
Inception Cookbook

Recipes, Prep & Facilitating

- Peter Graves



Agile Coach with Cognizant



1. Inception Intro

Typically one-week collaborative process to create a solution for 3-6 months of work.

→ **Preplanning**

Set expectations. Prepare. Id teams.

→ **Creating a Shared Vision**

Business & Product Context. Validate Shared Vision. Stakeholders.

→ **Product and Tech Solutioning**

Personas. Roles & Goals. UX, As-Is. User Journey & Story Mapping

→ **Release Plan**

Create a Road Map of next 2-3 releases focusing on next one. RAID. Id MVP/Rel

→ **Showcase**

Verify internally & externally. Go-NoGo

What is an Inception?

Collaborative workshop to understand, align and plan a MVP or next release

Tip

Several weeks of
planning

Many times, one-week
Inception workshop

Showcase for Business
and IT stakeholders. On
Friday mid-day.

Build, Measure & Learn loop

Created to kickoff new MVP or new release of a product, the Inception Cookbook builds answers for

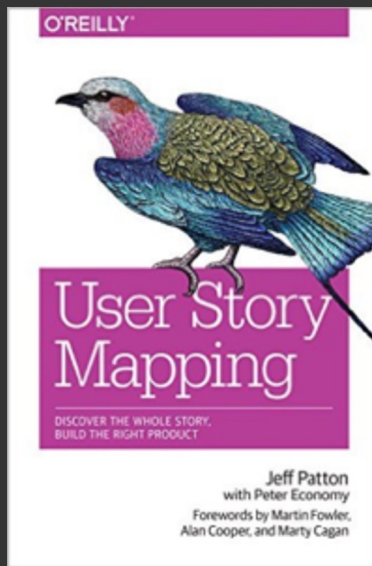
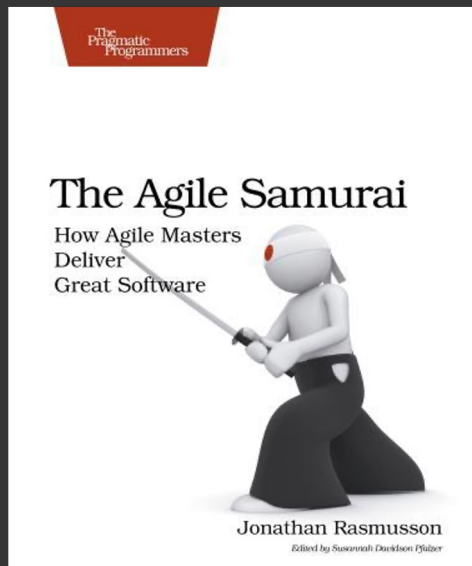
- Why is there a need for Shared Vision?
- What is in the walking skeleton, MVP, Releases?
- What bets the business will be testing?
- How will the business get feedback on the bet?

How to build and deliver the right product by using alignment on a Shared Vision

Tip

Two weeks for
Discovery and Inception
One week for Inception
Several weeks for larger
products, not MVPs

Credit where credit due



Scrum and Agile are Silent on how to gain alignment and layout a release



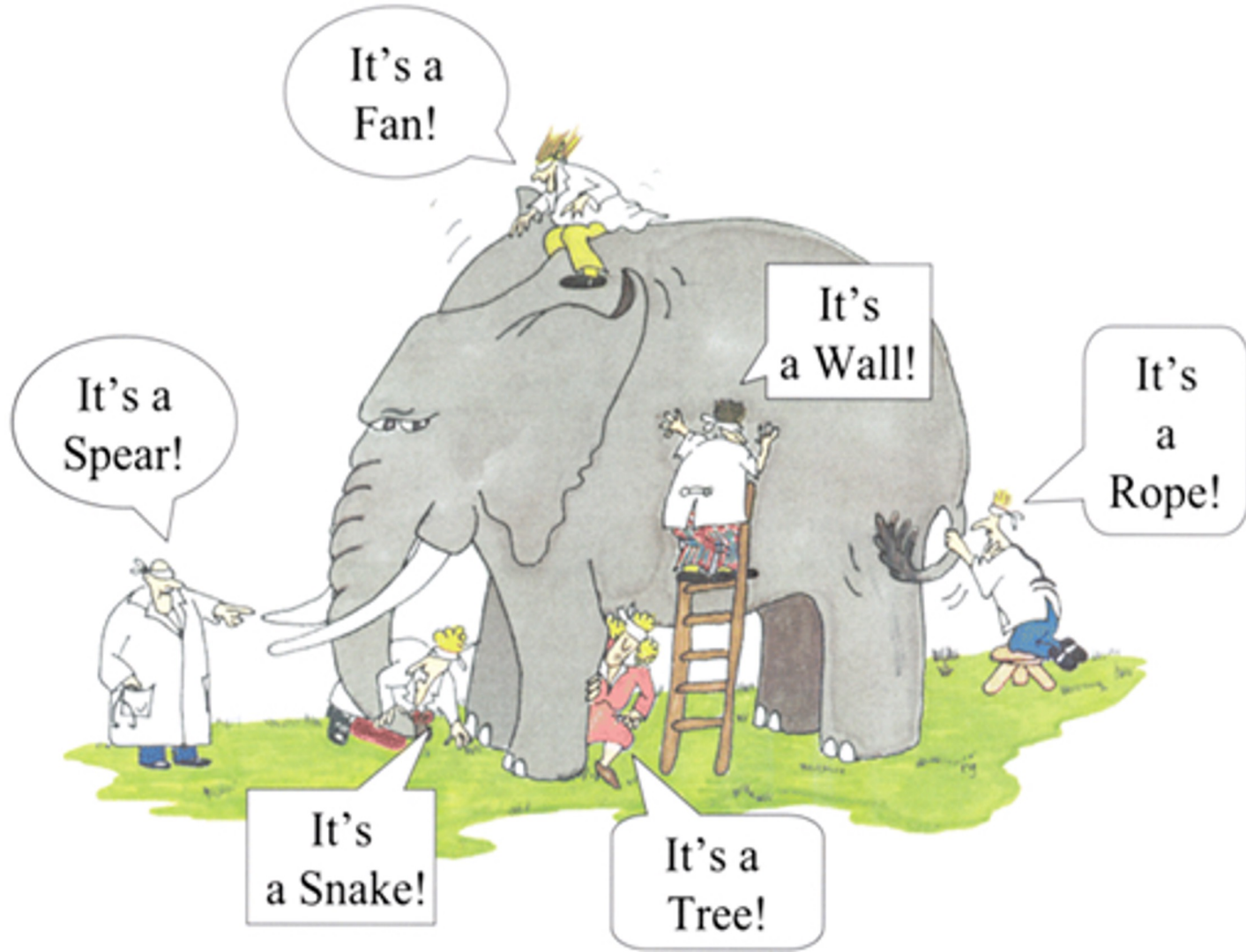
Tip

Do we all agree on the value in setting an initial direction?

