



Product Discovery

A Practical Guide for
Product Teams



Table of Content

01	0. Introduction
02	1. Fundamentals to Get Started
04	What Is Product Discovery and Why Is It so important?
05	How does Product Discovery relate to Scrum and Product Delivery?
07	Adjacent Product Discovery Processes
11	2. How to Arrange Team Participation and Structure Product Discovery Phases
12	What are the Best Ways to Prioritize Product Discovery Opportunities?
14	How to Make Your Product Discovery Process Work for You
16	Who Should Be Involved in Product Discovery?
18	What are the Important Aspects of Product Discovery?
24	3. Using Product Discovery Techniques and Frameworks to Gain a Better Understanding of the Problem and Solution Space
26	Idea Validation
29	Impact Mapping
30	Actor Mapping
31	4. Applying Product Discovery best practices as a cross-functional Product Team
36	5. Takeaway: Develop your own best practices

Introduction

You should be able to prioritize the topics you and your team wish to work on when creating year-ahead roadmaps. Those subjects usually stem from previous epics you've worked on, your Product Strategy, customer input, or your team's Objectives and Key Results (OKRs).

From a high-level viewpoint, it's fairly evident what to focus on by then. However, as a Product Manager, you could be wondering what the next challenge is. And how can you make the most difference? This is when a well-planned and intelligent product discovery approach takes center stage.

The purpose of this guide is to demonstrate how broad Product Discovery can be, as well as how to set up and run your own Product Discovery process. Focusing on a set of tactics and habits you want to internalize and that work for your unique setting is the most effective way to begin implementing your own process.

This tutorial should not be used as a step-by-step guide for every Discovery. Take that as motivation to organize your thoughts and choose what works best for you.

1

Fundamentals to Get Started

Fundamentals to Get Started

In this chapter, we'll present the basic notion of Product Discovery, answer some basic questions, and show how it relates to some of the processes that surround it.

The following are the main points you should remember from this chapter:



Know what Product Discovery is all about



How does Product Discovery relate to Scrum?



Focusing your Discovery efforts on what really counts

What Is Product Discovery and Why Is It So Important?

Product Discovery is, at its heart, a set of non-linear actions carried out as a cross-functional team to reduce uncertainty in relation to challenges worth fixing and solutions worth constructing based on data.

Product discovery is a (flexible) phase during which you and your team concentrate on developing the right thing rather than the correct thing (which would be Product Delivery). As we'll see later, product discovery may take many different shapes and frameworks.

Product Teams usually work on either the problem space or the solution space. They're either still attempting to figure out if their users, clients, or stakeholders have an issue, or they're focused on putting a solution in place.

While working in both environments is required to please users and assist the company, teams frequently make mistakes in their time and attention allocation. Product discovery is, or should be, primarily concerned with the problem space.

So, while it might be tempting to jump straight into discussing and designing shiny solution ideas, it's important to stay disciplined about what to work on.

Outlining and aligning on the problem space is a crucial activity, which you should rarely skip

How does Product Discovery relate to Scrum and Product Delivery?

As a product team, you're always in some form of Product Discovery phase. This is because, if your company is genuinely customer-centric, you want to expose as many team members as possible to user input on a regular basis. This will eventually lead to fresh insights into the demands of users.

Most product managers are confronted with a situation known as Dual-Track Agile. This implies that you must apply Agile concepts to your product's discovery and delivery track at the same time, such as cross-functional cooperation between Product, Design, and Engineering, user-centered thinking, and incremental improvements.

The tasks of Delivery and Discovery (ought to) intersect and interact. Both of these efforts are ongoing.

The outcomes of both activity tracks substantially impact one another and, to some extent, occur in parallel all of the time. However, it's critical to recognize that the Product Manager, UX Designer, and Development Team must devote varying amounts of time to each activity. While a Product Team should start working on a new Product Discovery objective as a group, certain team members will be more involved than others.

TIP FOR PRACTICE

Make Discovery Part of your Team, instead of setting up a Discovery team



Product Discovery and Product Delivery
should be owned by the same team to
increase the intrinsic motivation to execute
and reduce knowledge silos

It's fine to concentrate on Delivery or Discovery for a short period of time. However, ensure that a Product Team has the capabilities and autonomy to work on both areas independently.

