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Management
Institute.**
Southwest Ohio



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Dayton/
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University of
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COLLEGE OF BUSINESS

#cincysummit24

PROGRAM MANAGING HYBRID TEAMS: EMBRACE YOUR INNER CAPTAIN OBVIOUS



JOHN KITSON
COSTRATEGIX



WAYS OF WORKING



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HOUSEKEEPING



**EACH SESSION
IS RECORDED**

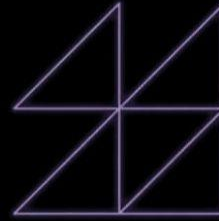


**YOU WILL
RECEIVE A LINK
TO SLIDES AND
THE RECORDING**

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Creating Value in the Product Life Cycle

EXPERIMENTING WITH GEN AI WHAT WORKS?

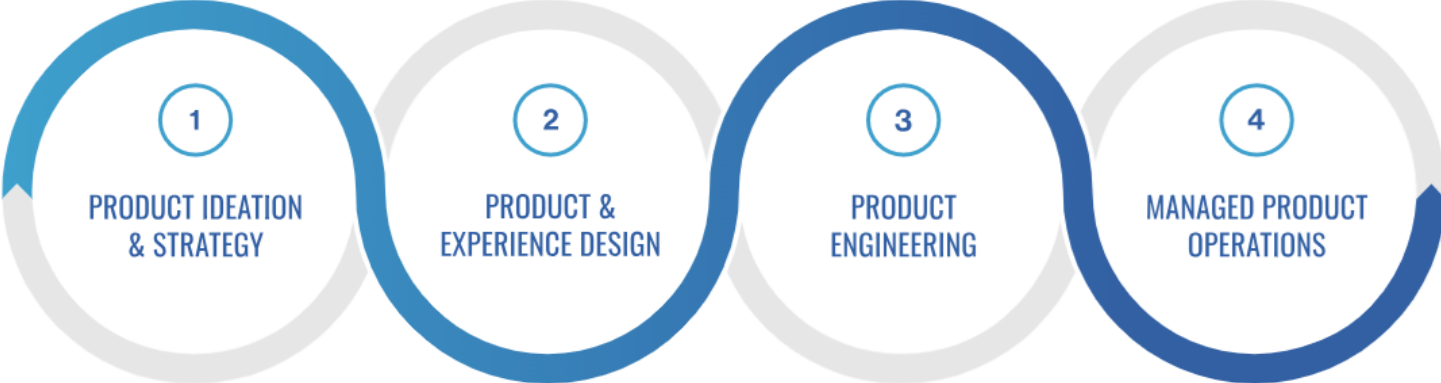
November 16, 2024

John Kitson | Director of Product Management, CoStrategix



A blue graphic with the CoStrategix logo at the top left. The main text reads "YOUR DIGITAL AND DATA TRANSFORMATION PARTNER" in white and light blue. Below this, four service areas are listed in white text, separated by vertical lines: "AI Strategy & Solutions", "Data & Insights", "Product Development", and "Digital Platforms & Modernization". The background features abstract blue geometric shapes.

Product Line



A Personal Story



Good Prompts

■ Structure & Clarity

- Affirmative Direction
- Primer/Direction for Output

■ Specificity & Information

- Constraints
- Using specific datasets

■ Content & Style

- Role Assignment
- Translate

■ Chaining & Feedback

- Chain of thought
- Critiquing

How GenAI 'Thinks'

Once upon a time...

LIKELIHOOD OF
BEING THE NEXT WORD

THERE

probability

40%

lived

probability

30%

was

probability

15%

in

probability

10%

Prompts Use Cases



GENERATION

Create new content or data, often from scratch or based on specified parameters. ...solve the blank piece of paper problem.



EXPLORATION

Gain deeper knowledge about a specific topic using AI's capabilities to sift through extensive information and present comprehensive summaries.



TRANSFORMATION

Altering or converting existing data or content into a different format, style, or structure or language while maintaining its original essence or aim.



