



 <p>Goal: Capture the reality and the context of a given environment – all the unplanned, ad hoc work as well as management and other operational activities.</p>
	 <p>Outcome: Shared understanding of current state of organization, including all work actions and activities. Enables decisions to be made holistically with full awareness of all existing work.</p>
<p>Identification</p>	 <p>Target Knowledge Area: Information Architecture</p>
	 <p>Core Competency: Flow</p>
	 <p>Techniques: Work Value Diagram, Lean Agile Kaleidoscope, Experience Map</p>

MAPPING THE FLOW OF WORK

The Identification phase of the Compass involves understanding and visualizing the current state or reality of the system in a specific context; it serves as a counterbalance to the vision generated in the Ideation step. You are identifying all the work actually being done.

It is important to identify EVERYTHING that you are doing, because there is a cost associated with everything that you do. And that cost comes not just in terms of time and resources needed to accomplish the task; it is also the opportunity cost of the actions that do not or could not happen because the necessary resources were spent on other things.

Another value of holistic work representation is the ability to discern patterns and relationships among the work items. Dependencies among work items and opportunities for paralleling or parceling certain work items become easier to

identify when the work is visually mapped.

For example, in one scenario, the Identification step led to the discovery that multiple team members were working independently with a specific stakeholder group in the process of writing an article due the current month, planning for a conference coming up in three months, and updating content bi-weekly. None of these team members realized this connection until it surfaced in the shared Identification, and once the connection was made, the team members were able to restructure their work processes to minimize rework for all three teams and take up less of the stakeholder's time.

Each Identification technique ensures that your path forward is grounded in reality. In many cases, this process feels analogous to exposing an iceberg. The first round of work representation becomes the tip of the iceberg as additional work is identified. Most people (especially managers) are quite surprised when they realize how much work lies below the

“surface.” Many work items are often initiated by what you might call hallway drive-bys, while other work items are long-standing recurring items without a client value proposition other than being “part of this department’s deliverables”; other work items start out as small, discrete work elements with manager approval (usually at a stakeholder’s request) that balloon into something considerably more complex.

The Identification step is a reality check specifically in contrast to Ideation, which is about the big picture. It is very tempting, especially given the ever-present constraints of limited time and resources, to jump from envisioning to implementing. Planning and doing are intrinsically linked for most people. It is almost counterintuitive to pause, so the Identification step is often overlooked. However, Identification is a crucial link between Ideation and Intake. Without taking the time to do a complete inventory as part of the Identification step, you will discover that many of the assumptions made during the Ideation process are flawed, and that discovery happens

considerably later, often during the Introspection step, leading to loss of early value.

An additional benefit of investing in Identification is that it serves as a risk mitigation strategy, because it minimizes the chances of discovered work further downstream. While it’s not the primary goal of the Identification process, this step also reveals inefficiencies and duplications (as noted in the story above) that can be remedied in a more straightforward manner.

TECHNIQUES FOR IDENTIFICATION

As with the techniques for Ideation, the three techniques of the Identification step are different approaches to holistic information assembly and they vary by level of effort.

The Work Value Diagram, which represents the smallest investment in Identification, is most applicable when most

of the work flows through one department or group. It serves as an excellent conversation and decision catalyst for a small group of stakeholders.

The Lean Agile Kaleidoscope is one of the most powerful techniques in the entire Compass for Agility because of its ability to challenge assumptions and provide a framework for improved clarification and shared understanding. It enables transparency with the result of improved decision-making and forecasting in scenarios where the efforts of multiple groups must be integrated to deliver a business solution.

The Experience Map is optimal when the current state of work is not yet in progress or when the scope of the problem being addressed by the Compass for Agility is broad and/or complex with multiple products, projects, and processes. As the description indicates, it requires a significant level of effort to implement but provides an excellent foundation for larger-scope challenges.

To effectively use these approaches, especially the last, it is crucial to have an understanding of how to structure large amounts of information and how work flows through an organization, which is why the field of Information Architecture is particularly relevant.



