



Ellen Gottesdiener challenges traditional roles in agile teams and explains the hurdles that need to be overcome to use agile most effectively. By sorting people into fundamental “disciplines”, Gottesdiener shows how to reduce putting individuals in overwhelming positions and to focus on a common goal: creating value. At the same time, she notes that agile teams need to become smarter about timeframes and finding the relationship between time horizons and details.



Ellen is an expert in Agile product and project management practices, product envisioning and roadmapping, business analysis and requirements, retrospectives, and collaboration.

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Tony Higgins We’re very fortunate today to have Ellen Gottesdiener with us today. Ellen’s a well-known industry expert, prolific author, sought after speaker. She spends most of her time working directly with clients helping to transform teams to agile and lean approaches to improve their working situation and of course to increase the value of what they deliver to the business as a whole. Welcome, Ellen.

Ellen Gottesdiener Thanks for having me.

Tony Higgins First question: In an industry that’s going agile without question, how do we reconcile the roles of business analyst, product manager, product owner?

Ellen Gottesdiener Yes. This is a big topic and actually, to step back from the

word “role”, the perspective that I like to have is that it’s more about the goal. So we’ve written about this before that it’s the goal, not the role. What we need to have on teams are the disciplines of business analysis, the discipline of product management and disciplines of project management and also testing discipline, user experience discipline.

So rather than trying to fight your way into the agile teams by saying well, my role is this, my role is the analyst, you know, my role is the product owner; yes, those roles take on certain disciplines but what’s important is that we have people on the team that can use those disciplines.

So I can recall a team that I work with that there was no business analyst on the team. They had software engineers and testers and they had a product champion – we prefer that term over product owner – and this was in a scientific application. They just didn’t have this idea of a business analyst. However, one of the software engineers was really great with analysis. He had some really good modelling skills. He was doing the work of business analysis on that team. So I was doing some deeper coaching with him on agile analysis and he was playing a really key role for the team in being able to drive out the requirements. So here we have a team that has no formal role. A software engineer is playing that role.

We’ve worked with other teams where testers often have some really sharp analysis skills. Many testers want to build some of their modelling skills so that they can do better analysis. And it’s really a conundrum when you come to that PO or product owner role because unfortunately the way people think of a product owner is they are superwoman or superman. They need to be feeding the team day to day. So they’re deciding what to build and when to build it and answering questions about okay, which rule? Does this look right? Will you want the prototype to look like this? Meanwhile – so they’re, you know, focused inward tactically but meanwhile, excuse me, but we have a product and we need to do research out in the field with customers and we need to do competitive

analysis. And we need to do some valuation. Where should we be as an industry? What – we need to be sharply looking at trends in technology and market. And to do both of those things one person it's virtually impossible. So a pattern particularly in large enterprises that we see is that we need to have people that have product management skills, those more strategic outward looking skills and activities and discipline, and at the same time sort of tied at the hip we need to have people that can work with the team to feed answers about the data and the roles and yes, we're going to go Android versus iOS first for the environment or whatever. That's just an example. But that tactical sort of product owner is tied at the hip with the product manager who's looking out strategically.

So even in the product owner, quote, "role", there's a lot of confusion and those people have – you know, really can struggle. And I mean then you get into the project management. So one of our clients that I've been working with, we have a large group of product owners. That's what they're called. They're in a product and user experience group. And they're doing a little bit of project management, product ownership, product management all at the same time and they're totally stressed in their time and you can't do all of that work. They need help with some of those disciplines.

Tony Higgins Right. So we have the disciplines but the notion of role or predefined role or fixed role is kind of those barriers broken down.

Ellen Gottesdiener Yeah. Exactly. I mean if we're going to say oh, I'm an analyst so I'm not going to do testing, that's not good for the team. I mean we're all about the end game. Let's get to the deliverables. Let's pitch in together. The best agile teams learn to do that anyway. But getting hung up on the role, I'd like to change the conversation from role based to more discipline and do we have on our team the disciplines that we need to discover and deliver the high value product that we need to.

Tony Higgins We need the pool of skills basically is what we should be looking

at and not be focusing, as I said, on the traditional role titles for example.

Ellen Gottesdiener Yeah. There's an idea that the folks in the design thinking world have talked about called "T" people. I don't know if you've heard of that.

Tony Higgins No.

