

# *Business901* Podcast Transcription

*Implementing Lean Marketing Systems*



## Kalbach on User Design

Guest was Jim Kalbach

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### Transcription of the Podcast

**Joe Dager:** *Welcome everyone! This is Joe Dager the host of the Business901 podcast. With me today is Jim Kalbach. He is a Principal UX Designer with Citrix Online and an active speaker, writer, and an instructor on business design, user experience, and information architecture. He has helped start local UX groups as well as organize conferences in Germany and Europe. Jim is the author of the book "Designing Web Navigation" an O'Reilly Publication. I found Jim through his contribution to the book UX Storytellers and in preparation for the interview I read his blog at [experiencinginformation.com](http://experiencinginformation.com) and got lost in the multiple layers of information I found. Jim I'd like to welcome you and that's some marvelous writing I found in this short journey of learning a little bit about you.*

**Jim Kalbach:** Hi Joe. It's great to be here.

**Joe:** *You've been around this side of the business a long time, but you've made the journey from Information Design to User Experience. What's the difference or we just kind of rebranded that word?*

**Jim:** One that I don't struggle trying to define to be honest with you because, from my standpoint, they complement each other so well that going from one to the other isn't

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really a change. It's an extension or expansion on things. My formal background, that is my education, is in Library and Information Science. When I started, doing web design and product design I was attracted to Information Architecture. But part of that is of course usability and user research. But when you're talking about e-commerce and anything online, the user experience is kind of the dominant term that we're using right now. So it just progressed and made complete sense that I expand my interests and my career towards user experience and more recently into topics around business design and design thinking and those types of things, as well.

**Joe:** *Well I really found it interesting that you have a Master's degree in Music and Composition.*

**Jim:** Yeah, that's what I studied initially. I have a very musical family. Both my parents are musicians, and I've always played instruments and been around music in more than just a passive entertainment kind of way. I was always active in making music and organizing events and concerts and things. I studied music as an undergrad and went on to graduate school to get a degree in Music Theory and Composition, which means that I'm not a really good performer although I have a formal degree in that. I realized there's not much of a career there so I got a second Master's degree in Library Science, which at that time put me in contact with the web and programming – a little bit of HTML. And that was kind of my introduction into web design and digital design.

**Joe:** *Well it seems that architectures, systems thinking goes well with music composition. Deming was a composer, Drucker and even Frank Lloyd Wright; I think his parents were*

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*music composers. What do you think that connection is?*

**Jim:** That's a really interesting question. I've always wanted to do more with that. Again it's one of those things that's my life experience. Those two things in my mind aren't separate. I think if you break it down you can make comparisons. Particularly when you talk about music composition, you can talk about levels of abstraction at which you create a solution. In music composition, we talk about form. The form of music is, for people who don't understand it, very kind of abstract and nontangible topic. But that's where a lot of it begins. How is my piece going to begin and take shape in the middle and then come to the conclusion? Those kinds of questions, but also then how you layer up towards the surface from there, as well. You have these levels of abstraction, levels of completeness in music composition. When coming up a digital solution whatever it might be a product interface, or even a strategy, my experience as a composer I think does help me approach problem solving at multiple levels at the same time. So thinking about an abstract problem in terms of "what's the form of this?" and then moving up to the surface from there. I think there are probably some other comparisons, but I've never really broken it down. That's probably a talk that I need to work up for some conference at some time.

Interestingly enough I've made some other comparisons between music and just collaboration in general but particularly design collaboration. That is a creative type of collaboration in teams, in companies, projects that we work on and particularly around jazz. So I played and listened to a lot of jazz although I studied kind of classical composition. There are actually a couple books on this topic. There's one in 1996 I believe from a man named John Kao called "Jamming," and another one more recently by Frank

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Barrett called “Yes to the Mess.” In both of those books they use jazz as a larger metaphor for an alternative way of companies, businesses, and leaders, and teams even, how to think and collaborate because when you think about it a jazz improvisation and how a group on stage can improvise and look at all those dynamics and dimensions going on, I think it’s a valuable lesson for us particularly in this day and age. We have to rethink businesses, how we work.