Does anyone want an incomplete product release or rework?

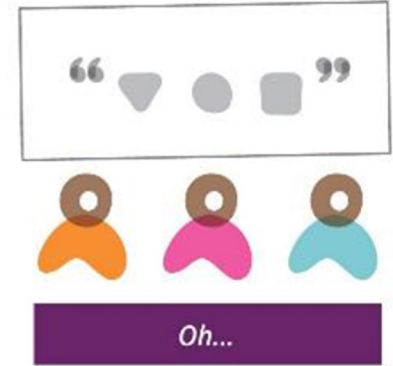
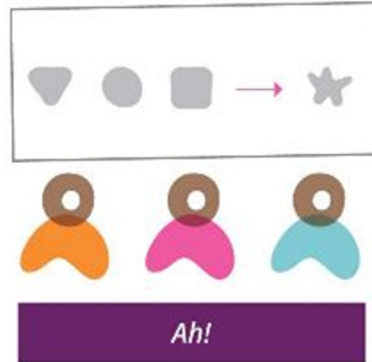
Who has been there?

Who Has Been Here?



Why We Do Inceptions?

Together with the stakeholders, create a shared vision of the product strategy, the core user experience, scope of delivery and working principles.



Inception Objectives

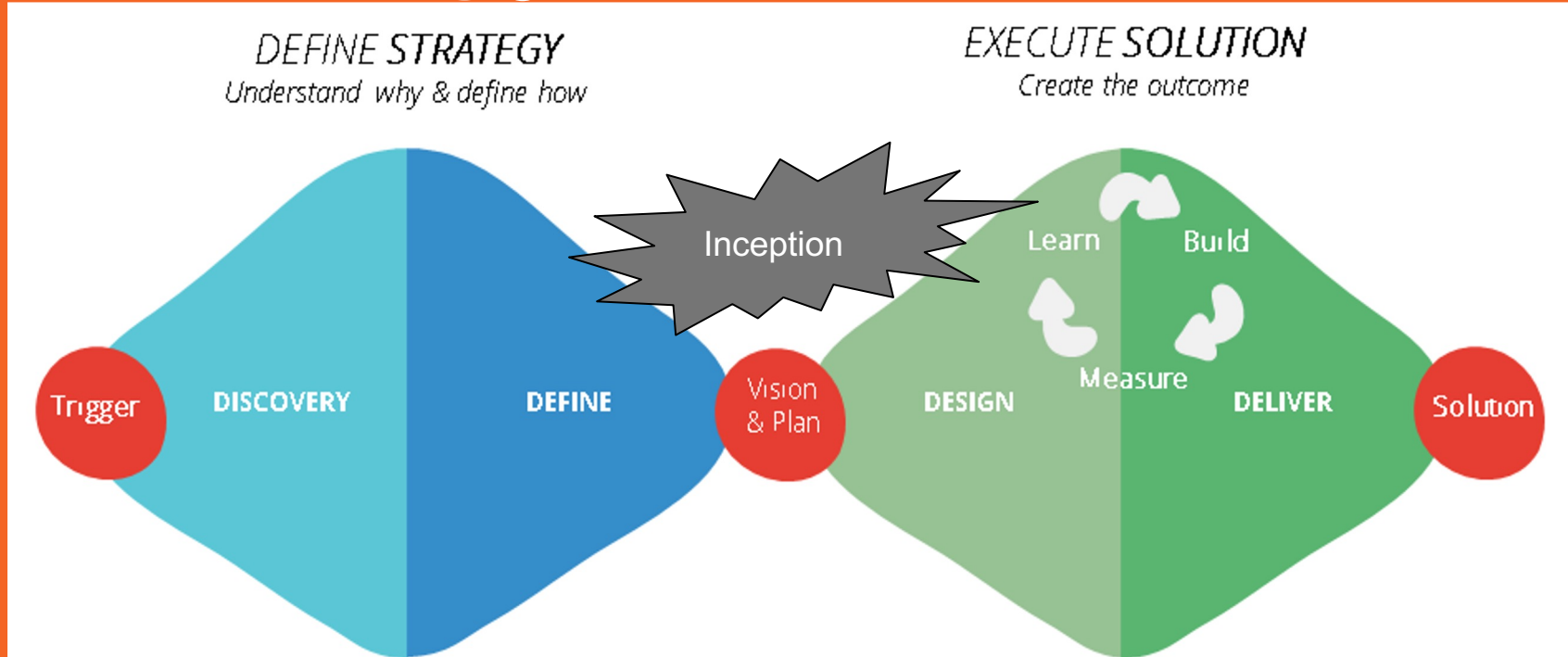
Build a shared understanding of project vision and goals

Evaluate high-level scope and core processes

Evaluate key risks, issues and constraints in delivering the MVP Roadmap and Release Plan