Ellen Gottesdiener But if you look at a capital "T" you have a band on the top that goes horizontally – horizontal wide and then you have a slice that goes down that makes the stem of the "T". So let's say we need people who have strong analysis skills, that's the vertical bar, but they have a broad understanding of okay, product management. I have an understanding of testing. I understand what the devs, the engineers are doing. So they can communicate to each other, pitch in if needed. And so almost if you think of it mentally a whole bunch of "T" people when they have deep skills in one or two areas, if you have enough of those on the team you have sort of a square "T".

Tony Higgins You got the coverage you need.

Ellen Gottesdiener You got the coverage you need, yeah.

Tony Higgins Excellent. What are the problems that you're seeing that agile teams have with, you know, quote, "requirements"? So the traditional requirements word which is a loaded term in itself.

Ellen Gottesdiener It is a loaded term. You know, sometimes I say there ain't no stinking requirements because there are really options, there are wants. So we talk about and discover to deliver three planning horizons: the big view, the preview and the now view. And if you recast that word requirement, the big view are really things that you want. Those are – the big view would be things that would be a couple years out, 18 months, a couple of years that would be traditionally on a product roadmap. So that's what we think we want; really big, chunky features if you will.

The preview would be a release level. And again, your mileage varies there but let's say it's a month or two months out at a release, now those are things that you know you need to deliver. So we went from wants to needs, yeah?

Tony Higgins So timeframe is kind of dictating this.

Ellen Gottesdiener Yes. Because in agile we're smart and we're trying to get feedback and we learn from our deliveries. We validate; oh yeah, we're on the right track. So it's not until you're at the now view whether you're using a time boxed approach like Scrum and you have an iteration or a sprint concept or whether you're using a flow base model like Kanban where you're thinking about whip and you're pulling an item in, now I need to make that a requirement that is completely unambiguous. I know exactly what the expected the results are, the acceptance criteria. So we're sort of spinning down the level of granularity from want to need to requirement based on planning horizon.

Tony Higgins Which is tied to time.

Ellen Gottesdiener Yeah. Yeah, and having gotten feedback. So everybody talks about these backlogs and in agile we have backlogs that could have different things in them. Most of the time teams think oh, that's where you put your stories. And yeah, you would have stories and you would have potentially defects and other work that the team needs to get done for delivering the product, but we need to have lumpy backlogs. We don't want to have thin – a whole bunch of thin sliced stories. You don't want to go through that slicing work until you really have decided – the product champion has decided yeah, we need to pull this work in and deliver this for value reasons. We've looked at value and risk and about how much time it's going to take you to build it, right? So some things in the backlog can be big and chunky, some things will be thin slice because we're just about to deliver it. And so the backlog – that helps the backlog stay lean. And so they don't really become requirements till they're at the now view.

So we like to think about the backlog being a set of unvalidated options.

Requirements are not really – I'll go back to using that term because it's so common in our vernacular. But backlogs are a set of unvalidated options and we need to try to make the smartest choice possible at a given point in time and

what we're going to pull, deliver it and get some feedback as quickly as we can. Does that make sense?

Tony Higgins Oh, yeah. And progressively driving to great levels of detail as our time horizon kind of shrinks in front of us.

Ellen Gottesdiener Right. Right. And so that's a big – that's a – you know, you-
Tony Higgins That's huge.

Ellen Gottesdiener –ask at the big shift as you ask what some of the problems are. So a lot of teams are so used to writing textual requirements of trying to go down to the glory of detail and a lot of documentation and making that shift of oh, I don't have to know everything up front. But I think there's something really beautiful here.

I think there's a tension that's really cool. And on one hand when you think about agile requirements you're thinking oh, I have to have this tolerance for ambiguity because I'm not exactly sure what I'm going to be building in the next release or next month. I might have an idea but I don't have to know exactly. So our minds have to have that tolerance for ambiguity but – big but – you need to have a drive for concrete specificity when it's time to deliver.

So your mind – and this is the thing I love about this work because your mind is balancing tolerance for ambiguity with a drive for specificity at the same time, yeah?

Tony Higgins Right. Right.

Ellen Gottesdiener So you know, that's a ...

Tony Higgins Depending on what you're focusing on at that point of what you're looking at.