The hierarchical command and control type of leadership isn’t working anymore. So what do we do? Jazz improvisation can provide a metaphor for us. So Jeff Gothelf, who wrote the Lean UX book, is close to me here in New Jersey where I am, and he and I are going to be giving a talk where we’re actually going to play on stage – Jeff plays keyboards. We’re actually going to play with a little jazz group that we put together. We’re going to play some music and then talk about exactly what I just mentioned. That is what are the dynamics of a jazz group and how can we use that as a larger metaphor for teams to work together better. That’s at the RE: DESIGN Conference on April 28 and 29 in Brooklyn. If you search for just redesign on Google, you don’t find it but if you search in RE: DESIGN in Brooklyn, you might find that conference on Google. We’re going to be speaking on Tuesday, April 29.

**Joe:** *One of my next questions was about the conference and what you are going to be talking about, and I didn’t know you would have a musical side to the whole thing.*

**Jim:** Yeah. For me when I saw people like John Kao and his book, and I’ve seen videos of him, I said, “Wow,” because I completely understand what he’s talking about. So he plays



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on stage and then talks about what he just played in terms of how businesses and creativity within business can work as an alternative model. And I've just always thought, "Wow, I really want to do that as a talk." But logistically it's a little harder and those kinds of things. But this conference has an alternative format and Jeff's close by to me, and we just hooked up and said, "We're going to do this. We're going to play live music in front of a group of designers and then talk about that." So I'm really, really excited because I think it does exactly what your initial question was. That is how my musical background merges with my professional background now. I think there are lots of crossovers; one is team collaboration and using jazz as a larger metaphor for that.

**Joe:** *Many of my listeners have a Lean background, can you explain how all this design thinking and Agile and now the Lean startup kind of fit together with that?*

**Jim:** Sure. I can tell you some of my thoughts about that. Well first of all I think a lot of particularly design thinking and Lean are kind of a rebranding of activities and approaches that have been around for a while that maybe haven't gotten traction or maybe needed a new relevance, so they've been kind of repackaged, which is fine. When we think about the life cycle of a product, particularly a new product, that is if we're creating new value that is not just optimizing a product that we've already launched or a business model that we've already started. If we're trying to do something new, I think design thinking provides a really great starting point for that life cycle because it allows us to diverge. So we talk about abductive thinking around design thinking, and that is the ability to connect the dots – maybe unrelated dots. You know I always say, "You got chocolate in my peanut butter," kind of thing. Who would have thought that we could put those things together? And

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design thinking really provides a good structured way to do that based on empathy and cross-functional groups of people working together in a collaborative way where you can engage in divergent thinking. Because what you want to do upfront is you don't want to get the solution right, you want to get the right solution. In order to do that, you have to make sure that you're looking laterally and that you use your creative peripheral vision to kind of explore not only what's possible, but like what's not possible. What could be crazy? What's that chocolate and peanut butter thing that nobody ever thought of before? So design thinking provides a really good environment context and structured framework. I think that's what in particular design thinking does is it brings a repeatable structured framework that businesses can grab onto to kind of expand your thinking, push the boundaries and then come up with concepts, ideas that could provide this new value. But you can't end design thinking and then go develop things. So you can't go from a Post-it on a wall to code.

There's something in the middle, and I think that's what Lean really does. Startups do this because they have to do this but sometimes in big companies that middle step of going from the concept to developing gets left out. I think that's what Eric Reese kind of made very, very clear in his book "Lean Startup," is that we need to take this idea and make it market ready. We need to make sure that it's going to fit the needs of the market, and we're going to compose that solution in a way that's going to bring the value that we envisioned, and it's going to be profitable for us to. That requires a lot of negotiations. Lean startup is a toolkit to kind of navigate those negotiations. He calls it build, measure, learn and then pivoting. That idea that Post-it on the wall that comes out of design thinking, you really need to take it through that discipline funnel – and Lean Startup, by

