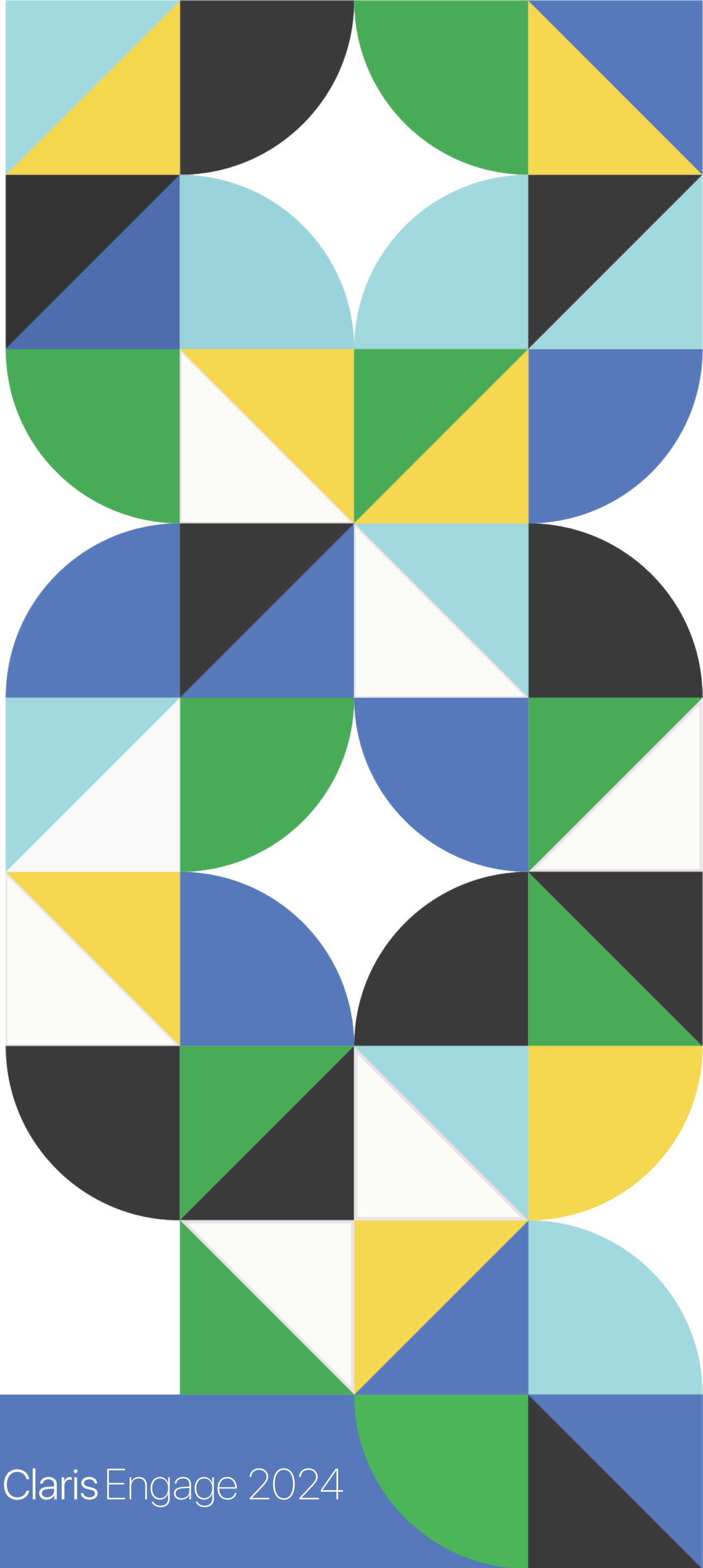


# How We Set Out To Become Better Problem Solvers

February 8, 1:30 pm – 2:30pm

Vanessa Costanzo

NaviCu



# About Me

**Vanessa Costanzo**

VP of Operations, NaviCu

- Based in Madison, Wisconsin



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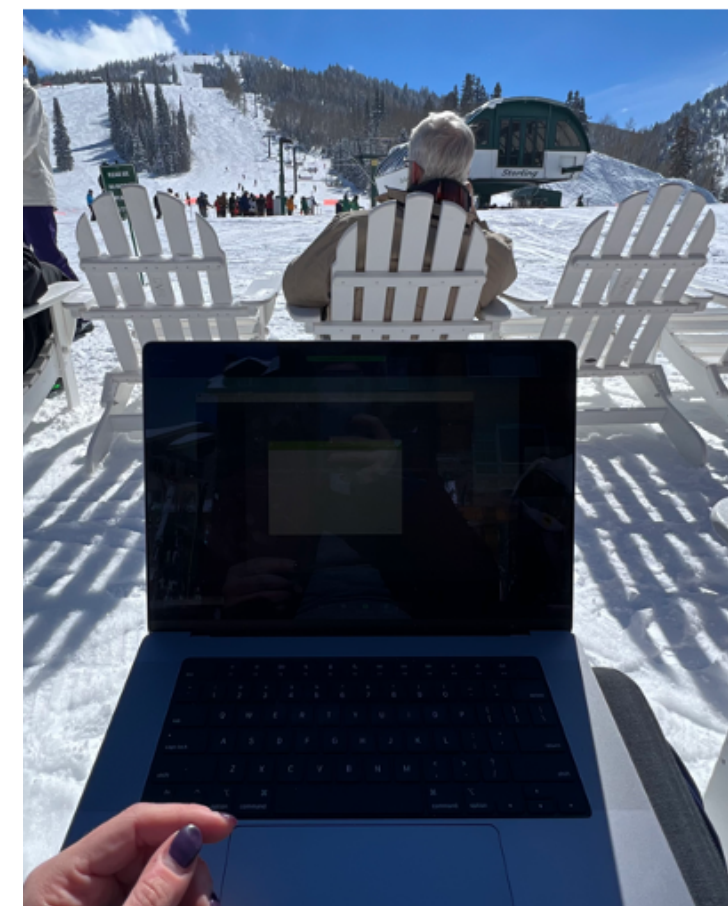


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- Whether work or life outside of work I LOVE a list!



# Session Outline

01

## Where We Started

*Struggled with trying to understand the root cause of a client's issue after a short meeting.*

02

## Our Process

*We determined the way to get the time to dig deep without hurting the bottom line was to charge clients for it.*

03

## NaviCu® p2s Platform

*Wanted to be able to use this for all projects, not just major engagements.*





# Session Outline

04

## NaviCu® Discovery Portal

*Making the Discovery and Scope steps more efficient while exposing clients to some of the technologies we use.*

05

## NaviCu® Tracker

*How this has extended into managing development timeline & scheduling, testing, training, and client communication.*

06

## What We've Learned & Tips

*What have we learned throughout this journey and what we would do differently.*





# Where We Started

Defining our process

# Where We Started

## Our “Un-Process” Process

- For 20 years we had been in the SAAS, vertical market business
- Short intro meeting with a client
- They would describe what they saw as the problem
- We would provide them an estimate and limited specification documentation
- Move forward with development

# Where We Started

## Issues With This Process

- They didn't always KNOW what the problem was
  - Symptom of something greater
- Estimates may not be accurate
- Difficult to dig deep into problems and pain points without TIME
- How do you get that time without hurting the bottom line?
- Undefined and different every time - not replicable



