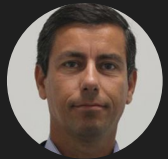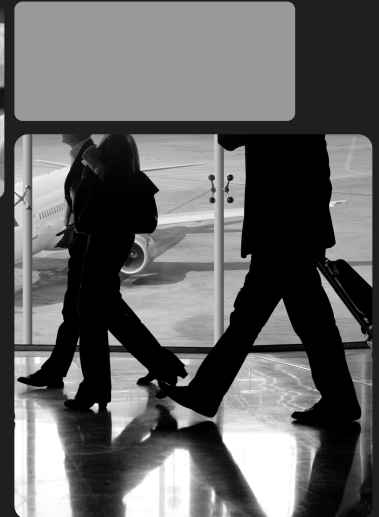outsystems

Navigating the Initiation Phase:
Setting the Foundation for Successful Software Delivery

Vera Seabra
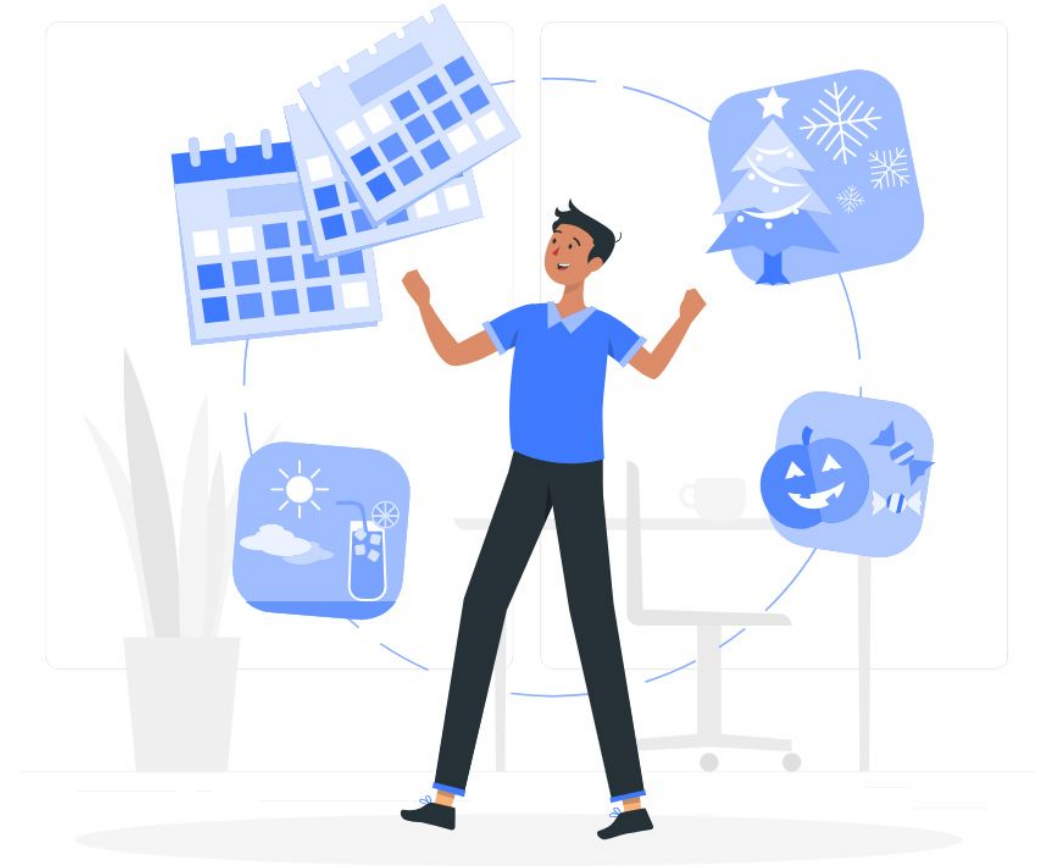OS Engagement Manager

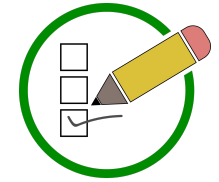**Carlos Primavera**
OS Engagement Manager

Agenda

- Understanding the Initiation Phase

  - Defining the Vision

  - User journey

  - Story mapping

- Backlog creation

- Iteration planning

- Risk management

Time for a quick Poll

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OutSystems Delivery Methodology
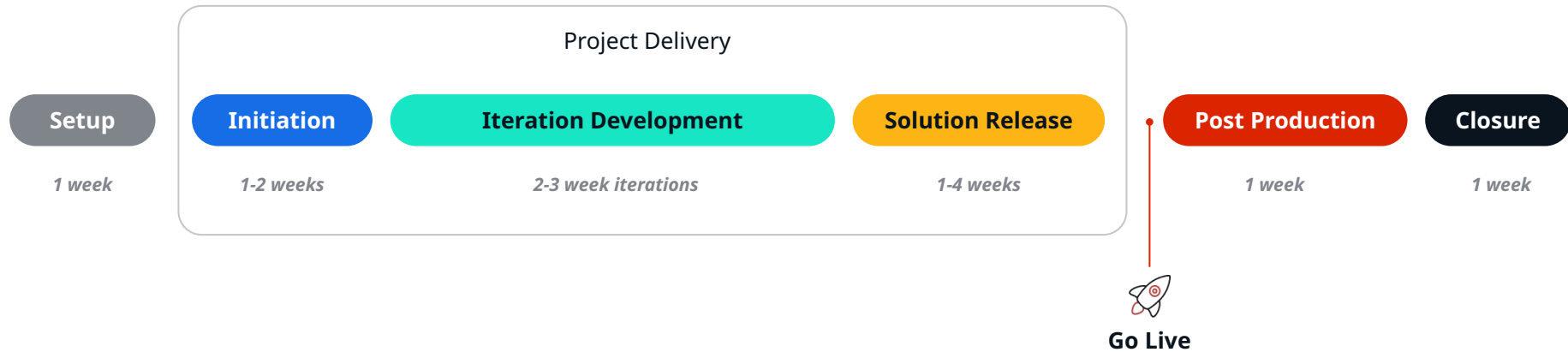
Project Delivery

Setup

Initiation

Iteration Development

Solution Release

Post Production

Closure

1 week

1-2 weeks

2-3 week iterations

1-4 weeks

1 week

1 week

Go Live

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Project Delivery Playbook

outsystems Partner Center

Manage ⌄ | Enable ⌄ | Promote ⌄ | Sell ⌄

Search

Project Delivery Playbook

Copy URL

Delivery   Delivery Playbook

Fast delivery is not just about technology. There are multiple dimensions that can be combined to reach an optimal value extraction from the platform (Team hard and soft skills, backlog management, continuous improvement discipline, a quality mindset and... the delivery methodology, the glue of everything).

Agile is not synonymous with Velocity. Agile is not about using scrum. Agile is about decision-making and adaptability.

Keeping the cadence of grooming the backlog (into a definition of ready state), delivering what was planned, and accepting what was delivered in the last sprint, is the success formula of a high velocity, high-quality delivery.

We can also call this playbook the OutSystems Delivery Method, a document that has been fine-tuned during the last 20 years, reflecting our tried and true practices.

Again... it's all about People, Processes, and Technology. OutSystems platform, HPLC market leader, addresses the technology part. The methodology is the glue between the People and the processes. Following it thoroughly gives you the reassurance of a steady and controlled delivery in full alignment with the customer.

Keeping the cadence of ceremonies, always involving your customer representatives, creates a sense of belonging, commitment, and ownership, halfway through the delivery success.

A regular demonstration of the progress (business demos) and the sharing of Project Status (our own Template is also a deliverable), gives everyone full transparency. Be strict with the communication, and follow the User Stories Lifecycle, detailed later in this presentation.

This is a reference, a guiding document. Adapting it to your customer scenario is also part of the success!

Download: Project Delivery Playbook

outsystems
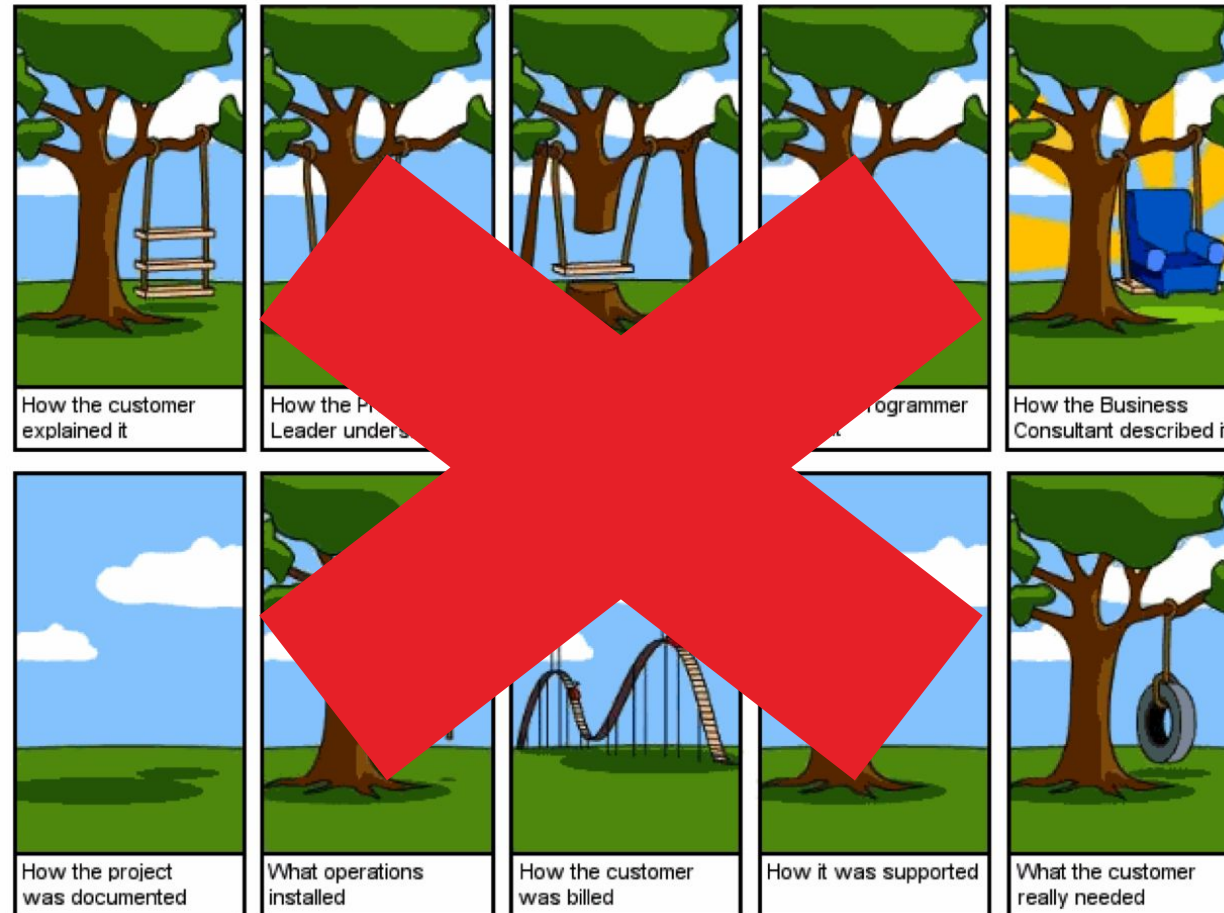
Why Initiation?