Establish technical, testing and metrics approaches

Strategy to Product



LEAN INCEPTION AGENDA

MORNING

MON

KICK-OFF

PRODUCT VISION

TUE



PERSONA

WED



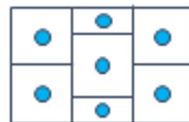
TECH, UX &
BUSINESS
REVIEW

THU



JOURNEYS &
FEATURES

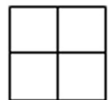
FRI



MVP CANVAS

LUNCH

AFTERNOON



IS - IS NOT
DOES - DOES NOT
DO



FEATURES
BRAINSTORMING



USER
JOURNEYS



SEQUENCER

SHOWCASE



Tip

This is permanent until
changed

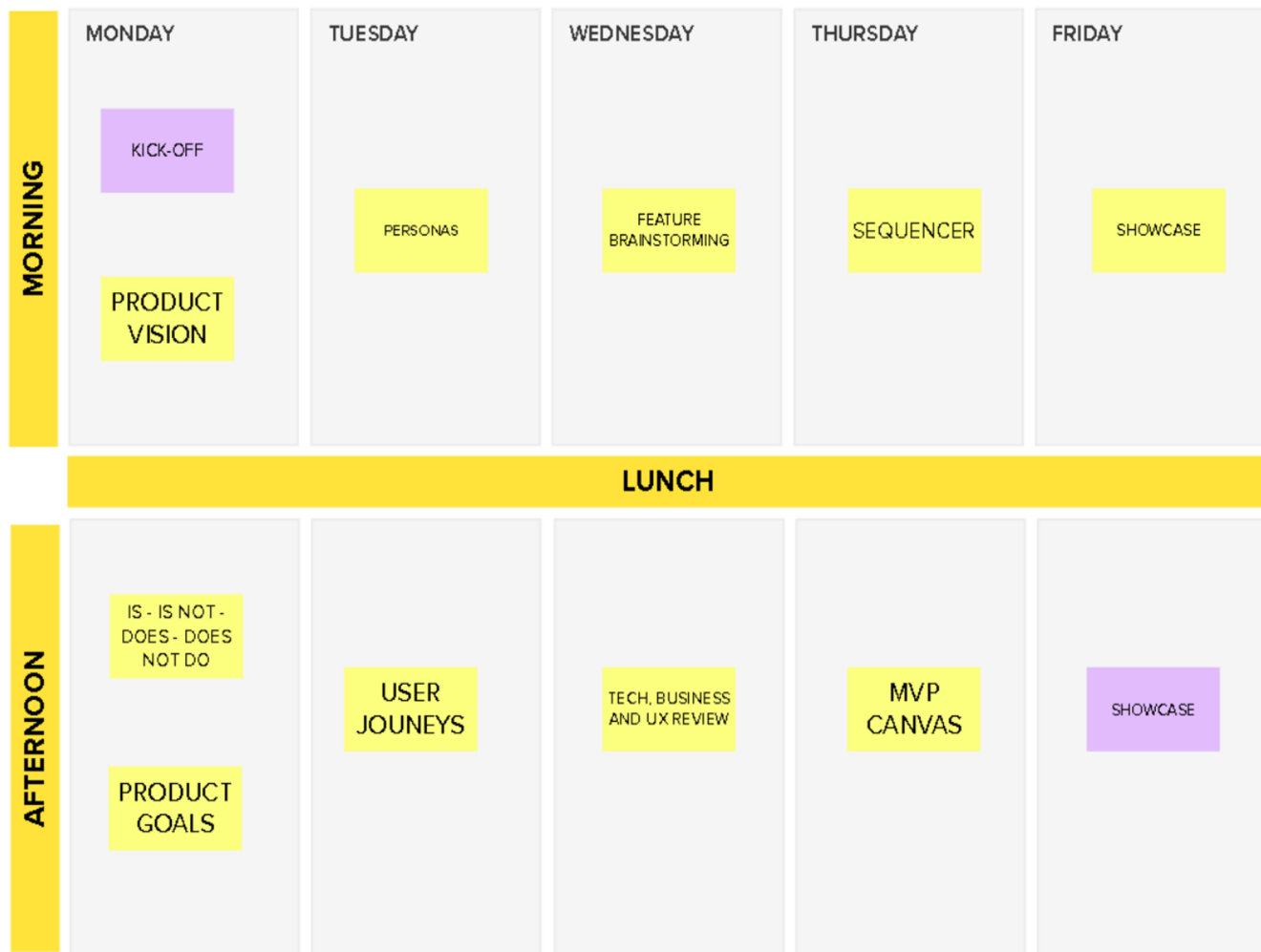
Very high level for
attendees

Tours and afterhours

Detailed spreadsheet
schedule is needed

Remote Inception Agenda

<https://www.caroli.org/en/lean-inception-agenda-template/> Ana Paula da Silva, Gabriel Viegas and Paulo Caroli





Lean Inception is a remote or in-person workshop for creating a shared understanding of the product vision, user stories, and business goals, and aligning the team on the best way to bring the product to life.

Agenda
The agenda for the workshop is as follows:
1. Kick-off
2. Product Vision
3. The Product IS, IS NOT, DOES, DOES NOT DO
4. Product Goals
5. Personas
6. User Stories
7. Feature Backlog
8. Technical, Business, and UX Decisions
9. Segments
10. MVP Canvas

Facilitation techniques
The facilitator should use a variety of techniques to ensure that the workshop is engaging and productive. These include:
- Encouraging participation from all team members
- Using visual aids to help illustrate concepts
- Encouraging collaboration and discussion
- Keeping the workshop on track and on time

- 1. Encourage participation from all team members
- 2. Use visual aids to help illustrate concepts
- 3. Encourage collaboration and discussion
- 4. Keep the workshop on track and on time

Outputs
The outputs of the workshop are as follows:
- A shared understanding of the product vision, user stories, and business goals
- A shared understanding of the best way to bring the product to life
- A shared understanding of the team's role in bringing the product to life



<https://www.caroli.org/en/remote-lean-inception-on-mural/> Ana Paula da Silva, Gabriel Viegas and Paulo Caroli



2. Preplanning

Preparation is key to a successful Inception and Setting Expectations

- **Who will attend and when**
OOO and vacations
- **Planning / Review Meetings**
Schedules, goals, vision, attendees,, user journeys, presenters
- **Logistics**
Big room, technology, hotels, supplies, transportation, meals, events
- **Scheduling the Inception**
Long lead time for offshore, vacations, other company events / meetings
- **Showcase Planning**



Tip

Contact List - location, TZ, Role, phones, email, teams, t-shirt size, PTO

COMM Plan - Who What When How

Past Inception Decks

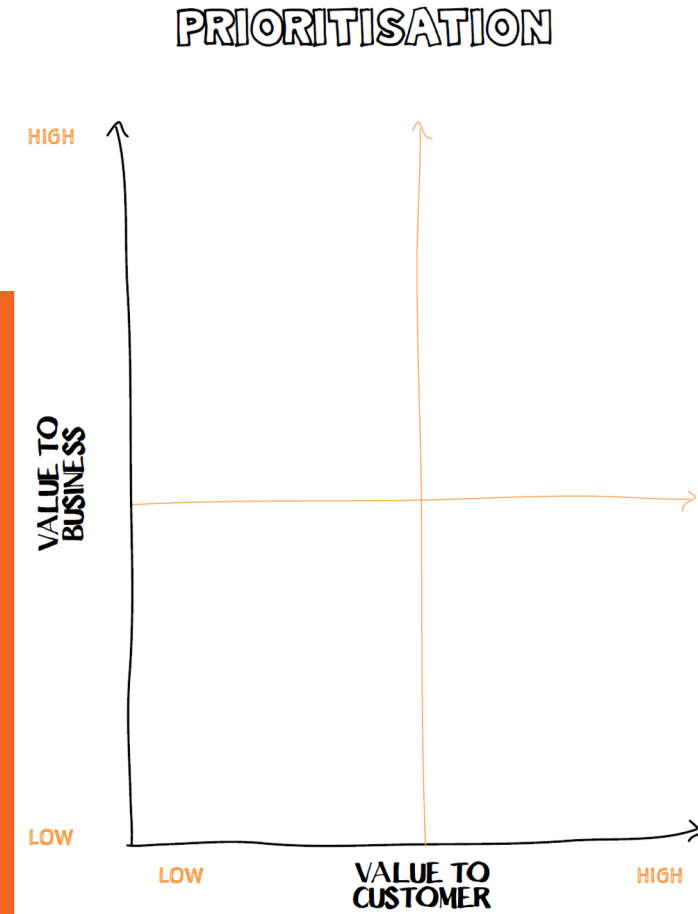
Risk Logs, PM stuff!