Of course, there may be times when unique projects need you to go into a more explicit Product Discovery mode, and it makes sense to divert your (and your team's) attention away from delivery for a while.

However, the fact is that you're probably working in a mix of Discovery and Delivery modes for the most of the time, with the scale tilting more in one side or the other.

The more unsure you are about the solution your business goals require, the more time and effort you should put into Product Discovery. But, in general, it is recommended to shift your mentality away from seeing Product Discovery as a single, well-defined goal. Product Discovery, on the other hand, is a set of activities that help you explore the problem space. In addition, this combination must be adaptive and non-linear. It must become a habit for product teams.

Adjacent Product Discovery Processes

Your capacity to focus on outcomes through Discovery isn't just determined by your ability to converse with users or conduct studies.

While one of them is Product Discovery, it also necessitates an outcome-oriented approach to Product Strategy, Product Goals, and Product Roadmaps.

It's critical for you to understand as a Product Manager what you have the authority to alter and where you should demand clarity. That area of duty includes product discovery, strategy, goals, and roadmaps. Your Discovery efforts aren't likely to be sluggish due to a lack of interviewing skills or insufficient validation. Rather, make sure that these three nearby processes are also supporting your efforts

Obviously, there are many other ways to approach each of these three areas, with various degrees of success in supporting your Product Discovery efforts.

How Product Discovery Relates to Product Strategy

The term "product strategy" refers to how you intend to compete and succeed in the market you've selected.

Without getting into too much depth regarding Product Strategy, we lay out the fundamental questions that should underpin any (good) Product Strategy:

- 1 What is the one overarching problem that your product addresses?
- 2 Which alternatives (direct and indirect rivals) could your users utilize to address that problem?
- 3 What are your product's most important value propositions?
- 4 What distinguishes your product from direct and indirect competitors?

It's common for teams to lack a starting point for Product Discovery owing to a lack of strategic context. The goal isn't to build a McKinsey-level business plan, but to have something to refer to while you travel through the issue space of a discovery mission and have to make trade-off decisions.

How Product Discovery Relates to Product Goals

Product goals are frequently confused with strategy. Strategy is how you plan to attain your goals.

Goals make Product Strategy's "winning strategy" more real, allowing you to utilize it to prioritize your day-to-day tasks.

In an ideal world, they would offer a comprehensive view of how success would appear in the form of quantitative measurements.

Product goals are frequently confused with strategy. Neither of these phrases has a standard meaning in the business, and organizations seldom take the effort to ensure that everyone in their organization understands them.

Aligning the Discovery and Delivery cadence with target cycles is one of the most difficult aspects of adopting OKRs in Product Management.

Rather than rushing through Discovery, Delivery, and iterations in the same cycle, product teams should provide the groundwork for future Delivery-oriented OKRs and activities by anticipating Discovery-oriented OKRs in a previous cycle.

This is where product roadmaps come in.

The Product Roadmap is a frequently overlooked and undervalued source of inspiration and advice for forthcoming Discovery objectives.

How Product Discovery Relates to Product Roadmaps

The flexibility and autonomy you have for Product Discovery is significantly influenced by how you handle roadmaps and plan "the job." You're not performing Product Discovery if you have the capacity to understand the problem yet your roadmap says you have to produce the new start page feed by March 31st. Rather, you're just making amendments to an established idea.

Product Roadmaps may be a useful tool for making the objectives and activities you've chosen more concrete.

When planning for the next year, product teams should have high confidence in the current quarter's areas of concentration, but they should also expect that they will learn so much during the current quarter that their plans for the following quarters will alter. As a result, a theme-based roadmap with loosely defined time ranges that deteriorate in granularity as you go farther into the future is more appropriate.

This type of roadmap should be updated on a rolling cycle basis and should correspond to the actions of Strategy and Goal iterations.

2

How to Arrange Team Participation and Structure Product Discovery Phases

How to Arrange Team Participation and Structure Product Discovery Phases

In this chapter, we'll go over some of the most critical phases that product development teams should go through, as well as how to arrange these tasks.

The following are the main points you should remember from this chapter:



Organizing and prioritizing your Product Discovery phase



Who should be included at each step of the product discovery process?



What are the most important aspects of product discovery?

What are the Best Ways to Prioritize Product Discovery Opportunities?