*Ensure that **all stakeholders have a shared understanding** of the project **and its objectives** before moving forward with detailed planning and execution*

What is Initiation?

Initiation phase is the first stage of the project life cycle. It involves defining the project's goals, scope, purpose and overall vision.

The result of the Initiation is a well-defined vision, containing a clear understanding of the user needs, and a foundation for the subsequent phases: iterative development, solution release and post-production.

Time for a quick Poll

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How we do it?

INITIATION • Users come first • Be visual • See the forest

SPRINT N-1 • Small yet valuable • Make it personal • Independent yet connected • Less is more

SPRINT N • Manage ongoing discussions

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A 3 steps journey

Link the user needs value proposition to the User Story and understand its contribution.

Mock up the macro process (if needed) and discover hidden scope.

See the full picture and know where each User Story fits inside it.

User Story Mapping

Users come first

Be visual

See the forest

INITIATION

SPRINT N-1

SPRINT N

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Preparation checklist

- ❏ Handover from Sales team:
  - ❏ Client and business context
  - ❏ Goals
  - ❏ Assumptions
  - ❏ Risks
  - ❏ Operations and Administrative processes

- ❏ Team allocation plan is done

- ❏ Infrastructure will be available with no impact on plan

- ❏ Project tool is bootstrapped

- ❏ Initiation workshop is fully planned with the customer
  - ❏ Goals
  - ❏ Agenda
  - ❏ Stakeholders (Sponsors, Key users, project team)
  - ❏ Availability

- ❏ "Kick Off" presentation is validated with the customer PM

- ❏ "Great Apps Program" meetings are scheduled

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Who drives the Initiation?

Engagement Manager

Coordinates engagement, conduct sessions, performs business analysis

UX/UI Expert

Tests the optimal user journey
Consolidation of patterns, feasibility check

Tech Lead

Designs the application architecture and surrounding systems
Integration patterns (caching, offline, etc.)

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Who is needed from the Customer?

Business

We need to understand how business is today, what are their actual pains and what they would like to do

Sponsor, Stakeholders, Project Manager, Business Analysts/SME, Marketing, Operations, etc.

Users

We need to understand their needs and test the journey we'll be designing

Whoever will be using your application

IT

We need to understand your information systems architecture and integrations, as well as the way to go

Enterprise Architect

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Schedule - Week 1

	Day 1	Day 2	Day 3	Day 4	Day 5
Morning 9:30 – 12:00	**Meet & Greet**	**Daily scrum**	**Daily scrum**	**Daily scrum**	**Daily scrum**
	Initiation kick-off All Hands **Business & Functional Overview**	**Integrations I** Core Systems, Networking, Accesses, Integration patterns *PM, ARCH*	**Requirements Gathering II** Personas, and User Stories *PM, PO, SME, BA, ARCH*	**Requirements Gathering III** Personas, and User Stories *PM, PO, SME, BA, ARCH*	**Requirements Gathering IV** Personas, and User Stories *PM, PO, SME, BA, ARCH*
Afternoon 13:00 – 18:00	**Business & Functional Overview** *PM, PO, BA, ARCH* **Requirements Gathering I** Personas, and User Stories *PM, PO, SME, BA, ARCH* **OS Team Work** *Ad hoc PM, PO, BA, SME*	**See Users in action** **OS Team Work** *Ad hoc PM, PO, BA, SME*	**OS Team Work** *Ad hoc PM, PO, BA, SME*	**OS Team Work** *Ad hoc PM, PO, BA, SME*	**Integrations II** Core Systems, Networking, Accesses, Integration patterns *PM, PO, SME, BA, ARCH* **Week wrap-up** Progress Update *All Hands*

* 1 week of initiation per 4 sprints of development

Spr - Sponsor **PM** -Proj Mgr **PO** - Prod Owner **ARCH** - Arch/Tech Lead
SME - Subject Matter Exp **BA** - Business Analysts **KU** - Key Users

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Schedule - Week 2

	Day 6	Day 7	Day 8	Day 9	Day 10
Morning 9:30 - 12:00	**Daily scrum**	**Daily scrum**	**Daily scrum**	**Scope walk-through**	**Team Work** Final Changes & Prep Sprint 1
	Requirements Gathering V Personas, and User Stories *PM, PO, SME, BA, ARCH*	**Requirements Gathering VI** Personas, and User Stories *PM, PO, SME, BA, ARCH*	**Usability Testing and Business Alignment** *PM, PO, SME, BA, ARCH*	*PM, PO, SME, BA, ARCH*	*Ad hoc PM, PO, BA, SME*
Afternoon 13:00 - 18:00	**Team Work**	**Team Work**	**Team Work** Feedback review, Backlog review and Project Plan	**Team Work** Feedback review, Backlog review and Project Plan	**Team Work** Prep Sprint 1 *Ad hoc PM, PO, BA, SME*
					Backlog Validation & Sign-Off All Hands
					Initiation wrap-up

Spr - Sponsor **PM** -Proj Mgr **PO** - Prod Owner **ARCH** - Arch/Tech Lead
SME - Subject Matter Exp **BA** - Business Analysts **KU** - Key Users

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Getting started

1 or 2 objective sentences, yet inspiring, that can be used by the team to make decisions

it's not the application description: it's the **change** that this application is supposed to support in the customer organization

Company Strategic Goals

Company Tactical Goals

Vision Ultimate Goal

Success Criteria

Epics

User Stories

The strategic and tactical goals help giving context to the project (drivers and motivations)

Business tactical goals planned to be attained with this new solution, preferably quantifiable - like the increase / decrease of a particular business KPI to be affected by the project

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High-level context for a Hotel Bookings use case

A chain of hotels in Europe wants to improve their booking process and at the same time create a loyal community of Customers, starting with the front desk process.

Strategic Objectives

- Become a market leader in the industry
- Achieve high-levels of customer satisfaction and loyalty
- Achieve operational efficiency and effectiveness
- Embrace digital transformation for enhanced competitiveness

Tactical Objectives

- Increase market share by 10% in the next fiscal year.
- Achieve a Net Promoter Score (NPS) of 75 within the next six months.
- Reduce operational costs by 15% in the next quarter.
- Achieve a 10% increase in quarterly revenue.

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Hotel Bookings Ultimate Goal

"To **revolutionize the hospitality industry**, creating a seamlessly **integrated hotel bookings** front desk app that not only **streamlines reservation processes** but also fosters **personalized** and **memorable** guest **experiences**, setting a **new standard for efficiency** and **customer satisfaction** in the global hotel management landscape."

Users come First
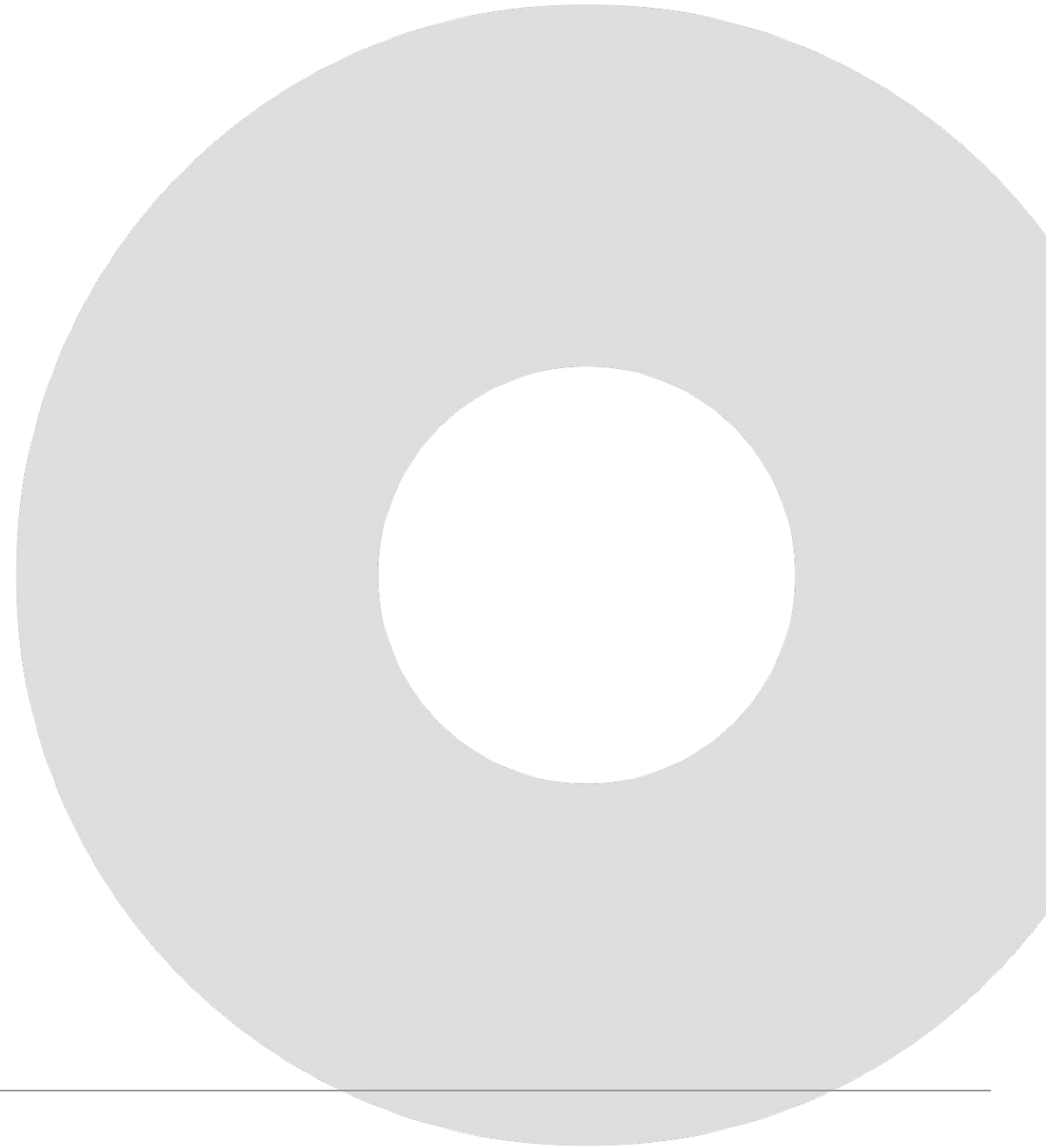
What is a Persona?

Personas are user roles that interact with a system in a certain way. Even though they are fictitious characters, they should be based on our knowledge of real users.

