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## Customer Involvement in the Talis Aspire Development Process

February 2010  
Website Copy

## About this document

This document describes how you can get involved with the Talis Aspire development process. The aims are:

- To describe how Talis will transparently document, describe and communicate information about the development process
- To define how customers can best communicate new ideas and suggestions with both Talis and each other
- To describe how Talis will respond to these suggestions
- To define a working group process, allowing you to work closely with Talis on development themes
- To highlight the tools that can help to keep a watching brief on the development of the product

The methods in this document will apply from February 2010.

## Contacting the Talis Aspire team

Talis Education: <http://www.talis.com/aspire>

Email: [aspire@talis.com](mailto:aspire@talis.com)

Tel: +44 (0)870 400 5400

## General enquiries

Tel: +44 (0)870 400 5000

Fax: +44 (0)870 400 5001

Email: [info@talis.com](mailto:info@talis.com)

Internet: <http://www.talis.com/>

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## Why involve customers in the development process?

The philosophy of involving customers directly in the development process is to make sure that the outputs of the development team remain aligned with the expectations and business processes of the customer. Regular involvement and feedback from customers can quickly highlight any issues, so the development team can affect changes or improvements.

Talis Aspire has been developed using an Agile process, using feedback gathered from working closely with the early customers who have implemented the product. Customer involvement has involved a combination of site visits, user interviews and design sessions. The team has released small increments of functionality as regularly as possible, typically every Thursday. In 2009, the Talis Aspire team made 34 automated releases to product, all of which were made available to customers with zero maintenance downtime.

By breaking the annual or bi-annual release programme of more traditional software development programmes, and in combination with the Software as a Service (SaaS) automated release approach, features are released to users in small increments almost immediately after they have finished development and testing. This means customers can track and evaluate the outputs of a functional area as it evolves, rather than waiting for a point-release or major version before they can experience new features for themselves. This means they can immediately feedback, and influence the cycle much quicker than with traditional software products.

## User goals, tasks & features

It is important to make the distinction between **user goals**, **tasks** and **functionality or features**.

Understanding user goals is about exploring the desires, needs and motivations of the target end user. A user performs tasks simply to satisfy their goals, and software product features are merely the tools that are used to get the job done.

**An example user goal:** An academic wants to share learning resources with her students

**An example task:** The academic creates an online reading list

**Features and functionality:** Bookmarking resources, drag and drop list creation

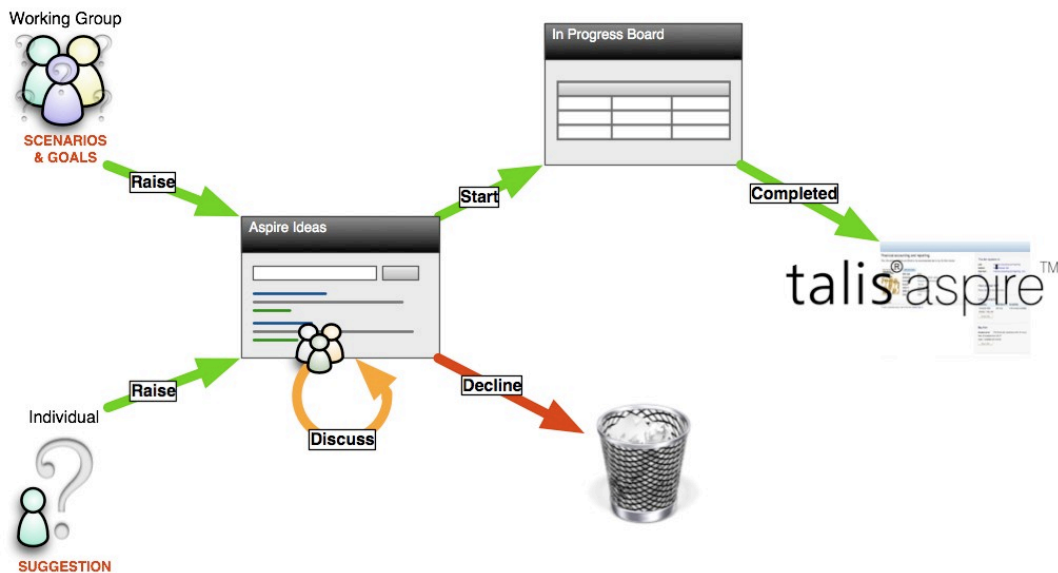
Sounds simple – but often in software design, people focus on the tasks and features first, forgetting to consider the user's true desires, needs and motivations.