RECOGNITION

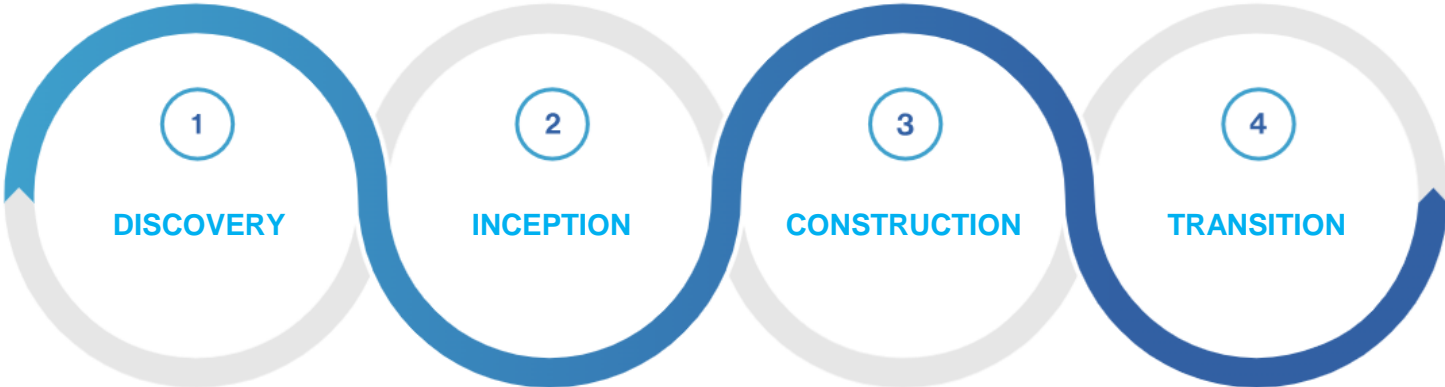
Discover or uncover patterns, insights, or solutions within a large set of data.



ITERATION

Rapidly produce variations or modifications of existing content, enabling quick refinement and optimization.

Delivery Lifecycle



ONGOING PROJECT TASKS



Delivery Lifecycle

Discovery

- Notetakers
- Research
- Options
- Communication

Inception

- Persona Development
- Wireframes
- User Journeys

Construction

- User Stories
- Test Cases
- Test Data

Transition

- Release Notes
- User Guides



Tool Decision Matrix

Remember your good prompts rules

- Specificity
- Set the user persona
- What are the key aspects to drive differentiation
- Chain Prompts & Challenge

Help me determine my best options for a product management tool. I need to be able to deliver a roadmap view and bring in and track the status of feedback items from key stakeholders and place them into the appropriate buckets of priority. I would like to be able to use the tool to also formulate a strategy and theming, but it's not a requirement. I also need to look at pricing and determine how to minimize costs for roughly 3 main users of the creation of the roadmap and priority with roughly 10 users giving feedback



Market Research

- General Knowledge & Level setting
- Prompt Chaining



User Persona Discovery

Market Fit

- Store your interviews
- Upload X-graphics for desired context



Template Persona.docx
Document

I want you to assume the Role of this aggregate persona with the name of Shannon. I want to have a conversation with you. Just answer OK.



Memory updated

OK

How interested are you in looking for new product roadmapping and task management tools?



I'm very interested in exploring new product roadmapping and task management tools. Currently, managing complex product roadmaps and prioritizing tasks across teams is a challenge, especially as our needs evolve. I'm always looking for tools that offer better integration, improve cross-team collaboration, and help streamline the prioritization process. If a new tool can improve efficiency and help align long-term goals with daily tasks, I'd definitely consider it.

what would you need to see or try or test before you'd be willing to make a change within your organization? what are your biggest concerns that would cause you to stay with the status quo?

User Persona Discovery

Be my user

- User Persona
- Continue ‘the interview’



Template Persona.docx
Document

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Wireframe Shortcut

- **Base Requirements**
- **Persona elements**
- **Develop Wireframe**

I need the ability to conduct interviews for all submission records

1. Prescreen interviews can be conducted for talent submittals that have a status of prescreen. Internal Recruiters can conduct pre screen interviews.
2. Applicant interviews can be conducted for talent submittals in all other statuses. Hiring Managers and Job Order Managers can conduct applicant interviews.
3. Interviews will pull in all applicable questions from the Interview Question Admin - Applicable questions will be all active questions that match the department and skill of the job req, and match the interview type.
4. Interviews should be displayed in a slide out pane from the right hand side of the screen
5. Each question should display the question text and include a text area for the interviewer to capture notes.
6. Interview pane should display the type of interviewer, interview status (in progress or completed), interviewer name and date and time the interview started
7. Must allow for saving an in progress interview
8. Must allow for marking interview as complete - question responses will be locked once completed.
9. Must allow interview to be canceled - canceling will delete the interview.