The goal of product discovery is to reduce ambiguity and increase confidence in investing resources in a certain product. That is why it is best to prioritize opportunities based on uncertainty and their impact on your strategic goals.

You may obtain a much clearer image of which opportunities you need to investigate further during Product Discovery by analyzing the uncertainty.

If there are opportunities that have a major impact on your ability to deliver the product strategy goals but are uncertain then they must be categorized under “Needs Discovery”. On the other hand, if there is low uncertainty regarding those opportunities you can move them to “Implementation”.

It's okay if prioritizing opportunities seems difficult. This isn't about generating a 100% correct forecast, but more about having a shared understanding of which ideas to pursue inside your team and organization.

As time goes on, you'll get more knowledge and proof about what works and what doesn't. It's more essential to get started than to do it properly.

How to Make Your Product Discovery Process Work for You

You don't want to start with the day-to-day techniques while preparing and arranging a forthcoming Product Discovery. Instead, gradually zooming in makes sense.

The majority of Product Discovery should be devoted to gaining a better understanding of the issue area. While it may be tempting to get right into brainstorming meetings and explore particular ideas, it's critical to take the time to define the problem you're attempting to address.

Setting a deadline for discovery isn't just for the sake of it, it really helps the team make the best effort possible during that timeline.

Process and structure are not the enemies of Product Discovery. As long as they are seen as options to choose from, depending on the context and phase of Discovery.

Six weeks has shown to be an excellent beginning point. Why is it taking six weeks?

- It makes no attempt to forecast how "everything" will turn out (limited risk investment)
- It's easy to consider it as a jumping-off place rather than a definitive timetable. It gives you adequate leeway to make course corrections and redirect actions before and after
- It strikes the perfect balance between predictability and acceptance of unpredictability

It's crucial not to lose sight of the timeframe you've committed to when you have the time to divide a discovery into several segments. Even if your project is more experimental in nature, you should not proceed without first determining how much time should be spent on each step.

Feel free to use your best approximation as your initial timing estimate. Instead of seeing milestones as limits, think of them as constraints that will provide you with the most useful information as a Product Manager as you work toward real deliverables. It's also a smart way to define the project's scope for the folks you work with.

Who Should Be Involved in Product Discovery?

While it may be tempting to keep your team's developers busy with releasing code, more and more companies are involving the entire team in the Product Discovery process from the start. That is the essence of real cross-functional teamwork.

At the same time, there is no need for a fixed assignment of who should engage in Product Discovery. After all, rather than a one-size-fits-all definition, who should be a constant partner of Product Discovery activities should be depending on the requirements and circumstances of your problem.

On the other hand, people who will be permanently involved in the Product Discovery, those who will participate momentarily, and those who are general supporters of the process are all vital to be aware of.

Permanent	• Product Management • UX Designers • User Research • Engineering Leads
Temporary	• Development Team • Marketing Managers • Sales Reps • Head of Support
Support	• VP and C-Level • Infrastructure Teams • Other Product Teams

The level of involvement of each of these groups is ultimately determined by your discovery setup. Due to a high degree of reliance, including other product teams during the Alignment phase may be important. And whether or not Sales Reps are a beneficial participant in an ideation session is dependent on how you usually include this department.

Also, bear in mind that your definition of Product Discovery collaborators will and should vary as your Discovery progresses. This is not a hard-and-fast classification, and it should allow for context-dependent changes.

There are two main benefits to involving team members across domains (even thinking beyond the ‘typical’ trio of Product, Engineering, and UX) during Product Discovery:

- 1 The group may come up with ideas and make choices at their own pace. The product team can benefit from sharing their research or validation efforts by minimizing their reliance on central departments. However, it ultimately owns the process and feels powerful and responsible for the outcomes.
- 2 The comprehensive viewpoint from multiple disciplines of knowledge helps to preserve a balance during interviews or ideation sessions, avoiding confirmation bias. These three primary areas of knowledge each bring their own interpretations and points of view to the table. As a consequence, Product Discovery initiatives remain a true team effort, and findings are shared in a way that benefits the whole team.

What are the Important Aspects of Product Discovery?

Creating Alignment in order to Allow for Team Autonomy

In the early stages of Discovery, balancing alignment to explore the problem and solution space autonomously as a product team is an often overlooked, but critical task to master.