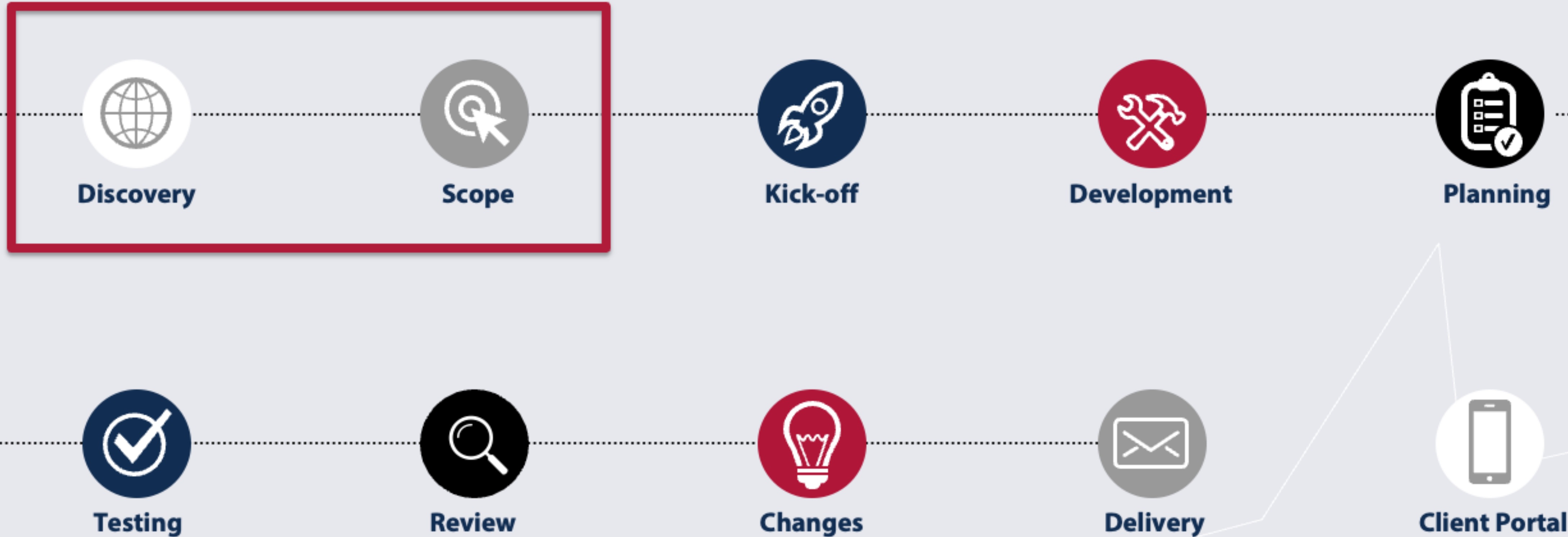
# Our Process

Recruiting Pro "Version 1"