Ellen Gottesdiener Yeah. I think it was F. Scott Fitzgerald has a great quote. I'm going to probably mess up the quote. But it's something like this, "The indication of a great mind is one that can hold two conflicting ideas in it at the same time."

Tony Higgins Well, this sounds like it.

Ellen Gottesdiener It does. It does. So it's a mental challenge and a difficult one

for a lot of teams.

Tony Higgins But I can also see how you could err in either direction, like you don't go to that degree of specificity at the correct time. And at the other end we still have a whole lot of people that are really uncomfortable not having that detail even though it's way too early to do so and they're, in many cases, a huge force that are still driving people to go to that level of detail.

Ellen Gottesdiener Yes. And I mean in some ways-

Tony Higgins Kind of at their peril.

Ellen Gottesdiener That's exactly right. I mean user stories are great and I love user stories as a way to – as, you know, Ron Jeffries has said, it's a basis for – it's a promise for a conversation. But the thing is that one of the patterns that we've seen agile teams do with stories is they think okay, well I have our stories and I have a bulleted list of acceptance criteria, I'm ready. Well, that's not necessarily true unless the team, the testers, the devs, have really very specific domain knowledge. They may not know what business rule they have to implement. They may not know what data, right, that – or even the environment of use. They may not know the quality attributes like the performance level and the security. So we need to be able to drive down to that level of specificity at the now view. So people think okay, I have a user story, that's really cool. As a user I need to do something. Well, one of the issues with that is – and Tony, you're familiar with the seven product dimensions that we talk about in discover and deliver. The user story is really only discussing two of those dimensions, the user and the action.

So when teams just work off of stories and don't deepen their conversations around all of those dimensions that make up holistically requirements, then they run into trouble inside their iterations. Then they have the phenomenon of the travelling stories.

Tony Higgins Yes. Yes. It's kind of another version of turn.

Ellen Gottesdiener Yes. Exactly.

Tony Higgins Basically we keep revisiting r sprint and in good traditional waterfall it was the whole reuse – or sorry, reuse – rework.

Ellen Gottesdiener Rework. Right. And the teams end up having that rework and realizing oh, we didn't slice those stories well enough because we didn't understand, drive down into the story itself holistically and that wreaks all kinds of havoc.

Tony Higgins So there is that sweet spot where you describe when we have those horizons correct and we go to the level of detail, it kind of matches the horizon. You kind of find that sweet spot and we get our maximum velocity if you will.

Ellen Gottesdiener Yeah. Yeah.

Tony Higgins But you could overshoot either way.

Ellen Gottesdiener Right. And one other thing that they some – the teams that we work with sometimes forget to do is okay, well let's just talk about some examples. More and more people are catching onto this idea of specification, by example behaviour driven development, acceptance, test driven development. There's different names for this but let's talk about a real example. And here of course our business partners, product champions, subject matter experts, can just spew real examples.

So we often will have workshops that are – you know, they could be lease planning, product road mapping or even at iteration level and we will have our business partners at the wall writing out examples. Okay. And it might be examples of, you know, of assay data so that we really understand the rules. It's a way to reverse engineered so the rules. Or they may be drawing without even calling it a model such as a state diagram and the transitions and then we can focus on okay, which states are we focusing on for this particular iteration or release and we can have the deeper conversations.

Tony Higgins So using those as a catalyst really to come into the conversation from different angles.

Ellen Gottesdiener Exactly. So we don't want to throw the baby out with the bathwater. For those listeners that have analysis skills those models are beautiful and they're really, really helpful for deepening the conversation.

Tony Higgins Excellent. Shift gears a little bit. The focus on delivery has certainly shifted to delivering business value versus years ago I remember when all headlights and attention was on delivering software and once that was done we felt our job was over. How do you integrate this focus on value into your work with agile teams as you consult with them?

Ellen Gottesdiener Yeah. That's a great question because I mean it makes things difficult a lot of times because people use this term value, value, value. It's almost a mantra in agile. But people don't explain what do they mean by value. So there actually is a value standard body of knowledge. And in that body of knowledge value is defined roughly to say – the translation is roughly it's fair return for goods, services or money of good services or money for something exchanged.

