Milestone Facilitation Guide

Included in this document are action items and sample agendas for each sprint milestone. You will use this guide consistently throughout your sprint to craft weekly emails to sprint participants and to facilitate milestone calls.

Table of Contents

Action Items & Sample Agendas

TOP Sprint Timeline 2

Pre-Kick Off 3

User Research 5

Data Exploration 7

Concept Development 9

Beta Demos 11

Minimum Viable Products 13

Sample TOP Sprint Timeline

| **WEEK** | **MILESTONE** | **ACTIVITY** |
| --- | --- | --- |
| Week 0 | **Kick Off Call**  **[Date]** | Sprint launches with kickoff call. |
| Week 1 |  | Tech teams connect with user advocates who can offer insights into their communities. |
| Week 2 | **User Research**  **[Date]** | Tech teams share about their target end users, as well as plans for continued user research; Sprint leaders and user advocates provide feedback to each team, suggesting additional ways to reach potential end users. |
| Week 3 |  | Teams continue user research and begin data exploration. |
| Week 4 | **Data Exploration**  **[Date]** | Data dive Q&A between data stewards and tech teams. |
| Week 5 |  | Teams continue exploring data and developing products |
| Week 6 | **Concept Pitch**  **[Date]** | Teams share concepts, wireframes, and works in progress, with wide variation in product maturity. Sprint leaders, user advocates, data stewards, and other tech teams offer feedback to each team. |
| Week 7 |  | Teams continue building products and user testing. |
| Week 8 |  | Teams continue building products and user testing. |
| Week 9 | **Beta Demos**  **[Date]** | Teams come together to showcase and share feedback on more mature versions of their products. Typically, tools have reached at least wireframes and have some functioning features by this stage. |
| Week 10 |  | Teams address feedback from Beta Demos and continue building products and user testing. |
| Week 11 |  | Teams address feedback from Beta Demos and continue building products and user testing. |
| Week 12 | **MVP Demos** | Teams share Minimum Viable Products to sprint leaders and potential end-users. MVP demos culminate the sprint process for tech teams, and allow sprint leaders to assess the results. |
| Post-Sprint  (Ongoing) | **Share the Results of the Sprint** | Tools developed during the sprint are highlighted via a showcase event and/or agency communications. |

Pre-Kick Off

Action Items

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At least 1 week before Kickoff

* Customize kickoff call agenda (template below)
* Make sure all participants receive calendar invites for the kickoff call
  + Optional: you may want to send calendar holds for all milestone sessions up front after the kickoff call.
* Send pre-kickoff call email.
  + Introduce sprint leaders.
  + Remind participants about sprint kickoff date, time, and purpose.
  + Attach Sprint timeline (customize as needed) and include information about your Problem Statements.

Kick Off Call Sample Agenda (Week 0)

Recommended length: 1 hour - 1 hour 15 min (depending on sprint size).

Attendees: Sprint leaders, tech teams, user advocates, any other confirmed participants.

| **Time** | **Topic** | **Speaker** |
| --- | --- | --- |
| 5 min | Introduction   * Welcome * Review of meeting agenda * Introductions by sprint leads and TOPx team members. | Sprint Leaders |
| 10 min | Overview of The Opportunity Project, Roles  and Sprint Timeline | Sprint Leaders |
| 10-15 min | Background of the challenge   * Background/introduction to the challenge - provide a compelling narrative of the problem, focus on telling a story to show why the problem is important. | Sprint Leaders |
| 20 min | Introduction from sprint participants   * Sprint participants introduce themselves:   + Start with technology teams,   + Move to user advocates and ask them to give 1 minute overview of the background/expertise they bring to the sprint,   + Any other participants involved. | Tech Teams; User Advocates; Additional Participants |
| 10-15 min | Q&A |  |
| 5 min | Next Steps   * Communication: Inform sprint participants that they’ll receive a weekly email, and indicate what communication tool (e.g., Slack, Teams) you will use. * Ask tech teams to reach out to user advocates and set up user research calls to learn about their experiences and needs on the ground. Tech teams should connect with at least 3 user advocates over the next two weeks. * Next milestone is User Research in two weeks. |  |

Post Kickoff Call

* Send email thanking teams for joining, and asking anyone not officially confirmed to sign up to participate in the sprint by the Monday following kickoff.
* Add any late breaking participants to the sprint contact list.

User Research

Action Items & Sample Agenda

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Week 1 – Weekly Email Key Points

(Send Monday after kickoff call)

* Remind participants to introduce themselves in communication platform such as [Slack](http://opportunity-slack.herokuapp.com/) or Teams.
* Ask tech teams to begin reaching out to user advocates to conduct user research. This can include formats like user research video or phone calls.
* Include resources on user research. Feel free to include your own, but some we often recommend include:
  + [What is User Research](https://www.interaction-design.org/literature/topics/user-research)
  + [How to Conduct User Interviews](https://www.interaction-design.org/literature/article/how-to-conduct-user-interviews)
  + [Empathy Isn't Enough](https://www.invisionapp.com/inside-design/empathy-isnt-enough/)
* Attach: Sprint contact list to help sprint participants connect.