# Our Development Process

Letter of Engagement → Project Specification Document

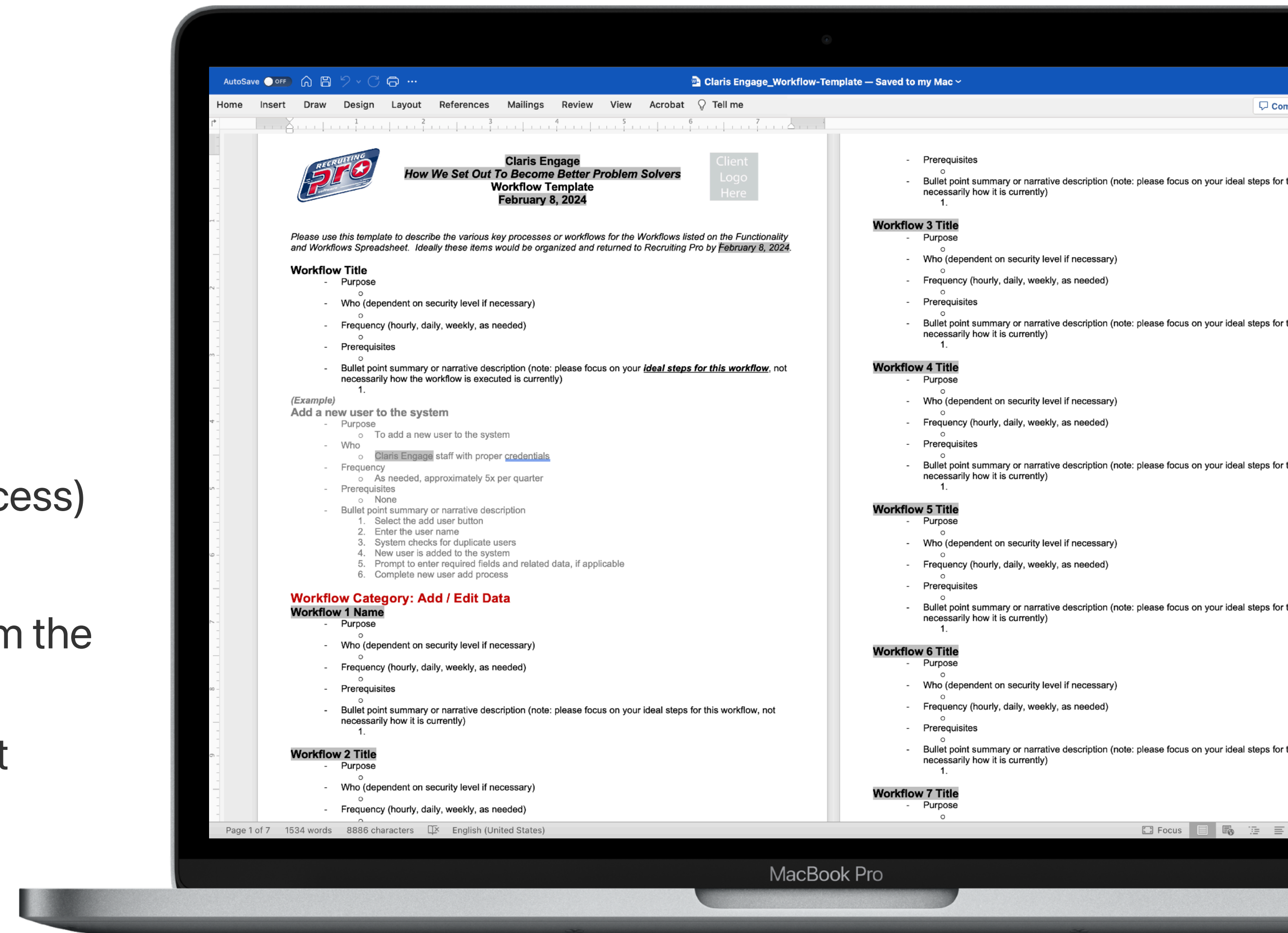


**TECHNOLOGY FOR THE COMPETITIVE EDGE**

# Our Process

## Recruiting Pro "Version 1"

- Improvement from before
- Focus was on initial, major engagements
- Breaking out Discovery and Scope (legally & process)
- Linear process
- Used document templates for data collection from the client for workflows and features
- Client Portal focussed primarily on project budget





# NaviCu<sup>®</sup> p2s Platform

Version 2: Iteration & Scalability







# NaviCu<sup>®</sup> p2s Platform

Letter of Engagement → NaviCu<sup>®</sup> Game Plan

## Discovery



Information gathering, via meetings & online portal, to determine the overall goals, features, and workflows related to the business problem. Includes a process review and tools “audit” when necessary.

## Scope



Analysis of the Discovery information to design a solution for the business problem. The NaviCu<sup>®</sup> Game Plan defines key elements such as layout mockups, investment estimate & timeline, and serves as the “blueprint” for the potential project.

## Kick-off



The first meeting after the contract is signed where we will review the project objectives, timeline, and schedule review meetings.

## Development



Utilizing platforms and tools such as Claris FileMaker, web, iOS, Android, and Tableau while also integrating with other systems to build innovative solutions. NaviCu verification that the solution reflects the NaviCu<sup>®</sup> Game Plan.

## Review



Regular meetings with the client to evaluate the most recent development, refine and adjust project needs.

## Testing



Client verification and approval that the solution reflects the NaviCu<sup>®</sup> Game Plan.

## Changes



Ongoing evaluation and prioritization of features which are critical to the overall success of the project.

## Launch



Data cleanup & import, training, installation, and deployment to the production server. Hosting services available, as needed.

## Support



On-demand technical and development support enabling the solution to grow and adapt with the business.

## NaviCu Tracker



Central location for feature requests, bug tracking, testing status, and budget status.

# NaviCu® p2s Platform

## What we learned from "Version 1"

- Had focused on major engagements - wanted to apply this to smaller projects as well
- The process is iterative
- Didn't address what happens AFTER launch, foster long-term relationships
- Moved to a multi-server environment
- Smaller changes
  - Internal testing during development
  - Changes in verbiage
  - Delivery → Launch