Prioritization Matrix

Maybe Value to Business vs Cost

Impact vs Effort

Weighted Shortest Job First ([SAFe link](#))



Who Gets Invited

Business

Executive Sponsor

Product Owner / Manager

End Users / Customers

Subject Matter Experts as needed

Decision Makers all week!

Technology

Dev Team, possibly other

Dev Teams or PO / TLs

Quarterback, Inception

Facilitator, PO, SMs, SA/BA

Other PO and Tech Leads

DBAs, Enterprise Architect,

Security, DevSecOps

Showcase Stakeholders

Leaders needed to make
Go/NoGo decision

Impacted business and
tech stakeholders

Important to get people notified early and scheduled.



3. Shared Vision

Typically one-day for understanding business and project contexts.

→ **Kickoff**

Sponsor kick-off, Business Context, Scope, Bets.

→ Introductions

→ What is an Inception? Grounds Rules

→ **Product Vision / Elevator Pitch**

→ **Technical Vision**

Provide a simple unifying message for what is to come

→ **Sliders / Hopes & Fears**

First Icebreakers are important

→ **As-Is or current product demo**



Tips

1. **Peel Post-Its horizontally!**

2. **Write legibly! (BLOCK CAPS)**

3. **Try not to write in fragments**

4. **Use the Glossary**

5. **Use black Sharpies**

Project Sponsor should be prepared to discuss:

- ❑ Business and Project Context
- ❑ Current business issues, pain points, challenges
- ❑ History and need for this Inception
- ❑ High Level Vision and Bets
- ❑ OKR, Metrics, AC for MVP
- ❑ Initial Scope / Features
- ❑ Be available do homework and to review Kickoff deck

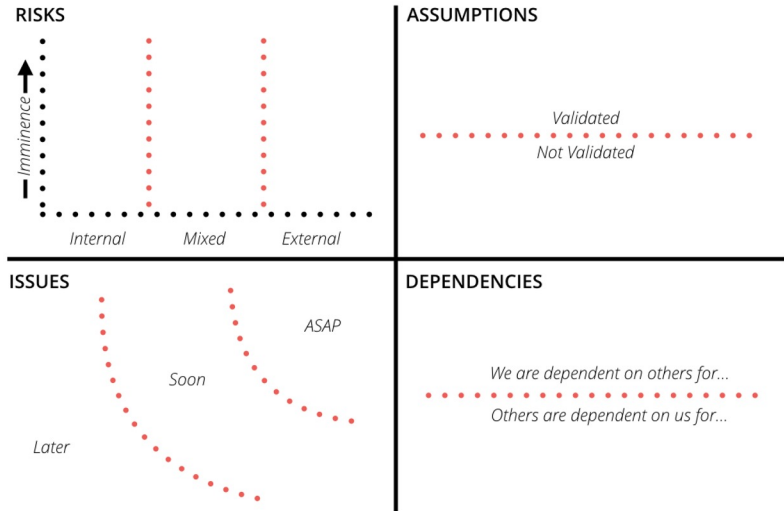


RAID - Risks, Assumptions, Issues, Dependencies

This activity is poster used through Inception

As RAID items are identified, write them on the corresponding

THE PROGRAM-LEVEL RAID



IS

IS NOT

Mobile app	Multi-platform	App
	Free	Facilitator for organizing pick up soccer matches

FB, Twitter, whatsapp	site
chat	messenger (chat)

DOES

DOES NOT

Schedule matches (agenda)	Schedule fields	List matches
Locates nearby pick-up soccer matches	Geolocation	Alert on events
Notify users	Rating user	Save reputation

Organize matches	Define teams by request	Organize matches and teams
Assemble teams	Manage payments	Provide online payment of the match
Organize championships		

Is-Is Not Activity

Use Post-Its then have volunteer read note and another create affinity groups on poster



Elevator Pitch

For
who
the product
is
which
comparing to
our product

Leave enough
blank space to
fit in multiple
post-its.

Ask validating
questions.
Be critical.

Has to have a meaning
for the customer, no
technical or corporate
terms.

<target customer>

Don't make your
segment too wide.

<needs something>

Write the
outcome, not a list
of activities.

<product name>

<product category>

Why is this benefit
important? What
problem does it
solve?

<key benefit, reason to buy>

<competition>

Choose one or two
competitors.

Benefits should be
hard to beat.

<is better by what>

An activity to learn and converge on our product definition.

PO should facilitate to focus workshop from the beginning.

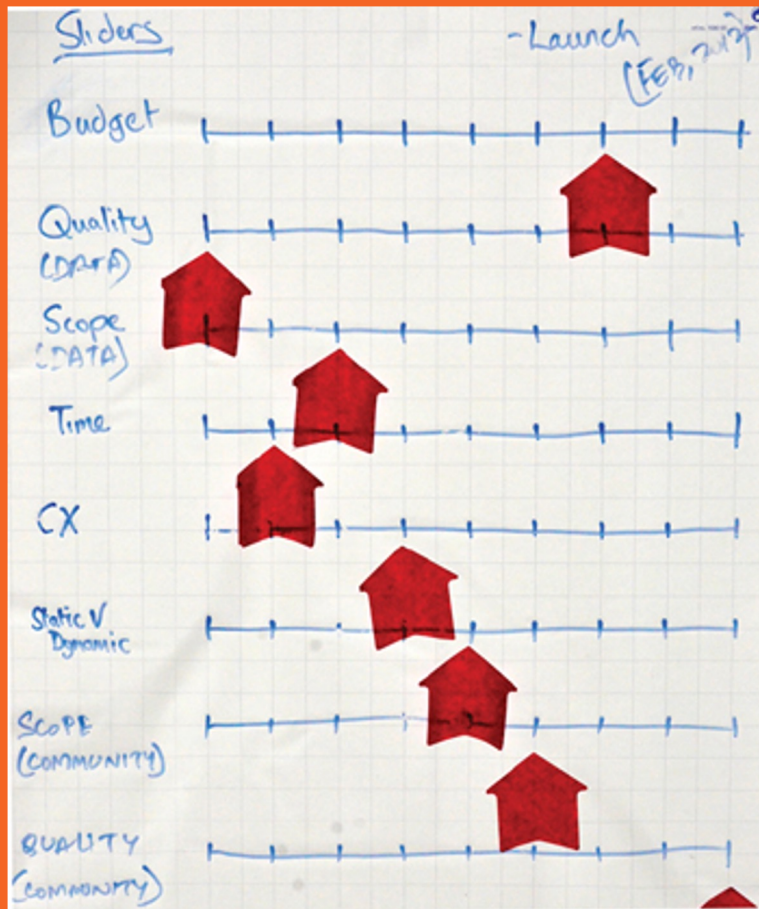
This confirms a Shared Vision is in place. Use PostIts or a Whiteboard to draft.



Hopes and Fears

An activity to learn and gauge participants' attitudes about a project, product or workshop. "Hopes" reveal what can be accomplished. "Fears" reveal their doubts.