So it's not always about money. You may be giving me a benefit that improves my life or makes me happy or lets me save time that I'm willing to pay for, right? So we first have to have that definition of value clear and then what we – and we talk about this in discover, deliver. We want to recast stakeholders from just generic stakeholders into thinking about partners. And the partners are from the customer business and technology realms. And they each have their own view of value, you see. So as we like to say, value is in the eyes of the beholder. If we always try to deliver say a user's value it might not be financially viable to the business. If we only try to do what the technology partners because they think it's feasible, it may not be viable from a business point of view.

So you get the ideas that you want to balance the three perspectives. So we – when we're working with teams what we do is say okay, let's look at those three partners. Who are those partners and what is their definition of value, what are their value considerations? And then we turn to the product champion and say

for this next time horizon that we're focused on which of these value considerations trump, right?

So I remember working with a team once in release planning and they were discussing value considerations and one of the options in building in a particular platform, this have to be a cloud platform with a cloud database that had a lot of value for the lead architect, a global architect. He wants to really be able to use this product as a way to test the viability of cloud data storage and save a lot of money so there was some operational expenses there. But – but from the product champion point of view the data that we were working on was protected under what's called U.S. HIPAA Laws. In other words, highly regulated. And that data storage platform had not been – addressed security. And that quality attribute of security definitely trumped the savings, right?

Tony Higgins Yeah.

Ellen Gottesdiener So those conversations, the beauty is if we think about the three partners, have them together discuss their value considerations and then turn to the product champion who has the ultimate burden and responsibility to make the choice which value do we focus on, then we've at least had this understanding and it happens very quickly in conversation. We literally put the stuff up on the wall because, you know, value – as I said, value is not always about money. It's – you know, you do sometimes definitely want to increase revenue. But sometimes you'll do things to avoid costs or protect revenue, avoiding costs like having a regulatory violation or improving customer service so people – you increase the, quote, "lifetime" value of your customers.

So those are some patterns that fall into, we call it, IRACIS, increase revenue, avoid cost, improve service. But it's not, not always about money. There may be things that we'll do for our users that have a value that's not tangible that's difficult. There's always a way to translate things into money but it's sometimes more difficult to translate it into money.

Tony Higgins I'm trying to – as you talk about this, I can't help but think on the

timescale and how those values may shift and change and morph over time. So it's not like at the outset of the project we sit down and make this decision. I imagine it's on a more frequent basis.

Ellen Gottesdiener Absolutely.

Tony Higgins Maybe down to a sprint. I don't know what level. Depends on the situation-

Ellen Gottesdiener Depending on the market.

Tony Higgins -or the market you're in.

Ellen Gottesdiener Yes. Depending on the market segment. That's a really great point because value's not only in the eyes of the beholder but value constantly changes. Market conditions change, our competitor comes out with something that threatens our customer segment or our geography. So we always have to have our eyes on that prize and that prize shifts around, yeah. So just being really explicit about what is value and in those short conversations having everybody rallying around that is so powerful.

Tony Higgins And then being able to track it and-

Ellen Gottesdiener And then you can track it.

Tony Higgins -stay on top of it.

Ellen Gottesdiener But you're always – and you're always using – when you're pulling an item from the backlog and you're doing what we call optioning in the structured conversation where you look at an item and you say okay, what are the possibilities for what we would deliver with say this story looking at the user, the data, the action, the environment, the quality attributes and the interface, those seven dimensions, how do we decide which ones? If we have, you know, five sets of data for example or choice of which rules for this next release, the mechanism to slice is value. Which are the ones that are going to give us the highest value?

Tony Higgins It's really the driving force.

Ellen Gottesdiener Right.

Tony Higgins Would another one be risk? I mean general principle of I want to do risky first.

Ellen Gottesdiener Absolutely. Yeah. Yeah. Balancing risk. You look at value. You look at obviously benefits. You look at risk and another little sneaky thing called dependencies.

Tony Higgins Oh, yes. I forgot about those.

Ellen Gottesdiener Oh, yeah. Remember those dependencies. And dependencies have an interesting play in agile requirements and this is a little bit of a trap for agile teams too because there's sort of two types of dependencies. There's dependencies on external partners. Maybe somebody's giving you a software component or another team is building a service that you're going to consume. But that's – so that's sort of external dependencies. But then ... Then we come to dependencies in the requirements and it comes down to the data where I can't build some capability or deliver some capability unless I have data in a specific state or correct data in a specific state. So we also have to have some good discipline, analysis discipline to understand those dependencies.