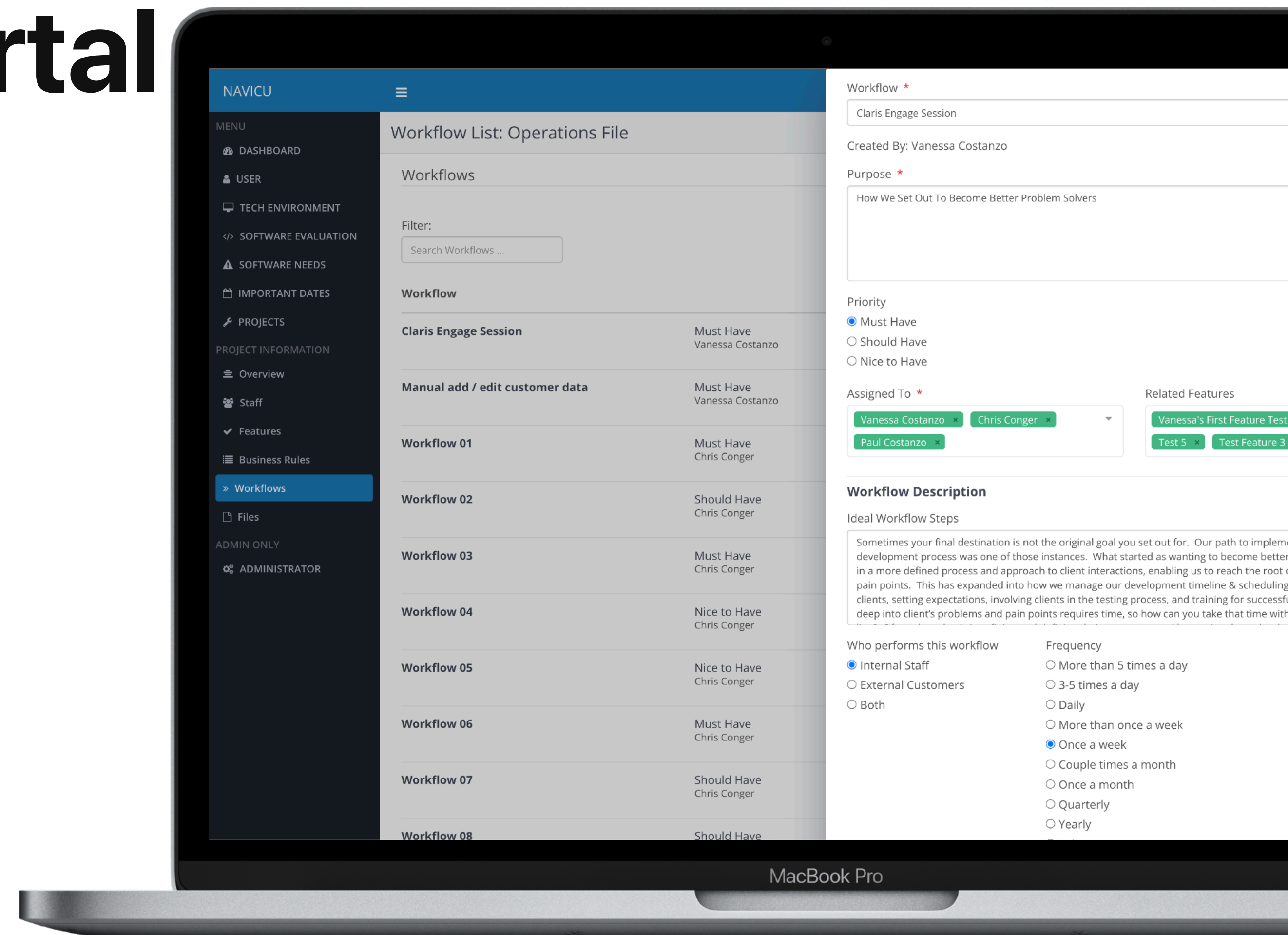
# NaviCu<sup>®</sup> Discovery Portal

Efficiency in Data Acquisition

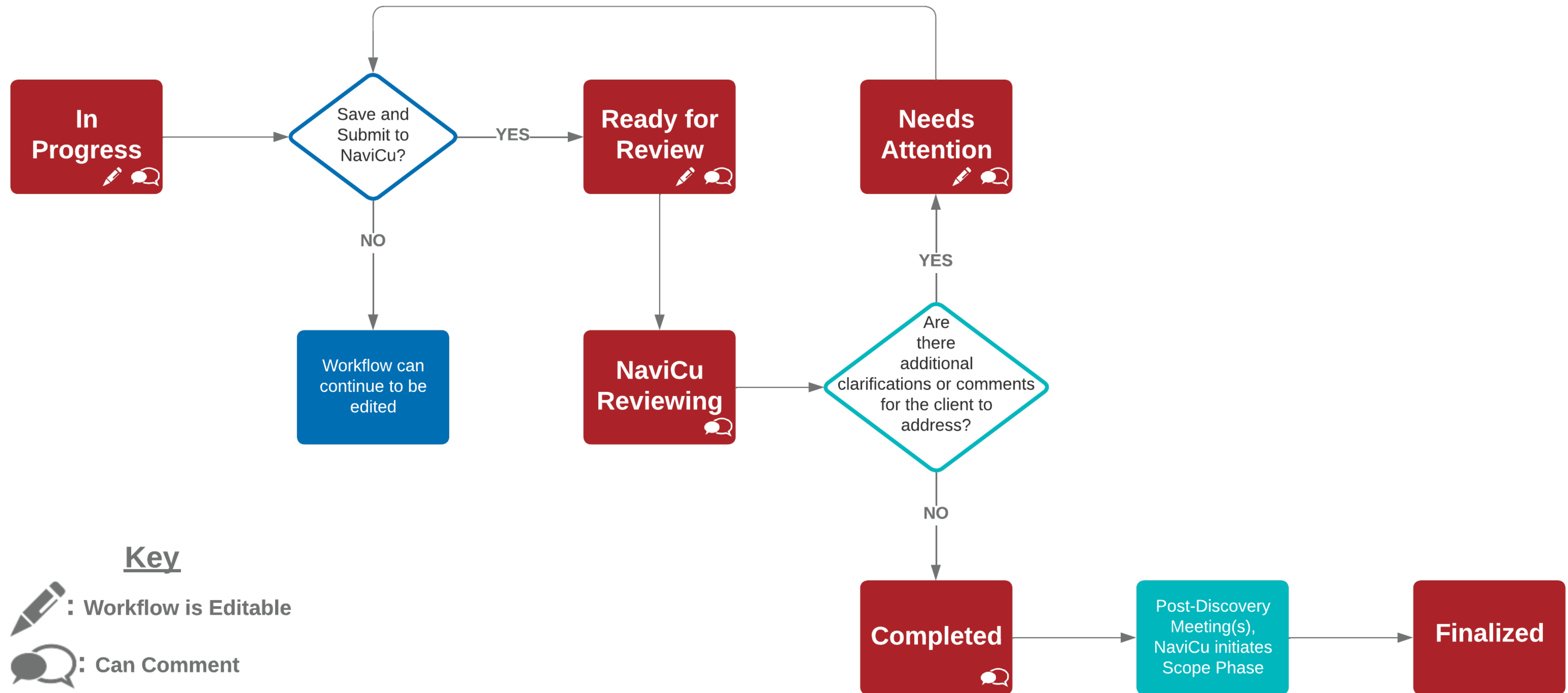
# NaviCu® Discovery Portal

## Online Portal

- More in-depth workflows and features
- Can have multiple stakeholders involved
- Ability to collaborate and comment on each others' work
- Efficient data acquisition
- Expose clients to some of the technologies we use
- Ability to gather and export information from our backend operations file to produce the NaviCu® Game Plan