A lack of understanding of WHY you should care about this Discovery scope might lead to problems like solutioning or confirmation bias later on. Even if you understand the significance of alignment, not all alignment is equal.

Almost every Product Manager is familiar with this scenario: certain of your stakeholders always have specific features in mind that they want you to include in your product (ie. solutions and not problems).

Unfortunately, this misunderstanding stems from a lack of confidence among your stakeholders, who are skeptical that the content your team produces will meet their expectations. Focusing on alignment early in Product Discovery and committing to a certain goal rather than features is the best method to overcome this problem.

It takes more than sending an email to bring people together. It also doesn't imply you have to get everyone on the same page. Commitment is the most important aspect of alignment. Getting commitment from your stakeholders is far simpler than getting everyone to agree.

The Mission Briefing, which we'll describe later, is an efficient technique to develop this type of collective alignment.

Identifying the Most Serious User Problems

While there is almost always a business necessity to justify discovery activities, the success of your product ultimately hinges on its ability to identify and address your target audience's most pressing concerns.

When most teams think about research, they instantly think of conducting interviews or sending out a survey. While this isn't necessarily incorrect, there are preferable methods to follow for a more concentrated exploration of the problem space:

- 1 Before choosing and performing a strategy, clearly define your research intent questions based on the most significant areas of ambiguity.
- 2 Make careful to gather information from a variety of perspectives in order to uncover the truth that resides at the junction of what people say and what they do.

Also, keep in mind that you don't necessarily have to start new research projects immediately. It could be a good idea to transform current sources of continual feedback into physical evidence storage. Tools like EnjoyHQ or Airfocus are an easy approach to record and arrange continuous feedback.

Identifying what your consumers want and need is crucial whether you're searching for a means to improve an existing product that is currently in use or you're going to construct something that tries to satisfy an unmet need.

What are the Important Aspects of Product Discovery?

Developing Solutions That Foster Behavior Change in a Collaborative Manner

The finest ideation activities are designed to push people out of their comfort zones and encourage them to be innovative. Reality will eventually catch up, but let's aim for the stars at this point of the Product Discovery process.

Of course, with so many ideas generated over so many enjoyable sessions, how do you decide which ones to prioritize? Because the main objective of contemporary Product Discovery is to incorporate temporary and supportive Discovery collaborators rather than staying within the bubble of your product team, it shouldn't be the CEO going into the meeting and pointing to the idea she or he loves the most. Attempt to make the process more democratic.

On the highest level, you must first organize the ideas generated throughout the brainstorming sessions. Dot voting is a quick and easy way to reduce a large number of ideas to just ten.

If you have a wonderful idea, you should put it into action right away, either by studying it more or by putting it into action right away

.

Great ideas will resurface in subsequent versions, ultimately making their way into the most important buckets. Don't be concerned about rescuing them; instead, concentrate on going forward with the ones you've chosen.

Prototyping

While prototype tools are the "shiny things" of Product Discovery, remember that you are not obligated to utilize them. Instead, concentrate on the difficulty of recreating an experience in order to test the concepts you've come up with. Keep in mind that you're prototyping an experience, which isn't necessarily defined by a user interface.

Consider how to put the concept of a personality evaluation test to the test. By linking numerous tools and manually creating a thin version of the product in the background, you may prototype the experience.

You might make a simple landing page for folks to begin the "personality test." You may then direct them to a survey tool like typeform. Through a Zapier connection, the results of the survey might be delivered into whichever tool you'd like to utilize. Given that you are unlikely to present your prototype to tens of thousands of people, why not generate the final "evaluation" using pre-defined text blocks that correspond to the survey responses? Combine it with MailChimp, a free but professional-looking email tool, and your prototype is ready to test.

With all of the flexibility and power of today's No Code technologies, it's easy to get carried away and develop your entire concept instead of adhering to the experiment scope that's needed to verify the assumptions.

Prototyping should always be used to test theories quickly. Don't get sucked into style guidelines or animations. Concentrate on encouraging the (re-)actions you want to see from people who have come into contact with your product.

Testing All Critical Assumptions

Validation, like Research, isn't simply about checking boxes like showing consumers a design prototype or bragging about how many A/B tests are running in production. Validation, on the other hand, is about gathering the greatest information available in order to further commit to or eliminate a specific solution based on actionable facts.