Guidelines for a Persona

When defining a Persona, we need to cover

at least these categories:

- Identification (Photo, Name, Title/Role)

- Background

- User Characteristics

- User Needs

- Business Goals

Identification
(Photo)

Identification
(Name, Title/Role)

Background

User
Characteristics

User Needs

Business
Goals

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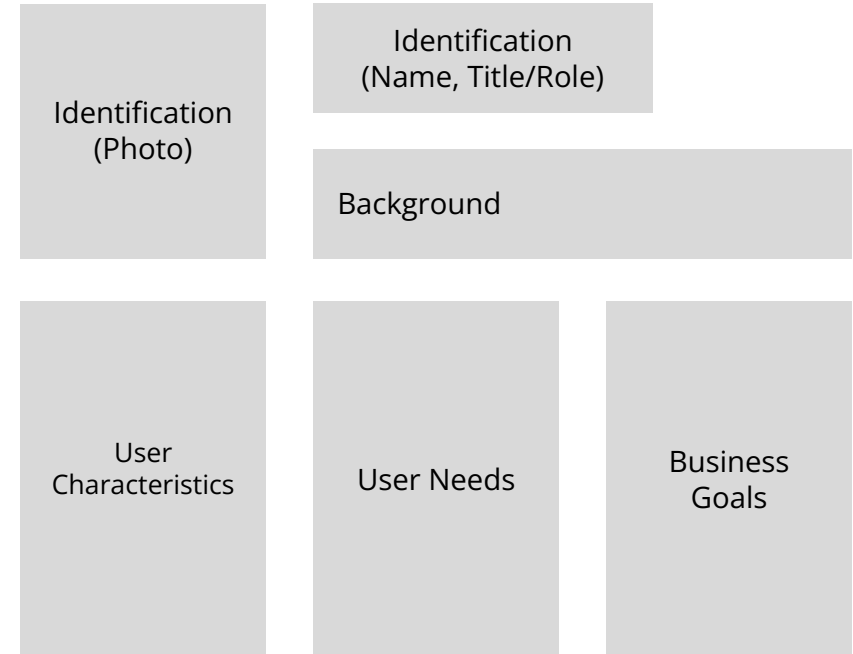
Guidelines for a Persona

Identification

- Identification is about creating a realistic illusion of the user context, and making it identifiable within the team
- User Photo – avoid illustrated avatars
- Name – avoid names like John Smith
- Title – This can either be a made-up term that encompasses the user characteristics or in some cases (b2c) can be the role in the company

Identification (Photo)	Identification (Name, Title/Role)	
	Background	
User Characteristics	User Needs	Business Goals
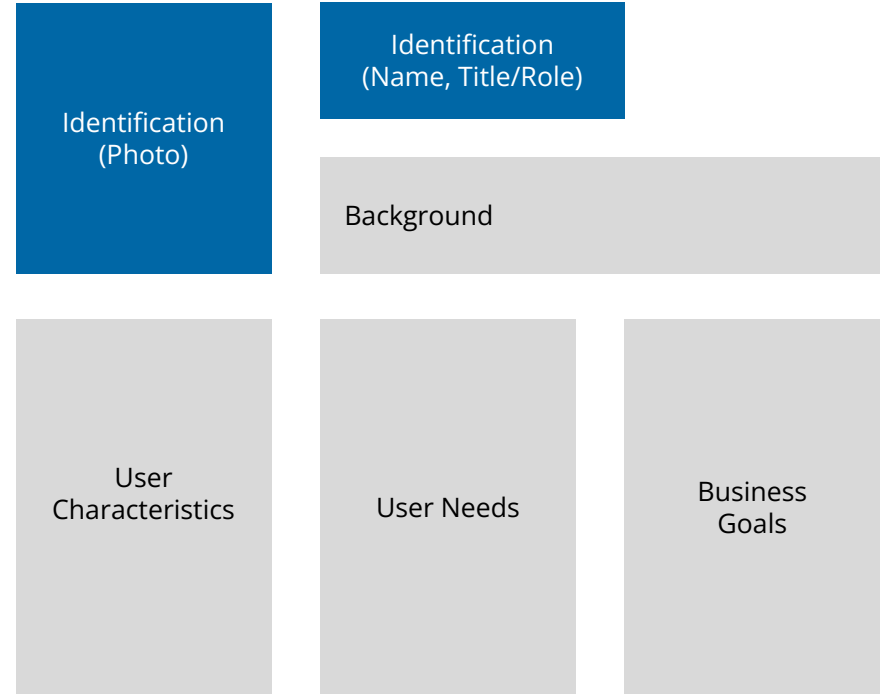
Guidelines for a Persona

Background

- Write the story for this persona. This is what helps contextualize the persona in relation to the product

- What is the professional background?

- What is their work environment like?

- What are their main constraints?

	Identification (Name, Title/Role)	
Identification (Photo)	Background	
User Characteristics	User Needs	Business Goals

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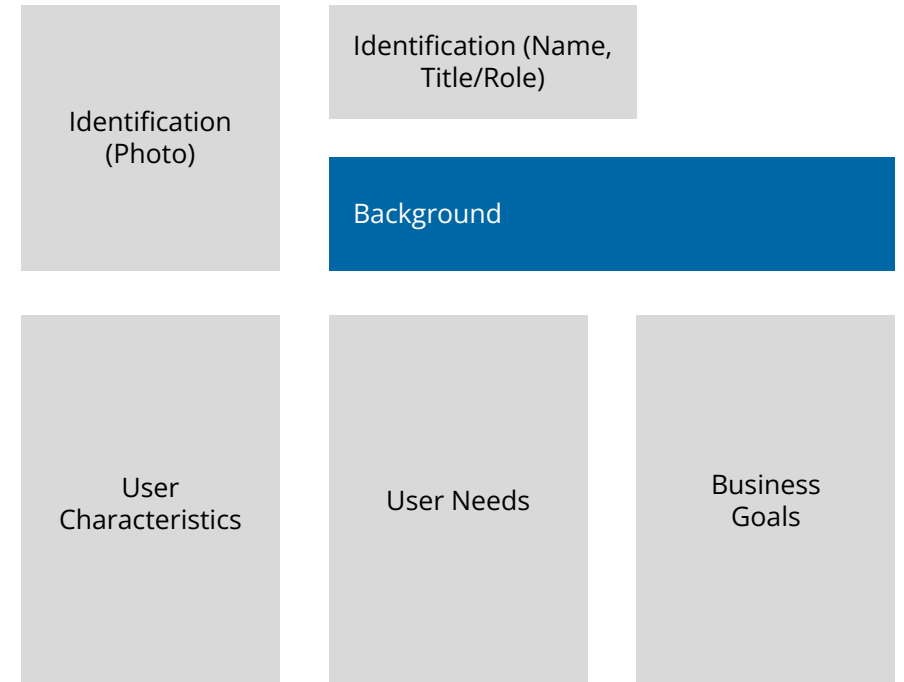
Guidelines for a Persona

User Characteristics

- Demographic information and other characteristics that can be helpful in realising the user
- How much experience do they have?
- What level is their tech proficiency?
- What other data/stats can contextualize this type of user?

Identification (Photo)

Identification (Name, Title/Role)

Background

User Characteristics

User Needs

Business Goals

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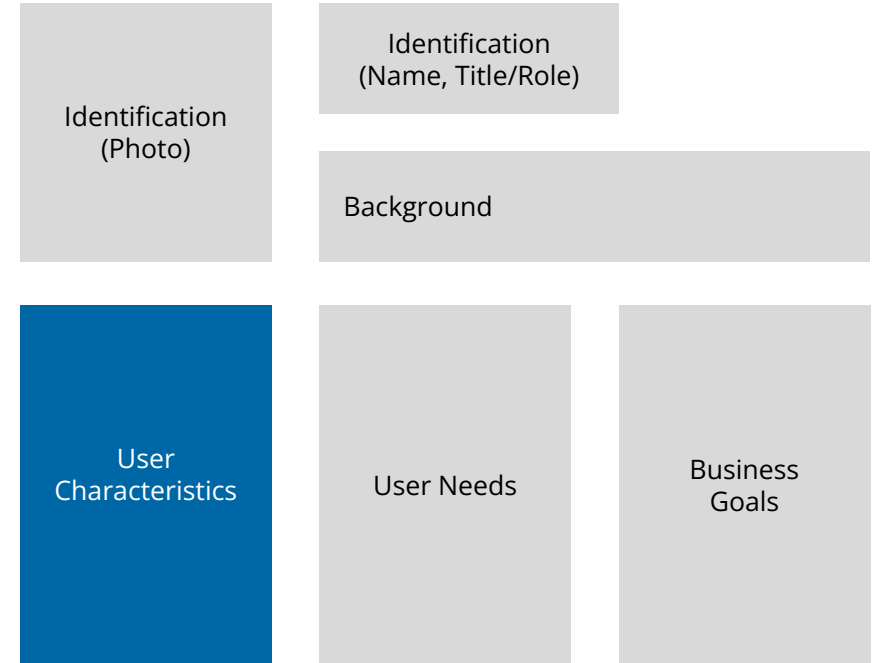
Guidelines for a Persona

User Needs

- Frame this around outcomes, not features

- What are their outcomes?

- What are they looking to do?

- What are their motivations?

Identification (Photo)

Identification (Name, Title/Role)

Background

User Characteristics

User Needs

Business Goals

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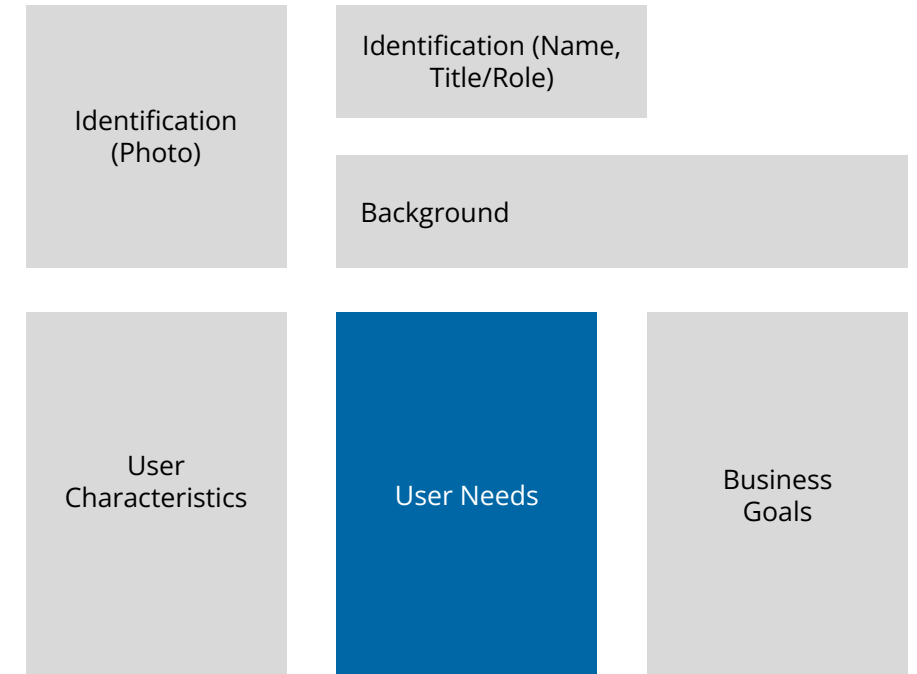
Guidelines for a Persona

Business Goals

- How do their actions translate to value in the business?

- What motivates them to perform well?

