



[Your Company name Here]
[Project] Inception Workshop

[Your Logo Here]

[Date]

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Executive Summary

Set the scene

The background of your project goes here. This includes where the idea originated, what work has been done to date and some detail about the business area it will benefit

Understanding the opportunity

Why are you doing this? What are the key business drivers and desired outcomes?

Key Business Drivers

- Increase Market share
- Increase sales
- Reduce costs
- etc

Key Customer Benefits

- Better user experience
- Easy access to documents
- Easy access to new products.

Project Scope

This section outlines the key “Feature” level items that are included in the project. They will be relatively high level and detailed later in the report. For example:

The project will deliver against several key themes

- User Sign Up and Login
- User and Organisational Admin
- System and User Reporting
- View sales pipeline
- Close and manage sales
- Manage customer accounts and records
- Other items
 - FAQs, Help
 - Notifications
- Non-Functional requirements
 - Intuitive user experience
 - Market leading data security
 - Utilising cloud services for scalability and resilience
 - Identity management and 2FA

Proposed System Architecture

A description of the proposed system architecture for review by the customer technical teams. This section describes the pros and cons of the approach including any known technology risks accepted during the inception workshop

Proposed timeline and milestones

A high-level state of the key milestones and estimated timeline. For example:

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
<ul style="list-style-type: none">•Gather requirements•Define User Experience•Setup infrastructure for development	<ul style="list-style-type: none">•Begin development•Sign off wireframes and colours•Deliver first feature completed for approval	<ul style="list-style-type: none">•Continue development•Build, test and review•Evolve design	<ul style="list-style-type: none">•Continue development•Build, test and review•Evolve design	<ul style="list-style-type: none">•Move to user acceptance testing•Penetration testing•Sign off for roll out to live	<ul style="list-style-type: none">•Product available to customers

Investment Required

A ballpark estimation of cost usually within a tolerance of 25%. This will give you a quick validation of any costs estimates or budgets you may have internally.

This will also include an estimation of the setup and running costs of the proposed system architecture.

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Introduction

Set the scene

The existing sales platform was developed from 2000 at the request of the sales department. The purpose of the tool is to provide a standardised method of tracking sales activity to optimise the number of early opportunities that we close and to identify potential improvements to the sales process.

The existing platform has been developed incrementally over 20 years and is becoming more and more expensive to maintain and run. There are key resources within IT that the business is dependent on and the sales team are not able to update the system regularly to meet changes in their business environment.

The current software supporting the sales platform is based on outdated technology that will soon become unsupported by both our vendor and the internal IT department so is in urgent need of replacement in order to not impact the growth of the business. Furthermore, the current software solution is difficult and unintuitive to use risking a lack of engagement from the sales team and management.

Understanding the opportunity

This project was initiated to replace the existing sales software with a modern Software as a Service platform that will provide an intuitive user experience, reliable data storage and security as well as making it easier to expand the number of sales staff and to improve management visibility. Ultimately this makes allows the sales team to grow in line with the company's revenue ambitions.

Our Approach

At the request of [INSERT COMPANY NAME HERE] IJYI conducted a one-day Inception workshop on XXXXXXXX

The workshop was conducted remotely via Microsoft Teams and utilised PowerPoint and Trello as the key tools for presenting and gathering information.

The attendees at the workshop were:

- IJYI Team
- Your Team

The workshop aimed to use interactive exercises to accelerate the gathering of the key information required to define and progress the software element of the sales platform. This included:

- Setting the scene and understanding the project background
- Identifying key business drivers
- Defining a summary elevator pitch for the project
- Analysing the unique selling point for the customer
- Defining the project scope
- Analysis of the stakeholder community
- Definition of the high-level technical solution
- Indication of high-level timeline and estimated cost.

The output of the workshop is detailed in this document and provided in a raw form in Appendix B – Workshop Output

Key Business Drivers

The first exercise completed in the inception workshop asked the team to identify the key business drivers behind the project. The top three identified were:

1. Ensure the tool is flexible and the pipeline can be altered
2. Make the sales process more efficient through automation
3. Ensure secure storage and transfer of sensitive data

The workshop then focussed on ensuring that all requirements specified for the platform has a direct link back to these three drivers.