When it comes to choosing the actual experiment methodologies to apply for evaluating the most crucial, yet unproven assumptions underlying some of your concepts, take a holistic approach.

However, before choosing an experiment approach, develop a list of the explicit assumptions that must be true about a notion. Too many teams immediately rush into the one technique they normally utilize.

This distinction can be useful in the following situations:

An assumption is something that is assumed to be true or certain to occur without proof.

An experiment, on the other hand, is a scientific technique that is carried out in order to test a hypothesis.

We'll go through several approaches later in this book to help you arrange your validation efforts so that you may choose tests that actually help you establish data-based confidence in a hypothesis.

Refining validated ideas for focused Delivery

Experiments to (in-) validate the assumptions underpinning a collection of concepts aren't the end of the discovery process. Refinement of product discovery is critical for converting goals into reality.

Assume you've come up with a set of verified assumptions and concepts that are ready for a first iteration or MVP for a genuine product. The task isn't done yet. This stage of your Product Discovery process is critical for achieving your goals: It's time to be ready and start putting your ideas into action.

Another issue in the "ultimate" phase of Product Discovery is slicing a notion into a prioritized list of backlog items and considering possible releases. Although the ultimate vision for your product or feature concept will guide you along the road, it should not prohibit you from releasing early iterations in order to learn from your consumers. The days of developing and launching a complicated notion in one go are gone.

All too frequently, our first releases or MVPs are merely shabby copies of all the features that were originally planned in order to meet an arbitrary deadline. Instead, create a limited-scope MVP that highlights the most important features while not sacrificing quality.

Because the scope of user stories should not only be specified from a user viewpoint, but also by the required technical implementation processes, slicing user stories should be a joint endeavor between UX and engineering team members.

After all, the refining phase should be focused on the very next increments you and your team should offer. Instead of personal judgments on favored feature ideas, utilize the most pressing user problems as your priority guidelines.

3

Using Product Discovery Techniques and Frameworks to Gain a Better Understanding of the Problem and Solution Space

Using Product Discovery Techniques and Frameworks to Gain a Better Understanding of the Problem and Solution Space

Teams must be mindful of when to employ which framework on purpose. In this chapter, I'll present approaches that may be used throughout the Product Discovery process to help teams execute with confidence and clarity.

The following are the main points you should remember from this chapter:



Using tried-and-true approaches and frameworks to organize problem and solution spaces



Creating a link between user insights and actionable information

Idea Validation

As previously stated, the precise planning and setup of experiments need its own organization and location.

And, much as with research methods, jumping right to the best validation approach your CPO has heard of isn't a good idea. Instead, you should make a case for why a certain method is appropriate for the problems you're dealing with.

This is not only beneficial for having a clear argument when discussing our resources, but it also ensures high-quality discussions with other domain experts in your firm about which experiment to choose.

We'll need five crucial items to develop a more complete perspective of our experiment design in order to do so:

- 1 A high-level summary of the created idea.
- 2 Objectified decision-making criteria, such as an ICE score, that we might use to convey the priority of an idea and our evolving confidence in it.
- 3 Making a list of and ranking assumptions about an idea. In other words, we define the behaviors or outcomes the idea must achieve in order to succeed.
- 4 Connecting this idea to the change in behavior we wish to see.
- 5 The experiment we choose confirms our assumptions, as well as any outcomes and conclusions in the form of the next steps, in relation to the user outcome we want to achieve.

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Impact Mapping

One of the most powerful approaches for helping Product Teams make sense of all the facts gathered and subsequently make trade-off decisions is Impact Mapping.

Product teams may use Impact Mapping to relate Features and Activities to overall business goals by leveraging user behaviors.

Impact Mapping has three primary advantages for teams:

- 1 Making data-informed decisions by putting strategy advice, research findings, ideation outputs, and experiment outcomes into perspective.
- 2 Working at a level-by-level approach so that teams (and executives) may avoid leaping from high-level corporate consequences (such as increased revenue or user engagement) to seeking solutions.
- 3 Facilitating tactical decisions without losing sight of the larger picture of how each answer contributes to the achievement of greater goals.

The beauty of Impact Mapping is that its levels aren't merely abstract depictions of hypothetical processes. Instead, the majority of the work done by product teams during Product Discovery is documented on an Impact Map.

