

## Proof Of Concept Planning Guide

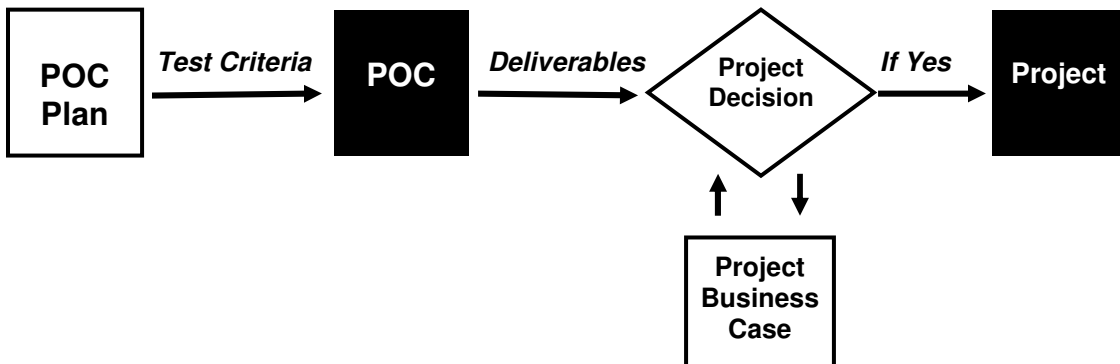
## *Making The Best Possible Decision*

Congratulations! Your decision to test the XYZ Corp. software platform is an exciting step forward on the road of business possibilities. And your XYZ account and partner team is proud to be included in this first stage of your journey.

This Guide is intended to provide both you and your XYZ account or partner team with a focus for a worthwhile discussion around your Proof-of-Concept (POC).

A POC is a test of an idea – in this case the idea that software from XYZ will be a good choice for a project at your organization. Your POC can be as simple as a one-day workshop, or as intensive as a week-long project.

Along with a POC, you will likely also have developed an overall business case and ROI investment calculation in support of a business objective. Your POC test will contribute to a business case in terms of a better understanding of project costs and benefits as well as in terms of information for product selection. Here is a diagram showing how your POC and your Project are related.



*A POC is also a “special case” of project. While most projects focus on a deliverable which will provide on-going, concrete value, the result of a POC is an intangible, the “Decision”. For this reason, the Scope of the POC Project is not defined separately from the POC Project Criteria and the POC Test Plan, the two project elements that define the work of the POC.*

What’s the best way to run a POC? Our customers have had success with POCs large and small, formal and informal, and organized and sponsored in many different ways. But successful POCs often share common elements. We’ve gathered these typical elements together in the handy guide below. Each of the items can be a suggestion for casual discussion, or for a larger POC, the subject header for a written project plan.

Please see the next section for your discussion guide.

## POC Discussion Guide & Checklist

- 1. Next Step Project:** What will be the result of a successful POC test? Presumably you are running the test because you want to move ahead and acquire your new capabilities! Are your hopes justified? The POC will provide the answer.

Summary Of Desired Project: \_\_\_\_\_

\_\_\_\_\_

- 2. Overall Project Sponsors & Stakeholders:** Like all successful projects, your project will have a sponsor and a champion and various stakeholders. Your sponsor will have bought into the decision criteria of the project and is prepared to support the “next step” on a successful outcome. Likely, your sponsor is both the source of funding for the next step and the prime beneficiary of the resulting deployed system. What other stakeholders will be affected by either the POC or an implemented system? Ensure in particular that project sponsors are in agreement with your objectives and next steps.

Project Sponsor: \_\_\_\_\_

Other Stakeholders: \_\_\_\_\_

\_\_\_\_\_

- 3. Overall Business Case & ROI Calculation:** IT projects are often measured now on business criteria, as well as traditional IT measures. What is the business case for your project? Is it documented or more informal? Has there been an ROI or NPV calculation performed? Is there a strategic reason to consider the project? Your POC test may contribute to your business case in terms of a better understanding of project costs and benefits as well as in terms of information for product selection. Your Business Case will likely be a separate written document.

Notes On Project Business Case: \_\_\_\_\_

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4. **POC Objective(s):** What is the objective of your POC? An Objective could be something like “*satisfy our requirements that the XYZ platform is the best choice for our organization to acquire the capabilities defined in the ABC project.*” An effective Objective specifically mentions both the test you want to perform and the business project that you are supporting.

POC Objective: \_\_\_\_\_

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5. **Project Decision Criteria:** How will you decide if the software under examination is right for you? This step is very important and likely includes multiple criteria in several categories, for instance technically (*the software must be scaleable, must be secure, must have certain performance characteristics*), from an end-user perspective (*the software must have certain features and usability characteristics*), from a management perspective (*the software must be easy to manage, the software must present a unified approach across all modules*), from a financial perspective (*the software must be affordable*) etc.

Here’s an example: “*ABC Corp. runs a lean IT shop. The software should have capable management tools available that make day-to-day operations easy. Measured by the subjective evaluation of testers.*” Decision criteria are typically measured numerically, subjectively or as a gating factor; some criteria you will know ahead of time, others you may develop through the POC itself. The Decision Criteria and the Test Plan together define the Scope of the POC Project.