TARGET KNOWLEDGE AREA: INFORMATION ARCHITECTURE

Information architecture is officially the art and science of organizing (digital) information to enhance the usability of websites and software. To me, the aim of the tools and techniques, not to mention the philosophy, of information architecture is to display and deliver value from raw material.

However, “information architecture” extends far beyond websites and software, making it difficult to pin down a single definition. This arises partly from the term’s existence in multiple fields. In the field of systems design, for example, information architecture is a component of enterprise architecture that deals with the information component when describing the structure of an enterprise. In addition, information architecture as it is known today began long before the rise of the web and mobile apps or the popularization of user experience (UX) design. It has roots in

numerous fields and methodologies that UX practitioners still draw on today, including library science, cognitive psychology, and architecture.

For the purposes of this book and the Compass approach, consider a generalized definition. According to Peter Morville, one of the founding fathers of the modern practice of IA, “Information architecture is the practice of deciding how to arrange the parts of something to be understandable.”

The end goal is to help users find information and complete tasks. To do this, you need to understand how the pieces fit together to create a larger picture, how items relate to each other within the system.

Good information architecture helps people to understand their surroundings and find what they’re looking for – in the real world as well as online. Practicing information architecture involves facilitating people and organizations in

thoughtfully considering their structures and their language.

Basically, if you're making it easier for people to work with each other and understand each other's points of view, then you're practicing information architecture, or at least applying information architecture best practices.

In the context of the Compass for Agility, the logic anchoring the identification process is based quite significantly on the techniques and philosophy of information architecture in that it attempts to gather all relevant information and then recognize connections and identify patterns to make sense out of what initially seems like chaos. The result is a blueprint or navigational aid for an information-rich system. As Anthony J. Rehm pointed out in his book *Knowledge Management in Practice*, "The purpose of your IA is to help users understand where they are, what they've found, what's around, and what to expect." This is the essential expected outcome of the Identification process of the Compass for Agility.

Here are some questions information architects ask themselves that are particularly relevant as you complete the Identification process:

- How must information flow to get this work done?
- How does this process help people know what stage work is in?
- How is information about work status presented back to all the people involved in this workflow?
- How is information helping to drive decisions? How could it help improve decision making and validation?

Ask yourself these questions and apply information architecture best practices as you apply one of the Identification techniques – Work Value Diagram, Kaleidoscope, and Experience Map – to most accurately represent the current state of your work. Remember, the goal with Identification is to capture all of the work currently being done, in progress, or expected to be done later.

The IA process and outcome informs subsequent strategy.
Similarly, the Identification process and outcome informs the subsequent Intake step of the Compass.



CORE COMPETENCY: FLOW

Of course, neither information nor work is not static. If you want to create sound representations of your work, you must understand flow. Flow refers to a continuous, steady stream of movement. In a business context, flow is the movement of work across an organization, from start to finish, including delivery to the customer.

Flow is a hallmark of Lean, which originated in manufacturing with Toyota. In both manufacturing and other product-centric industries, it is relatively easy to envision, track, and improve the flow of parts along an assembly line. Adapting Lean principles to knowledge work, which involves visualizing and managing the flow of more abstract elements, is considerably harder but even more essential. It enables accuracy in planning, estimating, and forecasting in terms of both capacity and delivery.

Managing flow is also integral to the success of any process improvement effort, which is an inherent component of any organizational transformation effort and is therefore a critical attribute of success within the Identification step.

The Identification step of the Compass for Agility provides a holistic view of work and includes an explicit and shared recognition of the core unit of work for each context. Recognizing the core unit of work and understanding its flow – how the work unit gets started, acted out, transformed, edited, processed, and finally declared done before delivery to the customer – is fundamental to optimizing the subsequent steps of the Compass.

Determining the core unit of work can be straightforward, for instance, producing video content, or it can be relatively challenging, especially if you're a department within a complex organization.