Other notable drivers identified by the team were:

- Create a network of sales specialists
- Create data to allow trend analysis of outcomes and creation of training plans
- Deliver a cost-effective service that enhances the reputation of the profession

Elevator Pitch

Following the identification of the key business drivers the inception process seeks to reinforce this by asking the team to produce an elevator pitch. This pitch conforms to a defined structure identifying the who, what and why of the project and should take no more than 30 seconds to deliver. Several pitches were nominated but the team agreed on the statement below:

“For the sales team of company X

Who want to ensure that they maximise the value of their sales and manage their customer accounts efficiently.

The new sales platform is a one stop shop for all sales data, process, and management information

That directs a highly efficient sales process while recording and enriching data gathered.

Unlike our existing sales platform

Our product will be available anytime, easy adapted to a changing sales environment and based on supported technology”

Product Box

The product box exercise is designed to make the team look at the project from the customer's point of view. If you were to look at designing a literal box to sell your product in what would you put on it? What would appeal to the customer and sell the unique benefits of your project?

"Matching business ambition with Sales Growth"

Comprehensive sales platform giving maximum flexibility and efficiency to our world class sales team.

- ✓ A central source of all sales data and process
- ✓ World class "always on" platform
- ✓ Market leading management information and insights
- ✓ Driving sales growth by allowing sales professional to focus on sales

Project Scope

The scope of the project was defined by the team at a “Big Rock” or Feature level. The features below are the essential high-level functional and non-functional items that the team identified as required to put the Minimum Commercially Viable Product out to market. The Out of Scope section includes ideas that may be desired in future iterations of the project but are not required for launch.

More detail will be required around these features in the early stages of the project to determine the exact behaviour and user experience of the system.

In Scope

Sign Up and Login

1.1	Login
As a	Sales Person
I want	To login to the system from anywhere and have a role applied
So That	I can access the platform and only see features and data relevant to me specifically

1.2	Single Sign On
As a	System Admin
I want	To allow my users to access via single sign on only
So That	I don't maintain user ID details and provide a convenient way of connecting my users to the platform

User and Organisation Admin

2.1	Manage Organisations
As a	System Admin
I want	To be able to manage my organisation structure and create links between parent and child departments
So That	I can report on my data in a manner that suits me

2.2	Manage Users
As a	System Admin
I want	To be able to manage users of the system
So That	I can perform basic functions such as disabling, resetting passwords and updating user details

Reporting

3.1 Organisation Dashboard	
As a	Sales Manager
I want	To see a dashboard of high-level stats showing the use and state of my platform.
So That	I can monitor the sales within my organisation

3.2 Customer satisfaction	
As a	Sales Manager
I want	To gather customer feedback automatically
So That	I can ensure my customer base are happy with the sales team

3.3 Commission	
As a	Sales Manager
I want	To be able to see automatically calculated commission data
So That	I can inform payroll efficiently

Sales Admin

4.1 Automatically delete data	
As a	System Admin
I want	Sales records to be automatically deleted after 12 months
So That	I can ensure that data within the system meets data retention policies

4.2 Sales Categories	
As a	Sales Manager
I want	to create new sales categories for reporting purposes
So That	I can judge performance at a more granular level

4.4 Sales Workflows	
As a	Sales Manager
I want	Sales workflows to be customisable
So That	I can control how users move through the sales process

Sales Completion

5.1 Create Sale	
As a	Sales Person
I want	Create a sale
So That	I can record the sales info

5.2 Notifications	
As a	Salesperson
I want	The system to auto generate messages to me
So That	So that I can be reminded to progress sales

5.3 Complete a sale	
As a	Sales Person
I want	To be able to close a sale and record the outcome
So That	So that I can get commission

Other

6.1 Resources and FAQ	
As a	User
I want	Access to online resources related to the sales process
So That	I can find information to help myself easily

6.2 Contact Support	
As a	User
I want	The ability to contact a support team to get help in using the platform
So That	I can use the system effectively

Non-functional

- Autoscaling infrastructure
- implements the 14 NCSC Cloud Security Principles
- Compatible with latest version of modern browsers such as Chrome, Firefox, Edge and IE
- Flexible API for integration
- Penetration Testing required