POC Decision Criteria: \_\_\_\_\_

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6. **POC Deliverable:** Probably the most important deliverable from your POC is the final decision. Will any deliverables be written up?

POC Deliverable Notes: \_\_\_\_\_

7. **POC & Project Time Frames:** When must the results of your POC be delivered? What other important dates are there? Examples include “development start”, “testing start”, “go live” etc.

POC & Project Important Dates: \_\_\_\_\_

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- 8. POC Test Setup:** What hardware, network, database and software components do you need to assemble for your test? What about test data? Beyond the physical infrastructure needed for your test, what is the logical relationship of different test components? XYZ can assist you with this list, and the characteristics of each required item, for instance the recommended memory for your “test bed” and advice concerning interactions between different software components.

POC Test Setup Notes: \_\_\_\_\_

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- 9. POC Test Plan and Test Script:** Your test plan is the overall sequence of tasks that must be accomplished in order to execute your POC, starting for instance with “install software according to XYZ guidelines”. The test script itself is likely the most interesting part of your POC plan. Once your software is installed and configured, what are the list of tests and procedures that you will perform? Likely the test script directly supports the decision criteria identified above. It’s up to you whether you write down a full test script. The Decision Criteria and the Test Plan together define the Scope of the POC Project.

POC Test Plan & Test Script Notes: \_\_\_\_\_

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- 10. POC Project Cost:** How expensive will your test be in terms of time and/or dollars? Your test setup and test plan will obviously influence the cost of your POC. For instance, you might be able to achieve integration or business intelligence test objectives by building a test environment with just a few tables and a dozen data elements. A test environment involving dozens of data elements would clearly be much more expensive – but might be required depending on your criteria.

POC Project Cost Notes: \_\_\_\_\_

\_\_\_\_\_

**11. POC Resources:** What resources will you need for your test and where will they come from? You will almost certainly need assistance in setting up, configuring the software – and then additionally to understand the software for the purposes of the test.

POC Resource Notes: \_\_\_\_\_

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**12. POC Dependencies:** What outside factors will influence the successful execution of your POC project? For instance, are you waiting for the end of an existing project to free up an important team member?

POC Dependencies: \_\_\_\_\_

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**13. POC Critical Success Factors:** What are the CSFs for your test? You might think of a CSF as a “dependency that you worry about”. For example, you might be concerned about commitment to funding a full project, regardless of the technical success of your POC – in which case it might be better not to do the POC. It’s usually better to identify CSFs up front!

POC CSFs: \_\_\_\_\_

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**14. POC Funding:** Depending on the size of your POC, various parties may provide funding and are thus likely to have a say in how the POC is run. Getting stakeholders to fund a POC is usually a balancing act driven by commitments, risk and benefits.

**Commitments** (*I’m committing these resources to the project*) balance **risk** (*XYZ does not know the internal politics of the customer; customer has not used this software before*) which in turn balance **benefits** (*XYZ sells services, customer gets no-cost training*).

XYZ is confident that the XYZ software platform will be very successful in any POC and is therefore able to provide resources to assist customers who are considering the XYZ platform. At the same time, customers will usually have their own criteria for running a POC, whether it is one day long or a week.

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A more extended engagement will most likely be driven by customer needs; in such a case the customer is more likely to assume more of the responsibility for funding the POC.

The success of any given POC is dependent in part on the mutual commitment of both parties; in most cases therefore, both XYZ and the customer will be contributing resources and/or funds to the project.

POC Funding Elements & Commitments: \_\_\_\_\_

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- 15. POC Agreement:** Like almost any project, the POC is a joint effort, in this case between XYZ and a customer. Whether informally over coffee, or as part of a fully contracted Agreement, coming to a common understanding of the objectives, decision criteria and other aspects of a POC is essential for success.

POC Agreement Type & Status: \_\_\_\_\_

- 16. How Much Work Is The POC?** A POC is not a huge multi-month or year-long project, so planning for your successful POC should be very simple. Even with simplicity however, your chances of success will be enhanced by checking off the elements of your POC project plan as suggested here.

You should be able to document and get buy-in on everything in your POC plan in a matter of hours!

## What Is A Successful Proof-of-Concept?

A successful Proof-of-Concept is *not* that the customer decides to buy XYZ software or services. A successful POC is one where the customer is able to fairly and accurately assess whether or not any given proposal is the best match for the customer's requirements. And the answer to that question could be "yes" or "no" – although probably you wouldn't be conducting a POC if you didn't have a reasonably high expectation of yes!

Naturally your XYZ team believes that our software platform is ideal for almost any customer situation. At XYZ we have become very successful by providing outstanding software solutions for our customers. But we have only achieved this position, and can only hope to maintain such success, by continually re-earning a place in customer organizations. We hope to earn the opportunity to work with you. And we hope you will find that XYZ software and services is the best choice for your needs.

***Thank you for the opportunity to be tested!***