Today’s Webinar:
Design Thinking In Agile

Featuring
Jack Caine

SUMMER OF AGILITY
AND INNOVATION
WEBINAR SERIES

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Design Thinking Webinar

17 August 2017

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Scrum Alliance Certified Scrum Product Owner (CSPO)
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Learning Objectives

A Pattern of Beginning

In this webinar, we will cover:

• The basic flow of design thinking

• Various models incorporating design thinking into agile, scrum, and SAFe
# Jack J. Caine

**I help people make better decisions**

## Trainer, Mentor, Coach & Facilitator @ Many Companies

<table>
<thead>
<tr>
<th>Company</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>AmerisourceBergen (Pharma Distribution)</td>
<td>Facilitator, Mentor</td>
</tr>
<tr>
<td>Barclays (Financial)</td>
<td>Mentor</td>
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<td>Fiserv (Financial)</td>
<td>Mentor</td>
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<td>ISO Verisk Analytics (Insurance)</td>
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<td>Motorola Mobility (Telecom)</td>
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<td>Kremsa (Digital Agency)</td>
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<tr>
<td>Motorola Mobility (Telecom)</td>
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<td>Walmart (Retail)</td>
<td>Mentor</td>
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<tr>
<td>ASPE &amp; CPRIME (Training)</td>
<td>Mentor</td>
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## Certifications

<table>
<thead>
<tr>
<th>Organization</th>
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<tbody>
<tr>
<td>Scrum Alliance</td>
<td>Certified ScrumMaster (CSM)  Certified Scrum Product Owner (CSPO) Certified Scrum Professional (CSP)</td>
</tr>
<tr>
<td>Scaled Agile Inc.</td>
<td>SAFe Program Consultant (SPC4) Instructor for the SSM, SASM, PMPO, SA and SP courses</td>
</tr>
<tr>
<td>ICAgile</td>
<td>Certified Professional in Agile Coaching (ICP-ACC) Certified Professional in Agile Team Facilitation (ICP-ATF) ACI Agile Coaching Bootcamp (ACI-ACB) (via ACI) Instructor, Agile Fundamentals (via ASPE)</td>
</tr>
</tbody>
</table>

## Other Activities

<table>
<thead>
<tr>
<th>Activities</th>
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<tbody>
<tr>
<td>B.S. Biochemistry (UCLA) Founder, ADH Hockey Association (Costa Rica)</td>
</tr>
<tr>
<td>Creator of Jack’s TOMP Matrix</td>
</tr>
<tr>
<td>Editor of Jack’s Agile Notebook (1300+ slides)</td>
</tr>
<tr>
<td>Author on Mob Programming (Scrum Alliance)</td>
</tr>
<tr>
<td>Speaker at PMI, Agile User Groups, AgileCamp</td>
</tr>
<tr>
<td>Previously a Dev, BA, QA, PM, Prod. Mgr., Cost Center President</td>
</tr>
</tbody>
</table>
Why Do We Need Design Thinking In Agile?

In Agile, We Use Empiricism which follows...

- **Hypothesis** > Experiment > Inspection > Adaptation

Where does the original hypothesis come from?

In Design Thinking, We Create the Hypothesis...

- Observation >>> **Hypothesis**

So the new paradigm is...Design Thinking + Agile

- Observation > **Hypothesis** > Experiment > Inspection > Adaptation
Agile Wants To Innovate
Design Thinking Provides the Innovative Ideas

Source: IDEO
Design Thinking Basics

VALUES

PRINCIPLES
Never forget that better principles, not better practices, are what organizations really need.

Jurgen Appelo
Design Thinking Basics

Design Thinking (Definition)

“As a style of thinking, it is generally considered to be the ability to combine empathy for the context of a problem, creativity in the generation of insights and solutions, and rationality to analyze and fit solutions to the Context.”

