Product Owner role – deeper exploration of Product Management Techniques, particularly as it relates to Scrum. Prerequisite: PSPO I
Explore the various Product Owner stances through a class project	
User Personas, Hypothesis and Validation techniques	
Learn how to work with governance	
Apply all using the Product Wall	

Kanban 101

Prerequisites: None   (Certification: Scrum.org – Scrum w/ Kanban) 16 hrs

OBJECTIVES	TARGET AUDIENCE
Refresh your knowledge of the Scrum framework	Those who have a general understanding of the Scrum and Kanban Frameworks but who want to go further in their practical application to combine the best of both worlds.
Introduce Kanban techniques	
Learn how to implement both together	
Explore complementary practices	

Complementary Practices

Use as add-ons to Framework Classes or Standalone offerings   8 hrs

OBJECTIVES	TARGET AUDIENCE
User Story Workshop – deep dive building out the start of a Product Backlog, including testable Acceptance Criteria.	Those who have a general understanding of agile mindset and the common frameworks, but who want to go further in their practical application exploring and applying techniques mentioned in framework classes
Story Splitting Patterns – deep dive for teams who struggle to size work items to get things to done. Uses 9 common patterns in an interactive workshop on their own items to practice this major paradigm shift to small batch sizes.	
Release Planning - How to plan out big items across multiple sprints to create a hi-level working pan. Can be a standalone or added onto User Story Workshop. Include elements similar to SAFe's PI Planning to mitigate dependencies and integrate a product across multiple teams, including vendors.	
Coaching for Performance Management	This session will help participants at any level of management to develop skills to effectively

"I enjoy giving critical feedback and I am confident it is received well." Said no manager ever.

Gallup, a leader in management and employee engagement, reminds us that "Employees are more likely to learn and grow when they receive immediate feedback that is specific, targeted at their development and able to be put into practice right away." We know this - but Why Is It So Hard to Do? Perhaps because the only time we give feedback we are already in a stressful or emotionally charged situation or perhaps we just don't get the training we need as managers to provide effective feedback.

deliver feedback and improve performance management. You should attend if you are interested in practicing how to:
• Improve feedback and dialogue skills
• Create behavior changes
• Build a high-performance culture

Product Management / Innovation / Design Thinking

Product Mindset

Prerequisites: None   2 - 4 hrs

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Product Bootcamp

Prerequisite: none   8-16 hrs

Overview

In this 2-day intensive Product Bootcamp, you will dive deep into learning how to develop products people will love and identify and develop product opportunities. The toolkit we provide utilizes design thinking and agile techniques which makes it a very hands-on workshop.

OBJECTIVES	TARGET AUDIENCE
Product Mindset - closing the gap between Project and Product Thinking.	Anyone interested in growing their Product Management experience through an interactive workshop that uses techniques from ideation to validation.
Practice Ideation exercises - get those creative ideas flowing	
Learn a common design exercise - shape up a idea and create a clear value proposition	
Intro to personas - beyond the demographics	
Journey maps - identify product opportunities	
Validation techniques - concierge, smoke-screen, etc. Participants will apply validation techniques through a hands-on exercise such as rapid prototyping with Marvel.	

MVP Workshop

Prerequisite: Agile 101 is strongly suggested but not required   24 – 40 hrs

Overview

The MVP Workshop is designed to provide participants with the basic knowledge and techniques to learn how to take an item from idea to backlog. This is an immersive, interactive workshop that uses techniques from Design Thinking, Lean Startup, and Agile to build a Product Backlog that is ready for development teams to execute. The agenda listed below is an example of what the workshop entails but is not prescriptive in nature. We conduct each session with a pragmatic, flexible approach, so that we solve the problem at hand as well as align the participants with current learnings and updates from the program.

Involvement All members of the Core Product Team are expected to attend and fully participate so that each member leaves the sessions with a complete picture of the MVP and the decisions made.

Outputs The main outputs of these sessions are roadmap and release planning, depending on the granularity achieved. The Core Product Team should be fully equipped to continue to conduct refining of the backlog at the end of these sessions.

OBJECTIVES	TARGET AUDIENCE
Techniques to break down a large item into an MVP such as Story Mapping	People responsible for planning and sizing larger items, using the idea of the most viable product and release planning
Techniques to prioritize work such as Kano Model	
Use of Product Canvas or Lean Canvas to capture vision and MVP framework	

Intro to Design Thinking Workshop

Prerequisite: None   8 hrs

Overview Design companies outperform others on the S&P 500 by 200%! It's not a new idea - Design Thinking is rooted in behavioral sciences and returns our focus to solving problems for the user. Learn more about this non-linear, iterative process to understand your users, challenge assumptions, redefine problems and create innovative solutions to prototype and test.