# NaviCu® Discovery Portal Client Workflow Cycle





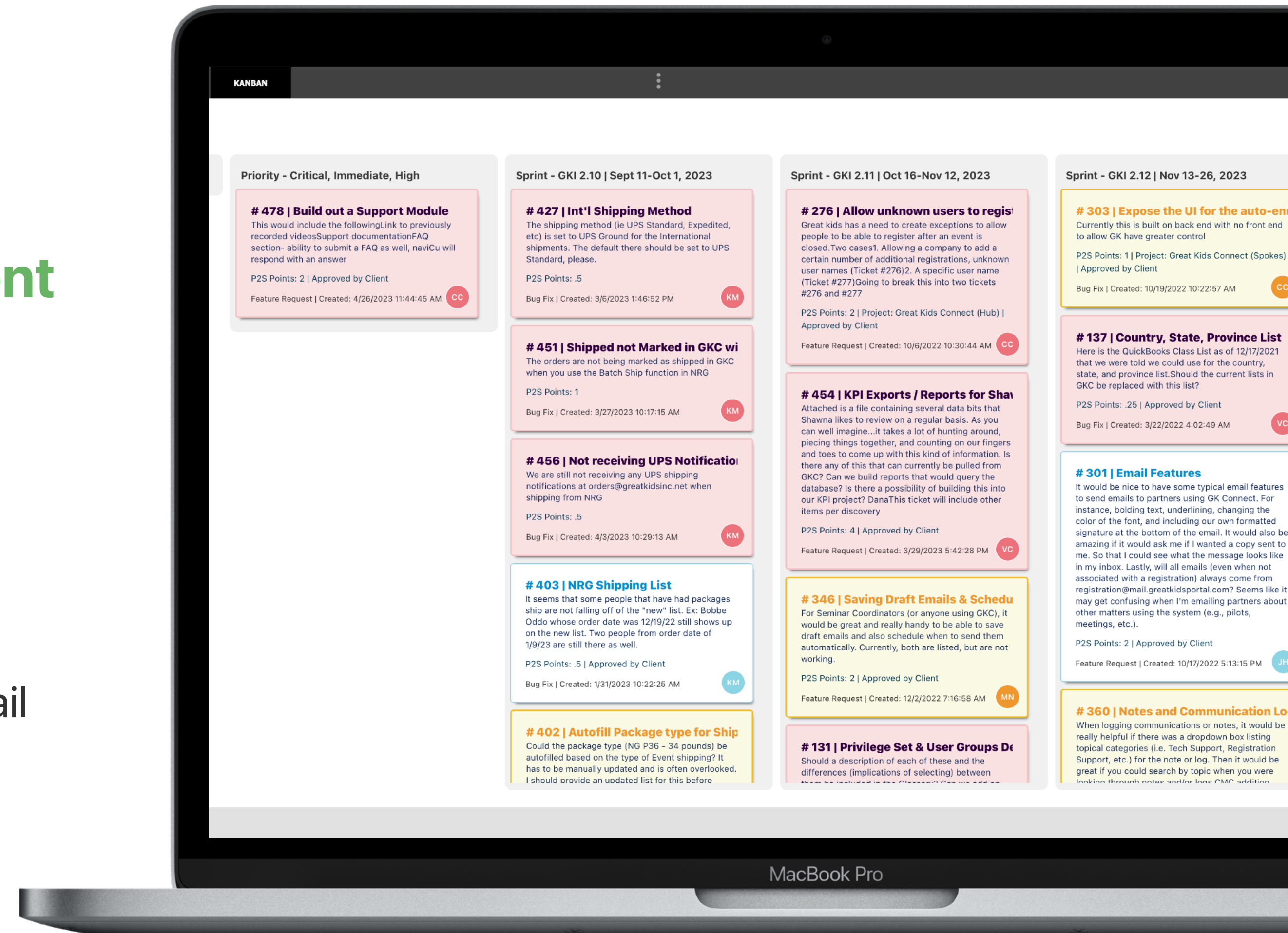
# NaviCu<sup>®</sup> Tracker

Extending These Principles

# NaviCu® Tracker

## Extending Beyond Initial Development

- Managing development timeline and scheduling
  - Assigning points to tickets
  - Kanban Board
  - Sprint cycles
- Consistent client communication
  - Central location, not losing information in email threads
- Testing (Internal & Client) and Training







# NaviCu® Tracker

## Managing Timeline & Development

- Managing development timeline and scheduling
  - Assigning points to tickets
  - Kanban Board
  - Sprint cycles
- Consistent client communication
  - Central location, not losing information in email threads
- Testing (Internal & Client) and Training

### 2023 IMPORTANT SPRINT DATES

#### Sprint 2.10 (9/11 – 10/8)

- Wednesday 9/6: Client confirms Sprint 10 tickets
- Monday 9/11: Sprint (Development) Starts
- Monday 9/25 & Tuesday 9/26: Client Testing
- Wednesday 9/27: Review Meeting
- Friday 9/29: Client Re-Testing
- Monday 10/2: Client Training Session
- Sunday 10/8: Sprint 10 Development Launched to Production Server

#### Sprint 2.11 (10/16 – 11/12)

- Wednesday 10/11: Client confirms Sprint 11 tickets
- Monday 10/16: Sprint (Development) Starts
- Monday 10/30 & Tuesday 10/31: Client Testing
- Wednesday 11/1: Review Meeting
- Friday 11/3: Client Re-Testing
- Wednesday 11/8: Client Training Session
- Sunday 11/12: Sprint 11 Development Launched to Production Server

#### Sprint 2.12 (11/13 – 12/3)

- Wednesday 11/8: Client confirms Sprint 12 tickets
- Monday 11/13: Sprint (Development) Starts
- Monday 11/20: Client Testing
- Tuesday 11/21: Review Meeting
- Wednesday 11/22: Client Re-Testing
- Wednesday 11/29: Client Training Session
- Sunday 12/3: Sprint 12 Development Launched to Production Server (from Testing Server)

#### Sprint 2.13 (11/27 – 12/26)

- Wednesday 11/22: Client confirms Sprint 13 tickets
- Monday 11/27: Sprint (Development) Starts
- Monday 12/11 & Tuesday 12/12: Client Testing
- Wednesday 12/13: Review Meeting
- Friday 12/15: Client Re-Testing
- Wednesday 12/20: Client Training Session
- Tuesday 12/26: Sprint 13 Development Launched to Production Server

	September			October					November				December		
	11	18	25	2	9	16	23	30	6	13	20	27	4	11	18
NaviCu Development & Testing	█	█				█	█			█		█	█		
Deploy to Testing Server		█					█			█			█		
Client Testing & (Re) Testing			█					█			█			█	
Review & Planning Meeting			█					█			█			█	
Training Session				█					█			█			█
Deploy to Production Server				█					█			█			█