Identification (Photo)	Identification (Name, Title/Role)	
	Background	
User Characteristics	User Needs	Business Goals
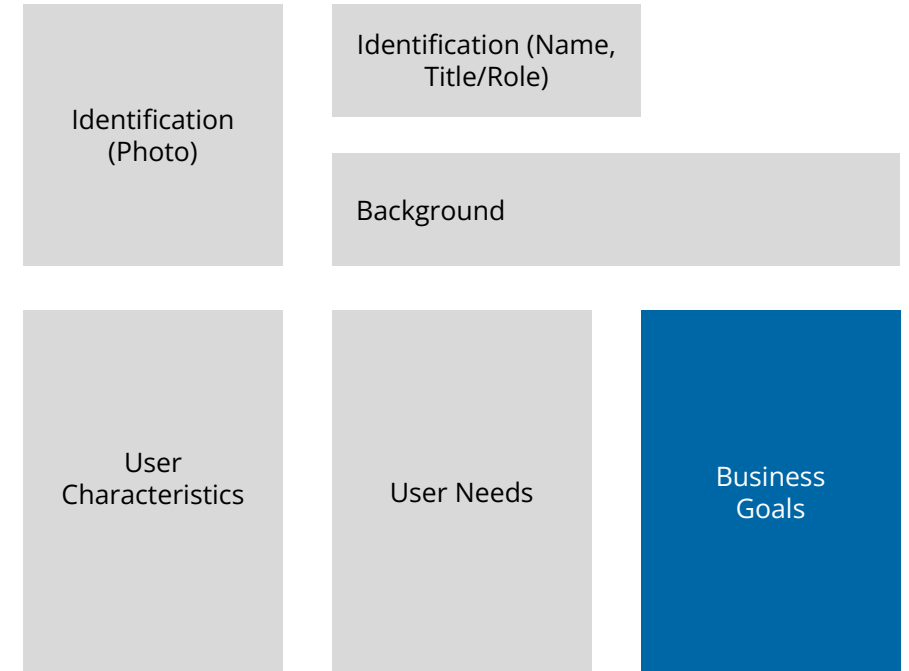
Users come first
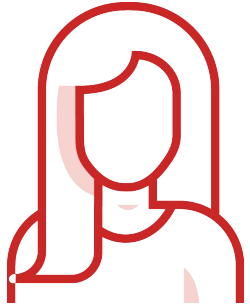
Sarah Silver
Hotel Clerk

Sarah has the responsibility to answer booking requests by sharing the best options for the guests. She checks-in, manage room service requests and checks-out guests on a daily basis.

Sarah spends her day at the hotel front desk, answering the phone and managing guests.

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Users come first

Users come first

Always start with the end users so that we may **link back to the value proposition** at any point in time.

The **user needs will derive all items in the backlog**.

1. Needs to have clear picture of rooms availability.

2. Needs to easily register information in application during the phone conversation or at the front desk.

3. Needs to keep track of daily objectives.

user needs

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Users come first

Users come first

user needs	**business goals**
1. Needs to have clear picture of rooms availability.	⟷ 1. Hotel Clerks have daily booking goals.
2. Needs to easily register information in application during the phone conversation or at the front desk.	⟷ 2. They have incentives to fill as many rooms as possible.
3. Needs to keep track of daily objectives.	⟷ 3. Share booking options, check-in and manage room service guaranteeing happy guests.

user needs   business goals

Users come first

outsystems

Users come first

Sarah Silver
Hotel Clerk / Manager

Sarah has the responsibility to answer booking requests by sharing the best options for the guests. She check-in, manage room service requests and check-out guests on a daily basis.
Sarah spends her day at the hotel front desk, answering the phone and managing guests

About 200 hotel clerks in 10 locations.

Spend all day in application and simultaneously on the phone.

Frequent user.

Minimum technology proficiency.

~30 years old.

user characteristics/metrics

1. Needs to have clear picture of rooms availability.
2. Needs to easily register information in application during the phone conversation or at the front desk.
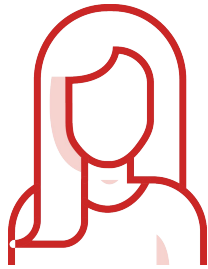3. Needs to keep track of daily objectives.

user needs

1. Hotel Clerks have daily booking goals.
2. They have incentives to fill as many rooms as possible.
3. Share booking options, check-in and manage room service guaranteeing happy guests.

business goals

Users come first

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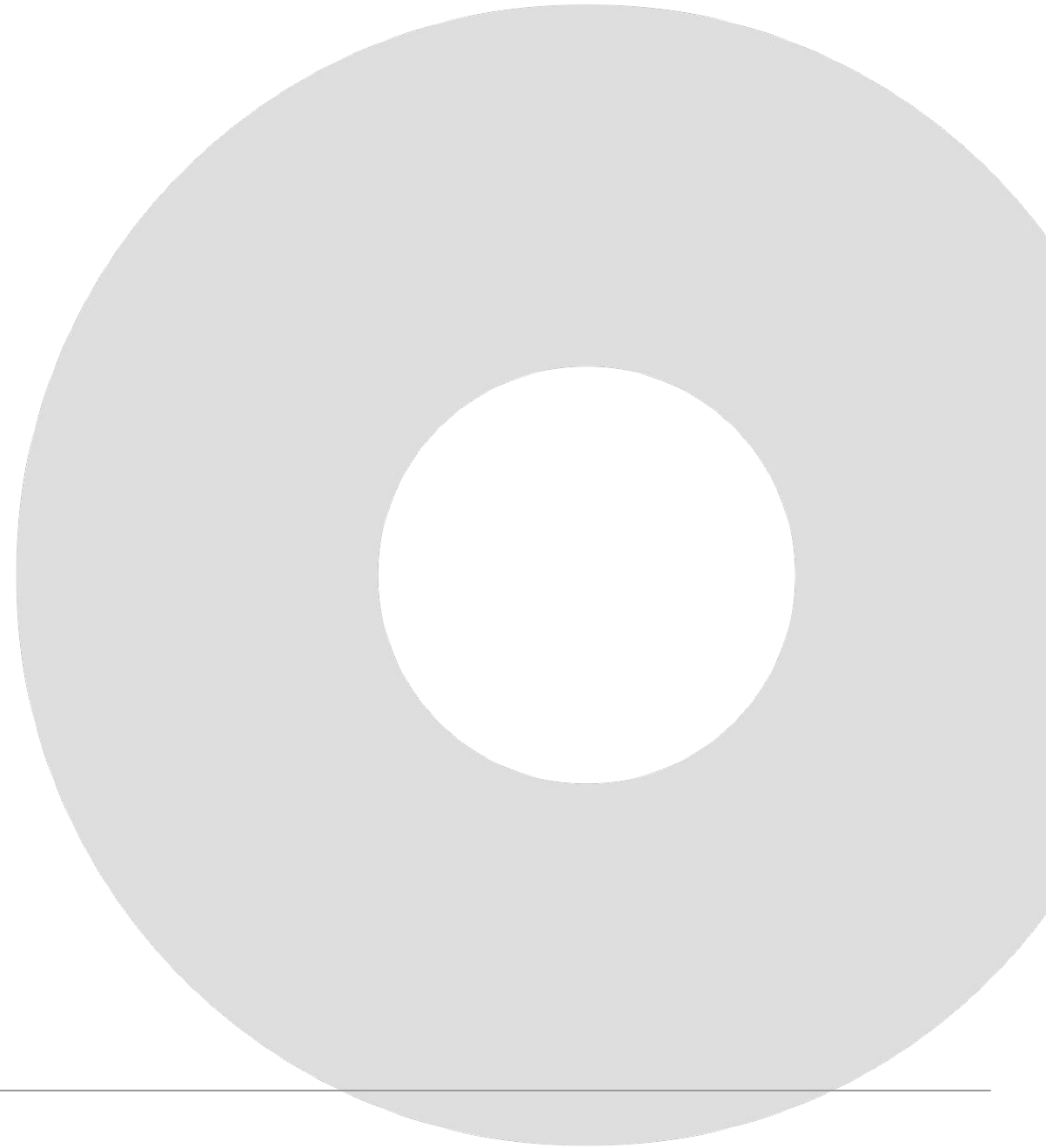
Be Visual

Be Visual - Business Process

Modeling the **main Business Process** will help break the ice and kick–off the discovery process, returning a most needed bird's eye view.

Be Visual - UX journey

USER EXPERIENCE

USER INTERFACE

Business Analysis

Identifies crucial business goals and metrics and informs design decisions

User Research

Identifies pain points and user needs from interviews to observation, multiple user research methods can be applied

Interaction Design

Communicate the layout and structure of a given website or mobile app through varying levels of fidelity

Usability Testing

Validate the proposed path with direct feedback from the users

Visual Design

Implement the experience in high fidelity with images, colors, fonts and other visual elements in consistency the brand guidelines

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Be Visual - UX journey

Mock-ups are key to tackle the user's journey and **how they will interact with the Product**.

User stories written on top of mock-ups are a lot more **grounded on the user's experience**, which is what Agile is all about.

It's **critical to engage CX/UX/UI experts** in product development - especially for consumer applications.