It is essential that we first ensure we uncover and understand user goals. This might start from a specific feature request – but the aim is to understand the root user motivation behind the request before we select and suggest the optimal solution. Often what ends up in the product is quite different from what was originally asked for, but crucially it is more fit for purpose.

## Talis Aspire customer involvement process

Talis Aspire has adopted the following processes to inform customers and allow them to get involved with the development of the product:

- Talis will publish a high level product roadmap covering a rolling 12 month period. This will show the approximate timings of planned focused development and research themes. We will invite customers to participate on the design of selected themes via a new customer working group process. The roadmap will be available at <http://www.talis.com/aspire/documents/roadmap.pdf> and will be updated every three months.
- The roadmap will contain a perpetual theme, labelled **continuous improvement**. This allows the team to respond to smaller and more bounded changes to the product as they become necessary. Customers should expect that 33% of the development team's time will be allocated to this theme.
- Customers will have two ways of influencing the development of the product:
  - By opting into a customer working group.
  - By raising individual suggestions for continual product improvement.
- Both routes will be managed online via the Aspire Ideas community platform at <http://www.aspireideas.talis.com>. Via Aspire Ideas, Talis will actively work in partnership with customers to establish the root user goals and/or business scenarios behind any proposed ideas. All comments and discussions will be available for all community members to review and reply to.



Customer ideas from raise to delivery in product

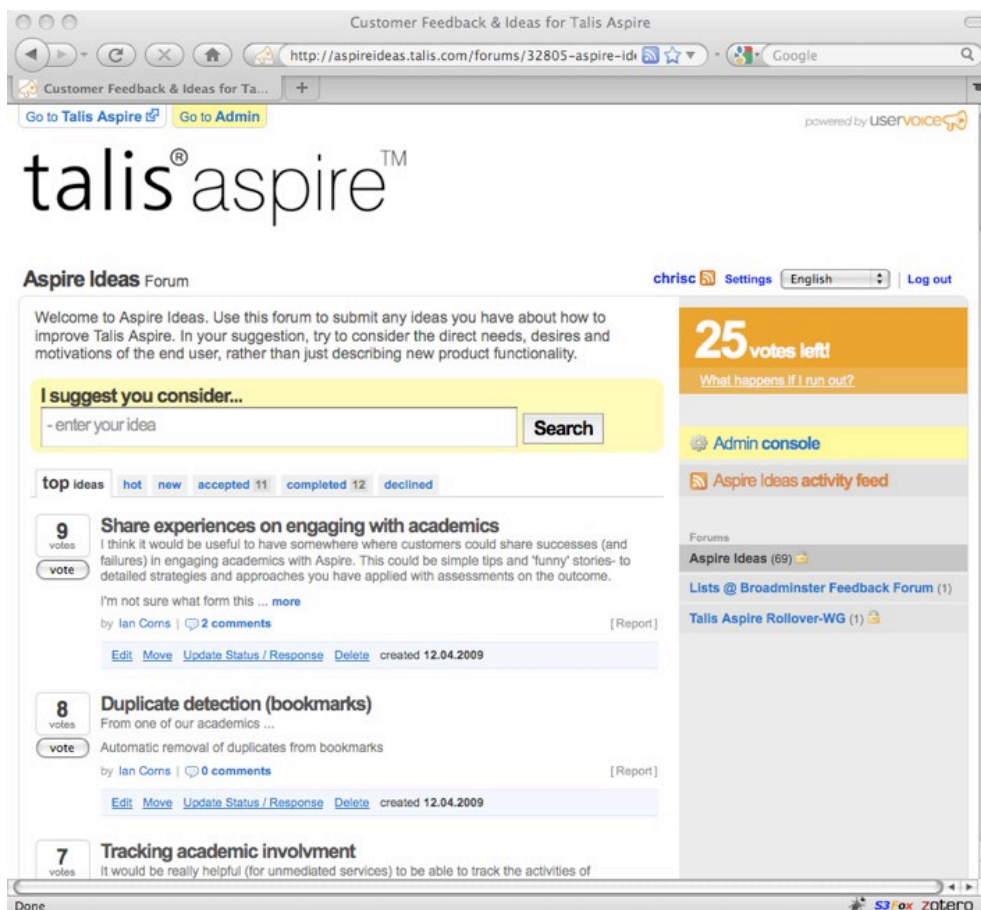
- Customer Working Groups work in-depth on ideas focused around a single theme at a time. As well as actively participating in the working group's forum on Aspire Ideas, members will be asked to attend face to face design sessions with the Talis team at