– Tim Brown, IDEO
Design Thinking Core Tenets

• Empathy
• Abductive Reasoning
  ➢ Research through Empathy
  ➢ Problem Framing
  ➢ Ideation
  ➢ Prototyping
  ➢ Validation
• Users
• Real World

• Empathy is necessary
• Abductive Reasoning:
  “Form of logical inference that goes from an observation to a hypothesis”
• Remember that you are not the user
• Design happens in the real world
Design Thinking Starts with Empathy

- **Empathize**: Find the deep and meaningful needs through observation and interview.
- **Define**: Reframe needs and insights into an actionable problem statement.
- **Ideeate**: Generate volume and variety of ideas.
- **Prototype**: Visualize possible solutions by creating quick models.
- **Test**: Share prototype with stakeholders to gain feedback and refine solutions.
What is Empathy?

Designer’s Approach
• Without judgment
• With a beginner’s eyes
• With curiosity
• Optimistically
• Respectfully

Area of Empathy                              The Numbers
Companies Need to Understand What Customers Want to Buy, Rather Than What They Want to Sell

Customers Want to Feel Empowered

People are Willing to Pay More for a Better Customer Experience

Companies That Want to Innovate Must Have Empathy

You Must be Able to Turn Negative Experiences Into Positives

68% of customers stop doing business with companies they feel don’t care about them

Customers will manage 85% of their relationships without interacting with a human

86% of people are willing to pay up to 25% more for a better customer experience

On average, loyal customers are worth up to 10 times as much as their first purchase

88% are influenced by online customer reviews when making buying decisions
Perspective Taking (Empathy)

Adapted from Growing Communication Skill with the Empathy Toy (Andrew Annett, Sue Johnston)
# Abductive Logic

“Form of logical inference that goes from an observation to a hypothesis”

<table>
<thead>
<tr>
<th>Components of Abductive Logic</th>
<th>Instead of</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Empathy through Research</td>
<td>• <strong>NO EMPATHY/RESEARCH.</strong> We have this problem. Let’s jump in &amp; brainstorm a solution.</td>
</tr>
<tr>
<td>2. Framing the Problem</td>
<td>• <strong>SOLUTION IN SEARCH OF A PROBLEM.</strong> We have a new technology. What can we possibly use it for?</td>
</tr>
<tr>
<td>3. Generative Ideation</td>
<td>• <strong>PARITY.</strong> Our competitors just launched X; how quickly can we also do X?</td>
</tr>
<tr>
<td>4. Prototyping</td>
<td></td>
</tr>
<tr>
<td>5. Validation</td>
<td></td>
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</tbody>
</table>
Gemba – Go To Where The Work Is

Gather Insights About the User

- Demographics
- Background Knowledge
- Behavior
- Motivations
- Needs
- Pains
- Problems

Create Personas
# Design Thinking Flow

**Diverge**

**Converge**

**Diverge**

**Converge**

<table>
<thead>
<tr>
<th>Discover &gt;&gt;&gt;</th>
<th>Simplify &gt;&gt;&gt;</th>
<th>Ideate &gt;&gt;&gt;</th>
<th>Prototype &gt;&gt;&gt;</th>
<th>Share &gt;&gt;&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explore the ecosystem in which the organization operates &amp; gain insights into the business challenges</td>
<td>Build a common understanding of the business challenges and where we might best deliver value to the customer</td>
<td>Generate ideas for potential solution options and evaluate which ideas to prototype</td>
<td>Build, try, listen, learn and refine</td>
<td>Share learnings from prototyping the way forward</td>
</tr>
</tbody>
</table>
Design Thinking Flow

Diverge → Converge → Diverge → Converge

UNDERSTAND → OBSERVE → POINT OF VIEW → IDEATE → PROTOTYPE → TEST

The Problem → The Vision
The Kano Model (Delighters) (1984)

Customer Satisfaction
The Kano Model is a “customer satisfaction” model developed by Professor Noriaki Kano

Categories (Qualities)
- Must-Be
- One-Dimensional
- Attractive
- Indifferent
- Reverse
New Mindsets (Delighting the Customer)


**Minimal Viable Product (MVP)**
MVP is validated learning. Nothing else.

**MVP rule:** When building your MVP, remove any feature, process or effort that does not contribute directly to the learning you seek. Even a low quality MVP can act in service of building a great high-quality product.