Source: https://balsamiq.com

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Be visual

Be Visual - UX journey
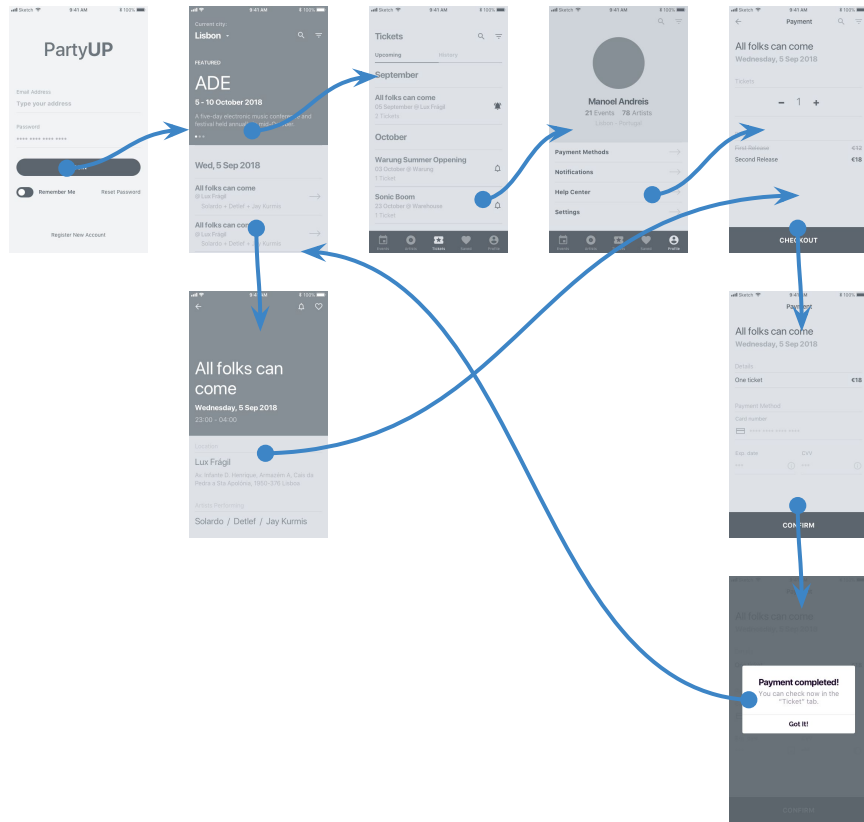
Be visual

Be Visual - Architecture Canvas

OutSystems Platform

| X Mobile App | X Portal | X BO |

Service API's
- Appointment Queue API

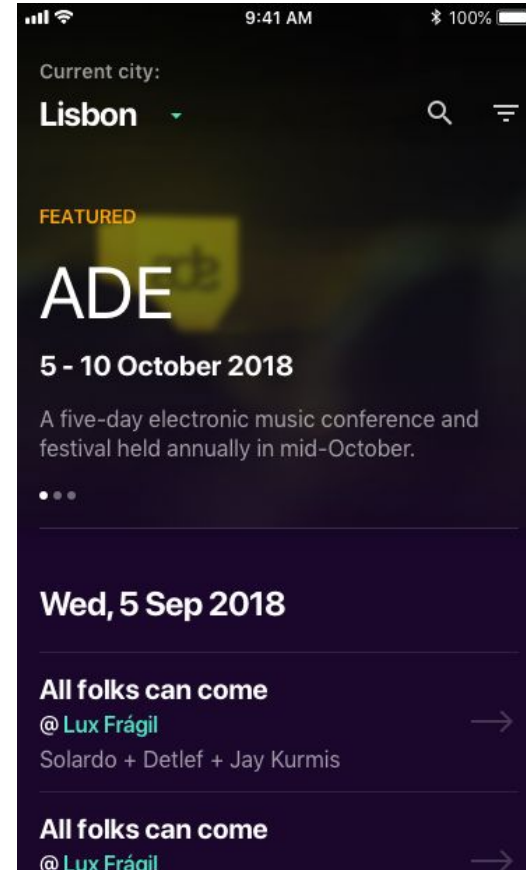**Reusable UI**
- X CW
- X MCW

Omni channel & Composite Logic services
- X BL
- Customer Service BL
- Appointment BL

Synchronization Services
- Reference Data Sync
- ...

Core Services
- Client CS
- Clinical Data CS
- Billing CS
- Appointment Queue CS
- Offer CS
- Reference Data CS

Integration Services
- Client IS
- Appointment IS
- Billing IS
- Auth IS
- ...

NFRs
- Theme
- Audit
- ...

Plugins
- Touch ID
- Location
- ...

TIBCO

External REST APIs

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See the forest

Build your backlog

Build working software

Henrik Kniberg
Source: http://blog.crisp.se/author/henrikkniberg

See the forest
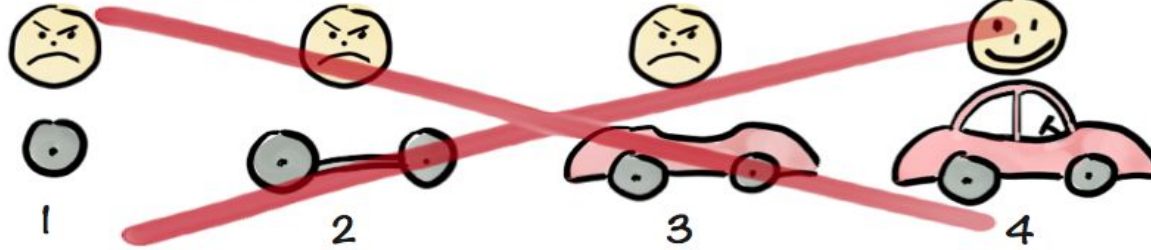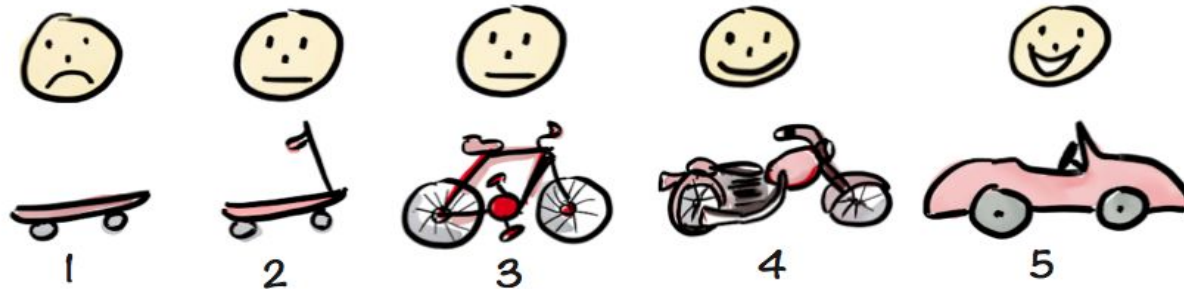
User story mapping

"Your company can't get what it wants unless your customers and users get something they want."

"Minimize output, and maximize outcome and impact."

"Stories get their name from how they should be used, not what should be written."

O'REILLY®

User Story Mapping

DISCOVER THE WHOLE STORY,
BUILD THE RIGHT PRODUCT

Jeff Patton
with Peter Economy

Forewords by Martin Fowler,
Alan Cooper, and Marty Cagan

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See the forest

See the forest

Process Steps

| Epic A | Epic B | Epic C | Epic D | Epic E | ... |

US
US
US
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US

US
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US

US
US
US
US

US

US

- Epics are sorted by process steps sequence
- The content of each epic is the set of its composing user stories, thus epics vary in size

See the forest

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See the forest

Process Steps

Epic A	Epic B	Epic C	Epic D	Epic E
US1	US1	US1	US1	US1
US2	US2	US2	...	...
US3	...	US3	USy	USz
...	USw	US4		
USv		...		
		USx		

Value (+ to -)

Inside each epic, order each user story by their precedence and value.

See the forest

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How valuable is a User Story to the User?

- How important is this for the ultimate goal?

- How many users will use this user story?

- How often will the user story be used?

- How risky is this user story?

Must have
Should have
Could have
Would have
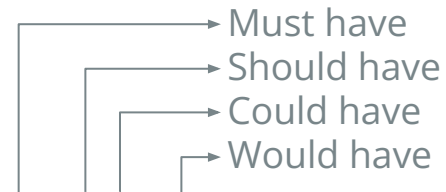
Revert the decisions to **MoSCoW** ranking!

See the forest

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Source: The Happy Startup School

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Minimum Viable Product

Process Steps

Epic A	Epic B	Epic C	Epic D	Epic E	...

MVP

Value +

Epic A: US1, US2, US3, ..., USv

Epic B: US1, US2, ..., USw

Epic C: US1, US2, US3, US4, ..., USx

Epic D: US1, ..., USy

Epic E: US1, ..., USz
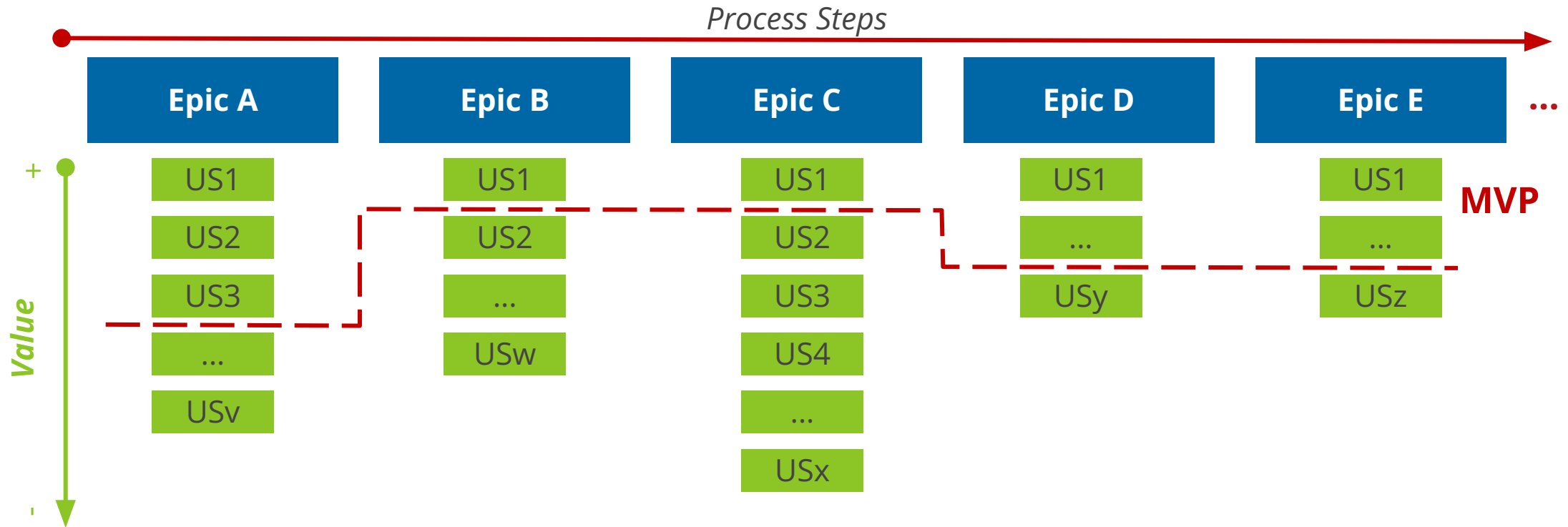
The Minimum Viable Product (MVP) is the line on your epic structure that meets the minimum requirements for you to deliver a form of working software.