least once during the lifecycle of the working group. At these sessions customers will be involved in the process of turning ideas into prototype task flows and features.

- To allow customers to track in more detail, Talis will publish a work in progress board at <http://www.talis.com/aspire/inprogress>, where customers will be able to chart the progress of items that are currently being coded and tested by the development team. This will include average wait time statistics, giving an indication on when items are likely to arrive in the product. This will be updated every week.

## Aspire Ideas in detail

Aspire Ideas (<http://www.aspireideas.talis.com>) is an online community through which all ideas raised by customers will be managed. Users can search existing or raise new ideas, make comments, vote on ideas that are most important to them and track the status of ideas.



Aspire Ideas main forum

Suggestions for improvements or new features that are made outside of the working group process are made in the main forum (shown above).

Scenarios and goals generated by working groups focussed on specific development themes will be made in a separate forum, accessible only to those customers participating in the working group.

From time to time, Talis may move suggestions made in the general forum into a working group forum, if they are relevant to the theme the group is working on.

To allow customers to track where an idea is in the development process, Talis will update the status on every idea regularly. The statuses will be:

- **Under review:** The idea is under consideration, and how to satisfy the idea is still being discussed and considered
- **Planned:** The idea is accepted and Talis are committed to incorporating the idea in the product
- **Started:** The idea has been picked up by the team and is currently being implemented. Customers can track the progress of the idea in detail via the In Progress board.
- **Completed:** The idea has been delivered to product
- **Declined:** Talis will not incorporate the idea in the product
- **Duplicate:** The idea has already been raised and is under consideration, is already incorporated into the product, or has been declined in the past

To allow Talis to really understand the priorities of the customer group, customers can allocate 1, 2 or 3 votes to ideas that are important to them. Customers can add or retract votes at any time, as they see fit. Talis will limit the overall number of votes a customer can place per forum at any one time, however votes are returned to customers as ideas are implemented into the product.

## Customer working groups in detail

The aim of the working groups model is to work much more closely and productively with customers on the design phase of selected development themes, and for this process to scale well as the overall customer group grows in size.

By making the working groups “opt-in”, customers self-select the topics they are interested in influencing. By opting in, customers are expected to take an active part in the process.

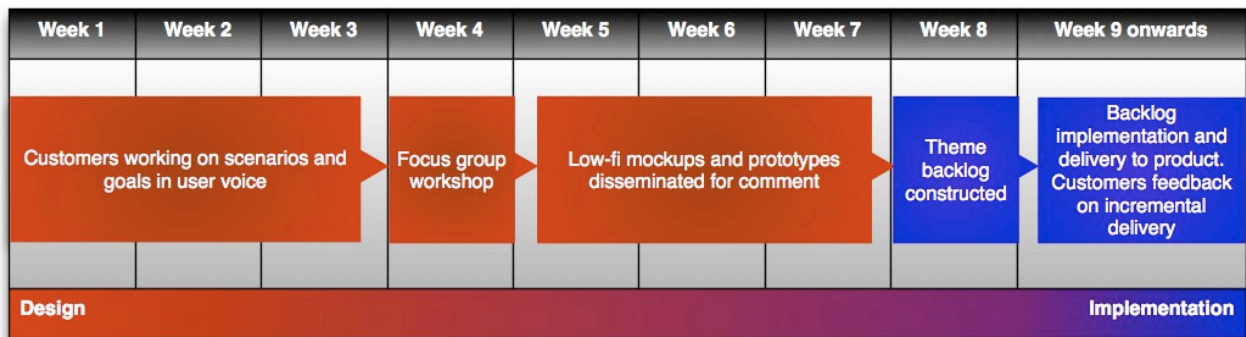
Customers interact with the working group via a nominated representative, who will manage the communications, voting and participate in the design process. Customers can nominate representatives by contacting us at [aspire@talis.com](mailto:aspire@talis.com) before the start of a development theme.