Identify emerging themes. Group together. Topics too sensitive to discuss?



Trade-off Sliders

A group activity to learn project priorities. What are most important and least important. This will help make decisions throughout the product inception and build.

This facilitated discussion will force rank each priority.



4. Solutioning

The heart of the Inception is User Story

Mapping to create initial features and user stories.

→ **Personas / Roles and Goals**

Possibly use Empathy Maps

→ **User Journeys / VSM / Process**

High level steps and Tasks for each

→ **User Story Mapping**

User Stories under each Task

→ **Technical Solutioning**

Tech Runways needed, DB Changes, Security needs, new tech behaviors like TDD or Pair Programming for example

→ **UX Wireframes Review**



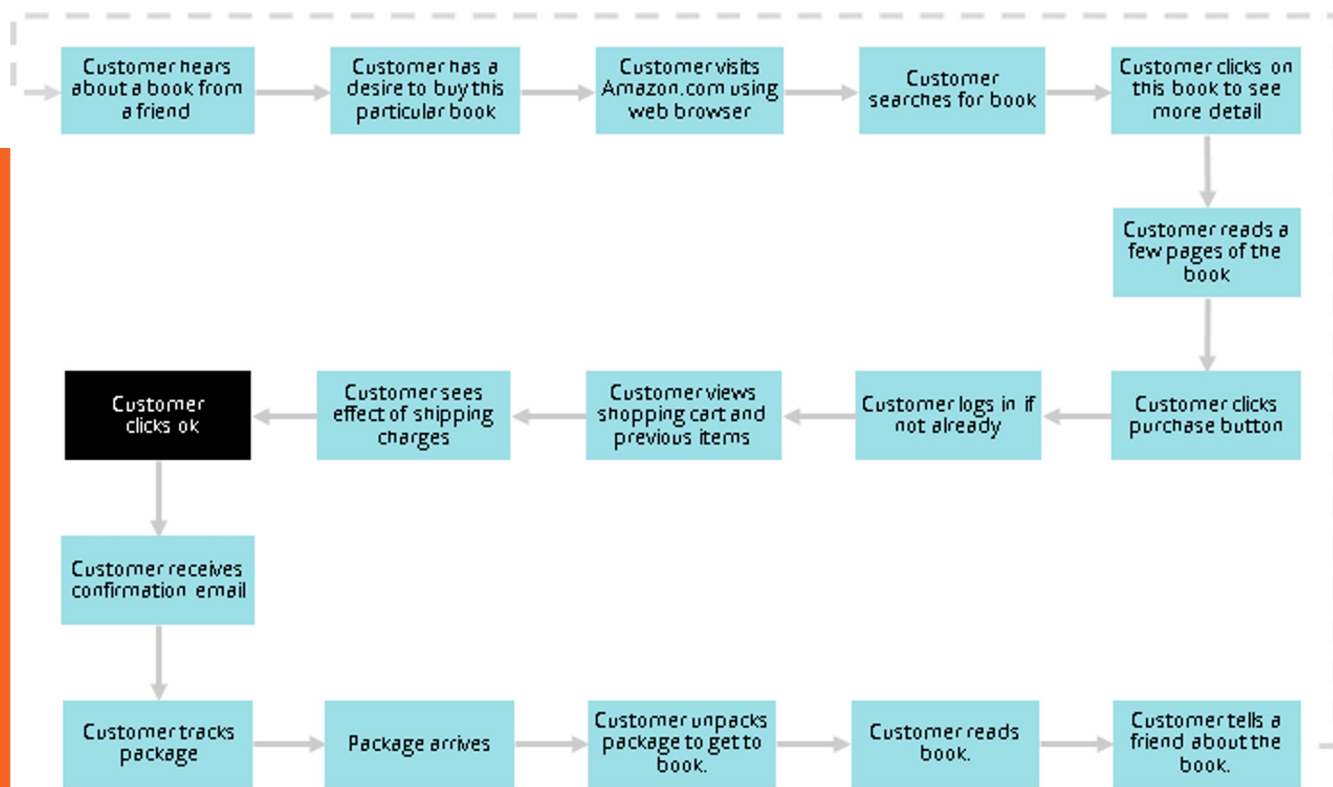
Tips for every day

1. Cleanup after yourself
2. Reset/Prep the room every evening!
3. Standup sharp at 9AM.
4. End Of Day Retro Core team reviews and AI



Personas / Empathy Maps

User Journey for Online Bookstore



Users

A map tells a story about a type of person doing something to reach a goal. Make sure to include them in your map along with a little information about them.

Try using lightweight persona sketches to describe your users.

User Tasks

User's tasks are short verb phrases that are the basic building block of a map. If I ask you what you did earlier today when using email, you'll likely respond with tasks like:

- Read an email message
- Respond to a message
- Mark a message as spam

Goal-Level

The actions that users take in order to reach their larger goals have a goal level themselves that's tied to user behavior.

Summary: lots of tasks done in support of a bigger goal.

Functional: I'd expect to complete this task before taking a break.

Sub-Functional: smaller things done in support of a bigger tasks.

As you read across tasks in the backbone, check to make sure that tasks are of a similar goal level.



Get cleaned up

Shave

Take a shower

Get Dressed

Adjust Water Temperature

Wash Body

Wash Hair

Backbone

Activities and tasks at a higher goal level give the story map its structure. The backbone is arranged in a narrative flow. Smaller sub-tasks, details and variations hang down to form the ribs connected to the backbone.

Narrative Flow

The left to right axis in a story map is organized in the order you'd tell the story about your user to someone else.

Of course any specific user might choose to do different things in a different order. Use conversation to explain the details and variations.

If you're looking for the precision of a workflow model, flow chart, or UML model, then a story map isn't your best choice.

A story map will take lots of conversation to use effectively. But then that's the purpose of stories.

Release Slice

Use a tape line to identify slices of tasks that users might use your software for to reach their goals. The smallest number of tasks that allow your specific target users to reach their goal compose a viable product release.

Use release slices to identify small experiments, minimal viable product releases, or a "walking skeleton" version of your product.

Identify the target outcomes of your slice in a sticky note or card to the left of the slice.

User Tasks make great story titles!

Write short verb phrases on cards or stickies. Use them later as your story titles. If you use the story template to write descriptions, the task fits nicely right after "I want to," the activity fits right after "so that."

Details, Details...

Break down high goal level tasks into:

- Sub-tasks
- Alternative tasks
- Exceptions
- Details

Down in the details of the map, it's OK to include details about what UI might look like or what the system might do in the background.

