|  |
| --- |
|  **Agenda** |

# ­Prepare Phase Agenda

## 8th Mar 2021 to 26th Mar 2021

## Key: Orange = Design Sprint Team.

## \*Design Sprint assumes pre-work has been conducted during the Discover phase. Day 1 & 2 is not enough time for pre-work.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
| Sales to Delivery Transition | Introduction, Vision Alignment, Review Goals, Methodology,Technical ArchitectureSponsor Review | \*Design Sprint: **Map**Enablement Plan, Test Strategy, Governance, DevOps | Design Sprint: **Sketch**Define Ready/Done, Managing Change, Training, NFRs | Design Sprint: Decide |
| Day 6 | Day 7 | Day 8 | Day 9 | Day 10 |
| Design Sprint: **Prototype** | Design Sprint: **Test** | Design Playback to wider audienceDelivery Planning, Create Stages & Steps model | Create User Story List, Create Journey Centric Test Plan, Planning User Story Creation | Create User Stories |
| Day 11 | Day 12 | Day 13 | Day 14 | Day 15 |
| Create User Stories | Create User Stories | Create User Stories | User Story Reviews / PlaybacksBuild Preparation | User Story Reviews / PlaybacksBuild Preparation |

## Facilitated by: Pega

## Attendees:

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Organisation | In Design Sprint? |
| Sponsor | e.g. Mary Hawkins (MH) | Client |  |
| Project Manager | e.g. John Doe (JD) | Client |  |
| Product Owner | e.g. Raj Mishra (RM) | Client | Y |
| Business SME(s) | e.g. Joe Bloggs (JB), Susan O’Neill (SO) | Client |  |
| Designer |  | Pega | Y |
| Design Sprint Facilitator |  | Client / Pega / 3rd Party | Y |
| End User/Customer Representative(s) |  | Client | Y |
| Scrum Master |  | Client |  |
| Solution Architect / Technical Lead | e.g. one tech representative needs to be in the design sprint | Client / Pega | Y |
| Test Lead |  | Client |  |
| Business Analyst / Business Architect | e.g. one BA should be in the design sprint | Client / Pega | Y |
| Change Manager |  | Client |  |
| Project Delivery Lead |  | Pega |  |
| Lead System Architect |  | Pega |  |
| Lead Business Analyst |  | Pega |  |

## Pre-requisites:

|  |  |  |
| --- | --- | --- |
| Pre-requisite | Owner | Status |
| Client to arrange meeting room with a screen/whiteboard, building access, wifi availability, lunch/refreshment arrangements, people’s calendars have been cleared | Client | e.g. Done |
| A Case Type Backlog has been created | Pega |  |
| Key resources have been Pega enabled | Client |  |
| The project team have had the opportunity to conduct pre‑reading | Client / Pega / Partner |  |
| A Pega development environment is available | Client / Pega |  |
| Client research into users has been conducted by the client prior to the Design Sprint starting | Client |  |
|  |