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the way, is very disciplined so that you're proving a hypothesis, moving forward, and then pivoting or not. And it's only once you get that market product fit, once you know that you're product is going to fit a market need, and it's going to be profitable for you that you should actually start building it. So once you get that all fleshed out, that's when Agile comes in because then you want to go from point A to point B fairly quickly, although Agile does have the iterations and does allow you to change the vision. The reason why you're doing it should be clarified kind of upfront. The second chapter of Eric Ries's book "The Lean Startup" is around vision, and it's really about getting that vision I believe before you start doing Agile sprint. So for me it's kind of design thinking, discover what's possible. Lean startup is "Okay let's design that solution in a way that brings value to customers and to the business." And Agile is "Deliver. Let's do it now."

**Joe:** *So it's really about Agile and it's really about the execution of it?*

**Jim:** That's how I see Agile. Again obviously there are iterations there and Agile focuses on quality and takes into account changes, as well. You know there are some overlaps between what I said. It's not that they don't touch. Maybe it's a little bit more of bubbles that overlap. I think broadly speaking if we think about discovery, design, and delivery. I think design thinking, Lean, and Agile kind of touch that life cycle primarily respectively in those ways. But for me Agile kind of is heads down; let's get it done now and in a quick, efficient way, more than not.

**Joe:** *So where does the project planning fit in? Is that the Agile portion of it and we're going to do it whether it's a Scrum metaphor or a Kanban metaphor? I'm not going to get*



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*into that, but is that where the Agile part fits in?*

**Jim:** Well I mean you can project plan design thinking activities, you can project plan Lean activities, and obviously you can project plan Agile activities. And you have Sprint Zeroes, and Sprint planning, those kinds of things and Kanban planning even. You know Agile is interesting. Agile came out of the engineering community. It was some engineers that got together and said the Waterfall sometimes works, but often doesn't. And it was what they noticed, and they wanted a better way of working, and they lay out their principles in the Agile manifesto which they have a bunch of theses of working software over documentation I think. Don't quote me on these but things like that. They don't say you shouldn't plan. You need the planning. They don't say don't do it at all. But just don't make that become so overwhelming that you are spending more administrative time doing the planning than you are actually doing the coding. It's a balance anyway. It's not exclusion. None of these things excludes anything. For project planning though, yeah, I think you do need to really particularly before an Agile effort, you do need to do a fair amount of planning ahead of time.

**Joe:** *You developed The Project Canvas which was kind of a knock off on Osterwalder's business canvas, but how do you use that? I found that a little interesting.*

**Jim:** I did that out of selfish reasons first of all. I was working for a design consultancy at the time, so it is a little design centric perhaps. But for me it's if you're going into a project, any project, what I try to do is identify the key things that I want defined and nail down before work begins. I have been using that same set of attributes or qualities of a

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project for a long time now. But after seeing Alexander Osterwalder's Business Canvas, I said, "Ooh, why don't I just represent those on a single piece of paper?" because then it becomes a tool that you can bring into like kick-off meeting for instance and have a discussion with the project team around "What activities are we going to be doing? What are the risks of these projects? How are we looking at scope? What's going to be the ultimate user benefit that we deliver from this project?" So those are just some of the boxes, the fields on the canvas itself. But it was meant to be a tool to kind of break down the perceived daunting task of planning a project.

When people say particularly from Agile and Lean camps, "We don't need any planning. We don't need any documentation," what I was actually trying to do was say, "Yeah, but it doesn't take long. We can take two hours and just fill this out together, and we'll have a much, much better understanding of how we're going to work together, where we're going, what those risks are." I think Agile and Lean kind of favor doing stuff, producing things over planning but that doesn't mean you can just skip over the planning. So what my attempt was with the Project Canvas was to make planning a light activity because I think a lot of the reactions to planning using traditional methods of documentation and planning meetings and all that was not the planning part itself, but those approaches and those traditional methods are very heavy. Basically, what I wanted to say is we can still do that same level of definition, get the agreement. Let's get the shared understanding of who's working on what for what reason, but let's do it in a really quick way.