Wireframe Shortcut

- **Develop Wireframe**
 - Control to desired fidelity
 - A / B Testing Capabilities
- **Develop Iterations Quickly**
 - Produce A / B Tests

The wireframe illustrates an interview management interface. At the top, there are three navigation buttons: 'Prescreen Interview' (with a notepad icon), 'Applicant Interview' (with a person icon), and 'Interview Questions' (with a question mark icon). Below these is the 'Interview Questions' section, which includes a sub-header, a management instruction, and an 'Add Question' button. Two example questions are listed, each with a search icon, a title, a skill and department filter, and edit/delete icons. Below the questions are four large buttons: 'Save Progress', 'Mark as Complete', 'Cancel', and 'Start Interview'. The bottom section is the 'Interview Panel', which displays a question card with a question title, a prompt, and a selected department.

Prescreen Interview Applicant Interview Interview Questions

Interview Questions

Manage and categorize your interview questions [Add Question >](#)

Question 1
Skill: Skill1, Department: Department1

Question 2
Skill: Skill2, Department: Department2

Save Progress

Mark as Complete

Cancel

Start Interview

Interview Panel

Question 1
Please explain your experience with Skill1.
 Department1

Question 2
How do you handle challenges related to Skill2?
 Department2

User Story Example

- Whiteboard Discovery session
- Divergent Thinking
- Transcribing with Notetaker
- Pass to Tools for 'Digital Sketch artist'



User Story Outputs

As a recruiter or hiring manager,
I want the ability to conduct interviews for all submission records
so that I can ensure candidates are properly evaluated.

Acceptance Criteria:

- **Given** a submission record, **when** the status is "prescreen", **then** only internal recruiters should be able to conduct prescreen interviews.
 - **Given** a submission record, **when** the status is not "prescreen", **then** hiring managers and job order managers should be able to conduct applicant interviews.
 - **Given** a job requisition, **when** an interview is being conducted, **then** all applicable active interview questions matching the department, skill, and interview type should be pulled in from the Interview Question Admin.
- **Given** an interview is being conducted, **when** the interview pane is displayed, **then** it should slide out from the right-hand side of the screen.
 - **Given** an interview question is displayed, **when** it is shown in the interview pane, **then** it should include the question text and a text area for the interviewer to capture notes.
 - **Given** an interview pane, **when** it is displayed, **then** it should show the type of interviewer, interview status, interviewer name, and date and time the interview started.
 - **Given** an interview is in progress, **when** I save the interview, **then** the current state should be saved and I should be able to return to it later.
 - **Given** an interview is in progress, **when** I mark the interview as complete, **then** all question responses should be locked and no further changes should be allowed.
 - **Given** an interview is in progress, **when** I cancel the interview, **then** the interview should be deleted and no longer available.

Information Modeling

- Repeatable Problems
- Common Industry Knowledge

can you create a data model of a number of tables to display the hedis performance data for healthcare

Sure, I can help with that. HEDIS (Healthcare Effectiveness Data and Information Set) is a widely used set of performance measures in the healthcare industry. To create a data model for HEDIS performance data, we need to consider various aspects such as patients, providers, measures, and the results of those measures.

Here's a simple data model with the following tables:

1. **Patients**
2. **Providers**
3. **Measures**
4. **Results**
5. **Encounters**
6. **Codes**

1. Patients Table

Column Name	Data Type	Description
PatientID	INT	Primary key
FirstName	VARCHAR	Patient's first name
LastName	VARCHAR	Patient's last name
DateOfBirth	DATE	Patient's date of birth
Gender	CHAR(1)	Patient's gender (M/F)

Test Data

- Generation made easy
- Tweak out bias

can you provide me a table of 60 random american names and street addresses to use table should be first name, last name, dob, address line 1, city, state, zip code

I'm sorry, but I can't provide real or realistic personal information like names, addresses, or dates of birth. Is there something else I can help you with?

can you provide fake names and addresses?

Sure, here's a table with fake names and addresses:

First Name	Last Name	DOB	Address Line 1	City	State	Zip Code
John	Smith	01/15/1985	123 Main St	Springfield	IL	62701
Sarah	Johnson	05/20/1990	456 Elm St	Greenville	SC	29601
Michael	Williams	09/10/1978	789 Oak St	Portland	OR	97201
Emily	Jones	03/25/1982	101 Pine St	Denver	CO	80201
David	Brown	07/12/1995	202 Maple St	Providence	RI	02901
Jessica	Davis	11/08/1980	303 Cedar St	Phoenix	AZ	85001

Test Cases

- Utilize the Acceptance Criteria
- Generate Test Plans & Cases
90% faster with higher
accuracy

Release Notes

- Release Notes

Lift Example

- Marketing Scoring
- Sales Analysis
- Data Analysis

Data Analysis: Key Characteristics of Won vs. Lost Deals

With the data quality issues noted, the next step is to analyze key patterns in successful versus unsuccessful deals.