Week 2 – Weekly Email Key Points

* Share expectations for user research milestone:
  + All should attend.
  + Tech teams will be asked to share:
    - The type of end user they are focusing on,
    - What user research they’ve conducted so far, and what you learned, including things like the challenge the user is facing, their goals, needs, etc.,
  + User advocates and SMEs will be asked to share feedback and additional insights.,
* Attach: Sprint contact list

TOP User Research Milestone Sample Agenda (Week 2)

Recommended length: 1 hour (assuming 4 tech teams); max 1 hour 30 min if

5-6 teams.

Attendees: Sprint leaders, tech teams, user advocates.

| **Time** | **Topic** | **Speaker** |
| --- | --- | --- |
| 5 min | Introduction   * Thank you for joining. * Describe purpose of the milestone:   + This process is grounded in human centered design and the principle of “build with, not for”.   + We look forward to the tech teams sharing learnings from user research about the needs and challenges of their end users today. * Describe format of the session. | Sprint Leaders |
| 45 min | Share Out & Feedback   * Each tech team shares insights for X minutes on their potential end users from the user research they conducted:   + Target end user.   + Challenge they’re facing.   + Pain points, goals and needs. * After each team presents, sprint participants offer feedback for X minutes. | Tech Teams |
| 5 min | Next Steps   * Next steps: Continue user research and begin data exploration (Sprint leader will share datasets with points of contact this week, so teams can begin to reach out to data stewards if they have questions about data). * Next milestone is Data Exploration in 2 weeks. | Sprint Leaders |
| 5 min | Q&A |  |

Data Exploration Phase

Action Items & Sample Milestone Agenda

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Week 3 – Email Key Points

* Thank participants for joining the user research milestone and introduce the datasets. Encourage teams to begin connecting with data stewards.
* Attach: Data curation list, sprint contact sheet, and week 3 cheat sheet.

Week 4 – Email Key Points

* Remind tech teams to continue user research and to work on data exploration.
* This week at the data exploration milestone, each team will have X minutes to share what data they have explored, what needs they still have and any questions/challenges.
* Attach: Data curation list, sprint contact sheet, and week 4 cheat sheet.

TOP Data Dive Milestone Sample Agenda (Week 4)

Recommended length: 1 hour (assuming 4 tech teams).

Attendees: Sprint facilitators, tech teams, data stewards (no user advocates).

| **Time** | **Topic** | **Speaker** |
| --- | --- | --- |
| 5 min | Introduction   * Thank you for joining. * Describe the purpose and goals of the milestone. Suggested talking points:   + A main requirement for all tech teams is to use federal open data in your product.   + We define “open data” really broadly -- to include qualitative info as well as quantitative - and have pulled together a variety of data sets for you all to use.   + We recognize that federal open data is extensive, and that data discovery gets complicated. TOP exists to make that process easier, make data more accessible, and help you all understand how to use it.   + Goals for this session:     - Help tech teams find the data you need.     - Get your technical or general questions answered.     - Provide suggestions and guidance on how to find and work with the best government data to solve the problems that you are tackling. | Sprint Leaders |
| 15 min | Data Steward Introductions   * Data stewards introduce themselves and the data they represent. | Data Stewards |
| 1 hr | Share Out & Feedback   * Each tech team has X minutes to share what data they have explored and what needs they still have and any questions/challenges. * After each team presents, sprint participants offer feedback for X minutes | Tech Teams & Participants |
| 5 min | Next Steps   * Next steps: Continue data exploration and connecting with data stewards. * Next milestones is Concept Pitching. | Sprint Leaders |
| 5 min | Q&A |  |

Concept Development

Action Items & Sample Agenda

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Week 5 – Email

* Thank teams for attending Data Exploration milestone and remind them to continue exploring data and connecting with data stewards.
* Tech teams should begin developing their product concept and connecting with user advocates to receive feedback.
* Next week, during the Concept Pitch Milestone, teams will be asked to share:
  + End user and user needs.
  + High level product concept.
  + What data they will incorporate, and what data they are still looking for.
* Attach: Sprint contact sheet and week 5 cheat sheet.

Week 6 – Email

* This week is the Concept Pitch Milestone
  + Each team will have X minutes to share:
    - End user and user needs.
    - High level product concept.
    - What data they will incorporate, and what data needs they still have.
  + User advocates please be sure to join to share your feedback and begin to identify individuals in your network who can serve as beta testers of tech products.
* Attach: Sprint contact sheet and week 6 cheat sheet.

Concept Pitch Milestone Sample Agenda (Week 6)

Recommended length: 1 hour (assuming 4 tech teams).