I was hoping to use that canvas metaphor that Alexander Osterwalder made popular also for project planning and then be able to use that in things like kickoff meetings. We can

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make a big version of it or even project it from a projector on the wall with Post-it's and in an interactive way just have people sort of fill it out so you get a basic understanding and a contribution from the team as to "What's the project we're about to engage in and how can we define that in a quick and light way?"

**Joe:** *I think that's an excellent description because what I find so much is that you need that clarity so people can work independently, and you get so much more accomplished if there's some guiding light there that's sitting there.*

**Jim:** I couldn't agree with you more Joe. Well said.

**Joe:** *The other area that I got lost in this morning looking at your blog was alignment diagrams. What's an alignment diagram?*

**Jim:** An alignment diagram is a term that I kind of applied to a class of documents and their corresponding activities that are already part of the design cannon. So these are things that we are already doing. Basically, what I wanted to do was reframe the fundamental value that these documents and deliverables and activities bring to both us and the businesses that we consult or work for. So that class of documents includes things like customer journey maps, service blueprints, experience maps, things called mental model diagrams that Indi Young pioneered. There are some other examples. But what I believe these diagrams fundamentally do is align, hence the name alignment diagrams, align customer activity, user activity with what the business is doing to provide value. So it shows what the customer experience is in some way – usually chronological, not always.

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So customer journey map will have phases that move through a journey over time, and that's a normal type of alignment diagram. And that's often at the top of a diagram. So these are often horizontally oriented. And you described the pain points and all the activities or thoughts or devices – whatever story you're trying to tell about the customer experience on the top.

Then down below you describe what the departments are involved, what are the offerings that a business is providing to the users. Where those two meet are the touch points. That's where value is created. That's where the users get their values when they come in contact with product or service you're offering, and that's also where the business is going to make it's values well too, because if those touch points aren't meaningful, if they're not useable and attractive to those customers, they're not going to be ultimately making money. I believe what alignment diagrams do is it's a visual way for us to be able to locate and track the value creation chain. You and I were just chatting about that a little bit Joe before we started the podcast. I think an alignment diagram is a great way to both capture and diagnose an existing kind of state of play for a business. How are we creating value and what is that value that the customers desire. Yu can extend that – particularly if you're in a B2B type of situation, you can extend that all the way down to the end consumer. So you can look at that value chain even further. But ultimately alignment diagrams align value creation and allow value extraction from the business.

**Joe:** *One of the problems I have with alignment diagrams let's say is that they get created in isolation, away from the customer. What are some tips to make them really valid, to make them really useful to me? What are some tips you can give?*

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**Jim:** Yeah, very often these things are kind of thought up in a closed room. So alignment diagrams as a class of documentation is not a prescribed method. It's collection of these documents that already exist. But I want to do is talk about using them to point out alignment in the businesses that we work for or consult with. It's really this principle of alignment that I'm really focusing on, and that has a bunch of sub-points to it. And one of them is the principle of validation that is we can't just make up what we think the customer experience is. We actually have to go out and observe it and capture it in a real way. That's very, very important. Sometimes you can usually set up the framework of an alignment diagram, but you need to go out and observe customers or talk to them first of all. I think that's one of the first things that you need to do. I often will kind of capture some of that in a qualitative way in an alignment diagram. If there's a pain point show a quote from a user that had that pain point to make it real. So try to bring reality into the alignment diagram because ultimately you want to bring that reality into the business as well too. Sometimes businesses convince themselves of a different reality than customers are going through, and alignment diagrams are a way to kind of expose that and shine a light on "Well this is actually what is going on." Bring as much as possible, through primary research – that is direct observation, questioning, whatever method you want to use – to try to bring that right back into the alignment diagram. I've also done in a more limited way using alignment diagrams actually with end users or the consumers themselves and actually stepping through it with them to get their insight of it. "Is this how you would describe your journey with a product or service? Is this your workflow when you're working at work for instance?"