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Complexity, Completeness and Volatility

Used to qualify the level of uncertainty in each feature

Add Contingency for the unknowns

Feature CCV Activity

Feature	Points	Complexity	Completeness	Volatility	Total CCV	% Adjust	Adjusted Points (contingency)
A	45	1	2	1	4	33%	60
B	15	1	2	2	5	37%	21
C	30	3	3	1	7	50%	45
D	20	3	2	1	6	40%	28
E	25	1	1	1	3	30%	33
F	40	3	3	3	9	60%	64
Total	175						251

3 = 30%
4 = 33%
5 = 37%
6 = 40%
7 = 50%
8 = 55%
9 = 60%

Sequencer

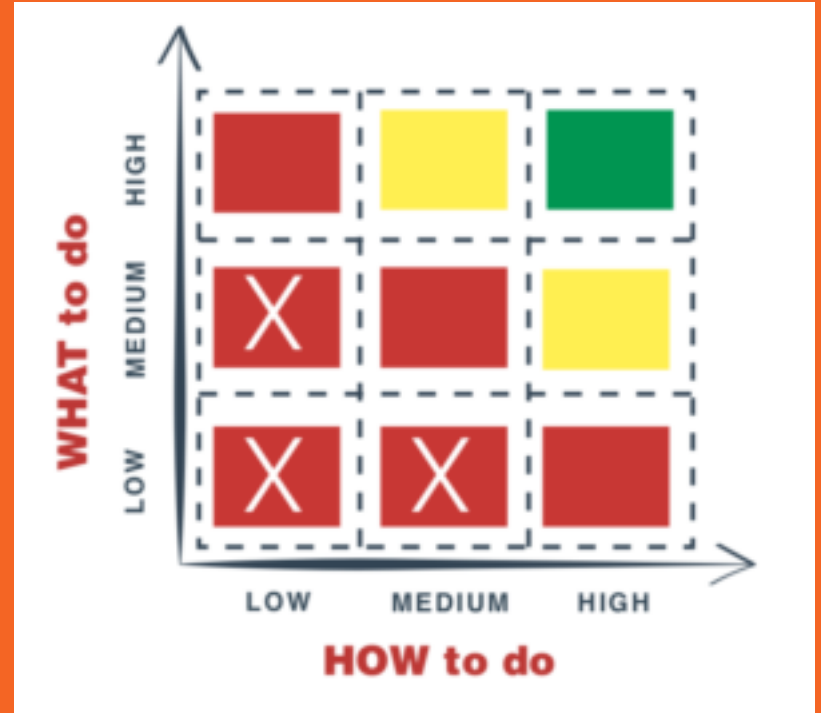
How to Order and Prioritize
Features

How

1. Write each work item on a post-it
2. Identify the level of confidence: WHAT versus HOW
3. Talk about value and relative effort
4. Order the items (on the Sequencer)

What vs. How

Have we done this before?
Do we know what we want from
each feature?



Sequencer

How to Order and Prioritize
Features

SEQUENCER

① _____

② _____

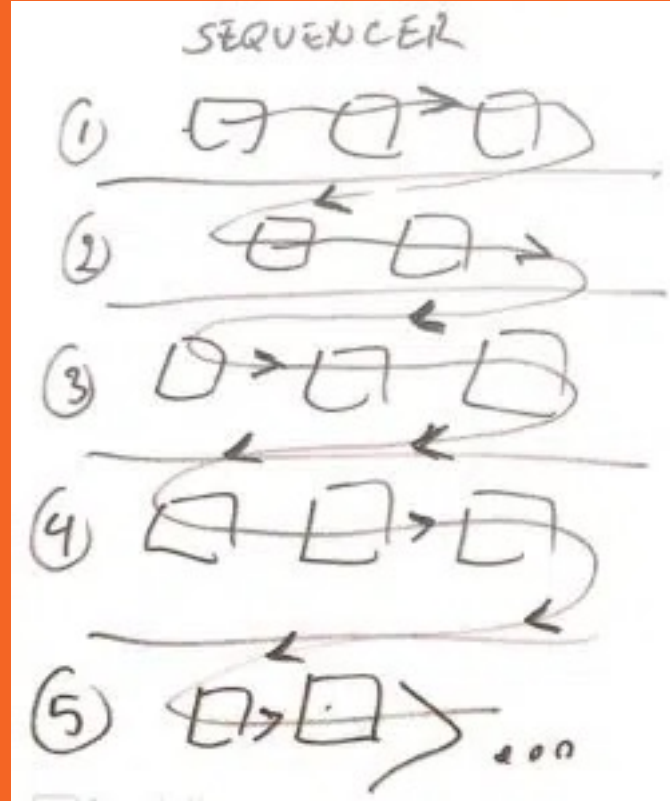
③ _____

④ _____

⑤ _____

Sequencer

How to Order and Prioritize
Features



Sequencer

How to Order and Prioritize
Features





5. Release Plan

Typically one-week collaborative process to
create a solution for 3-6 months of work.

→ **User Stories into Features**

Team exercise to group into Features

→ **Sequencing of Feature Roadmap**

→ **Estimating**

Initial story estimate from Dev Team

→ **Feature Summary and
Contingency Planning (CCV)**

Sum up User Story estimates and do CCV
exercise.