Out of Scope

- Robot sales people

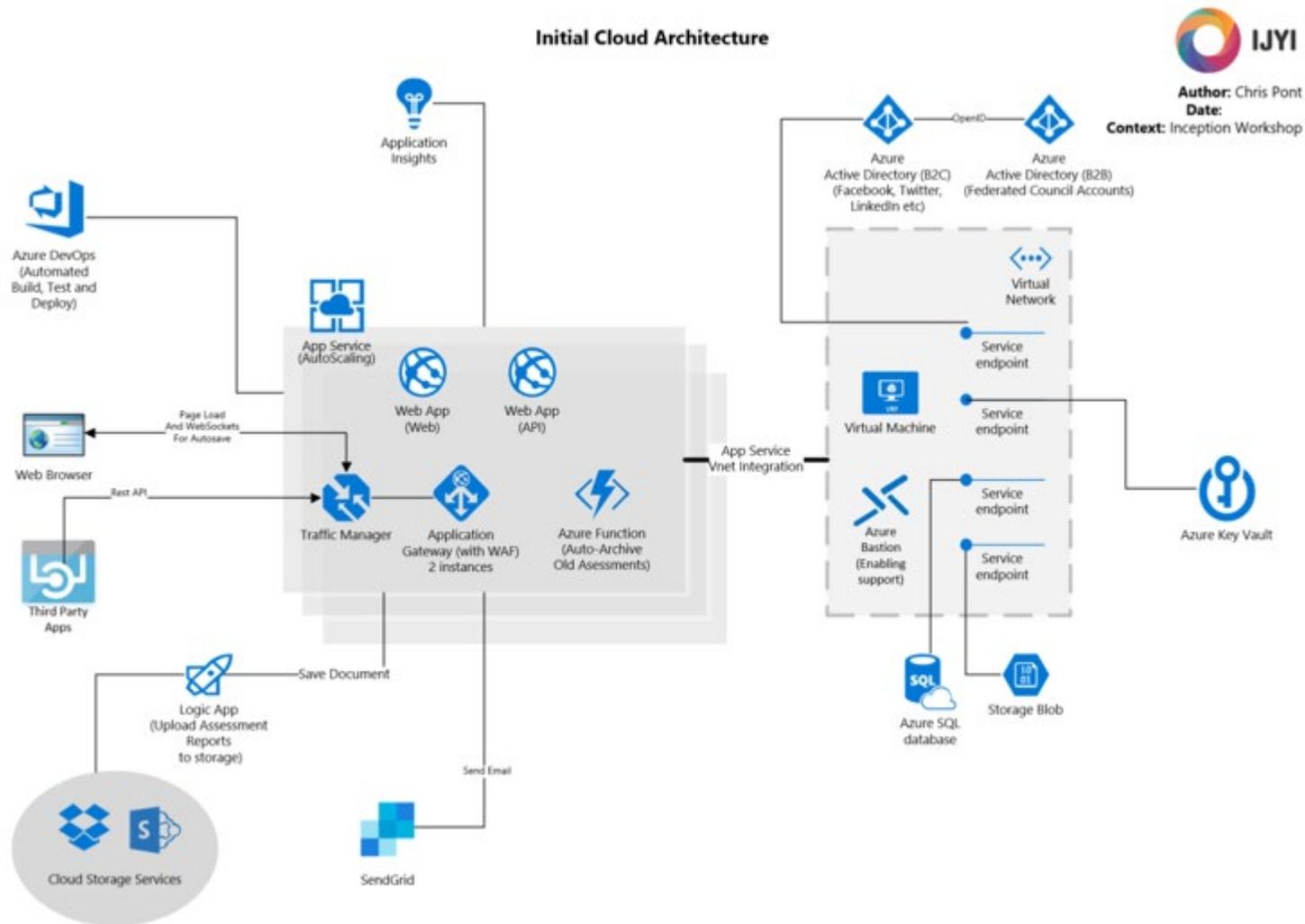
Stakeholder Community

List stakeholders and nature of their involvement where possible

1. Sales team
2. Sales managers
3. C-Suite
4. Customers
5. IT Supplier
6. Marketing team
7. Operations

Proposed System Architecture

The proposed system architecture was designed based on the project scope and the key business drivers. Below shows the design for the infrastructure based around the Microsoft Azure cloud platform, along with a description of each of the platform services being used.