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Ultimately for me the value of an alignment diagram particularly for designers and consultants is to be able to work with the business stakeholders. An alignment diagram project for me almost always ends up in a workshop where we will actually go through and read and look at all of the touch points in slow motion. It's artificial, but it slows it down so you start seeing things sometimes at a microscopic level but at a very analytical level, and you're looking at those touch points and how value is created, what the pain points are for the customer, what the problems of service provision are on the business side of things and doing that with business stakeholders. Very often they don't have that big picture.

Businesses are really complex now particularly with dealing with partnerships and outsourcing and all this stuff. Once you put all those things together suddenly it becomes a lot more apparent where potential breakdowns can occur, where there is an opportunity for efficiencies, on their side as well too, but also on the consumer side. It's basically a set of principles with a corresponding class of documents that allow us to diagnose the value creation process on both sides of the equation.

**Joe:** *In the workshops, based on user experience strategy, I think you have a couple of classes coming up. Can you tell me about them?*

**Jim:** I just gave a workshop at the Information Architecture Summit in San Diego on UX strategy. It's one I had done before in the past once or twice I believe. I'm giving it again in Germany at the Information Architecture Conference event there in Berlin in May. I don't have that particular workshop scheduled anywhere else, but that may change. So strategy in general, in particular UX strategy is an area of interest for me in the past five or so

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years of my career. I think alignment diagrams play to that very well. So an alignment diagram is a great diagnostic tool to start doing the strategic thinking that you need to do. Once you've done that diagnosis and that alignment of the customer and the business you can then start saying, "Okay, so what's our strategy? How are we going to overcome these strategies?" Strategy is also one of those words that gets used and interpreted in many different ways, so the way that people use the word varies a lot. I think there's a lot of confusion around the words particularly strategy and planning that people use a strategy as a synonym for planning. Part of the strategy is planning and I believe that's the output of strategy is to be able to then plan activities at any level – at a high level but then going all the way down to individual tasks and things like that.

Strategy itself is not the same as planning or rather there are elements of strategy that aren't the same as planning. And the same goes for analysis too. People believe if they do more analysis they'll have a better strategy, or that is the strategy. So very often people go from analysis to planning. They'll look at the market, they'll look at the users; they'll look at the business metrics and then say, "Okay, therefore we must do these activities and start planning them." What strategy is for me is right in between analysis and planning. It's a set of logic – I think of it as a business algorithm. It's through the why and the how we're going to overcome our challenges and ultimately how are we going to win. That's the question.

If you think about that question, "How are we going to win?" a lot of strategies don't address that question. They say, "Yes we found all these trends in the marketplace through my analysis, and we're going to do a lot of activities." But what they don't say is "Why are

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those activities going to make us win?” That for me is the core of strategy. I think there are some other elements around strategy too, but ultimately you want to know “How are we going to overcome those challenges, those opposable forces? How are we going to win in the marketplace particularly through our business?” So for me UX strategy starts with first of all a clarification, at least from my perspective or what I’m talking about when we talk about strategy, is that middle piece between analysis and planning that guides us to have a winning play.

You can think of a strategy as hierarchical. So you have a corporate strategy, you might have a division strategy, you might have a product portfolio strategy, a product strategy, but you can also think about a UX strategy as well too. How are the activities and resources and capabilities that we have around UX design, how are we going to use them in a way that overcome the challenges that the user experience design faces. And that needs to align upwards of course. So understanding UX strategy means you need to understand what the other strategies are, the superordinate strategies. Once you have a common framework for understanding and writing strategy you can apply it at any level of this hierarchy. So in my workshop I basically say, “Okay if we’re a UX team and we’re charged to improve or overcome challenges with the user experience design, how are we going to organize ourselves in a way that actually overcomes those challenges?” And that’s really what I focus on in those workshops.