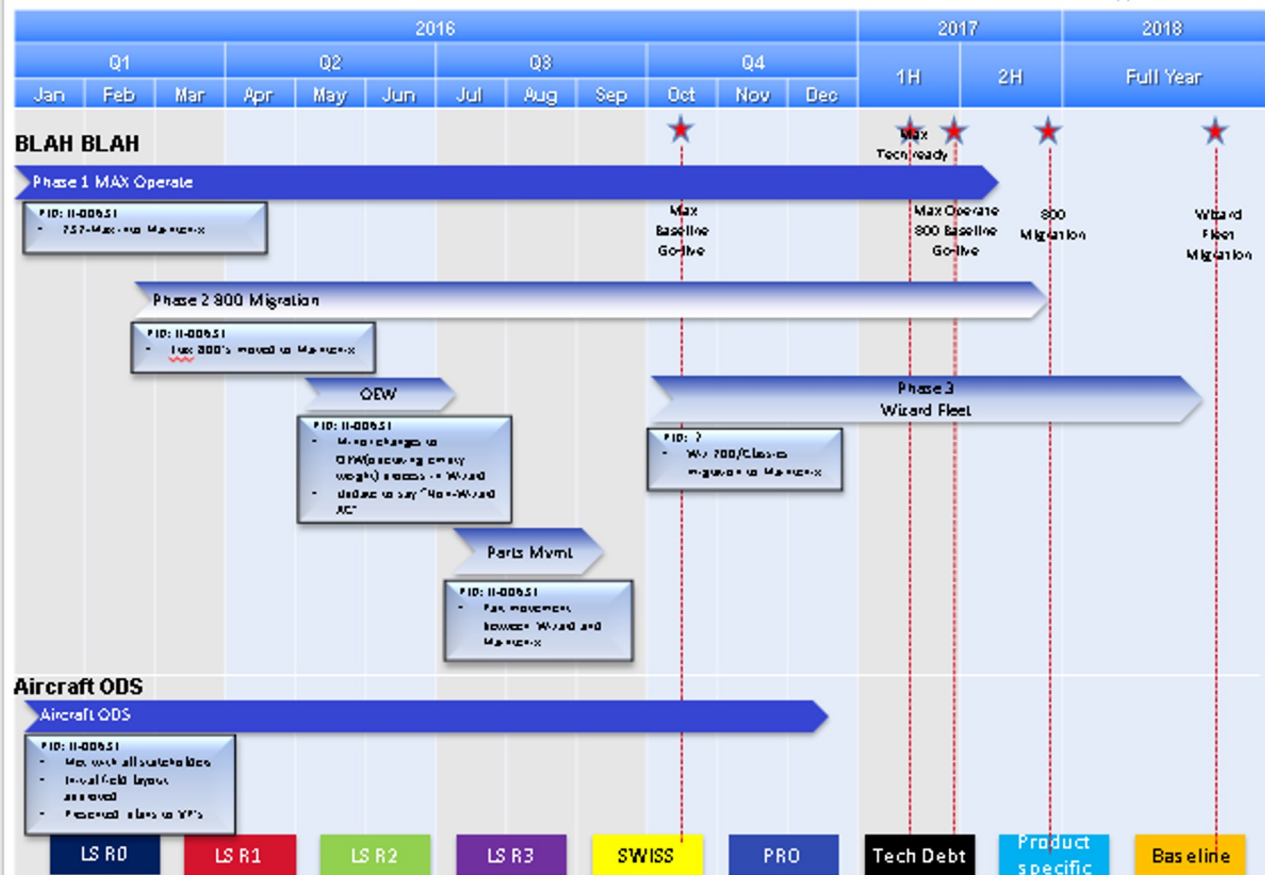
→ **Exercises - Don't Skip**

Headwinds & Tailwinds, Inception Retro

→ **Create Release Plan**

2016-2018 MOTLEY Roadmap

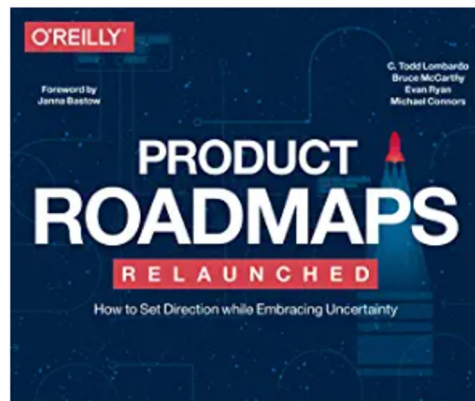
★ Reduces Risk



Product Roadmap

Reference:

Product Roadmaps Relunched: How to Set Direction While Embracing Uncertainty by Lombardo



Digital Platform Starter Kit Roadmap

Product Vision: Best-in-class standardized CI/CD pipeline for EM apps utilizing best practices for on-prem and cloud-ready automated build, test & deployment. Ease adoption with support & training. Reusable code for services such as containers, monitoring / logging, DB Connectors, SAP Connectors & Authentication.

- Enables EM dev teams to focus on business value delivery of digital projects.

Q4'18	Q1'19	Q2'19	Future
Enhancements: <ul style="list-style-type: none">• Integrated CD Pipeline• Logging & Error Handling• SAP Communication• Code Quality (Sonar)• Metrics & Visibility• Path-to-Production• OpenShift Config & Secrets	Enhancements: <ul style="list-style-type: none">• SK Generator• SK Usability• Jenkins setup Automation• Kafka Message Broker	Enhancements: <ul style="list-style-type: none">• SAP & HANA Authentication• ISTIO Cluster• Continuous Delivery (Blue / Green releases, Post-release Testing)	Enhancements: <ul style="list-style-type: none">• Secrets Management with ITPA (CyberArk)
Adoption / Technical Support: <ul style="list-style-type: none">• Release 1 Showcase• CX360 support• Customer API support• SK SharePoint	Adoption / Technical Support: <ul style="list-style-type: none">• Wiki Tech notes• Requested Training and Support Topics, Docs, Support Topics• Move from Yammer to GitLab for Issues and Requests	Adoption / Technical Support: <ul style="list-style-type: none">• Training Dev – PMs/Managers• Training Dev – Technical	Adoption / Technical Support:
Architecture / Infrastructure: <ul style="list-style-type: none">• Port to new cluster	Architecture / Infrastructure:	Architecture / Infrastructure:	Architecture / Infra:
Dependencies / Risks:	Dependencies / Risks: <ul style="list-style-type: none">• New PM to support SAP Auth.• Capacity for Support and Dev	Dependencies / Risks:	Dependencies / Risks:

MVP CANVAS

SEGMENTED PERSONAS 2	MVP PROPOSAL 1	EXPECTED RESULT 5
JOURNEYS 3	FEATURES 4	
	COST & SCHEDULE 7	METRICS TO VALIDATE THE BUSINESS HYPOTHESES 6

MVP
Canvas

Tip

Remember. If something sounds like common sense, people will ignore it.

Highlight what is unexpected about your topic.

Have some Showcase handouts

6. Showcase

Typically one-hour collaborative PowerPoint presentation of each Inception activity as well as each final poster version

→ PrePlanning

What, Who, When, Where, Why, How

→ Prep of Showcase is Daily Task

Every day add activities to Showcase

→ User Journey / Story Mapping

Explain and review core activity

→ Wallwalk Final Posters (RAID)

→ Release Plan review

Features w/Est, Product Roadmap and Release Plan. **Most time is here**

→ Next Steps

Tips for Showcase

1. **Schedule Early**
2. **May need big room for all Stakeholders**
3. **Have Team Present**
4. **Ask for Go/NoGo decision**

***** Add the Showcase each day or be overwhelmed!**

Inception Showcase Deck

1. What are we building and why
2. What's compelling about this project
3. What are the big rocks we need to move
4. Who's in our neighborhood
5. What does our solution look like
6. How big is this solution, Walking Skelton, MVP, R2,..
7. Where are we prepared to bend and flex
8. Approximately what is it going to take (time and dollars)



**Review deck
(Thursday PM or
Fri AM) with key
stakeholders.
NO surprises in
Showcase!**

Showcase

Most Stakeholders have two questions

1. **What** are you building?
 2. **When** will it be done?
-

Showcase Deck

1. Photos of each poster
2. Sequencer outputs
3. RAID ROAM'ed
4. Roadmap
5. Request to proceed with first sprint.

Business Context

Scope and priorities - What we are building and why

- ❑ Team / Attendees / Team Photo
 - ❑ Hopes & Fears / Tailwinds & Headwinds
 - ❑ Business Strategy around Project
 - ❑ Shared Vision/Objectives, In/Out of Scope, Value Proposition, Elevator Pitch & Workshop Goals
 - ❑ Key Metrics for product and process
 - ❑ Stakeholder Mapping - Influence vs. Support/Engagement
-

STORY DISCOVERY

Understand Who uses and how the product will solve a business problem. WOW factor, WIIFM, also What are the big features. What does solution look like?