|  |  |  |
| --- | --- | --- |
| Day 1, Week 1 |  |  |
| All Day | Sales to Delivery TransitionLead: Pega led offsiteAttendees: Pega Sales and Pega Delivery TeamInputs: Sales to Delivery Playbook, AgendaOutputs: Actions log updates  | Location |
| Day 2, Week 1 |  |  |
| 9am – 10am | Introductions, Sponsor Address, Agenda ReviewLead: Project ManagerAttendees: AllInputs: Workshop Agenda, VisionOutputs: Actions log updates | Location |
| 10.15am – 12.15pm | Vision Alignment WorkshopLead: Pega / Project ManagerAttendees: All including Pega Sales TeamInputs: Vision, Case Type Backlog, Day 1 Live Plan, Backlog, Business Objectives, Initial MLPOutputs: Create shared vision of what will be delivered, clear idea of the problems that need to be solved in the Design Sprint, actions log updates, agenda updates | Location |
| 1pm – 2pm | Review Goals, Methodology, Team Structure and ScopeLead: PegaAttendees: AllInputs: Vision, Case Type Backlog, Day 1 Live Plan, Business ObjectivesOutputs: Actions log updates | Location |
| 2.15pm – 4.15pm | Technical ArchitectureLead: Solution ArchitectAttendees: Project Manager, Solution Architect, Delivery Team, Test Lead (note Design Team not to attend to avoid impacting creativity)Inputs: Current and target architectureOutputs: Identify dependencies, owners, status of each integration, creation of initial integration dependency schedule | Location |
| 4.30pm – 5pm | Review Progress with SponsorLead: Pega / Project ManagerAttendees: AllInputs: Vision, Case Type Backlog, rough journey mapsOutputs: Actions log updates, agenda updates | Location |
| Day 3, Week 1 |  |  |
| 9am – 5pm | Design Sprint Day 1 of 5: MapLead: PegaAttendees: Design Sprint Team Inputs: Vision, ResearchOutputs: Frame, agree and define problem to solve and long-term business goal. Identify key questions, map journey for the challenge, conduct interviews  | Location |
| 9am – 10am | Enablement PlanningLead: PegaAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead) Inputs: Any prior Pega enablement plan for review (see pre-requisites), Pega slides to introduce EnablementOutputs: Review current enablement status, identify additional enablement candidates, initial high‑level enablement plan to continue enablement | Location |
| 10am – Midday | Test StrategyLead: Test Lead / PegaAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)Inputs: Client Test Process, Sample Pega Journey Centric test Plan Outputs: Understanding of test processes, tools (e.g. Automated testing, JIRA, Agile Studio) and available environments | Location |
| 1pm-3pm | Establish Governance and Roles & ResponsibilitiesLead: Pega / Project ManagerAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead), Sponsor (optional)Inputs: Current client governance structure, Pega standard governance model, sample Pega Status Report (PSR)Outputs: Agree governance model, R&Rs, meeting structure, reporting and cadence agreed.  | Location |
| 4pm – 5pm | DevOps PlanningLead: Pega / Solution Architect / Test LeadAttendees: Delivery TeamInputs: Current DevOps processesOutputs: Initial plan for people, processes and technology required to implement Continuous Integration / Continuous Delivery | Location |
| Day 4, Week 1 |  |  |
| 9am – 5pm | Design Sprint Day 2 of 5: SketchLead: PegaAttendees: Design Sprint Team Outputs: Structured walkthrough of key ideas, lightning demos, visual ideation (notes, ideas) and solution sketch | Location |
| 9am – 10.30am | Definition of Ready / Definition of DoneLead: Scrum MasterAttendees: Delivery Team, Test LeadInputs: Any prior examples of DoR / DoDOutputs: Agreed DoR / DoD and where they will be located for reference | Location |
| 10.30am – Midday | Change Control ManagementLead: Change ManagerAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)Inputs: Current organisation change management processOutputs: Agreed change management process | Location |
| 1pm – 2pm | TrainingLead: Change ManagerAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)Inputs: Training requirementsOutputs: Initial training plan, update Day 1 Live Plan | Location |
| 2pm – 3pm | Non-Functional RequirementsLead: Project ManagerAttendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)Inputs: Client to provide overview of performance / non-functional requirementsOutputs: Updated actions log, high level NFR plan, updated integration dependency schedule | Location |
| Day 5, Week 1 |  |  |
| 9am – 5pm | Design Sprint Day 3 of 5: DecideLead: PegaAttendees: Design Sprint Team Outputs: Solution sketch voting, heat map, prioritize/focus on ideas to build out in the prototype, storyboard to create prototype blueprint | Location |
| Day 6, Week 2 |  |  |
| 9am – 5pm | Design Sprint Day 4 of 5: PrototypeLead: PegaAttendees: Design Sprint Team Outputs: Build prototype and validate against key ideas. Prepare for customer / user interviews | Location |
| Day 7, Week 2 |  |  |
| 9am – 5pm | Design Sprint Day 5 of 5: TestLead: PegaAttendees: Design Sprint Team Outputs: Test prototype, Lean Usability Testing, customer/user interviews, summarize findings and insights | Location |
| Day 8, Week 2 |  |  |
| 9am – Midday | Playback Design Sprint to wider audienceLead: Design Sprint TeamAttendees: AllInputs: Design Sprint findings Outputs: Updated Day 1 Live Plan, provide basis to create Pega stages & steps model, updated actions log | Location |
| 1pm – 2pm | Delivery Planning based on Design Sprint findingsLead: Project Manager / PegaAttendees: Delivery Leads, Product Owner, DesignerInputs: Design sprint prototype, integration dependency scheduleOutputs: Validate assumptions, re-assess agenda based on findings, plan to refine case type backlog | Location |
| 2pm – 5pm | Creation of Initial Stages & Steps ModelLead: PegaAttendees: Lead System Architect, Lead Business ArchitectInputs: Journey maps, design sprint prototype Outputs: Initial stages & steps modelled in Pega | Location |
| Day 9, Week 2 |  |  |
| 9am – Midday | Create User Story ListLead: PegaAttendees: Delivery Team, Product OwnerInputs: Stages & steps model, design sprint prototypeOutputs: Delivery backlog (user story list) | Location |
| 1pm – 2.30pm | Create Journey Centric Test PlanLead: Test LeadAttendees: Delivery Team, Product Owner Inputs: Delivery backlog (user story list)Outputs: Journey centric test plan | Location |
| 2.30pm – 3.30pm | Planning SessionLead: PegaAttendees: Project Manager, Product Owner, Business SMEs, Solution Architect, Delivery Team, Test Lead Inputs: Stages & steps model, design sprint prototype, delivery backlog (User Story List)Outputs: Plan User Story creation. This may involve planning DCO sessions for remainder of Prepare phase if required  | Location |
| 3.30pm – 5pm | Create User Stories (for 2 sprints)In parallel: High Level Solution DesignsLead: PegaAttendees: Pega LBA, Pega LSA, Product Owner, relevant Business SME (decision maker) and Test Lead (or delegate)Inputs: Journey maps, any business requirementsOutputs: Updated flows, UI mock-ups and create user stories in Pega to Definition of Ready, high-level solution designs, creation of initial data model, creation of enterprise class structure | Location |
| Day 10 to Day 13 |  |  |
| 9am – 5pm | Create User Stories (for 2 sprints)In parallel: High Level Solution DesignsLead: PegaAttendees: Pega LBA, Pega LSA, Product Owner, relevant Business SME (decision maker) and Test Lead (or delegate)Inputs: Journey maps, any business requirementsOutputs: Updated flows, UI mock-ups and create user stories in Pega to Definition of Ready, high-level solution designs, creation of initial data model, creation of enterprise class structure | Location |
| Day 14 and 15 |  |  |
| 9am – 5pm | User Story Review / Playback with Business AudienceIn parallel: Build preparation tasksLead: PegaAttendees: AllInputs: Journey maps, stages & steps model, high level solution designs, integration dependency scheduleOutputs: Agreement to start Sprint 1, business approval that journey maps, solution designs, priorities and user story list are all correct, updates to journey maps / stages & steps, user stories and integration dependency delivery commitment.  | Location |

#### Additional Instruction:

Use this section for additional instructions, comments, or directions.