

**GUIDE**

# **K2 SOLUTION DELIVERY METHODOLOGY**

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# INTRODUCTION

As an organisation powering process transformation on the K2 Platform, a Centre of Excellence (CoE) enables you to gain maximum value from your technology investment. It also provides your people with the tools to contribute ideas, expertise and lessons learned in a way that really drives business forward.

A well-designed and governed CoE provides a sound framework for turning ideas and requirements into digital assets that:

- Adhere to pre-defined quality standards
- Are delivered in predictable timescales
- Produce exceptional outcomes
- Meet the expectations of all stakeholders

The goal is to establish a methodology that channels all these ideas and requirements through a standardised set of processes to ensure that the right people add maximum value at the right time – and that every application, workflow and other digital asset produced is quickly, easily and successfully adopted by your system users.

## WHY SET UP A K2 COE?

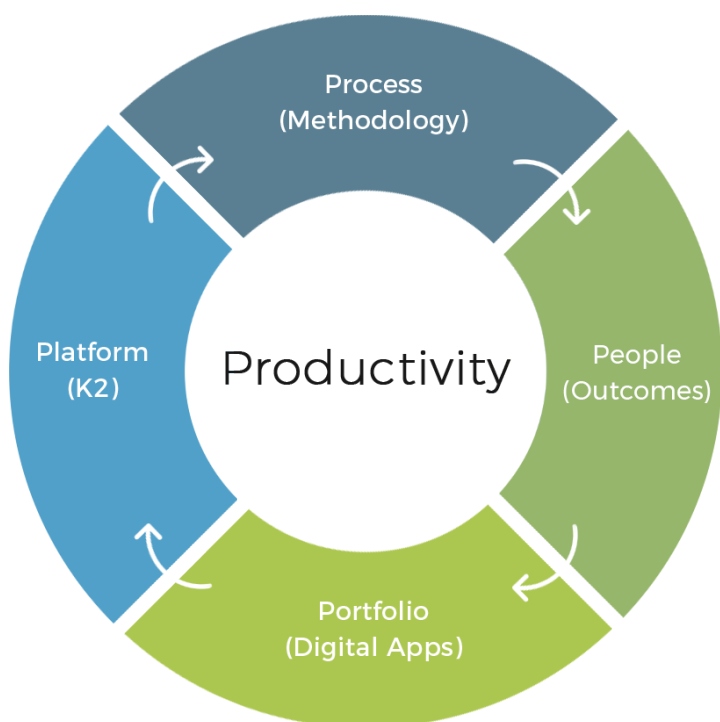
- ✓ Enhance collaboration between business, project and technical experts
- ✓ Maximise productivity on the platform
- ✓ Produce high-quality business apps at scale
- ✓ Minimise project risks
- ✓ Accelerate digital transformation

# THE K2 COE METHODOLOGY

The primary driver for adopting K2's low-code application development platform is that it provides more people with the tools to innovate more processes across the enterprise. With little to no coding required, both developers and business users can build process automation solutions quickly and easily. These rapid application development capabilities make K2 an attractive component of any CoE that's been set up to swiftly solve a broad range of business challenges.

But a digital platform like K2 is only part of the CoE story. To ensure the platform lives up to its full potential, the processes that produce digital assets need to be established, initiated, and constantly refined. These processes are known as the CoE methodology. The diagram below illustrates how the methodology (**process**) and the **platform** enable your **people** to deliver a successful digital **portfolio**.

All these components feed into each other continuously to maximise productivity, reduce costs and minimise project risks.



This paper provides steps to establish a K2 Centre of Excellence methodology. The advice and recommendations that follow are based on industry standards, best practices and lessons learned over delivering numerous K2 projects over a period of 16 years.

Each CoE methodology (process) incorporates six key stages:

- STEP 1 **Discovery and Formulation**
- STEP 2 **Design and Review**
- STEP 3 **Specification**
- STEP 4 **Development and Configuration**
- STEP 5 **Rollout**
- STEP 6 **Support**

Before we outline each stage, it's important to understand that each company's Centre of Excellence will tailor these stages to suit unique business goals and organisational cultures. This fine-tuning process helps to build a K2 CoE Methodology that supports your broader digital transformation strategy.

# DISCOVERY AND FORMULATION



This stage aims to identify user **needs** and **challenges**. These insights feed into the formulation of potential solutions which map user journeys and roles.



Representatives from the **user community** are required, as well as a stakeholder with strong business analysis and solution architecture experience, such as a Business Solutions Architect (BSA).



This phase is ideally conducted in a workshop setting, involving fast-paced sessions that constantly move in the direction of **potential solutions**. This is not the space to discuss issues that add little value to discovery or formulation.

During this process, stakeholders should generate whiteboard diagrams that capture:

- **Process maps for all the required workflows (Visio drawings)**
- **Roles of process stakeholders**
- **Data capture and task management user interfaces required for the user journeys (Balsamiq wireframes)**
- **Integration points with third-party systems**
- **A list of potential management information reports**

It's advisable to capture notes in the source documents to keep information contextualised and short.