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See the forest

Hotel Bookings Backlog - MVP

| Check Availability	Bookings & Amenities	Cancel booking	Check-in	Room service	Check-out
Rooms list	Book room	Cancel booking	Check booking details	Room service list	Check booking details
Edit room	Add amenity	Cancelation rules	Register check-in	Register room service	Register check-out
Amenities list	Bookings list	Cancelation trends	Check-in trends	Cancel room service	Produce invoice
Edit amenity	Booking trends			Room services trends	Check-out trends

See the forest

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Writing User Stories

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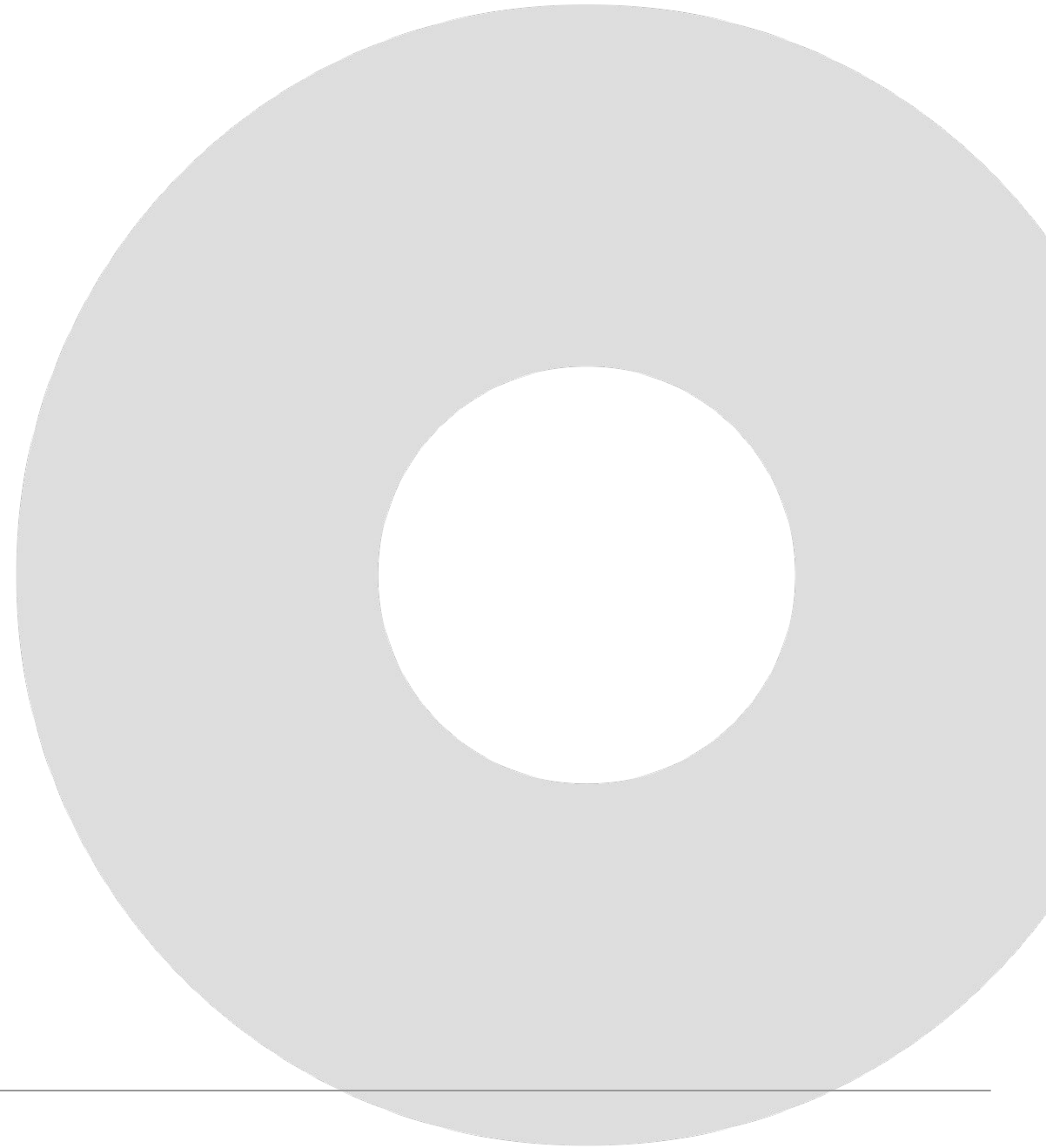
Small yet valuable

User Stories must be small yet valuable to enable early in-sprint feedback.

Small User Stories **minimize the risk of not delivering** but must enable the user to **enrich his experience** with the Product.

Breaking down into **smaller chunks** will also support a **finer grain in prioritization;** ideally it should be **1 day** of development and no bigger than 2 - 3 days of development.
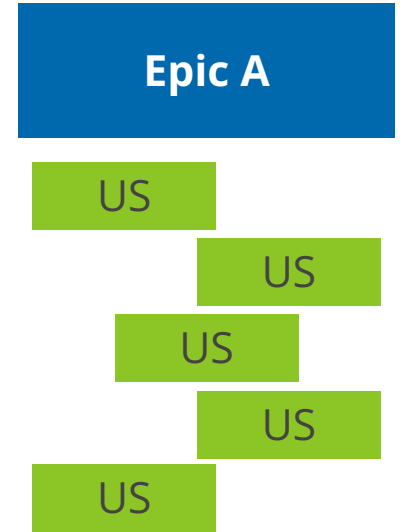
When to stop? Think demo!

Ask yourself if you would show that User Story in a demo to the end user.

Epic A

US

US

US

US

US

Characteristics of Good User Stories

The INVEST criteria are a great tool for determining the quality of the requirements.

I	**INDEPENDENT**	one user story should be independent of another
N	**NEGOTIABLE**	is negotiable because the story is a short description which does not include all of the details
V	**VALUABLE**	Agile projects require strong management and leadership to guide teams, facilitate communication, and remove obstacles. However, Agile promotes a more collaborative and team-driven approach to management.
E	**ESTIMABLE**	developers must be able to estimate a user story to allow prioritization and planning of the story
S	**SMALL**	a good story should be small in effort
T	**TESTABLE**	stories should be written so they can be tested to confirm they work correctly

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User Story structure

Collaboration

MUST

3-liner / Context

"**As a** *<user role>* **I want to** *<activity>* **so that** *<benefit>*"

Goal and **Business Goal** of the User Story

Mockup / Activity Flow

Depicts the expected **user journey**

Pins the User Story **in the bigger picture**

If it must, **hand drawn will do**!

Acceptance Criteria

Unfolds the **user journey, step by step**, using **business language**

States expected action/result, making it **testable** and fully verifiable

Unveils hidden assumptions, **key for accurate effort estimate**

Links to other User Stories, ensuring **connection** of the parts

Examples / Seed Data

Enriches with more **context/scenario** info if needed

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User Story Example: Book room

3-liner / Context
As a hotel clerk **I want to** efficiently register a new booking with all necessary details **so that** the guest's stay is seamless
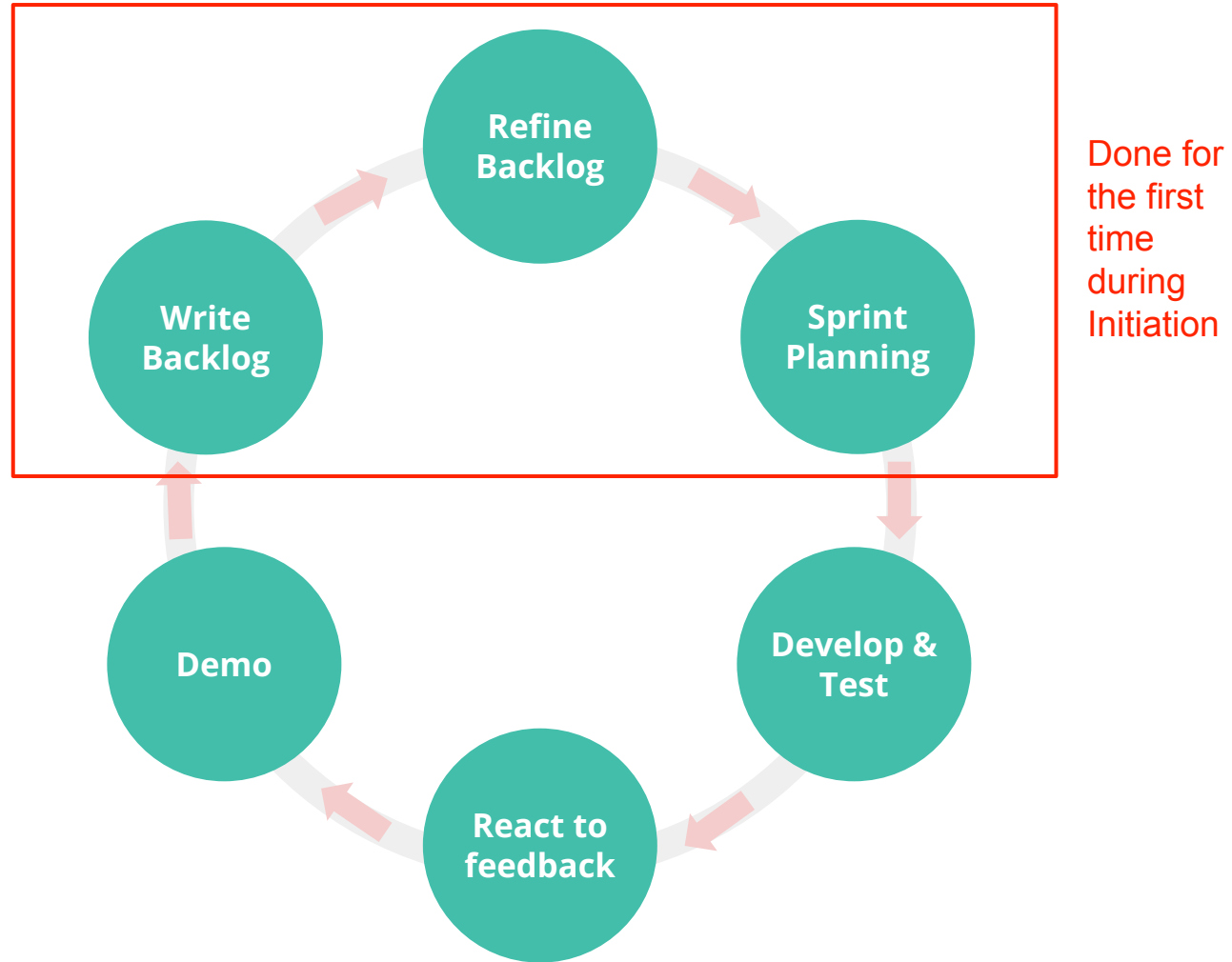
Mockup / Activity Flow   Check it on this slide

ACC

Given the front desk clerk is on the main dashboard of the hotel bookings app,
When a new guest approaches the front desk to make a booking,
Then the clerk selects the "New Booking" option.

Given the new booking form is open,
When the clerk enters the guest's details such as name, contact information, and check-in/out dates,
Then the app validates the information and prompts the clerk to proceed.