For example, the unit of work in healthcare could be either a patient or a patient health outcome. In the legal industry, it could be a lawsuit or a contract. For an accountant, it could be a tax return or a financial plan. The work unit could be a piece of software code in an IT team, or a specific piece of collateral if you're a marketing team. But what if you're a PMO in an organization? Is your unit of work a report? Or is it something more nebulous, such as governance? If the latter, how would you visualize it?

Identification of the core work unit should be accompanied by an understanding of the value stream in which it exists, i.e., of the state of the work unit coming into the organization (or department or team) and how that work unit is transformed before it is delivered to the organization's customer.

Clear identification of flow is a planned outcome of the techniques in the Identification step, sometimes via the visualization, as with the Work Value Diagram, and sometimes

emerging from the accompanying conversations, as with the Lean Agile Kaleidoscope.

While capturing all work items, think through what flow means for each item:

- In what state does the item come in?
- In what state does it leave?
- What actions happen in between? How many actions?
- Who performs the actions?
- Can anyone perform any action? What is the degree of specialization?
- Does each work item go through the same series of actions each time, or is there a degree of variability? If so, what factors trigger the variability?

A primary value stream – the concept-to-cash – can often be extended in both directions beyond the obvious. For instance, in the case of a law firm, the concept-to-cash is most likely

to be something like undertaking a legal case on behalf of a client through either settlement or a judicial judgement. Depending on the firm, the value stream could include business development on the front end (i.e., tracking work activities geared toward prospecting for clients so that they can be validated for effectiveness and efficiency) and invoicing and payments on the back end.

Within the context of the Identification step and the Compass for Agility, I recommend starting with the core value stream, in this case, navigating the client through the court system. In some instances, the work unit and the workflow are relatively obvious, but in others, it is considerably more challenging. The general heuristic is that the more challenging it is to identify the work unit and workflow, the more important it is since complexity inevitably increases the chances of missed opportunities and miscommunication.

After applying your selected technique – Work Value Diagram,

Lean-Agile Kaleidoscope, or Experience Map – you will have established a clear understanding of the work unit and how you will transform that work unit into value. That is why flow is the core competency at the heart of all three Identification techniques.

This understanding of flow will impact your prioritization criteria in the next step (Intake) of the Compass for Agility and will be instrumental in the final step of the approach (Introspection), when you validate the assumptions and actions made throughout the cycle, which will, of course, include your understanding of flow.



WORK VALUE DIAGRAM

The Work Value Diagram is an accessible visualization technique for those who are not accustomed to thinking in terms of backlogs and customers. Quite often, employees, and sometimes even managers, have been treated – and have thought of themselves – as one link in a chain, doing what is requested of them without understanding the whole. Shifting this perception allows people to self-organize and apply their knowledge and their expertise to innovate, minimizing effort and maximizing value.

Lean principles are grounded in the belief that those who do the work are the experts, and their expertise should be honored. But no matter how good they are at the How, if they don't know the Why or the What, their ability to do the work (the How) is unnecessarily constrained. Knowing the Why and the What enables them to envision alternatives to the current How.

The Work Value Diagram visualizes this paradigm shift, creating an “aha” moment that people can see and helping them understand how to apply their expertise to optimize the whole, not just increase their local utilization rate.

Optimizing the whole is about recognizing the internal flow of work, from its origination in the form of a request through the various states of work activity until it is delivered to a customer, either internally or externally.

The definition of a customer that matters to the Compass for Agility is the entity that is going to use or consume the work product created. If the work product is a report, then the customer is the entity who will read the report or note that it has been created as a compliance item. The customer might also be thought of as a “requester.”

The Work Value Diagram visualizes and clarifies the “concept-to-cash” flow. It often helps to think through the deliverables over a specific time period, usually a month or a quarter.

For each deliverable, identify the attributes of the work:

- Was it planned or unplanned?
- How is the work carried out?
- Who is the requester of the work?
- Who is the customer? Are they the same person?
- How big is the work item compared to other items?
- How valuable is the item to the customer compared to other items?

