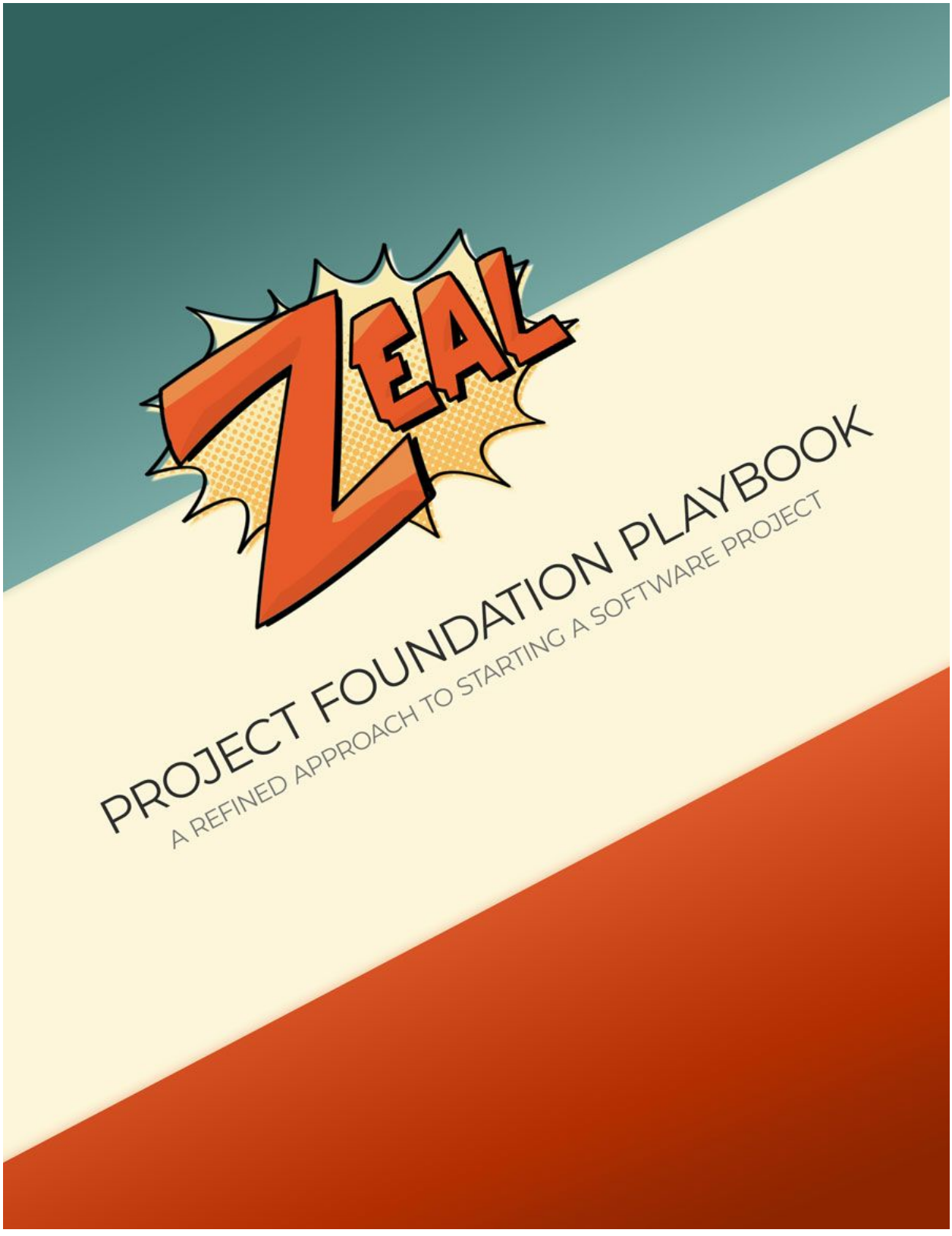
ZEAL
PROJECT FOUNDATION PLAYBOOK
A REFINED APPROACH TO STARTING A SOFTWARE PROJECT

Contents

Gather Information

We want to understand the process our clients have gone through which have led them to the product conclusions they have reached by the time they walk through our metaphorical doors.

Some of the information we hope to have available for the scoping session are as follows:

- Who are the users of the system and if any user interviews have been conducted?
- What are the primary outcomes of the application?
- What areas are most/least defined?
- What are the biggest concerns/risks?
- Where are the areas of complexity in the application?
- Any domain knowledge gotchas?
- Any dependencies we need to know about?
- Who are the key project stakeholders?
- Who are the team members we will be interfacing with?
- If a product, competitor research?

A Successful Scoping Meeting

The outcome of this meeting is to get a high-level snapshot of the scope requirements of the application desired to be built. We will take some steps to get fairly specific in the “What, Why, and How” of the application. The result of this meeting will be a Scoping Document which will be our map as we build the application. This early process will feel a bit waterfall-like. This is so that we can do our best to understand as much as we can about the application and the outcomes of the application out of the gates. We also want to provide our best guess early on as to where the complexities may be and create some calendar projections.