**Joe:** *Does Lean thinking change that role at all? How does Lean thinking apply to strategy?*

**Jim:** Yeah. That’s a good question. Well first of all if you’re a startup, you’re kind of

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figuring all this out. When you pivot, and you're a startup, you might be pivoting everything. You might be pivoting the entire business. And your strategy may be a lot more emergent as you're doing this. If you're an established company particularly of any size you probably have existing strategy. So even if you have a Lean effort within a large company – so right now for instance I work for Citrix, and we have corporate strategy and we have a division strategy as well too. We'll have a lot of efforts that aren't in the core path of our existing products. So these are side, you can call them innovation projects, new things that we want to bring to the market, and they're right for using Lean methods. But that doesn't mean we don't have these other levels of strategy that kind of guide even which ones of these projects we're going to take, right?

I think the strategy plays a framing role for Lean projects and just even deciding which ones you're going to do in anything other than a startup within that Lean effort itself or even for a Lean startup. I think a strategy can play a role. Again it might be a lot softer, and it needs to change, which is okay. By the way if you divorce planning from strategy, detailed plans don't make up a strategy. If strategy is this set of logic then I think we get away from this notion that a strategy is planning out what we're going to do before we do it. So I don't think that's the case actually. I do think there is a place for strategy within Lean. And as I mentioned the second chapter of Eric Ries's Lean Startup book is about vision. Vision and strategy are not exactly the same thing, but I think a strategy also has that kind of existential flavor to it that it should speak to the core of "Why are we doing this? Why does this matter?" And like I mentioned, "How are we going to win this?" So even within the pivots of a Lean effort, you need to be thinking "How are we going to win with this? Why is this going to make us successful and overcome the challenges that we've

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chosen to take on?" So strategy does play a role I think in framing Lean activities. Again if we don't think about it as planning everything out in advance but rather think about it as that set of logic that's going to give us a winning play, then it makes sense that it goes along with Lean activities.

**Joe:** *What else is upcoming for you? Do you have some other workshops or some other things going on?*

**Jim:** I do. In June, at the beginning of June, the conference is from the 6 of June, and it's called UX Lisbon or UXLx for short. That's in Lisbon, Portugal. It's a conference that has been running I think for five or six years – a very successful and large European event. And I'm going to be giving my faceted navigation workshop there which is one of my more established workshops. It's one of my favorite to give. So it's talking about faceted filtering, faceted search, and those kinds of things in a very broad way. I'm really happy to be giving that workshop again. I gave it last at UX London and now I'm doing it again at UX Lisbon on faceted navigation. I mentioned the talk that I'm giving in Brooklyn with Jeff Gothelf on April 29 at the RE: DESIGN Conference. I'll also be at the IA Conference in Berlin at the end of May. I think it's May 24. Then I'll be giving my UX workshop there as well too. In September, there'll be a couple of events that I'm planning on attending and hopefully speaking at. But that's all I have scheduled at this point in time.

**Joe:** *What's the best way for someone to keep up with you?*

**Jim:** Follow me on Twitter actually. It's @jimkalbach. I try to keep up with tweets.



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Sometimes you get into a lull as we all know. But same with blogging – I try to blog as much as possible. So that's experiencinginformation.com. I'm also on LinkedIn and the social networks out there so you should be able to find me. Don't be afraid to follow me and contact me in any of those ways.

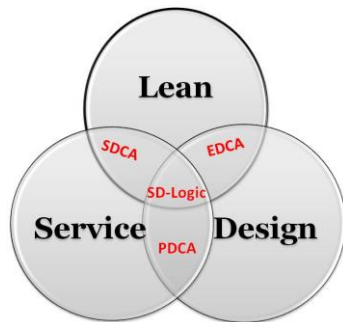
**Joe:** *It's a wealth of information on your website. I enjoyed combing through it very much and certainly will return to it. So I would like to thank you very much Jim. This podcast will be available on the Business901 iTunes store and the Business901 blog site. So thanks again.*

**Jim:** Thanks Joe, it was my pleasure.

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