The steps in the process are as follows:

1. Talis will advertise to the customer base that a customer working group is about to be formed. Customers opt-in and nominate a representative to work within the group.
2. Talis will establish a new ideas forum in Aspire Ideas for the user group to work in. This will usually be pre-populated with sample scenarios and goals which customers can add to, or they are free to create their own.
3. Customers will be invited into the forum to add, share and comment on user goals and business problems or scenarios they would like to see the system solving following the completion of the theme.
4. Towards the end of the process, customers who have contributed to the discussion of existing ideas or added new ideas will be asked to vote on the scenarios and goals most important to them. This will help set the scope for the theme.

5. After voting, Talis will organise at least one workshop where the working group will meet face to face and work with the development team to turn the user goals into prototype task flows and mockups.
6. Talis will work on a process of refining, and if necessary, producing working prototypes for further user testing. Talis will continue to communicate and accept feedback from customers using Aspire Ideas during this period.
7. Finally, Talis will create a theme backlog of implementation stories and start on implementation. Incremental delivery and weekly releases to product allow customers to feedback on delivered functionality as the backlog is worked through. Customers can track progress using the in progress board at <http://www.talis.com/aspire/inprogress>.

Below is an example of how the process might play out over time:

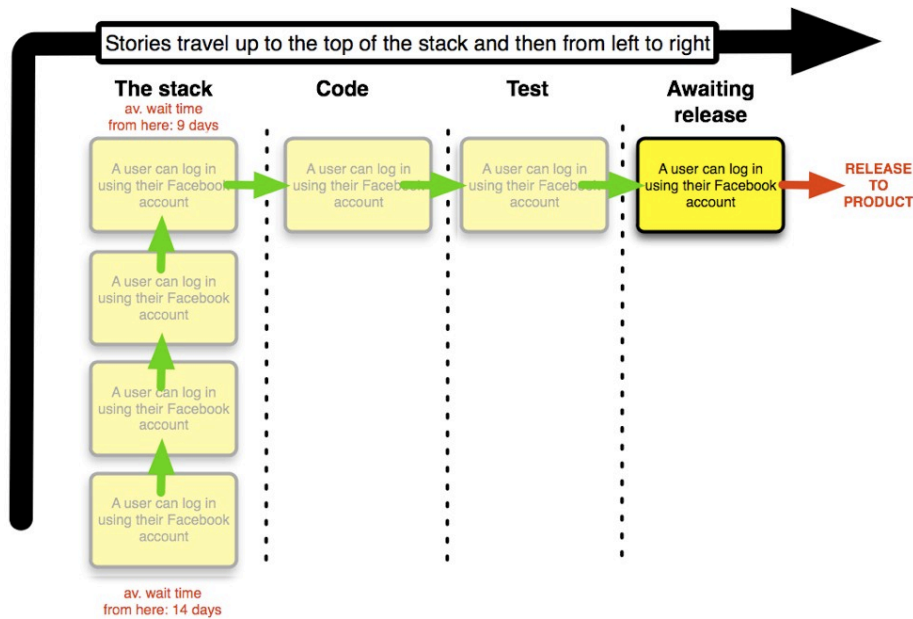


A typical Customer Working Group timeline

## In Progress Board in detail

Customers can monitor the progress of features by reviewing the in progress board at <http://www.talis.com/aspire/inprogress>. This will be updated weekly.