- ❑ Personas -> Roles & Goals
 - ❑ Current System Demo
 - ❑ Key User Journeys w Pain Points
 - ❑ Value Stream Map or User Story Mapping
 - ❑ Lo-Fi Prototypes or Wireframes
 - ❑ Epics / Features (Prioritized) / User Stories added to User Journeys
 - ❑ Non-Functional Requirements
-

TECHNICAL VISIONING

Understand technical
constraints, As-is Arch, and Best
Initial Arch

- ❑ Technical Architecture - As-is and To-be, Languages, Integration, Infrastructure / Tech Stack, DB, DevOps
 - ❑ Testing Strategy
-

ESTIMATION & PLANNING

Size of solution, Sequencer, RAIDs, Feature Prioritization, Release Plan, MVP Canvas, RAID, Who is in our neighborhood, Drivers, Release Plan, Product Roadmap.

- ❑ Working Agreements
 - ❑ Velocity Planning Game
 - ❑ Estimation with Planning Poker or T-Shirts or Forced Ranking
 - ❑ MoSCow Prioritization
 - ❑ Feature estimates w CCV
 - ❑ RAID with Constraints, Decision Log & Parking Lot
 - ❑ Release Plan - Walking Skelton, MVP, Release 2,...
 - ❑ Product Roadmap
 - ❑ Staffing and Start Dates
 - ❑ MVP Canvas
 - ❑ Sliders Trade-offs Exercise
-



7. Redux

Typically one-week collaborative process to
create a solution for 3-6 months of work.

→ **PrePlanning**

Set expectations. Prepare. Id attendees.

→ **Creating a Shared Vision**

Business & Product Context. Validate
Shared Vision. Id Stakeholders.

→ **Product and Tech Solutioning**

VSM. Personas. Roles & Goals. UX, As-
Is. **User Journey & Story Mapping**

→ **Release Plan**

Create a Road Map of next 2-3 releases
focusing on next one. RAID. Id MVP

→ **Showcase**

Verify internally & externally. Go-NoGo





Good luck!

I hope you'll use these recipes and tips to Align the People and Build the Right Product.

For more tips or facilitating for your Inceptions,

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Appendix

The Details

- ❑ Supplies / Tools
- ❑ Posters
- ❑ Technology / Big Rooms

Supplies List

Room Supplies

- Post-its (different sizes & colors)
- Story cards (different colors)
- Roll of 36" Paper - User Story Map
- Blue Painters Tape 1" & 2"
- Scissors
- Meeting Name Tents - Color paper
- Giant Post-it flip chart
- Normal flip chart paper
- Whiteboards - printing
- White Board Pens - Several pkgs
- Sharpies - Several Colors
- Voting dot stickers

Technology

- Laptops - one for each monitor and camera
- Video cameras & tripods (GoPros)
- Large Monitors and projectors
- USB Microphones
- Connected Speakers
- Laptop Chargers
- Excellent video conferencing
- Adapters, power strips, cables (AC & VGA)
- Laser Pointer / Clicker
- Camera (SmartPhone Pics)
- Smart Phone Timers

LUNCH, Drinks & Snacks

Planning Meetings - Assignments and Review Cycles

- Identify Core Team and Inception Facilitation Team - Quarterback and Inception Facilitators (Agile Coaches, ART RTE, Scrum Masters, other POs, BAs)
- Review User Journey[s], Feature List, Priorities, ...
- Room Reservations, Meals, Snacks, COFFEE and TEA
- Review Inception Schedule and Assign Presenters
- Sponsor Meeting - Inception Slides
- What is an Inception - Intro for newbies
- Review Inception Deck and Showcase Deck
- Technology Presentation from Enterprise Architect / Tech Leads





7 TRICKS TO A WINNING START

1. Understand expectations
2. Meet people
3. Have a product owner from the beginning
4. Have a core group - not lots of people dropping in and out
5. Logistics
6. Plan the inception with your team
7. Do your homework

Bonus: User Journey Go Ugly Early

Notes

Helpful Tips for PrePlanning



Reminder

Do the team photo on first day when most folks are attending usually Monday.

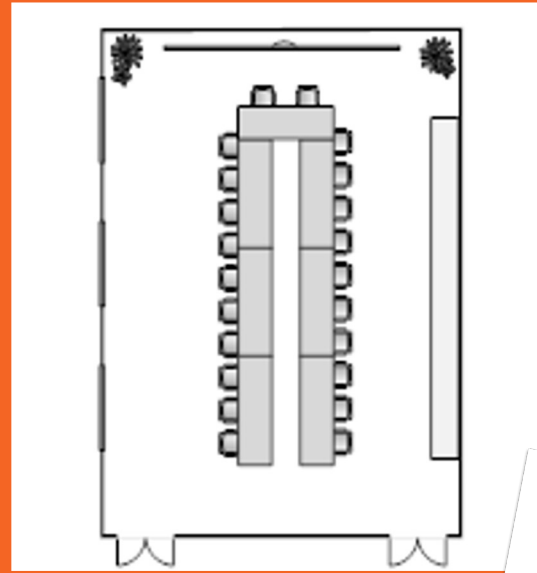
- Each Inception is unique
 - DO NOT skip Icebreakers
 - Several weeks for prep are needed
 - Create all posters ahead
 - Test technology / conferencing
 - Send invites at least 2-4 weeks ahead with room reservations
 - Send email with location, hotels, maps, & security instructions
 - Standup & Retro for 15 mins EACH day
 - Study up on Remote Facilitation
 - Plenty of breaks
 - Be flexible as possible - timebox
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Inception Posters on Large Post-Its

- Week Agenda and Daily updated Agenda
- User Journey Map or Value Stream Map as the basis for...
- User Story Mapping setup - large roll or paper with areas labeled
- RAID - Risks, Assumptions, Issues, Dependencies - be creativity
 - Update Daily to cleanout resolved Issues
- Parking Lot - Should be addressed by end of Inception or create a RAID item
- Elevator Pitch - For [target customers] Who Use PostIts first pass then fill-in
- Retrospective for each day
- Personas with Roles / Goals
- Prioritization Matrix - Helps delineate MVP features
- Stakeholder Maps - see PM 101
- Trade-Off Sliders
- Decision Logs - Business Rules and Architecture Decision Logs
- Glossary for Business and Tech terms with explanations, ABBREVIATIONS, TLAs
- Project Context Diagram and Interfaces

The Inception Room will need the space for a large group, facilities as well as

Technology for Wi-Fi and cabled connections for a room full of attendees as well as cameras and monitors.



Tip

Wallspace
Breakout rooms needed
Private meeting rooms
Extra seats for guest to stay against walls
Large whiteboards