Given the booking is in progress,
When the clerk selects the type of room and the number of guests,
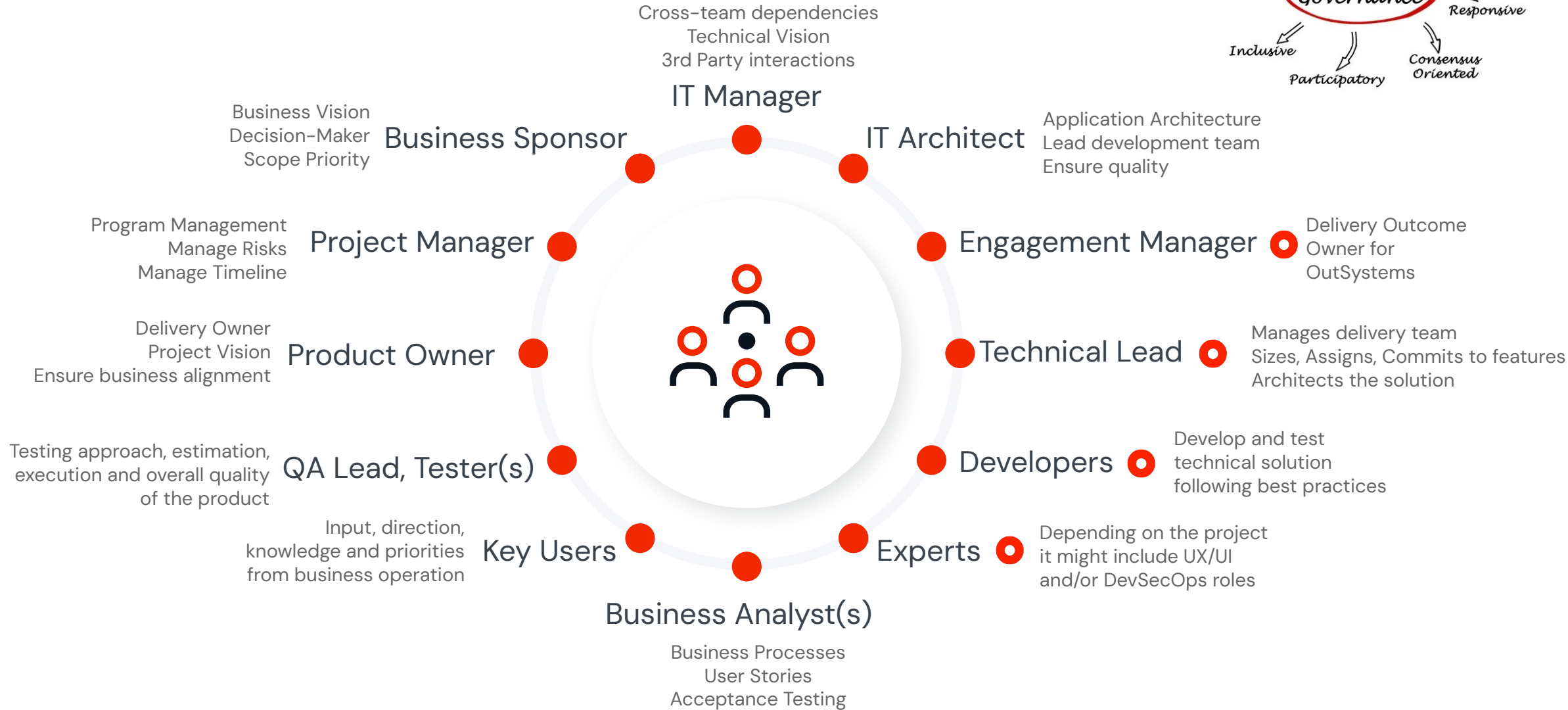**Then** the app displays available rooms matching the criteria, and the clerk can assign a room to the guest.
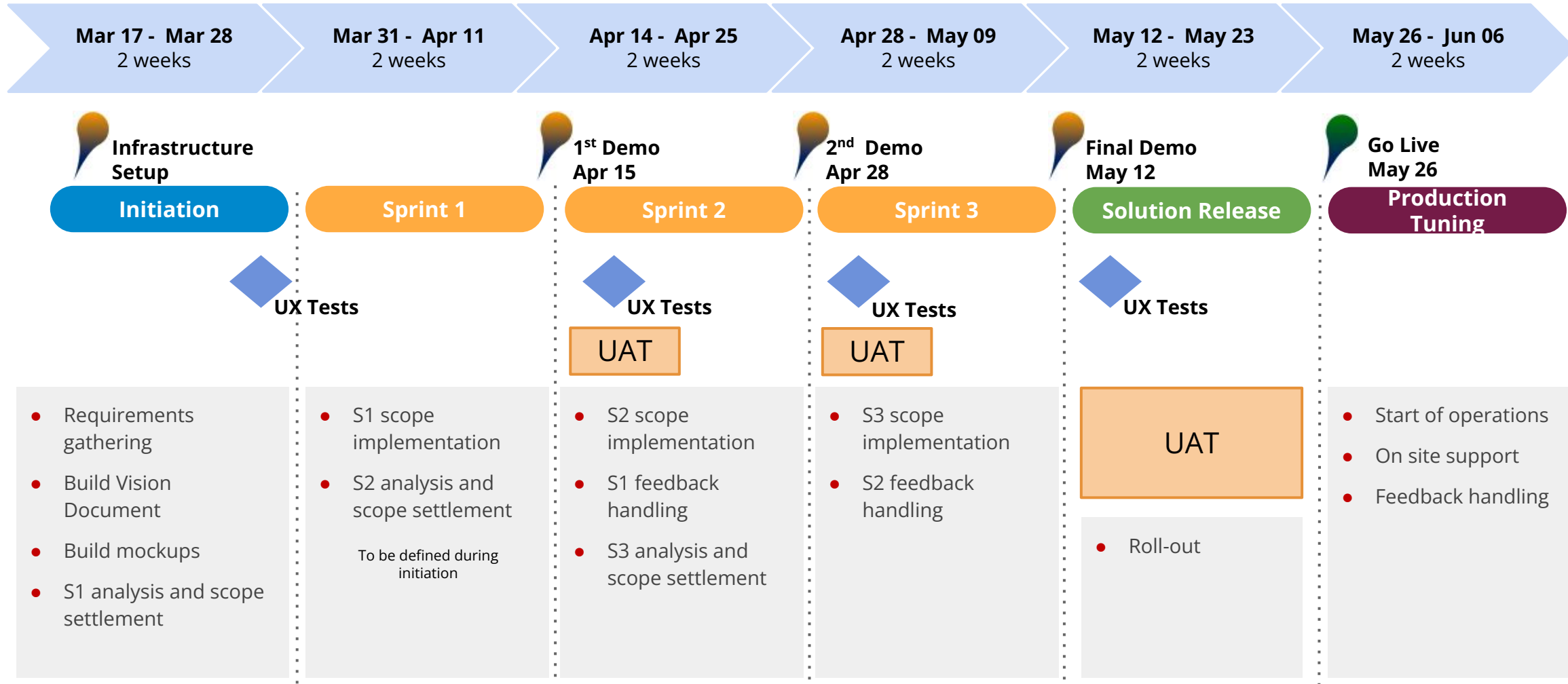
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Day in, day out of an Agile team...

Done for the first time during Initiation

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Iteration Planning

Who will do it?

Good Governance
Accountable
Transparent
Responsive
Consensus Oriented
Participatory
Inclusive
Following Rule of Law
Efficient

IT Manager
Cross-team dependencies
Technical Vision
3rd Party interactions

Business Sponsor
Business Vision
Decision-Maker
Scope Priority

IT Architect
Application Architecture
Lead development team
Ensure quality

Project Manager
Program Management
Manage Risks
Manage Timeline

Engagement Manager
Delivery Outcome
Owner for
OutSystems

Product Owner
Delivery Owner
Project Vision
Ensure business alignment

Technical Lead
Manages delivery team
Sizes, Assigns, Commits to features
Architects the solution

QA Lead, Tester(s)
Testing approach, estimation, execution and overall quality of the product

Developers
Develop and test
technical solution
following best practices

Key Users
Input, direction, knowledge and priorities from business operation

Experts
Depending on the project
it might include UX/UI
and/or DevSecOps roles

Business Analyst(s)
Business Processes
User Stories
Acceptance Testing

ⓘ OutSystems projects are heavily people-centric and collaborative

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When? High Level Sprint Settlement

Mar 17 - Mar 28 2 weeks	Mar 31 - Apr 11 2 weeks	Apr 14 - Apr 25 2 weeks	Apr 28 - May 09 2 weeks	May 12 - May 23 2 weeks	May 26 - Jun 06 2 weeks

Infrastructure Setup

1st Demo Apr 15

2nd Demo Apr 28

Final Demo May 12

Go Live May 26

Initiation	Sprint 1	Sprint 2	Sprint 3	Solution Release	Production Tuning

UX Tests

UX Tests

UX Tests

UX Tests

UAT

UAT

UAT

- Requirements gathering
- Build Vision Document
- Build mockups
- S1 analysis and scope settlement

- S1 scope implementation
- S2 analysis and scope settlement

To be defined during initiation

- S2 scope implementation
- S1 feedback handling
- S3 analysis and scope settlement

- S3 scope implementation
- S2 feedback handling

- Roll-out

- Start of operations
- On site support
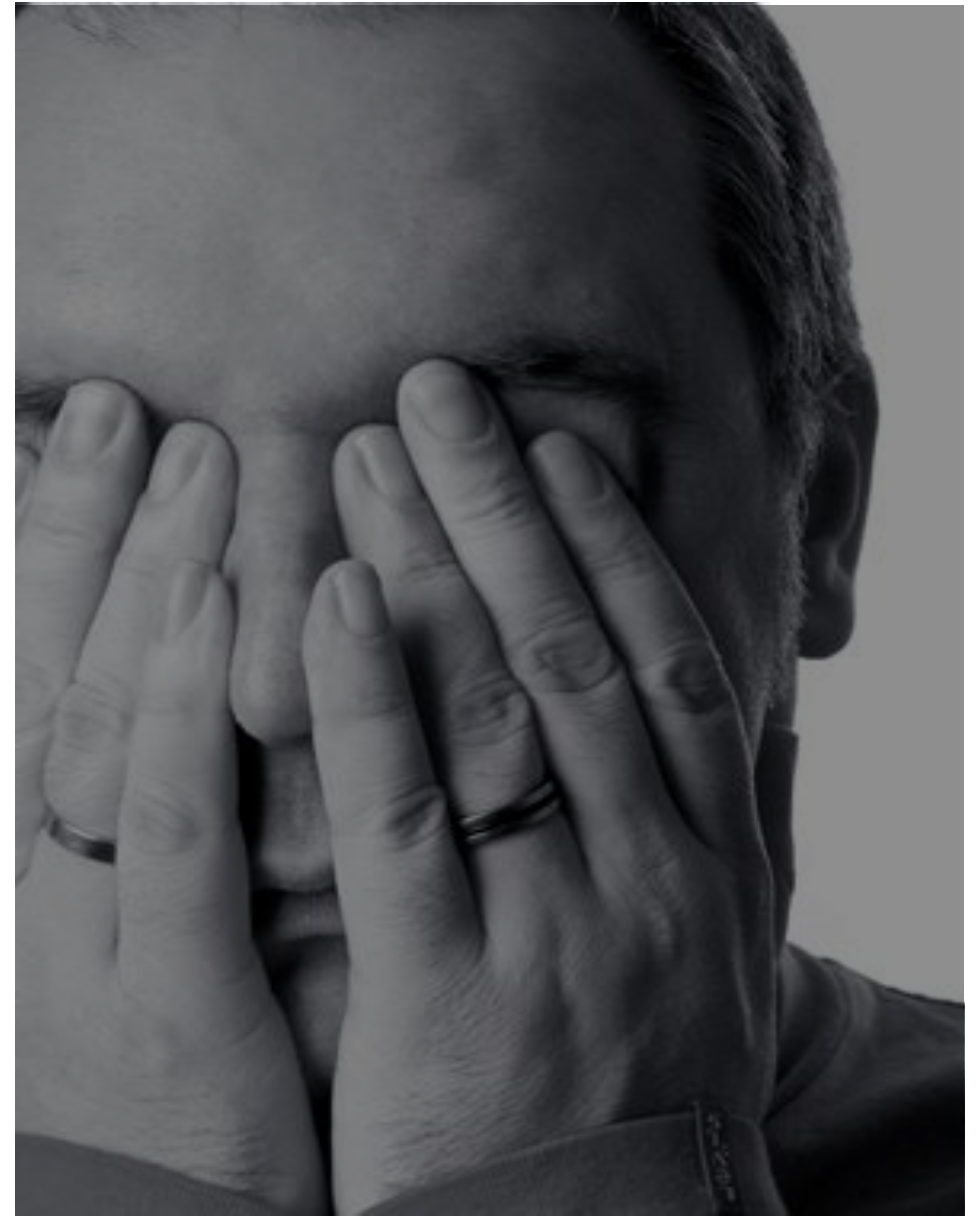- Feedback handling