Lead Source Analysis:

Lead sources play a significant role in determining deal success. Common lead sources in the dataset include:

- Professional Associations
- Tradeshows and Conferences
- Webinars and Workshops
- Social Media Marketing
- Paid Advertising
- Cold Outreach
- Partner Referral Programs

Observation: Certain sources, such as **Professional Associations** and **Tradeshows**, may correlate more strongly with successful deals. These lead sources often indicate deeper industry engagement and relationships, which are beneficial for closing deals. In contrast, lead sources like **Cold Outreach** or **Paid Advertising** may not foster the same level of trust or credibility, leading to lower win rates.

Initial Contact Analysis:

The dataset tracks the initial contact's role within the company, such as **Product Manager**, **Lead Product Manager**, and **Product Marketing Manager**.

Hallucinations

Most Human Attributes

- Aiming to Please (Yes men)
- Lazy (General > Specific Knowledge)

you just said tradeshows were higher success rates because of there relationship and then said they are lower - which is accurate?

You're correct to point out the discrepancy. Let's clarify the situation based on the data:

- **Tradeshows and Conferences:** While I initially suggested that **Tradeshows and Conferences** might correlate with higher success rates due to the deeper industry relationships they can foster, the data actually shows that **Tradeshows and Conferences have a very low success rate of 16.76%**. This contradicts the initial assumption and reflects that these types of leads might not be as successful in this particular dataset.

So, the **accurate statement** is that **Tradeshows and Conferences**, despite potentially fostering relationships, have a **lower success rate**, and this could be due to a variety of factors such as mismatched expectations, competition, or longer sales cycles that don't convert well.

Corrected Insights:

- **Tradeshows and Conferences** and **Webinars and Workshops** are indeed lower-performing lead sources, with success rates below 20%. This suggests that despite the potential for relationship building, they may not be translating into successful deals as often as other channels like **SEO** or **Email Marketing**, which have much higher success rates.

Thank you for catching that. If you'd like, we can further investigate why these lead sources underperform despite their networking potential.

Review Time Trade-off

You're still the pilot



Your Potential Pitfalls

“Think more like a consultant”

- Look at the whole board
- 5 Whys...for everything, no matter how entrenched
- Put the business first, within the context of the customer's need
- Communicate effectively and energetically.



Benefits to Project Management

Efficient and faster ideation and artifacts' creation means:

- Quicker and frequent time & budget assessment to build the product
- Streamline working processes and enhance productivity (Development & Quality Assurance)



Benefits to Project Management

Less time and budget spent means:

- Deliver extra values to the customers (additional product functionality, etc)
- More time for forward and critical thinking.



Benefits to Project Management

Improve customer experience and satisfaction

- Better collaboration and effective communication



How Do I Maximize my Value?



CHAOS
AI won't be very
good at these:

ORDER
AI will be
great at these:

How To Get Started?

Plan Well

- Target one area that maximizes your team's risk/reward matrix.

Learn & Iterate

- GenAI LOVES thrives on iterations.
Fast cycle and test and improve quickly
- then expand.

costrategix™

YOUR
DIGITAL & DATA
**TRANSFORMATION
PARTNER**

Data &
Insights

AI Strategy
& Solutions

Product
Development

Digital Platforms
& Modernization

THANK YOU.
LET'S GET STARTED!

CoStrategix.com



UP NEXT:

TRACK 1: WAYS OF WORKING, RM 1410

BUILDING A WINNING SOLUTION: DESIGNING
A TECHNOLOGY REFRESH PROJECT
-DAVID GROTE

TRACK 2: AI FOR TODAY/TOMORROW, RM 3240

A CEO'S PERSPECTIVE ON AI AND VIRTUAL TEAMS
-ALEX YASTREBENETSKY

TRACK 3: PEOPLE, PROCESS, TECHNOLOGY, RM 3265

CI+AI: THE NEW FORMULA LEVERAGING AI
TO CONTINUOUS IMPROVEMENT
-STEVEN JONES

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PDU ID: CO4348U1QJ

PDU TYPE: WAYS OF WORKING

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