Tony Higgins So how good your process is or how good you are at executing really depends on how good you do everything you just described.

Ellen Gottesdiener Yeah. It certainly makes a big difference.

Tony Higgins On an ongoing basis.

Ellen Gottesdiener Definitely.

Tony Higgins When I speak with people in large IT shops about the processes, I often hear back terms or vernacular, hybrid, Scrummerfall, [Waggle], countless other terms, it seems never ending. And most times that I'm observing – I may be wrong but most times I see that it's a company that's somewhere on this journey or somewhere on the road from traditional waterfall because the company's been around for a while and they're on this journey going towards agile and they're somewhere along there in that evolution. And each one seems to have some degree of homegrown handcrafted solution, no two seem to be the same. If we

fast forward say five, ten years from now what do you think this picture's going to look like? Will it have converged? Are we still diverging? Interested in your prediction.

Ellen Gottesdiener Well, I left my crystal ball at home, Tony, so I'm not sure I'm going to be able to be very specific-

Tony Higgins And then I have a question on the stock market after this.

Ellen Gottesdiener Yeah. Right. I wish. I think that we'll always be – in a healthy way always be adapting practices that seem to be working. What I think will be maybe true in five years is that larger enterprises that are harder to make changes to will start to understand the value of feedback and that whole – that other agile mantra of inspect and adapt. That we want to do experiments and get some feedback and learn from that. And it really is true that different – you know, we work with a lot of different organizations and they all have different cultures, different ways of being different, you know, smells and – not people smells but, you know, organizational. Not necessarily bad smells either. They could be very nicely scented and there's a really powerful good energy in an organization.

So there'll always be the need for people to adapt for their environment. You know, people talk about best practices. I really hate that term naturally because there's no best practices. There's just good practices in you context. Context matters. So when people say they're using hybrid the next – you know, the next – and is that going to change in the future, probably not but the question is, is it working? Is it giving you the outcomes that you want? If it's giving the outcomes or it's all the organization is culturally ready to take on at a given point in time, then it's fine. So I think we'll always be doing this merging of practices.

Tony Higgins Which, I guess, is a good thing, not a bad thing.

Ellen Gottesdiener Yeah. I mean when people get like zealots over all about must do XP, then I must do [Cumbun], then I must do DSTM, that's not healthy and it's also not a very good change pattern either.

Tony Higgins So what got you into this field and what keeps you in it?

Ellen Gottesdiener Ah, that keeps me in it. That part is a little bit easier. Well, actually sort of by accident to tell you the truth because my background was a dual major in psychology and sociology and I really fell into a training program for develop – to be a developer and went through a very comprehensive program and ended up working in financial services as a programmer analyst and then moved up to a project manager, did a stint in training for a little while. And one of the things that we had going in our training program which is a little side story that was unconsciously being unconsciously confident because I would be – I would act as a customer, give the students a case, you know, you need to deliver this change. And then we would come in for a session. We used to call it roast, roast the instructor, but we were really role playing the business customer. And they would have to ask questions. And when I ended up – the person that was running the program had to leave so they said “Ellen, will you manage this whole entry level training program?” I said okay, you know. We had a pattern of – we had nine case studies that they would go through and there was a predictable bell curve for how long it would take the students to complete each case before they could move to – we’d add more skills, deepen the case study and so forth. I said, “I just want to make one little change.” I’m going to have them after they interview us – and they did a group interview because we had a group of students – their first deliverable is not going be [unintelligible 00:29:21]. Their first deliverable must be a list of test conditions. And then we would sign off. I would pair with another instructor. We would sign – review and sign those off and then they’d say – then I said, “Your next deliverable is your actual test data.” I mean day – byte by byte and every piece of data that you would use to test. Then you can do your design. Then you could do your codes. Then you run your test.

Well, what happened was I created a beautiful nightmare because the beauty was they were all getting done with the case studies days earlier because of that

change. The problem for me was because we had a, you know, six month schedule and our business areas weren't ready and the technical areas-

Tony Higgins Now what do we do?

Ellen Gottesdiener Yeah. They weren't ready to consume these trainees. But the thing is I accidentally was doing, you know, acceptance test driven development without realizing it and people thinking about their tests first made it completely different – a big difference. Their code was much cleaner. They were testing. You know, their testing was not like this giant nightmare.