We do, however, want to stress that, like any plan created, the resulting process and application build will be based on our learnings along the way and the decisions made about unanticipated obstacles. Things will come up. We will not be able to foresee everything and things we thought would work may not when implemented.

Introductions

We like to start all meeting well acquainted and well caffeinated. The Zeal team will have project management, development, and design representation throughout the scoping meeting.

Project Overview

The Product Owner will lay out the history and high-level overview of what the outcomes are of the application. We will also review all materials brought to the meeting that were assembled during information gathering.

Risk Assessment

We will discuss the risks of building the application including:

- Areas of known and unknown complexity
- Team availability
- Budget
- Scope creep
- Known technical requirements/dependencies

Application Mapping

We will create a high-level visual walkthrough of all known areas of the application. From account creation to final outcomes, we want to lay out all of the areas and what areas are linked together. This process will typically expose the primary views of the application and which views are accessible from other views.

Workflow Diagramming

We will methodically work through each of the primary user flows diagraming the activities and options along the way to reaching each outcome. So much domain knowledge is gleaned through this step and will lead to in-depth discussions around how users might reach their outcomes.

Scoping Session

The scoping session is where we take what we have learned through Application Mapping and Wireflow Diagramming and document the known epics and high-level user stories.

Generate Scoping Document

Project Objective

Should be a short high-level statement of the purpose and outcome of the project. No more than a few sentences.

User Roles

A clear outline of the different User Roles identified in the application. Should also include a description of Permissions and how the User is added to the system (ex. Invited by Admin, Self Signup, etc…)

High-Level App Features/Stories

A description of the primary areas of the application along with the high-level feature sets associated with each area listed as bullet points.

Design/Layout Approach

A high-level description of the approach to design that will be utilized. This should describe the design outcomes as they relate to use (ie. Responsive, Mobile-friendly) and deliverables (ie. Styleguide, design review)

Staffing

A list of the team members assigned to the project with descriptions of roles and anticipated amount of time on project per week.x`

Generate Application Map & Wireflow Diagrams

Application Map

The Application Map is a tool that allows all project contributors, as well as, stakeholders to have a 10,000 foot view of the entire application. It also allows for a high-level view of progress as the project is developed.

Each area of the application is represented by a frame and pathways indicating flow and access from one area to the others. Each area has a title and key indicators for assessing progress, such as, whether the associated workflows have been completed, whether user stories have been written, percentage of design completion, and percentage of development completion. We also use colored frames to indicate where we anticipate the primary areas of complexity to be in the application.

This should be a living document that is kept up to date by the Project Manager of the application. Snapshots of progress should be included in the sprint update emails.

{{ex. Application Map Diagram}}

Wireflow Diagram

A Wireflow Diagram is a diagram that lays out a specific user workflow documenting the views and actions a user takes to achieve an outcome. Depending on complexity, a single area of an application could have several wireflow diagrams depicting all of the various user workflows anticipated.

We do not like to get to ahead of ourselves with the wireflow diagrams because they tend to be pretty specific, require discussion, and can be more overhead than desired if they are made to prematurely. We will, however, create the primary workflows for an area in advance as they help us to discover hidden complexities in an application.

Prior to any design work, we required a wireflow diagram be created and discussed to ensure product, design, and development are all on the same page. This step can save several rounds of design revisions help uncover development complexities prior to large investments are made in design. They are an essential part of our discovery and definition process.

{{ex. Wireflow Diagram}}

Establish Epics & Backlog

Epics

We approach Epics a bit differently. Often times Epics are associated with high-level areas of the application. We have found more value associating Epics with feature sets. A feature set is the smallest grouping of features that allow a user to reach an outcome. [an example would make this more clear]

User Story

A user story is the smallest definable building block of a feature (epic). It needs to have a purpose, meet an outcome, and have well-defined criteria of what done looks like. We typically follow a template as follows:

> In order to [purpose of the story],
> As a(n) [user type],
> I want to [outcome desired].

Then we define a bullet list of Acceptance Criteria. This should include all of the requirements of the story. We attempt to preclude implementation details when possible.

The Meetings

Iteration Planning Meeting

The Iteration Planning Meeting (IPM) is a critical component for ensuring alignment throughout the team prior to jumping into the work each sprint. The meeting is timeboxed to 1 hour (it can be shorter if the whole hour is not needed).

Prior to the IPM, the Product Manager should ensure the backlog is well prioritized and stories for at least the next 3 iterations are well defined (should include all Acceptance Criteria). If the Product Manager adds Acceptance Criteria to a story that has already been pointed, the story needs to be flagged so it can be reviewed and repointed if necessary.

Meeting Agenda

- Review backlog prioritization changes made since last IPM
- Review all stories in progress and discuss any potential blockage
- Scan the backlog for unpointed stories and point them
    - Break stories apart if they are over 3 points and it is

Daily Standups

Retrospective Meeting

The Tooling

Project Management

Design Review & Reference

Code Repository

The Processes

PR Process

Deployment Process

Story Development & Pointing Process

Design Review

Initial Design

UX for core functionality

UI Styleguide