The proposed system architecture is hosted within Microsoft Azure

The services used are listed below:

App Service

Description of service

Azure Application Gateway with WAF

Description of service

Azure SQL Database

Description of service

Deployment

Description of the deployment process

Risks

Risks were discussed in a part of the workshop called “What keeps us up at night” with the various perspectives in the team contributing to the list and then voted on. The key risks are detailed below.

ID	Description	Likelihood	Impact	Action Required
R-1	Delays to procurement and completion of the project mean competitors get alternative solutions to market earlier	L	H	Move the project through the tender process as quickly as we can and continue to monitor the market for the emergence of competitors
R-2	Description 2	M	H	Action 2
R-3	Description 3	M	H	Action 3

High Level Plan

Approach

The approach requested by the customer as part of the workshop is to follow an Agile software delivery approach utilising DevOps best practices to ensure a high standard of engineering and supportability. Therefore this timeline assumes the use of Scrum as the software delivery method (Appendix A: IJYI Delivering with Agile) combined with a traditional project management approach to ensure a familiar feel to project communication, planning, milestone reporting and stakeholder management.

Timeline

The timeline below is a very high-level timeline covering the software development portion of the overall project timeline. It shows top level activities that will occur up until the point where the customer has signed off the product as fit for live rollout to customers. It does not cover pre-project tasks such as gaining funding approval or post project activities such as user training, marketing, or rollout to customers.

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Resource Profile

Delivering this project will require your software vendor to provide resources across the following roles on varying allocations depending on what the activities are for that phase of the project:

- Project management – PM to manage the software delivery process and report to the client
- Software development – A range of development skills will be required to build the software
- Business Analysis – Principle point of contact for the product owner and will document the requirements and explain what needs to be done to the team
- Quality Engineering – Will manually and automatically test the software to ensure it is fit for purpose
- User Experience and User Interface Design – Design the screens and user interactions to make sure the software is intuitive and easy to use.
- DevOps specialist – A specialist role that allows us to efficiently manage the cloud infrastructure and resale software reliably and rapidly throughout the build process
- Penetration testing specialists – Likely to be a third party who will independently test the security of the platform

The customer should expect to provide the following roles to support the team defined above

- Product Owner – The principal decision maker and single point of contact into the development team. This person will be required throughout the whole delivery and is a key member of the team
- Subject Matter Experts – While the product owner will be very knowledgeable and influential in the core areas of the system, they cannot know everything. A group of SMEs will need to support the PO to provide low level details and decisions on specialist areas such as IT and Marketing. These people will work through the PO to interact with the software delivery team
- Project Manager – We would recommend every client having their own project manager to marshal resources on the client side, resolve issues and help the vendor navigate the internal processes. They would also be responsible for the wider project plan outside of which the software delivery is part
- Key user group - During month 4 or 5 it is expected that a formal User Acceptance Testing phase will be conducted. At this point the software will be opened to a wider audience and the customer should provide people experienced in each of the roles that will use the system. They will need to test the software and provide feedback
- Beta Testers – This is usually a friendly group of customers or early adopters who can use the platform in anger and provide feedback to ensure it is ready for commercial release

Investment Required

Based on the requirements laid out in this proposal we believe the customer should budget around £XXXXX (excluding VAT) for completion of the software development portion of this project. This is a figure provided for indicative purposes only and will be refined during the formal procurement process. A variation of plus or minus 25% is to be expected with this level of estimate.

Operating the service will incur costs associated with the Azure Services used in the proposed architecture. Those costs are outlined below.

Ongoing Infrastructure Costs

These costs are estimates only, created using the Azure pricing calculator and actual costs will be dependent on usage. App Service and Application Gateway Costs may go up as the number of users increases. All costs exclude VAT.

Service type	Region	Description	Estimated Cost
App Service	North Europe	Standard Tier; 2 S1 (1 Core(s), 1.75 GB RAM, 50 GB Storage) x 730 Hours; Windows OS	£XXXX
Azure Active Directory B2C		50,000 monthly active user(s)	£XXXX
Monthly Total			£XXXX

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