As a side note, discussion often emerges about how to capture recurring items without having to create separate sticky notes or cards for each iteration. My recommendation is to use symbols or colored stickers to indicate different rates of recurrence, one symbol or color for weekly, monthly, quarterly, or whatever cadence applies.

Without a complete backlog that represents all work items, it becomes almost impossible to accurately forecast completion

dates, prioritize work effectively, or shift from task completer to value-added partner. Any deficiencies in this process limit the group's effectiveness, which impacts the effectiveness of the entire organization.

The Work Value Diagram accomplishes the intent of the Identification process by creating a multi-dimensional view of incoming and outgoing streams of work. It is especially useful if the group is not accustomed to thinking in terms of backlogs, customers, or self-organization. Work items and streams known to different individuals or groups are unburied and shared in a transparent manner.

The technique is scalable in that it can be done by an individual, a team, or an entire department or even at the enterprise level depending upon the scope of the challenge. Regardless, it should be based on lists of work items that are compiled in real time. Human memories are not as reliable as people think, and few people can remember the routine and

mundane tasks that are often done on autopilot. Aiming for 80% completion for the first iteration is reasonable. The Work Value Diagram can be refined during the Introspection step and subsequent iterations of the Compass.

Consider alternate templates that could achieve the targeted outcome for this technique. Sketch your ideas here!

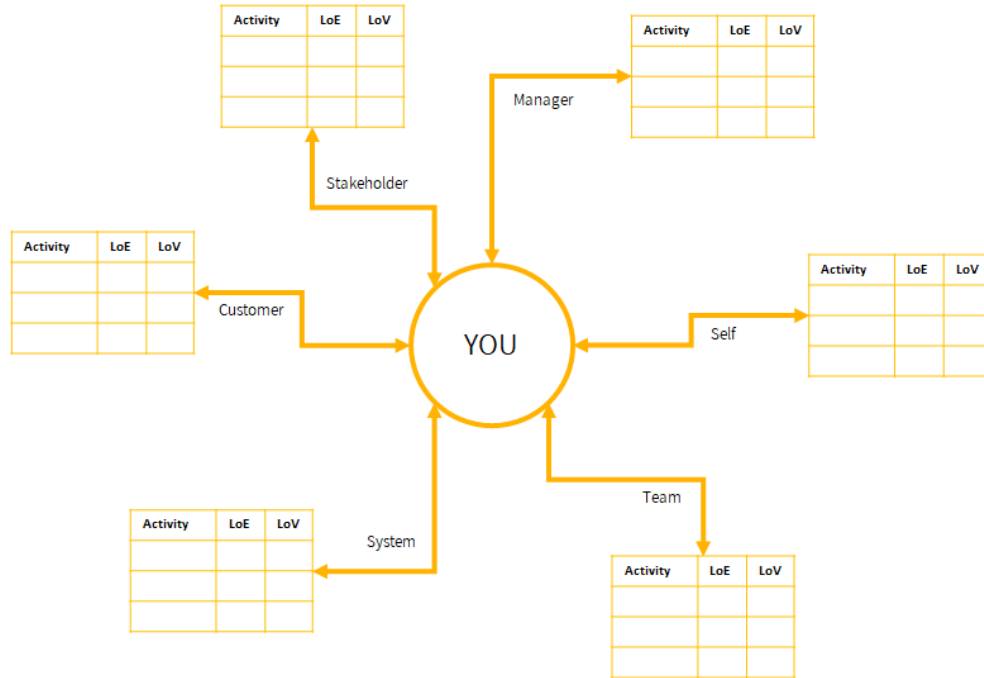


Figure 3.1 Work Value Diagram

This technique maps the flow of work. The You in the center can be a department, a group, or an individual and Activity is the work item name. LoE indicates the amount of time, risk, and other effort and is represented by Small, Medium, or Large, while LoV indicates the value for the client (this must often be presumed) and is represented by a numerical value.



