IT Strategy & Discovery Workshops: the decision path

How advanced is your project?

I have an idea for solution, and I want to deliver it

The vision for the IT product or service is not complete yet or the specification required to start the development is not comprehensive

There is a comprehensive documentation ready to start the development

What are the project's main success factors? What is my preferred model of the IT development?

The development team needs to quickly understand the challenge as well as requirements and gain common understanding of the specification.

I have a business problem to solve with technology

There is a problem to solve, strategic decision to make or a challenge to face in order to achieve business goals, but I haven't found a way to do it yet. Examples: optimisation of processes; increasing uniqueness and competitiveness of my IT service; planning Digital Transformation.

There are multiple ways to get to the solution, but we need to break down, analyse and make key decisions including technical aspects as well as users' and functional perspective (consultancy)

There is a budget for innovation, and I want to spend it efficiently

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Small budget at the beginning, and proved idea (POC needed) and I don't need complex documentation (only the one required to start the development)

Tight deadlines: I need to start development ASAP

I need to fix the budget for the whole project, or I prefer to develop it in waterfall methodologies

The solution will cover the key processes, it must be precisely designed and defined

I want to announce the RFP and need detailed requirements to compare the offers

User/customer experience is crucial for the project's success and, we need focus on their needs (we want to deliver an optimised, highly intuitive service)

I want to define the product's/service's idea well at the beginning and walk through the development process flexibly adjusting to the requirements

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Service Design

PROS
- Holistic approach to Customer Experience. Includes several methods of user centric design and covers an IT product as well as the whole service experienced by customer.

CONS
- Complex, in some cases time consuming, due to several phases of the comprehensive research, benchmarking and testing

REQUIREMENTS
- Access to all subject matter experts, key stakeholders and user representatives
- Engagement of decision makers in accepting design milestones

Design Sprint Workshop

PROS
- Quick verification of the idea and all assumptions
- Cost effectiveness and quick delivery of solution's design and testing results
- A well-structured process and an opportunity for key stakeholders to effectively, and creatively discuss the product

CONS
- Poor documentation - focus on POC delivery
- It won't detailly cover the full scope of the solution as it usually focuses on key process and on „happy paths". The rest will have to be specified during further design sprints or in parallel with the development

REQUIREMENTS
- Requires active engagement of key stakeholders and user representatives throughout the whole workshop

Initial Discovery Workshop
HIGH LEVEL ROADMAP + INITIAL SPRINTS SPEC

PROS
- May be used as a scoping session to define project boundaries and enable project delivery estimation
- Low-cost, quick and efficient results
- May cover high level roadmap and detailed backlog for first 1-2 development sprints or an MVP

CONS
- Due to incomplete accuracy of full scope analysis the project may start with wrong assumptions. Some important issues may occur later and result in unplanned changes as well as additional costs
- Lack of comprehensive, precise documentation to appropriately compare offers received in the RFP process

REQUIREMENTS
- Availability of the key stakeholders and user representatives in established timeslots (decision-makers included)

Complex Discovery Workshop
RESEARCH + FUNCTIONAL ANALYSIS & UX DESIGN + TESTING

PROS
- Thoroughly thought-out solution to minimise the number of cost consuming changes at further stages of the development.
- Comprehensive, precise documentation that enables comparing received offers (RFP process).
- The development team has all they need to start the development in the most efficient way.

CONS
- It's time consuming and requires bigger budget due to careful and comprehensive approach including user research and testing.
- Not recommended if it may not be possible to make all decisions before the development starts (i.e. decisions need to be made iteratively based on POC / results from previous stages).
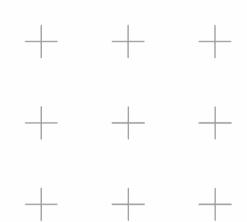
REQUIREMENTS
- Access to specialists in all subject matters, key stakeholders and user representatives
- Decision makers engaged in accepting design milestones

IT Strategy Workshop

PROS
- Benefits from expert support and specialist consultancy in making strategic decisions.
- Building an effective strategy before making investments

CONS
- If performed too late (when some investments were already made) - outputs may lead to additional costs

REQUIREMENTS
- Efficient strategy workshop needs good facilitation, engagement of decision-makers, well chosen methods as well as established business strategy milestones.
- Openness to make strategic changes