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Risk Management

Why Risk Management

Avoid:

- Deliver the wrong thing (no value)
- Deliver the right thing too late
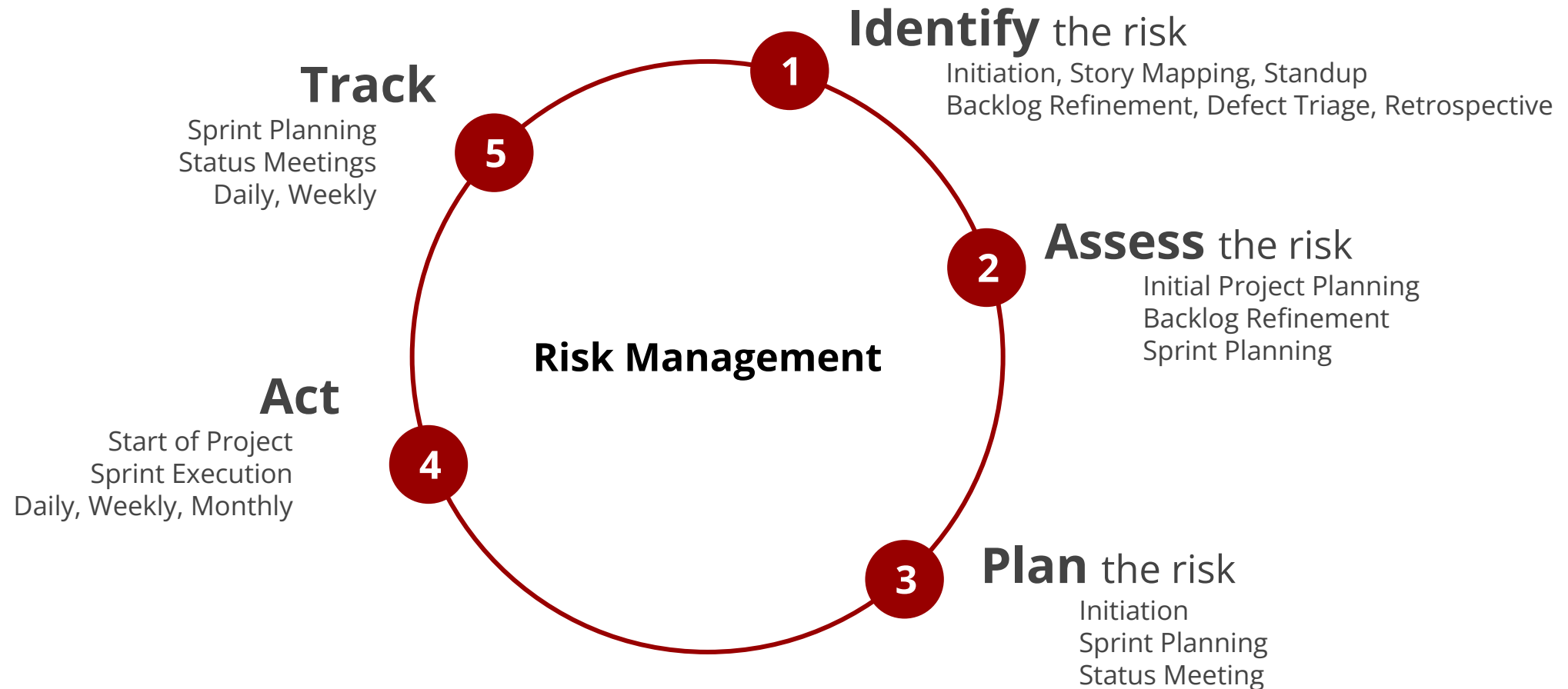- Deliver something that doesn't work

Impacts:

- Client not satisfied
- Low adoption
- Loss of trust
- Project failure

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The Case for Risk Management in Agile projects

- Risks should be evaluated and assessed during whole project cycle

Identify the risk
Initiation, Story Mapping, Standup
Backlog Refinement, Defect Triage, Retrospective

Track
Sprint Planning
Status Meetings
Daily, Weekly

Assess the risk
Initial Project Planning
Backlog Refinement
Sprint Planning

Risk Management

Act
Start of Project
Sprint Execution
Daily, Weekly, Monthly

Plan the risk
Initiation
Sprint Planning
Status Meeting

1
2
3
4
5

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Key point to take away

- Make risks visible
- Choose the right level of structure for Risk Management
- Identify and assess risks with the right people
- Continuously Monitor and Act on the most important risks
- Track risks using a risk burndown chart
- Include risk management in activities you already perform in your practice
- Don't merely rely on mechanics - keep your eyes and ears open!

Track

5

Identify the risk

1

Risk Management

2

Assess the risk

Act

4

3

Plan the risk

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Risks - Example

VPN access to the Customer OS Platform and other required tools

Nov 30 (Open)

Cause: Not possible to access required tools to support development in the OS platform @Customer
Impact: Reduced performance and capacity to deliver as expected
Mitigation: Unblock access to required tools
Responsible: Customer Team

Urgent

External Systems not ready

Nov 30 (Open)

Cause: External systems not ready to integrate
Impact: Unable to provide real API to application, delay on development, API rework or redesign
Mitigation: Anticipate connections availability
Responsible: Customer Team

Need Attention

Business Availability

Nov 30 (Open)

Cause: Business low availability (Product Owner, Business Sponsor and SMEs) to requirements validation, decision making and User Acceptance Tests.
Impact: Delays on the timeline and delivery milestones
Mitigation: Anticipate and guarantee availability of the key people required for the project
Responsible: Customer Team

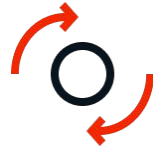**Need Attention**

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Wrap-up
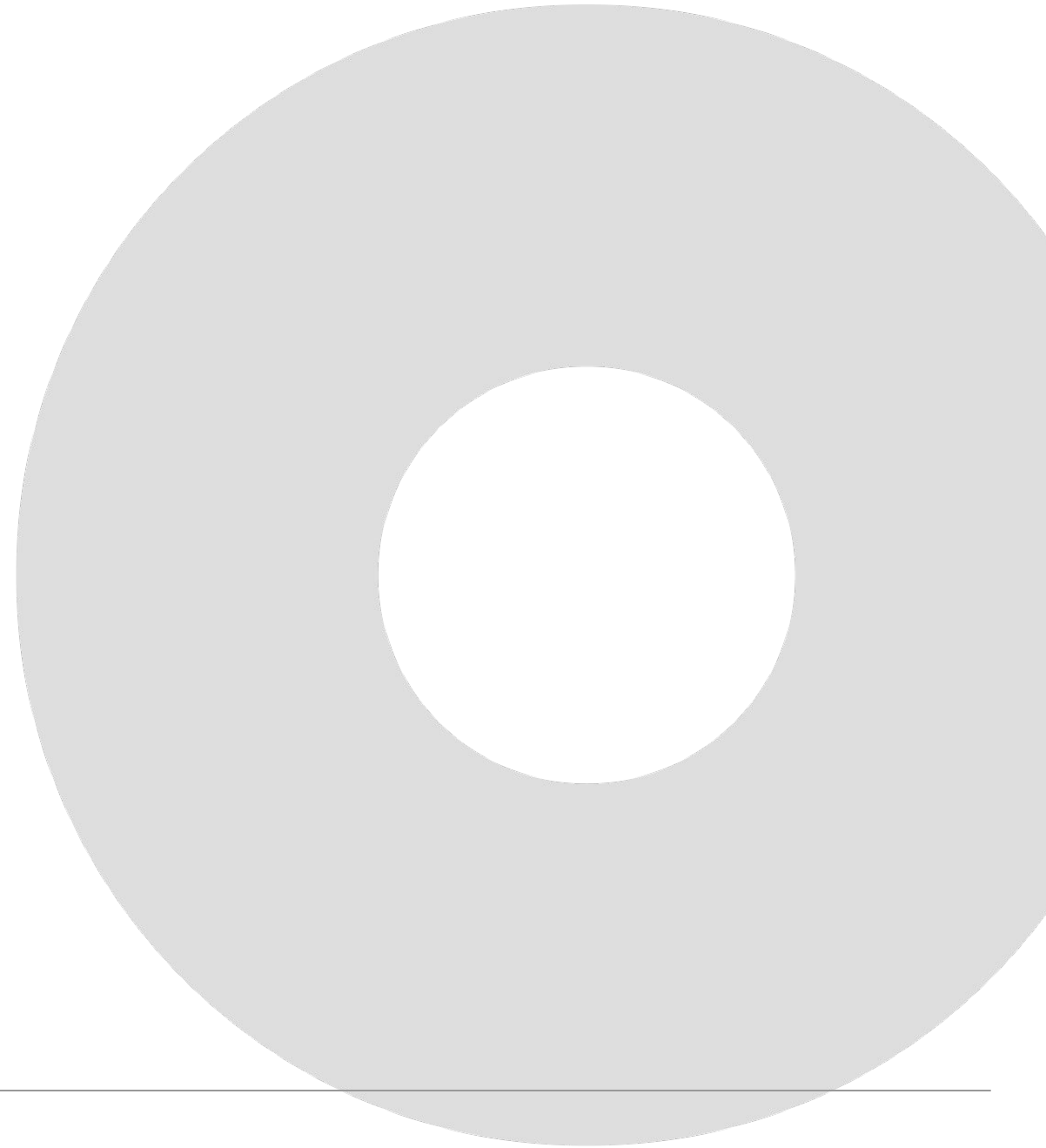
Initiation Key Results

Vision Document
Ultimate Goal & Project Drivers
Users definition – Personas
Business Process
Mockups
Architecture
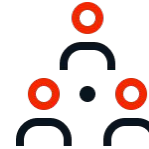Epics & User Stories

High level Sprint Settlement
Outline of End to End plan with Key Activities and Sprints

Sprint 1 User Stories Definition
Select US for Sprint 1
Define US and ensure enough detail for sprint to start
Discuss and Agree on the US to deliver

Delivery Practice Alignment
Discuss and align the Ways of Working
Agree on US lifecycles, roles & responsibilities, metrics to track, DoR & DoD

Definition of Ready & Definition of Done
Agree on the Definition of Ready and Definition of Done checklist between the dev team, PM and PO
Important Quality Gatekeepers

Delivery Kick-off
Decide on who to attend
Present the Initiation Outputs
Guarantee everyone is aligned and comfortable with the agreed scope
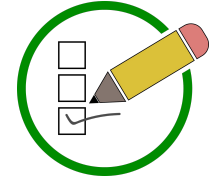
↗ Vision Document Template

↗ Requirements Gathering & Solution Mapping

↗ Experience Design Checklist

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Q&A

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Time for a quick Poll

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Thank You!