LEAN AGILE KALEIDOSCOPE

In complex organizations or organizations in the midst of significant change, it is very hard for people to get a handle on all the work that is being done or needs to be done. The reality of their jobs ends up as “I kind of do a bit of everything,” and any existing backlogs tend to be incomplete.

In contrast, a good backlog should tell a story about the team, about the product, and about the problem.

- What is the problem you need to solve?
- What solution do you use to solve the problem?
- How do you work?

Such a backlog applies far beyond building software; almost any kind of work creation and delivery process has a backlog, even if it is not explicit.

However, sometimes the goal is not a single product, which makes it much harder to define the backlog. Rather than project-based work, some organizations engage in ad hoc, situational, or temporary work. This tends to distort the value of traditional project planning efforts, because there is no holistic sense of work for prioritization, delivery, or validation.

The Agile Kaleidoscope (which is based on work done some years ago with Roland Cuellar, who also came up with the name) was created to address such situations. The original intent of this technique was to enable the visualization of all work efforts, either currently in progress or planned for the near term, in one way and/or place. Usually, individuals have their own version of a to-do-list, while some managers have a departmental priority list, but neither fully reflects the entire scope of work.

The Kaleidoscope was initially designed as a visual confirmation mechanism. It helps groups see and own

problems in their workflows. However, it also helps groups shift into a visually exploratory mindset so that they can see the work as a holistic representation – in other words, as a forest rather than disparate trees.

Clarifying these workflows helps stakeholders realize the gap between their strategic goals and all of the tactical actions of team members, most of which are often at the request of stakeholders. In other words, leadership is often focused on bright new initiatives without ensuring that the team has sufficient bandwidth to address the new initiative, either by stopping work actions derived from previous initiatives or removing the lowest-level work items so that teams can collaborate on the newest initiative for maximum success.

The Kaleidoscope also fosters discussion among team members to discover alignment among their previously hidden individual work efforts, which provides opportunities for collaboration or leveraging of each other's efforts and/or

reducing waste. It also helps leaders understand the value of work systems where people are able to “pull” tasks as they complete previous work in comparison to “push” systems in which work is simply assigned and pushed out to employees.

Experience with the Kaleidoscope facilitates understanding the value of determining the Why (the inherent value) of a work action before deciding to do the work, as well as the value of maintaining a single work intake queue, which usually leads to a discussion of work prioritization and trade-offs.

The Kaleidoscope reveals what is happening in real time and provides leading indicators, allowing potential problems to be identified early and addressed proactively. Agile doesn't solve problems, it just reveals the problems you already have. It is not just knowing what the problems are, it is seeing them, visually, repeatedly. This is one of the reasons the Compass for Agility is iterative and also why the output of each step is

a visual artifact. The team and their leadership can see that there is a problem that they want to solve.

The Kaleidoscope consists of three concentric circles that are eventually divided into pie-shaped sectors. The circles represent time frames, such as weeks, months, or quarters. Using the three circles to represent the next three weeks can be useful for understanding how the technique works, but most often, each circle represents a month so that the entire Kaleidoscope represents the work plan for a full quarter.

Similar to the Work Value Diagram, work items are identified by team members and “sized” relative to one another in terms of effort and importance. Large work efforts are broken down into their constituent parts. These items are grouped into “pie pieces” around the circle by relevant characteristics, such as project or work type. Major deliverables are placed outside the circles.

The process of creating the Kaleidoscope typically leads to valuable conversations among team members, identification of gaps in the work flow, and elimination of duplicate work, among other valuable results.

Creating a Kaleidoscope is not meant to be a one-time event; it is an iterative activity. Most organizations or teams will benefit from referencing and updating it during weekly or bi-weekly staff meetings. New versions should be created every quarter, reflecting now just the current state but also any process-related lessons learned.