OBJECTIVES	TARGET AUDIENCE
Intro to Design Thinking – Overview Development of a common understanding of the 5 phases of Design thinking	Those who are interested in learning or expanding their understanding of the Design and Exploration techniques that help participants evolve from the approach of "Are we building it right?" to consistently asking "Are we building the right thing?"
Immersion Design Thinking exercise like those used by Stanford (Wallet Exercise) or Tom Wujek's Draw Toast.	
Introduction to several Design Thinking techniques depending on the need of client – **Example:** Empathy➜Customer Journey➜Ideation➜Story Mapping	
Hi-level discussion of which design exercise to use for each phase of ideation and exploration	

Breakout Design Thinking Workshops

Prerequisite: Use in combination to solve the right problem   2-4 hrs each

OBJECTIVES	TARGET AUDIENCE
Design Thinking workshops (ex: Draw Toast for process or services; Design Wallet for products)	Anyone needing to generate ideas, converge on actions, explore problems, or generate actionable items from ideas or corporate objectives.
Problem Solving workshops (ex: Customer Journey; Assumption Mapping, Story Mapping, Feature Mapping)	
Team Building Workshops (ex: DISC, Gallup, Emotional EQ; Large retrospectives)	Those who have a backlog but need to evolve to a more strategic roadmap.
Strategy & Vision Workshops (ex: design the box, OKRs, Outcomes, Impact Mapping)	Those who are struggling with bringing innovation in while meeting demands of their current workload.
Understanding the user workshops (ex: empathy mapping, customer journey)	

Innovation Strategy Workshop

Prerequisite: None   8-24 hrs

OBJECTIVES	TARGET AUDIENCE
Fundamentals of Innovation – Industry definition then what it is in your organization	Those who are struggling with innovation while keeping up with current work demands
A taste of Ideation through hands-on exercises	
Who is best suited for Innovation Leadership where they fit in your organization	
What needs to change in your org and how to drive it	
Build out your Innovation Center	

SAMPLE AGENDAS

Design Sprint SAMPLE AGENDA

Below is how an agenda MIGHT look, based on client needs. This is a custom, highly interactive workshop that takes place face to face.

Prerequisite: Client Conversations to shape agenda and needs   2-3 Days

	OBJECTIVES	PURPOSE
[DAY ONE] **PHASE I: Gather information & Evoke Emotion**	**Interview and/or Empathy Exercise:** We are assuming there is someone in the room who has a deep understanding of the user. If they have actual User Data, it is important they bring it. With this short timeline, we are skipping most of the empathy exercises and diving in.	Deeper understanding of the user and a day in the life to frame the problem
	Reverse Engineer the Value Proposition	Get a clear understanding of the application or product of the client.
	Draw the Flow: We will use the Draw the Toast technique AND/OR format to get participants working together creating the user experience.	Understand the current user experience and uncover areas where the flow is not as expected or feels cumbersome. This exercise helps us, as a group, to start to use the other parts of our brain, so that we are opening up to innovation.
PHASE II: Probe Deeper	**Customer Journey Map:** Use the flow from the previous exercises to create the top row of a customer journey map.	Gain a holistic view of the app: empathy for the customer experience; interactions with systems, users, or devices; integrations with outside systems.
[DAY TWO]	**Create a point of view:** a short, sexy statement that acts as an inspiration for the mockup. **Team: Sketch ways to meet the user's needs:** UI/UX designer and developers work with client to They will then immediately move into creating a low-fidelity mockup.	Shared Understanding and Buy-in
PHASE III: Capture Findings	**Share Solutions & Capture Feedback:** We regroup with at least three hours left to go over designs with the client, hopefully a clickable prototype or walkable flow. One person will share, one will observe; one will take notes.	
PHASE VII: Reflect and then Share a New Solution	Make tweaks as needed.	Shared Understanding and Buy-in
Depending on time and understanding, there are several other exercises we could add on if you have any time to go further. For example, we could go even further and create a Story Map, where we go so far as to build a release plan. A Story Map is a 3-dimensional view of the product backlog. We discuss what the MVP would be (a first pass with the least amount of effort) and subsequent passes adding in functionality.		

MVP Workshop SAMPLE AGENDA

Below is how an agenda MIGHT look, based on client needs. This is a custom, highly interactive workshop that takes place face to face.

Prerequisite: Client Conversations to shape agenda and needs   2-3 Days

	OBJECTIVES	PURPOSE
DAY I: Level Set/Training	2 hours: **Level Setting** - agile terms and theory needed for this workshop 1 hour: **Ideation** exercise 1 hour: **Customer Empathy Mapping** - get a deeper understanding of the customer and their needs 4 hours: **Customer Journey Mapping** - map the customer experience and identify opportunities for improvements; synthesize insights	Deeper understanding of the techniques we will be using to create the MVP **Deliverables:** basic Personas, top three opportunities to validate for MVP
DAYS 2 – 4: (Depending on size and complexity)	1 hour: **Introduction by PO** to Product or Feature 1 hour: **Product Vision board** - align everyone to organizational outcome and vision & strategy for the product 2 hours: **Product Canvas** - build on the Vision to create a living one-page that describes the big picture, identifies main persona for MVP, and outlines the scope boundaries 4 - 12 hours: **Story Mapping** - build a 3-D backlog and MVP. Identify features, skeleton of product backlog items, integration & dependencies 2 - 4 hours: **Validation exercise** 4-8 hours: Prototyping or Planning a concierge model 2 - 4 hours: **Agile Estimating** 2 - 4 hours: **Release Planning**	Starting with one of the top opps identified in Day 1 **Deliverables:** Product Vision, Product Canvas, Story Map
DAY n Pulling it all together	2 hours **Team Building Session:** Define Teaming agreement and conduct team building exercises such as identifying intrinsic motivators 2 hours **Tool standards:** standards, refinement cadence and labels, Release Plan (Dependent on client providing Tool expertise) 4 hours **Portfolio Kanban:** Define a hi-level, lightweight governance system using the Kanban model to create policies around intake, planning, visualization of work in progress	**Deliverables:** Tool Standards, Teaming Agreement, Hi-level Kanban board and written cadence for accountability and organizational feedback