Tony Higgins They have a much more firm target to shoot at basically is what we're getting down to.

Ellen Gottesdiener Absolutely. And when they didn't understand, when they didn't have the right conditions, test conditions, they would start to deepen the questions to us as the business – role playing the business people. So I thought this was really cool even though, you know, I had that little scheduling problem. And I really love that part of it and went back, you know, as a project lead, was trying to institute some of those practices inadvertently doing, I guess, many years ago, ATDD.

But the thing that keeps me in this work is that – is the people. Is working with people and the change. And you know, my first book is "Requirements by Collaboration". And having people collaborate together to first what are – to around shared goals, defining them first and seeing how much commonality they actually have and that every single person has their own story and knowledge to lend to the success of the product, that's a beautiful thing. That's what I – that's what keeps me in it.

Tony Higgins So trying to get the barriers down and basically be able to leverage all of that.

Ellen Gottesdiener Right. Right. It's the collaboration that does it for me.

Tony Higgins That's great. Yeah. Just a few questions in closing if I could. What's piece of advice you'd have for somebody who's about to undertake a

new large enterprise project independent of role or discipline, excuse me?

Ellen Gottesdiener Right. A new enterprise project, one piece of advice?

Tony Higgins Yeah. Like maybe imagine somebody who hasn't really been in that situation before, they're walking down the hallway to enter this. What's a piece of advice you can give them?

Ellen Gottesdiener I would say that you enter with a curious mind and understand those three partners, who those people are in the organization, customer business and technology, who those players are, what they value and engage with all of them in an equal way because then you'll really get the big picture much, much quicker.

Tony Higgins Excellent. What shifts or trends do you see in IT or the business of IT, the title of this session, over the next couple of years? I mean there's so many out there but are there any that'll, you know, kind of bubble above the surface, you think, that will drive a lot of change or that are fascinating?

Ellen Gottesdiener Well, you know, there's a lot of – obviously the technology's going to change constantly. So that's a given. That's not going to change. The technology's going to change. I think one of the things – and I'm – actually, this is part hope and part a little bit of noticing. I think one of the things that's going to start happening is people are going to stop thinking about applications and start thinking more about products. And they will be making the shift toward the discipline of product management which is starting to take hold a little more so in Europe and growing here. That product management is indeed a discipline and that these applications are products that have a lifetime value that go through their own lifecycle, that need care and feeding and that we need to have people that are skilled in managing those products.

I think that's one thing that's going to start to happen. So now we – and by so doing, we're less IT versus business and we're more this is a product and we're all collaborating around the success of this product. Our product might happen to be very software intensive or a system with lots of software embedded or even

services that is also a product. So I think there will be a shift toward more of a product perspective.

Tony Higgins Product mindset.

Ellen Gottesdiener Yes. Yes.

Tony Higgins What are your favourite websites? Where do you go to, you know, spend your time when you're not in there helping customers?

Ellen Gottesdiener Oh, all my free time.

Tony Higgins Websites, blogs for good advice.

Ellen Gottesdiener Well, there's a couple that come to mind. I love David Kelley's design thinking blog and I think more and more people are becoming aware of that. The world of user experience, experience design and information architecture has really been popularized by his work and the work of IDEO. A lot of it isn't new but it's very powerful. It's very human centric. And I think more classic IT people that it would benefit by following that world. So I spend a little time on that one.

I also follow a bunch of product management blogs. In particular, I think I'd highlight Marty Kagan's blog and he's fairly well – and sort of a rock star in the product management world. And then there's a colleague I met in Germany last year at a conference I presented at, Karina [Baldoff], who has a really cool blog because I like the diversity of what she writes about called "Finding Marbles". It's just fun. As she learns in her journey as a coach, as agile coach, she writes about different things that she's learning. And of course to feed your brain and eyes and ears you can't beat Ted. And I would say in Ted, you know, don't just go to the technology one. You go to the, you know, biology and anthropology and everything because everything and everybody is connected.

Tony Higgins Excellent. Thank you so much for spending time with us. Appreciate it.

Ellen Gottesdiener Thank you. Thank you, Tony.

Tony Higgins Take care.

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Ellen is an expert in Agile product and project management practices, product envisioning and roadmapping, business analysis and requirements, retrospectives, and collaboration.