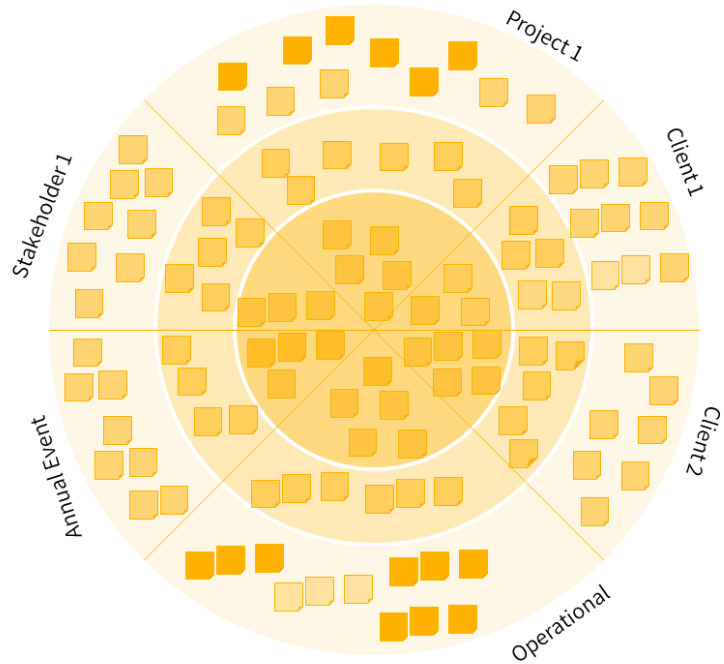


Figure 3.2 Kaleidoscope

This technique helps contextualize new initiatives and change efforts with all the other work currently in progress or planned for more realistic planning, forecasting, and prioritization. The Kaleidoscope is especially helpful in transformations with lots of moving parts and disparate groups.

Consider alternate templates that could achieve the targeted outcome for this technique. Sketch your ideas here!



EXPERIENCE MAP

The Work Value Diagram and the Agile Kaleidoscope are valuable tools for holistically visualizing work that is organically happening or scheduled to happen within an established organization. In a newly created organization, however, such as a start-up or a new department within an existing organization, when there are many unknowns, the Experience Map may be more helpful.

Experience Mapping is a high-level visualization from the user perspective of any series of interactions, incorporating the full range of actions and emotions, towards accomplishing a goal. It is agnostic in terms of a specific product or business domain, so it is helpful as an envisioning exercise in scenarios where there isn't any actual work happening yet, such as with a new business initiative.

Experience Mapping is one of several related techniques that

helps a group of people collaborate in designing and developing a service or product. The intent is to talk through and capture shared understanding about the Why, What, When, and How of the goal by means of a visualization framework.

The process of creating an Experience Map is typically open-ended. Depending on the concept and its intent, the structure can be customized to the specific context.

Experience Mapping may take the form of an empathy map, a journey map, a service blueprint, or any number of similar visualizations. The specific choice depends upon the identified need.

While Experience Mapping can be used to capture an existing process, it can also be used as a frame of reference in exploring avenues for innovation. For example, a start-up wanting to disrupt an industry might use Experience Mapping to create a high-level representation of the traditional work delivery process and then use that map to explore alternatives.

The outcome of the Experience Map in the context of the Identification phase is, as for the other techniques in this phase, a visual representation of the scope (to the best of your current knowledge) of work to be done. Also like the other techniques, it requires the participation of stakeholders who understand the system that is currently in place.

The structure of the Experience Map will vary depending upon whether you're starting from scratch or there is an existing process map or journey map.

If the process in question has not been mapped, you might use the first image on the next page as a template to identify not just steps in the process but additional attributes of each step to build a more holistic representation. If the process in question is already mapped or detailed in any way, then the second image may serve as a better template.

Gather a group of people who interact with the process in

some way; it is easier if, at least initially, the groups are structured around a similar point of view, i.e., they're all customers or workers or stakeholders.