## OUTCOMES

- ✓ An understanding of user requirements and the scope thereof
- ✓ The formulation of solutions based on these insights

# DESIGN AND REVIEW



The aim of this stage is to **elaborate on the outputs** of the Discovery and Formulation sessions, and produce a **detailed functional blueprint** for each required solution.



The **Business Solutions Architect**, user community and a **Project Manager** (if available) are required.



Conduct a **review process** in a workshop setting with all stakeholders to ensure details are accurate and that nothing is missing from a requirements or solution perspective. Be sure to keep reviews short and focused on re-articulating requirements and proposed solutions.

Stakeholders should then design the process by generating:

- Firm design documentation (i.e. blueprints of the proposed system) to foster a clear understanding of user journeys and functional fulfilment
- A sound estimation of the scope and build effort
- A quote if a business case is required
- A project plan with all the delivery milestones flagged (which forms the basis for sprint planning in the Development stage)

## OUTCOMES

Clarity on:

- ✓ Which issues and requirements will be addressed
- ✓ The type of solutions that will be built to solve these
- ✓ Timescales for each build
- ✓ Development milestones

# SPECIFICATION (OPTIONAL)



The aim of this optional stage is to create a **technical specification** for the proposed system. It's suitable for organisations that require detailed IT specification documentation to fulfil governance and IT compliance requirements.



Various **technical stakeholders** are required to produce the specification outputs.



A Centre of Excellence expert like Velocity can provide you with a full list of specification documents.

Get in touch at [contact@velocity-it.com](mailto:contact@velocity-it.com)

## OUTCOMES

- ✓ Architectural Specification Documents
- ✓ Integration Design Specification
- ✓ Solution to Feature Mapping Specification
- ✓ Document Management Specification
- ✓ Security Specifications

# DEVELOPMENT AND CONFIGURATION



The aim of this stage is to **build and configure** the solution specified in the design. Processes and activities focus on producing the system artefacts and unit tests, a build guide, and a deployment guide.



**Technical developers** develop and configure the app whilst the **development manager** oversees the development process and the outputs.



**Demonstrations** are required to showcase functional features and the level of progress. Ask stakeholders for **feedback** during these sessions and roll this into future sprints to ensure a best-of-breed solution is produced.

The following processes could be fine-tuned:

- Development management
- Development checklist creation
- Backlog and defect list management
- Scrum
- Change control

A Centre of Excellence expert like Velocity can provide you with a full list of development process template documentation. Get in touch at [contact@velocity-it.com](mailto:contact@velocity-it.com)

## OUTCOMES

- ✓ A fully functional system that is ready for user testing and rollout
- ✓ Ensure there's a loopback in place from the Rollout to the Development and Configuration stage, to absorb any additional user feedback of defect fixes into the developed system



# ROLLOUT



The aim of the Rollout stage is to **acceptance check**, **train users**, and **productionise** the developed system.



The **primary users** of the system need to be the largest stakeholder in this stage, with the **Business Solutions Architect** forming a link between them and the **development team** to finalise final change requests or defect fixes.



There are a few activities that need to happen during this stage to reach the goals of **setting a go-live date** and ensuring the support team is ready to provide **hyper-care** immediately after go-live. These include:

- **Phasing in the new system with a pilot (optional) once the go-live checklist is achieved**
- **Compiling a runbook (i.e. a system instruction manual) to provide comprehensive support to both system users and support staff**

## OUTCOMES

- ✓ An exhaustive runbook that provides both system users and support staff with the information they need to maintain optimum levels of productivity
- ✓ A system for logging troubleshooting tips and techniques in the runbook regularly, in order to avoid unnecessary support calls down the line

# SUPPORT



The aim of the Support stage is to provide **hyper-care after go-live**. The level of technical support can be gradually pared back from hyper-care to 1st, 2nd, 3rd and then 4th line support.



The **support helpdesk function** and **technical support team**. System user involvement is also critical, in terms of their feedback.



The resolution process varies from one organisation to the next. Some guidelines:

- Typically, support calls are logged by system users in a support helpdesk and assigned to an engineer for resolution (along with any relevant technical resources)
- It's important to absorb feedback from the support tickets back into the runbook's FAQ or Knowledge Base section - so all users have access to this valuable information
- As the Knowledge Base grows in this way, the support footprint should reduce in time

## OUTCOMES

- ✓ An optimally functioning system
- ✓ Quick and efficient query and issue resolution
- ✓ System benefits that are not undermined by slow or incomplete support processes

# ENGAGE WITH A CENTRE OF EXCELLENCE EXPERT

Are you ready to gain maximum value from your process transformation efforts and technology investments?

For guidance on how to best leverage the Centre of Excellence model to support your unique business goals visit [www.velocity-it.com/K2-CoE](http://www.velocity-it.com/K2-CoE)

OR

Email us at [contact@velocity-it.com](mailto:contact@velocity-it.com)

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