



Prioritise customer opportunities

Get together with your team and stakeholders and work out which customer opportunities to prioritise and when you should address them.

Onboarding

Getting started



Example

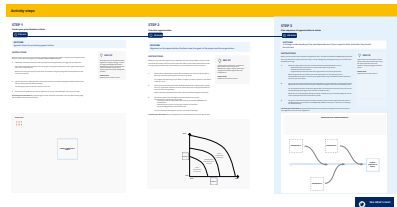


Activity

Set up



Activity steps



Next Steps

Actions & Resources



STEP 1

Create your prioritisation criteria

🕒 2 hours

OUTCOME

Agreed criteria for prioritising opportunities.

INSTRUCTIONS

Before you start, review your project summary, including project goals, key insights, user pain points and opportunities. Add your project objective and goals to the PROJECT GOALS & OBJECTIVES space.

- 1 Individually, brainstorm criteria you could use to prioritise the opportunities, one suggestion per sticky note.

The criteria should always link back to the overall goals of the project and business needs. Typical criteria include: Effort, value, complexity, risk.

When you're done, have everyone present their criteria back to the group along with a brief explanation of why each one is important

- 2 Spend a few minutes reflecting on the criteria presented, then each take two voting dots and place them the two that you think are best suited for prioritising...

Consider giving a Service or Product Owner an extra vote.

- 3 Discuss the most popular and come to an agreement on the two criteria that will be best for prioritisation.

You know you're done when the group has agreed on two criteria for prioritisation, and can explain how they align with the goals of the project and business.



PRO TIP

"Be careful of too-narrow parameters (like alignment to company strategy) - as these can stifle potentially effective solutions. Remember your goal is to achieve the best outcomes with the resources at your disposal, rather than merely iterating what you have."

Hamish Stead
Department of Customer Service

VOTING DOTS



STEP 2

Prioritise opportunities

45 mins

OUTCOME

Alignment on the opportunities that best-meet the goals of the project and the organisation.

INSTRUCTIONS

Before you start, write each opportunity on individual sticky notes (using a different colour for each).

Also add the two chosen criteria to the axes of the chart. Make sure the HIGH / LOW measures make sense (E.g. High investment may not be desirable, so you may swap them around on that axis).

- 1 Review the first opportunity as a group, then individually, take a coloured dot and place it where you think the opportunity sits in relation to the criteria.

For example, the opportunity may be HIGH on "impact on customer experience" but LOW on "value for money".
- 2 When everyone has voted. Discuss and negotiate the placement of opportunity as a group. Once you've got broad consensus, move the related sticky note to the agreed position and move onto the next opportunity.

Repeat until all the opportunities have been voted, discussed and mapped on the board.
- 2 Once all the opportunities are mapped, review the placement as a group. Some questions to ask the team may include:
 - Do we agree with the opportunities that ended up in the MOST IMPORTANT TO ACTION space?
 - Now that they're up there, are they right in relation to each other?
 - Are we still happy with the criteria we selected?Once you've finished discussing the outcome, move onto the next step.

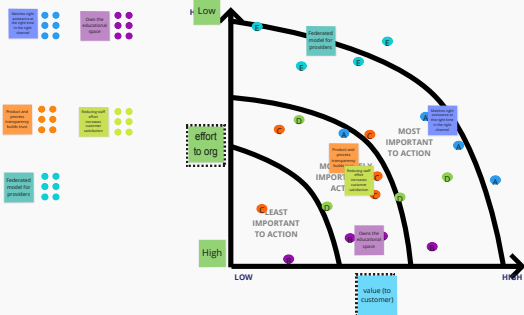
You know your done when there's broad agreement on the final placement of all the opportunities



PRO TIP

"If there is still no clear winner - consider as a group whether there are any natural dependencies, timing or capacity issues which may affect the order the opportunities may be delivered in."

Hamish Stead
Department of Customer Service



STEP 3

Plan a sequence of opportunities to action

60 mins

OUTCOME

A strategic understanding of the interdependencies of your opportunities, and when they should be actioned.

INSTRUCTIONS

Before you start, add the Project objective and goals from Step 1 and paste in the GOALS & OBJECTIVES space below.

Next copy and paste the opportunities from Step 2 into the working area (leaving behind any you've decided aren't worthwhile pursuing).

1. Review the opportunities, then discuss and note down any interdependencies, such as:
 - Opportunities that need outputs or outcomes from others to get started
 - Constraints of time and resource
 - Organisational priorities that make some opportunities more pressing than others

NOTE: All opportunities are related to the same project goals, so if an opportunity has no interdependencies its either not suited to your project OR you've got a predefined solution (that won't improve as you test & learn).

2. Once you've discussed and noted all the interdependencies, you should be able to identify the first three opportunities that will contribute to the project objective and goals, and the order they will be pursued.

You can extend the timeline to add more opportunities, but the further into the future they are, the less certainty that they will be right (so you'll need to review them later).

NOTE: This is not a final program backlog or strategic roadmap, but your work and thinking here can be used to develop those kinds of assets when required.

3. As a group, review the final sequence and discuss how you will ensure the opportunities will inform or overlap each other to best deliver on the OBJECTIVES & GOALS. If they don't - Oh-oh! You're working in the old Waterfall way!

You know you're done when the group feels the final order and placement of opportunities would stand up to interrogation from the rest of the organisation.

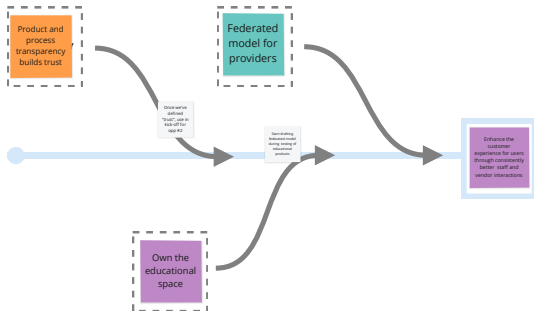


PRO TIP

"Opportunities may not always be ordered exactly as they were prioritised. The point of this exercise is the discussions and evaluations the group engages with via the process."

Hamish Stead
Department of Customer Service

OPPORTUNITIES & INTERDEPENDENCIES



STEP 1

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🕒 2 hours

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Department of Customer Service

VOTING DOTS



PROJECT OBJECTIVE &
GOALS

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45 mins

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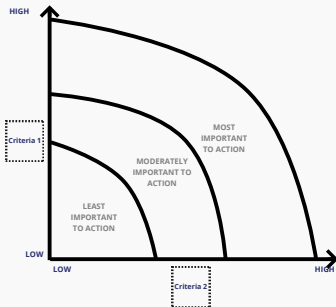
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