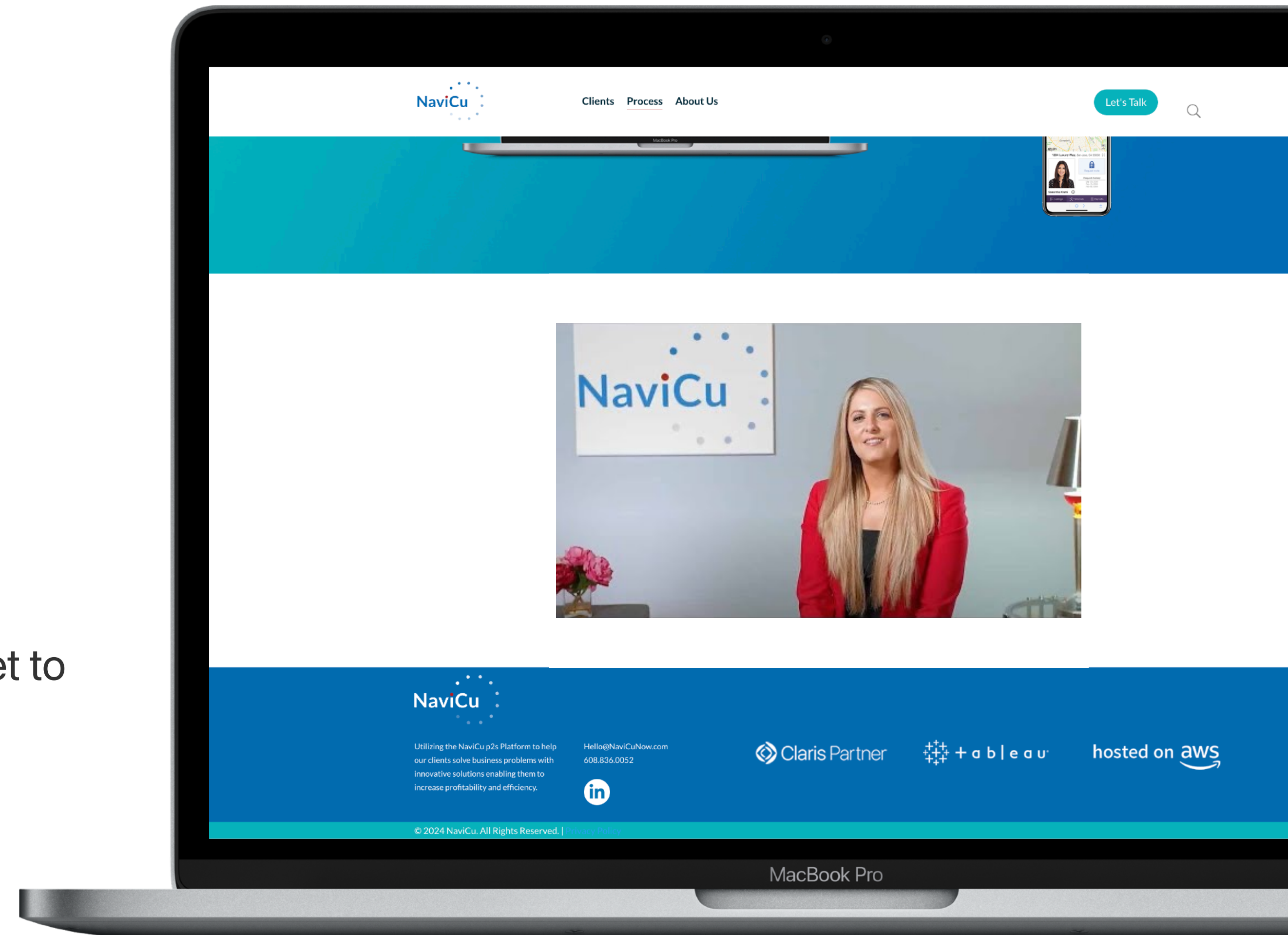
# What We've Learned & Tips

Where to Begin

# Tips

## What We've Learned

- It's an iterative process to define YOUR process
- Have to be able to change
  - Constantly re-evaluating
- Enables us to enter into more defined projects, get to the root cause of problems within organizations
- Allows us to evaluate the whole business and processes, not just the development work
- Made us better partners



# Tips



## What We've Learned

- Involvement of key stakeholders, end users, and decision makers is crucial
  - Forum for them to come to consensus about business rules and operational processes
- Clients need to buy-in
  - Homework is time consuming
- We want to build trusted partnerships - extensions of their team
- Consistency in client interactions and process





**Q&A**

**Thank you.**

**Vanessa Costanzo**

NaviCu

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**Please Keep  
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