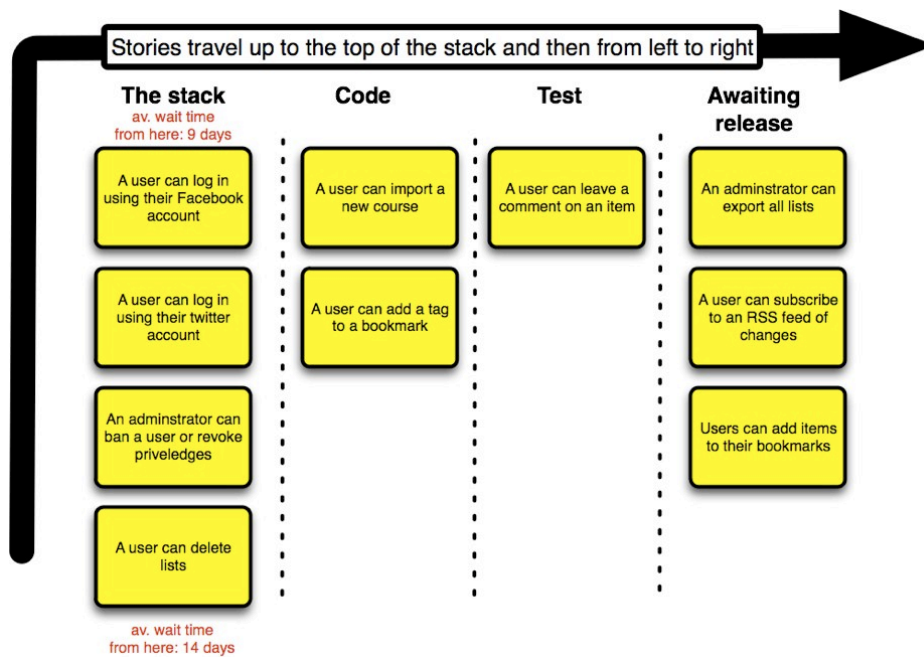
Stories (or cards) on the left hand side sit in the stack waiting to be picked up by developers. The developer always picks up the next card at the top of the stack. As they are picked up and progressed through development, they travel to the left hand side of the board to the right. They eventually leave the board completely once they are released and available for use by customers.



A story's passage through the in progress board

By monitoring the average time it takes for stories to travel through the board, Talis can predict the average time customers will have to wait to use the feature from the point a card enters the board (i.e. the bottom of the stack) to when it leaves (i.e. live). Predicted wait times will be shown on the top and bottom on the "Current Stack" column on the left hand side.

A snapshot of the board will be posted onto the Aspire microsite weekly, with a short description of that week's progress and any changes in priorities. Using the wait time calculation, and visual progress of items through the board, customers will be able to predict the likely live date of any stories they are watching, and releases should contain no surprises as stories will usually have been visible in development for a number of weeks on the board.



Example of a typical in progress board

## When to use Talis Support

Aspire Ideas is **not** a replacement or substitute for Talis Support (<http://www.talis.com/support>). Customers should use Talis Support to report defects or problems with service availability, changes to system configuration or high-impact issues (such as problems with implementation projects or data conversion) that require case management by support professionals.

## Guides on time to product

The combination of roadmap, ideas and the work in progress board are designed to give increasingly detailed views of ideas as they flow through the process and become incorporated in the product. The table below gives a guide on average times to product customers should expect for functionality at each stage.

|   | Time to product         | Monitor using..  |
|---|-------------------------|--|
| <b>Themes on roadmap</b>                                      | Between 1 and 12 months | Published roadmap document at <a href="http://www.talis.com/aspire">http://www.talis.com/aspire</a>      |
| <b>Ideas marked as “Planned” on Aspire Ideas</b>              | Between 1 and 3 months  | Aspire Ideas forum at <a href="http://aspireideas.talis.com">http://aspireideas.talis.com</a>            |
| <b>Work in progress (marked as “Started” on Aspire Ideas)</b> | Under 1 month           | In progress board at <a href="http://talis.com/aspire/inprogress">http://talis.com/aspire/inprogress</a> |

## Summary

By providing increasingly detailed mechanisms for customers to track the progress from roadmap, through Aspire Ideas and onto the in progress board, Talis is providing clear and transparent mechanisms for customers to track and predict what will arrive in the product and when.

By providing only one channel, Aspire Ideas, to record and respond to ideas, Talis is clearly defining the route customers can use to communicate product ideas with Talis and each other.

In creating opt-in customer working groups for areas that require more focus, Talis hopes that customers can get actively involved more often and earlier in the design process.

By focusing on user goals and scenarios first, and working collaboratively with customers to develop these into elegant task flows and functionality, Talis hopes to create a more compelling and engaging user experience within Aspire.