**Minimal Marketable Feature (MMF)**

- **Parity** - meets competition’s feature
- **Differentiator** - delights the user
- **Spoilers** - raises the bar for parity
- **Cost Reducers** - improves profit margin

Making sense of MVP (Minimum Viable Product) – and why I prefer Earliest Testable/Usable/Lovable (Henrik Kniberg)
Scrum is a Process Framework, Not a Process

• **Process Framework.** Scrum is a process framework that manages complex product development.

• **Not A Process/Methodology.** Scrum is not a process or a technique for building products; rather, it is a framework within which you can employ various processes and techniques.

• **Clarity of Efficacy.** Scrum makes clear the relative efficacy of your product management and development practices so that you can improve.
Scrum Cycle with Design Thinking

* 3 Roles  * 4 Events  * 3 Artifacts

Adapted from A Visually Rich Overview of the Scrum Framework (Ken Rubin)
Dual-Track Scrum/Agile
From the 12 Principles of the Agile Manifesto, “Customer” & “User” (or a derivative) are mentioned 4 times:

• #1. Our highest priority is to **satisfy** the **customer** through early and continuous delivery of valuable software.

• #2. Welcome changing requirements, even late in development. Agile processes **harness change** for the **customer's** **competitive advantage**.

• #4. **Business people** and developers **must work together daily** throughout the project.

• #8. Agile processes promote sustainable development. The **sponsors**, developers, and **users** should **be able to maintain a constant pace indefinitely**.
User Involvement & Feedback

The Scrum Guide and the Agile Manifesto and its 12 principles do not prescribe how a user should be involved or provide feedback; however, we know that in an empirical process that collaboration with and feedback from the user is essential.

As Scrum is a framework, it is compatible with external methods, methodologies, techniques and practices. The following are examples that can be used within the Scrum Framework to drive user involvement and feedback:

<table>
<thead>
<tr>
<th>From Lean, Lean Startup, Lean UX</th>
<th>From Design Thinking</th>
<th>From Agile</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Gemba Walks</td>
<td>• Empathy Through Research</td>
<td>• Story Mapping</td>
</tr>
<tr>
<td>• Qualitative Interviews</td>
<td>• Shadowing</td>
<td>• Backlog Refinement</td>
</tr>
<tr>
<td>• Customer Discovery</td>
<td>• Qualitative Interviews</td>
<td>• Sprint Reviews (Demo)</td>
</tr>
<tr>
<td>• A/B Testing</td>
<td>• Empathy Mapping</td>
<td>• System Reviews (Demo)</td>
</tr>
<tr>
<td>• Faux Testing</td>
<td>• Journey Mapping</td>
<td>• Solution Reviews (Demo)</td>
</tr>
<tr>
<td>• Customer Validation</td>
<td>• Persona Mapping</td>
<td>• Beta Testing</td>
</tr>
<tr>
<td>• NPS Surveys</td>
<td>• Persona Problem Statement</td>
<td></td>
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</tbody>
</table>
Planning & Adaptation

Key Levels of Planning

Vision: Product Owner
Cadence: Cycle Based on Pivot

Product Roadmap: Product Owner
Cadence: Typically Less than 36 Weeks

Release Plan: Team, PO, Stakeholders
Cadence: Every Sprint

Sprint Goal: Team
Cadence: Every Sprint

Daily Scrum: Team
Cadence: Every Day
Planning & Adaptation

Agile in the Enterprise – Planning, Inspection & Adaptation @ Every Level

Portfolio (Strategic)
(Vision) (Themes) (Initiatives) (Epics)
(MVP Benefit Hypothesis)
(Business Use Case)

Solution (System of Systems)
(Integrated Solution) (Capabilities)
(Solution Roadmap)

Program (System – Team of Teams)
(Integrated System)
(Minimal Marketable Features)
(Minimal Business Increment)
(Program Roadmap)

Team
(Working Software – Product Increment)
(User Stories) (Tasks)
(MVP Spikes)
(Sprint Goal)
Answer the 5 Questions:

1. **Targeted Buyer.** *Who is going to buy the product? Who is the target customer?*

2. **Needs Addressed.** *Which customer needs will the product address?*

3. **Critical Product Attributes.** *Which product attributes are critical to satisfy the needs selected, and therefore for the success of the product?*

4. **Competitive Analysis.** *How does the product compare against existing products, both from competitors and the same company? What are the product’s unique selling points?*

5. **Timeframe & Budget.** *What is the target timeframe and budget to develop and launch the product?*

To choose the right vision, ask yourself…

- Why are you **excited** to work on the product?
- Why do you **care** about it?
- What **positive change** should the product bring about?
- How will it **shape** the future?

Source: Adapted from various works of Roman Pichler
Planning & Adaptation

Product Vision Example

Toys R Us’ Company Vision

*To “put joy in kids’ hearts and a smile on parents’ faces”.*

The statement concisely captures the intention behind the company’s products and services and describes the change the users and customers should experience.

**Look beyond the Product.** Be clear on the difference between the product vision and the product and don’t confuse the two. The former is the motivation for developing the product; the latter is a means to achieve the overarching goal.

An effective product vision goes beyond the product and captures the change the product should instigate.

A vision for a game might be to *“Help children enjoy music and dancing”.*
A vision is the prerequisite for choosing the right strategy. If you don’t have an overarching goal then you cannot decide how to best get there. This is nicely illustrated by the famous conversation between the Cheshire Cat and Alice in *Alice’s Adventures in Wonderland*...

Asked which way Alice should take, the cat replies: “*That depends a good deal on where you want to get to.*”

“I don’t much care where –,” says Alice.

“Then it doesn’t matter which way you go,” responds the Cheshire Cat.
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Where Does the Vision Come From?

Adapted From

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## Planning & Adaptation

**Vision Board**

### The Product Vision Board Extended

<table>
<thead>
<tr>
<th>Vision</th>
<th>Target Group</th>
<th>Needs</th>
<th>Product</th>
<th>Business Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your purpose for creating the product? Which positive change should it bring about?</td>
<td>Which market or market segment does the product address? Who are the target customers and users?</td>
<td>Which problem does the product solve? What benefit does it provide?</td>
<td>What product is it? What makes it stand out? Is it feasible to develop the product?</td>
<td>How is the product going to benefit the company? What are the business goals?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Competitors</th>
<th>Revenue Streams</th>
<th>Cost Factors</th>
<th>Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are your main competitors? What are their strengths and weaknesses?</td>
<td>How can you monetise your product and generate revenues?</td>
<td>What are the main cost factors to develop, market, sell, and service the product?</td>
<td>How will you market and sell your product? Do the channels exist today?</td>
</tr>
</tbody>
</table>

www.romanpichler.com
Template version 05/17

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### Planning & Adaptation

**Methods to Validate the Product Vision – Don’t Confuse the “Product Vision” with the “Product”**

<table>
<thead>
<tr>
<th>Elevator Pitch</th>
<th>Design the Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Geoffrey Moore)</td>
<td>(Bill Shakelford)</td>
</tr>
<tr>
<td>Based on the idea that it should be possible to deliver the summary in the time span of an elevator ride, or approximately thirty seconds to two minutes.</td>
<td>If you were to design a box to sell your product, what would it look like?</td>
</tr>
</tbody>
</table>

1. **For** (target customers)
2. **Who want** (the compelling need we need to fill).
3. **Our product is a** (product category)
4. **That provides** (name the key problem-solving capability).
5. **Unlike** (the product alternative),
6. **Our product** (describe the key product features).