Because it wonderfully condenses information and relates actions (or lack thereof) to high-level corporate goals, an Impact Map may also be a highly useful input to the OKR definition of product teams.

Actor Mapping

We hear about feature quests, and we learn about difficulties and underlying reasons as a result of our work. But, while all of these are useful insights, we still need to perform some further effort to make them actionable.

This is the process of putting the insights into words. And that's how we end up describing the behavioral changes we want to see in the form of Outcomes. Outcomes serve as quantitative proxies for determining whether we have solved an actual user problem while also contributing to overall corporate goals.

Perhaps you are aware of the specific reasons and issues that an Actor faces in a certain setting. But what about the Actor's other issues that prevent him from obtaining the same level of motivation?

Or are there whole new motives that you missed the first time you tried to delve further into their experiences in a certain context?

Maybe there's another context that wasn't discovered, but it's much more important for reaching your overall Impact through this specific Actor.

Plus, one of the other relevant Actors in your Impact Map might have a whole different set of insights and interpretations.

Though you may not always find such diversity and one-to-many linkages among the many insights you collect, this method of mapping what you already know can help you reveal what you don't know—and, as a result, figure out how to improve it using the most effective method.

4

Applying Product Discovery best practices as a cross-functional Product Team

Applying Product Discovery best practices as a cross-functional Product Team

Product Discovery must benefit your team, your organization, and the sector in which you operate. As a result, this chapter concludes with an emphasis on individual beginning places and a critique of our erroneous "best practices."

The following are the main points you should remember from this chapter:



Why the frequency of interviews and experiments don't reveal much about your team's real development



How to take the initial steps toward a Discovery strategy that is right for you

There is no need to solve every user problem that exists

There are a few techniques that have been repeated so many times that product teams have adopted them without question.

There's nothing wrong with users interacting with one other indefinitely (in whatever form). However, imposing a certain cadence on your product team might have a lot of unforeseen implications.

The notion of speaking with one user once a week is a wonderful snappy motivator for firms that want or need to adjust their entire mentality toward more customer-centricity rather than self-conviction choices. However, you may want to reconsider in light of the actual realities of working through the Product Discovery issue area.

When you're only exposed to one user's difficulties every week, it's easy to leap to conclusions about what you've just heard. However, just because a user issue exists does not imply you must address it. If you're (too) focused on getting that customer interview every week, you'll probably stop talking to the proper people. What exactly do we mean?

You should concentrate your research efforts on user categories that are important to your overall strategic objectives. While every user problem has potential, the important question is whether it's the correct one for you to concentrate on right now.

There is no need to speak to customers on a weekly basis

You have to commit and move forward with a solution at some point, and most likely, talking to people isn't the best way to develop confidence. Instead, you should employ quantitative methods.

Moreover, depending on your stakeholder and team climate, continual qualitative insights from weekly user interviews may or may not be useful. Instead, it might lead to you rethinking your decisions over and over again simply because you discovered something new that the most recent iteration of your solution didn't examine.

Again, this isn't about the recommendation to seek out opportunities to contact your consumers on a regular basis. However, mindlessly following a cadence won't ensure "success" in Product Discovery, and it won't always provide you with the information you need to move forward.

Insight-driven Testing

"What does more effective Product Discovery look like in your organization?"

The answer to that question helps better understand where a company stands on really separating the problem from the solution, and if the WHY behind Product Discovery was based on short-term financial gains or a long-term commitment to a fundamentally different way of working.

"The teams do more experiments," is a common response to that query. That, in and of itself, does not appear to be a terrible thing. However, when you look at the negative aspects of that statement, it becomes clear that this is the same type of action, packaged differently.

When teams want to embrace Product Discovery, it's usually because they're weary of being stuck in the hamster wheel of producing additional features (that no one wants and that don't help them achieve their business goals). However, the number of front-and-center experiments just replaces user stories with <insert experiment technique here>.

The number of run experiments indicates that a team is engaged in activities other than "building." However, it doesn't tell you anything about whether the team chose the right experiment approaches for the task, executes them to a high enough standard to yield useful insights, or even whether they're (in-)validating assumptions surrounding the most promising notion.

Takeaway

Develop your own best practices

In conclusion; remember that your own contexts and own experiences while conducting product discovery will always inform your teams and organizations better than any other best practice out there.

Learn from mistakes and focus on the user throughout the entire process of product discovery.



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