Attendees: Sprint facilitators, tech teams, data stewards, user advocates.

| **Time** | **Topic** | **Speaker** |
| --- | --- | --- |
| 5 min | Introduction   * Thank you for joining. * Describe purpose of the milestone:   + For teams to share an initial concept of their product and to receive feedback from the group.   + We expect a lot of variation in terms of progress and product maturity – so it’s totally fine if teams just have even a PPT slide on your concept, or if you are further along in the build. | Sprint Leaders |
| 1 hr 15 min | Concept Pitch- Share Out & Feedback   * Each tech team has X minutes to share a high-level concept/approach, including their end user and what data they will use. * After each team presents, sprint participants offer feedback for X minutes. | Tech Teams & Participants |
| 5 min | Next Steps   * Next steps: Teams work on building their products, as well as developing plans for post-sprint. (e.g., continued product development and deployment). Deployment strategy could include incorporating product into existing business, making open source, partnering with an NGO, etc. * The next milestones is the Beta demo. At this point, products have reached at least the wireframe stage. | Sprint Leaders |
| 5 min | Q&A |  |

Beta Demos

Action Items & Sample Agenda

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Week 7 – Email

* Tech teams should iterate on their product development from concept pitches and continue to connect with user advocates.
* Attach: Sprint contact sheet and week 7 cheat sheet.

Week 8 – Email

* Next week is the beta demo milestone during which tech teams will share a more mature version of their product (ideally at least a wireframe) as well as indicate:
  + The target end user.
  + The user journey/workflow.
  + What federal data they’ve incorporated during this sprint and what data needs they still have.Initial thoughts on product sustainability and how/when they will launch their product.
* Attach: Sprint contact sheet and week 8 cheat sheet.

Week 9 – Email

* This week is the beta demo milestone.
  + Each team will have X minutes to share a more mature version of their product as well as indicate:
    - The target end user.
    - The user journey/workflow.
    - What federal data you’ve incorporated during this sprint and what data needs you still have.
    - Initial thoughts on product sustainability and how/when you will launch their product.
  + User advocates will join to share feedback.
* Attach: Sprint contact sheet and week 9 cheat sheet.

Beta Demo Milestone Sample Agenda (Week 9)

Recommended length: 1 hour, 30 minutes (assuming 4 tech teams).

Attendees: Sprint facilitators, tech teams, data stewards, user advocates.

| **Time** | **Topic** | **Speaker** |
| --- | --- | --- |
| 5 min | Introduction   * Thank you for joining. * Describe purpose of the milestone:   + This is the second milestone where the tech teams will actually be showcasing the tool they're building and provide an update from the initial concept pitches.   + The demos are meant to be another opportunity for feedback from the user advocates, product advisors and other tech teams— and a chance for teams to showcase the progress they have made since the concept pitch. | Sprint Leaders |
| 1 hr 15 min | Share Out & Feedback   * Each team has X minutes to share about target end users, user journey/workflow, federal open data being used, and initial thoughts about post-sprint product sustainability plans. * After each team presents, sprint participants offer feedback for X minutes. | Tech Teams |
| 5 min | Next Steps   * Next steps: Teams continue to develop their products and may consider testing the products. User advocates can help identify potential beta testers. * Next week is the product sustainability workshop, where teams will hear from leading experts and engage in speed advising sessions on product deployment and funding. | Sprint Leaders |
| 5 min | Q&A |  |

Minimum Viable Products (MVP)

Action Items & Sample Agenda

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Week 10 – Email

* Thank you for joining beta demos last week.
* We hope that teams are incorporating the feedback from the demos and continuing to build out their products.
* Next week, the TOP team will be facilitating a Product Sustainability Milestone, which teams should have received information about from the TOP team.
  + (\*Note: the Product Sustainability Milestone may fall in a different week of your sprint depending on your start date).
* Attach: Sprint contact sheet and week 10 cheat sheet.

Week 11 – Email

* Teams should begin signing up for and preparing for MPV demos.
  + During MVP demos, teams will share a demo of their product as well as present:
    - A walkthrough of your user journey product.
    - Identify your end user.
    - List the user advocates you have worked with throughout the sprint
    - List what federal open data you used.
    - Share general deployment strategy/implementation plan.
* Attach: Sprint contact sheet and week 11 cheat sheet.

Week 11 – Email

* This week tech teams should prepare for MVP demos, which is the most mature state of the product.
* During MVP demos, each team will share a demo of their product, as well as present:
  + A walkthrough of your user journey product.
  + Identify your end user.
  + List the user advocates you have worked with throughout the sprint.
  + List what federal open data you used.
  + Share general deployment strategy/implementation plan.
* Attach: Sprint contact sheet and week 12 cheat sheet.

Final MVP Demo Milestone Sample Agenda (Weeks 13 and 14)

Recommended length: We recommend scheduling individual 30 minute calls with each

of the tech teams.

| **Time** | **Topic** |
| --- | --- |
| 5 min | Introduction   * Suggested talking points:   + Thank you for joining.   + The purpose of MVP demos is to share the most mature demonstration of your product prior to the showcase event |
| 20 min | Demo   * Tech team shares a demo, discussing the challenge they are solving, target end users, federal data incorporated, and more refined post-sprint product sustainability strategy. * After each team presents, sprint participants offer feedback. |
| 5 min | Next Steps   * Next steps suggested talking points:   + After today, teams should incorporate feedback, continue testing, and continue product development and begin deployment.   + The [agency] team will be in touch with information about the showcase for the products that were developed. |