**Front of the Box**
To get the prospective buyer to pick up the box.
- Product Name
- Graphic
- 3-4 Key Selling Points or Objectives

**Back of the Box**
Checklist of functionality, constraints, directions, limitations.
- Product description
- Features list
- Operating Requirements
### Planning Your Minimal Marketable Feature Through the Use of Lean UX Canvas

<table>
<thead>
<tr>
<th>Title:</th>
<th>Date:</th>
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</table>

#### Lean UX Canvas

<table>
<thead>
<tr>
<th>Business Problem</th>
<th>Solution ideas</th>
<th>Business Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What business have you identified that needs help?</td>
<td>UI/UX product, feature, or enhancement ideas that help your target audience achieve the benefits they're seeking.</td>
<td>What changes in customer behavior will indicate you have solved a real problem in a way that adds value to your customers?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Users &amp; Customers</th>
<th>Business Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What types of users and customers should you focus on first?</td>
<td>User Benefits</td>
</tr>
<tr>
<td>What are the goals your users are trying to achieve? What is motivating them to seek out your solution? (e.g., do better at my job OR get a promotion)</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Hypotheses</th>
<th>What's the most important thing we need to learn first?</th>
<th>What's the least amount of work we need to do to learn the next most important thing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combine the assumptions from 2, 3, 4 &amp; 5 into the following template hypothesis statement: <em>&quot;We believe that [business outcome] will be achieved if [user] attains [benefit] with [feature].&quot;</em></td>
<td>For each hypothesis, identify the riskiest assumption. This is the assumption that will cause the entire idea to fail if it’s wrong.</td>
<td>Brainstorm the types of experiments you can run to learn whether your riskiest assumption is true or false.</td>
</tr>
</tbody>
</table>

Each hypothesis should focus on one feature.

Download this canvas at: [www.jeffgothelf.com/blog/leanuxcanvas](http://www.jeffgothelf.com/blog/leanuxcanvas)

Adapted from Jeff Patton’s Opportunity Canvas. Download at: [http://jpattonassociates.com/opportunity-canvas/](http://jpattonassociates.com/opportunity-canvas/)
# Planning & Adaptation

## Sprint Goal Template

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>SPRINT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product’s name</td>
<td>The sprint number / id</td>
</tr>
</tbody>
</table>

### GOAL

Why is it worthwhile to run the sprint? What should be achieved? For instance, address a risk, test an assumption, or deliver a feature.

### METHOD

How is the goal met? Which artefact, validation technique and test group are used? For instance, paper prototype, spike, shippable product increment; product demo, usability test, A/B test; users, customers and/or internal stakeholders.

### METRICS

How do you determine if the goal has been met? For instance, at least three of the five users carry out the usability test successfully in less than a minute.

### Possible Methods

- MVP (Validated Learning)
- MMF (Pivot / Delighter)
- MBI (Minimal Business Increment)
- Hardening
- Paper Prototype
- Spike
- Shippable Product Increment
- Product Demo
- Usability Test or A/B Test

### Usability Test Passes

- Usability Test Passes < 1 Minute
- Production Ready Tested Software (PRTS)
- PRTS Pushed to Production

Source: Adapted from Roman Pichler
## Backlog Refinement

### Backlog Item Format

| MVP Spike (Team) [Card | Conversation] | Feature (Program) [Benefit | Hypothesis] | Epic (Portfolio) [Outcome Hypothesis] |
|----------------------------------------|---------------------------------|------------------------------------------------|
| Acceptance Criteria [Confirmation] | Acceptance Criteria [Confirmation] | **For** <customers> **who** <do something> **the** <solution> **is a** <something – the "how"> **that** <provides this value> **Unlike** <competitor, current solution, or non-existing solution> | **our solution** <does something better – the "why"> |
| Learning Criteria Or BDD Format [Given | When | Then] Or Test Steps Recreation Steps Use Cases | Availability | Capability | **Outcomes hypothesis:** |
| Or Test Steps Recreation Steps Use Cases | Test Steps Recreation Steps Use Cases | **Leading indicators:** | **(early innovation accounting measures)** |
| | | **NFRs:** | |

8/17/2017

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SAFe’s Continuous Exploration

Planning & Adaptation

Hypothesis

Validation

Continuous Exploration

Research

Synthesis

Implementation
## Planning & Adaptation

### Metrics

**Outcome-Based Metrics**

1. Customer Satisfaction (NPS – Net Promoter Score)
2. Employee Engagement
3. Time to Market (Cycle Time)
4. Cost (& Cost of Delay)
5. Business Value Predictability Index

**Output-Based Metrics (Vanity Metrics)**

1. Productivity
2. Velocity
3. Features Delivered (Throughput)
4. Milestones Met

---

**Outcome** (noun)
- the way a thing turns out; a consequence

**Output** (noun)
- the amount of something produced by a person, machine, or industry.
Planning & Adaptation

Value

• Agile Principle #7. “Working software is the primary measure of progress.”