Walk through the process map – which is continually displayed for all to see – and have participants document their experience at each stage of the process. You can use either the four basic Think/See/Feel/Do prompts to gather their thoughts or you could use any other template (Empathy Maps, for example, or Persona Maps could also work).

Use convergent and divergent thinking time-boxes to keep the group on track. For groups of ten or fewer, five minutes to fill out each prompt individually using divergent thinking and 10 minutes of convergent thinking to collectively discuss and gather comments for each step is usually sufficient. Adjust the time-boxes as needed based both on the personalities within the group as well as the size of the group.

Once all experience reports have been gathered for all steps in the process, it is helpful to take a break and then regroup for a final 20-30 minutes. Use open-ended prompts to add any new insights.

The discussions that emerge are among the most valuable component of working with Experience Maps, so it can be helpful to have a scribe or someone responsible for capturing key ideas, questions, and points.

Consider alternate templates that could achieve the targeted outcome for this technique. Sketch your ideas here!

Phase	→ → → → → →					
Interactions	☒	☒	☒	☒	☒	☒
Goals	☒	☒	☒	☒	☒	☒
Intent	☒	☒	☒	☒	☒	☒
Expectations	☒	☒	☒	☒	☒	☒
Emotions	☒	☒	☒	☒	☒	☒
Opportunities	☒	☒	☒	☒	☒	☒
TBD	☒	☒	☒	☒	☒	☒

Figure 3.3A Experience Journey Map

This template is designed for scenarios where the journey of a transaction or a work item needs to be created or redesigned. It incorporates multiple perspectives and helps with alignment between intent and outcomes.

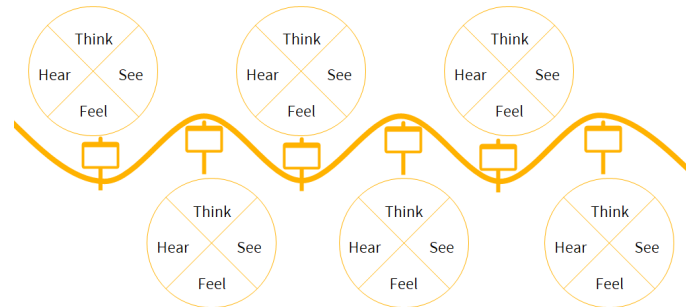


Figure 3.3B Experience Empathy Map

This template focuses on the perspective of users or stakeholders for a given process. It is most helpful for an established process that needs to be optimized.

FYI: IDENTIFICATION

Imagine This: The Transformative Power of Edu-Larp in Corporate Training & Assessment by Blaz Branc and Michal Lukasz Mochocki

Show Your Work: The Payoffs and How-to's of Working Out Loud by Jane Bozarth

No Hard Feelings by Liz Fosslie and Mollie West Duffy

Creative Visualization: Use the Power of Your Imagination to Create What You Want in Your Life by Shakti Gawain

Articulating Design Decisions: Communicate with Stakeholders, Keep Your Sanity, and Deliver the Best User Experience by Tom Greever

What You Do Is Who You Are: How to Create Your Business Culture by Ben Horowitz

Mapping Experiences: A Complete Guide to Creating Value through Journeys, Blueprints, and Diagrams by Jim Kalbach

The User's Journey: Storymapping Products That People Love by Donna Lichaw and Eva-Lotta Lamm

Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation by Karen Martin and Mike Osterling

User Story Mapping: Discover the Whole Story, Build the Right Product by Jeff Patton

FYI: INFORMATION ARCHITECTURE

Information Architecture for Information Professionals by
Susan Batley

How to Make Sense of Any Mess: Information Architecture for
Everybody by Abby Covert

Information Architecture: For the Web and Beyond by Louis
Rosenfeld, Peter Morville, and Jorge Arango

100 Things Every Designer Needs to Know About People by
Susan Weinschenk

Information Architecture: Blueprints for the Web by Christina
Wodtke and Austin Govella

Information Architects by Richard Saul Wurman

