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| **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.

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| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
| Sales to Delivery Transition | Introduction, Vision Alignment, Review Goals, Methodology,  Technical Architecture  Sponsor 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 audience  Delivery 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 / Playbacks  Build Preparation | User Story Reviews / Playbacks  Build Preparation |

## Facilitated by: Pega

## Attendees:

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| --- | --- | --- | --- |
| 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:

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| 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 |  |
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| Day 1, Week 1 |  |  |
| All Day | Sales to Delivery Transition  Lead: Pega led offsite  Attendees: Pega Sales and Pega Delivery Team  Inputs: Sales to Delivery Playbook, Agenda  Outputs: Actions log updates | Location |
| Day 2, Week 1 |  |  |
| 9am – 10am | Introductions, Sponsor Address, Agenda Review  Lead: Project Manager  Attendees: All  Inputs: Workshop Agenda, Vision  Outputs: Actions log updates | Location |
| 10.15am – 12.15pm | Vision Alignment Workshop  Lead: Pega / Project Manager  Attendees: All including Pega Sales Team  Inputs: Vision, Case Type Backlog, Day 1 Live Plan, Backlog, Business Objectives, Initial MLP  Outputs: 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 Scope  Lead: Pega  Attendees: All  Inputs: Vision, Case Type Backlog, Day 1 Live Plan, Business Objectives  Outputs: Actions log updates | Location |
| 2.15pm – 4.15pm | Technical Architecture  Lead: Solution Architect  Attendees: Project Manager, Solution Architect, Delivery Team, Test Lead (note Design Team not to attend to avoid impacting creativity)  Inputs: Current and target architecture  Outputs: Identify dependencies, owners, status of each integration, creation of initial integration dependency schedule | Location |
| 4.30pm – 5pm | Review Progress with Sponsor  Lead: Pega / Project Manager  Attendees: All  Inputs: Vision, Case Type Backlog, rough journey maps  Outputs: Actions log updates, agenda updates | Location |
| Day 3, Week 1 |  |  |
| 9am – 5pm | Design Sprint Day 1 of 5: Map  Lead: Pega  Attendees: Design Sprint Team  Inputs: Vision, Research  Outputs: 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 Planning  Lead: Pega  Attendees: 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 Enablement  Outputs: Review current enablement status, identify additional enablement candidates, initial high‑level enablement plan to continue enablement | Location |
| 10am – Midday | Test Strategy  Lead: Test Lead / Pega  Attendees: 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 & Responsibilities  Lead: Pega / Project Manager  Attendees: 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 Planning  Lead: Pega / Solution Architect / Test Lead  Attendees: Delivery Team  Inputs: Current DevOps processes  Outputs: 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: Sketch  Lead: Pega  Attendees: 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 Done  Lead: Scrum Master  Attendees: Delivery Team, Test Lead  Inputs: Any prior examples of DoR / DoD  Outputs: Agreed DoR / DoD and where they will be located for reference | Location |
| 10.30am – Midday | Change Control Management  Lead: Change Manager  Attendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)  Inputs: Current organisation change management process  Outputs: Agreed change management process | Location |
| 1pm – 2pm | Training  Lead: Change Manager  Attendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)  Inputs: Training requirements  Outputs: Initial training plan, update Day 1 Live Plan | Location |
| 2pm – 3pm | Non-Functional Requirements  Lead: Project Manager  Attendees: Delivery Leads (Project Manager, PDL, LSA, LBA, Solution Architect, Test Lead)  Inputs: Client to provide overview of performance / non-functional requirements  Outputs: Updated actions log, high level NFR plan, updated integration dependency schedule | Location |
| Day 5, Week 1 |  |  |
| 9am – 5pm | Design Sprint Day 3 of 5: Decide  Lead: Pega  Attendees: 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: Prototype  Lead: Pega  Attendees: 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: Test  Lead: Pega  Attendees: 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 audience  Lead: Design Sprint Team  Attendees: All  Inputs: 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 findings  Lead: Project Manager / Pega  Attendees: Delivery Leads, Product Owner, Designer  Inputs: Design sprint prototype, integration dependency schedule  Outputs: Validate assumptions, re-assess agenda based on findings, plan to refine case type backlog | Location |
| 2pm – 5pm | Creation of Initial Stages & Steps Model  Lead: Pega  Attendees: Lead System Architect, Lead Business Architect  Inputs: Journey maps, design sprint prototype  Outputs: Initial stages & steps modelled in Pega | Location |
| Day 9, Week 2 |  |  |
| 9am – Midday | Create User Story List  Lead: Pega  Attendees: Delivery Team, Product Owner  Inputs: Stages & steps model, design sprint prototype  Outputs: Delivery backlog (user story list) | Location |
| 1pm – 2.30pm | Create Journey Centric Test Plan  Lead: Test Lead  Attendees: Delivery Team, Product Owner  Inputs: Delivery backlog (user story list)  Outputs: Journey centric test plan | Location |
| 2.30pm – 3.30pm | Planning Session  Lead: Pega  Attendees: 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 Designs  Lead: Pega  Attendees: Pega LBA, Pega LSA, Product Owner, relevant Business SME (decision maker) and Test Lead (or delegate)  Inputs: Journey maps, any business requirements  Outputs: 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 Designs  Lead: Pega  Attendees: Pega LBA, Pega LSA, Product Owner, relevant Business SME (decision maker) and Test Lead (or delegate)  Inputs: Journey maps, any business requirements  Outputs: 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 Audience  In parallel: Build preparation tasks  Lead: Pega  Attendees: All  Inputs: Journey maps, stages & steps model, high level solution designs, integration dependency schedule  Outputs: 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.