• Burn Down Charts.
  • Output. Burn down charts based on hours or story points do not measure the amount of value delivered to the client
  • Outcomes. Burn down charts based on BV (business value) points do measure the amount of value delivered to the client

• NPS. Net Promoter Scores do measure the amount of value (delight) delivered to the client

Output (noun)
• the amount of something produced by a person, machine, or industry.

Outcome (noun)
• the way a thing turns out; a consequence
Planning & Adaptation

Evidence Based Metrics (Agility Index Snapshot)

Source: Scrum.Org
Q&A

Next Steps
Book References
# References

## Agile & Scrum

<table>
<thead>
<tr>
<th>Agile Manifesto &amp; 12 Principles</th>
<th>Scrum Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Manifesto for Agile Software development consists of 1 page. The Agile Manifesto’s accompanying 12 principles consist of 2 pages.</td>
<td>The Scrum Guide is a 17 page document written by the creators of the Scrum Framework, Jeff Sutherland &amp; Ken Schwaber.</td>
</tr>
</tbody>
</table>
| **Agile Manifesto Link:**  
http://agilemanifesto.org | **Scrum Guide Link:**  
https://www.scrumalliance.org/why-scrum/scrum-guide |
| **12 Principles Link:**  
http://agilemanifesto.org/principles.html | |

## Scaled Agile Framework

| SAFe Big Picture Link:  
http://www.scaledagileframework.com | SAFe Continuous Exploration Link:  
http://www.scaledagileframework.com/continuous-exploration/ |
References

**Videos**

*Design Thinking workshop* (Justin Ferrell of Stanford d. School) (34 minutes)

*Lean Startup Meets Design Thinking* (Google For Entrepreneurs) (Moderated by Kaili Emmrich of Google for Entrepreneurs, the Hangout featured Eric Ries (The Lean Startup), Tim Brown, (CEO of IDEO), and Google) (55 Minutes)

**Books, Articles & Tools**

Jack's Agile Notebook: [http://goo.gl/5IsK86](http://goo.gl/5IsK86)

Lean Startup by Eric Ries

Change By Design by Tim Brown

[Stanford University Design Thinking Methods Site](http://www.stanford.edu/group/dtmethods/)

Fortune teller to scientist - a lean approach to predicting successful products (Kylie Castellaw, Hugo Corbucci, Ashley Pandya)

Software Needs Design Thinking (Mohinder Khosla)

Critically Thinking Your Design DNA (Kupe Kupersmith)

[Integrating Lean Startup and Design Thinking](http://www.leanstartup.org/) (Ralph-Christian Ohr)

[Making sense of MVP (Minimum Viable Product) – and why I prefer Earliest Testable/Usable/Lovable](http://www.leanstartup.org/) (Henrik Kniberg)

[Misconceptions around the Minimum Viable Product](http://www.leanstartup.org/) (Leon Tranter)

*A Compelling Value Proposition: The Missing Tool in Your Lean Startup Kit* (Laszlo Gyorffy)


Creating Alignment with The Product Wall Release Planning Workshop (Alan Dayley)

[Empathy: The Hard Numbers On The Soft Skill](http://www.leanstartup.org/) (Dan Trommater)

[The Design Sprint](http://www.leanstartup.org/)

**DESIGN THINKING VS. LEAN STARTUP: A COMPARISON OF TWO USER-DRIVEN INNOVATION STRATEGIES** (Roland M. MUELLER and Katja THORING)

[The blurring between Design Thinking and Agile](http://www.leanstartup.org/) (Matt Cooper-Wright)