ORACLE

[Customer] [Project Name] Kick Off meeting

Cloud Lift Services

[Date]

[Presenter Name]

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Agenda

1. Introduction
2. Purpose of the meeting
3. Solution – Current and Future Architecture
4. Why Oracle Cloud Lift Services? (Optional)
5. Workload Architecture Document (WAD): Scope and Timeline
6. Governance/Meeting Schedule/Reporting
6. Lift Work Begins – Next Steps

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Introductions

[Customer] Team

Name	Title / Role	Email

Oracle Team

Name	Title / Role	Email

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Purpose of the Meeting

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Solution – Current State Architecture

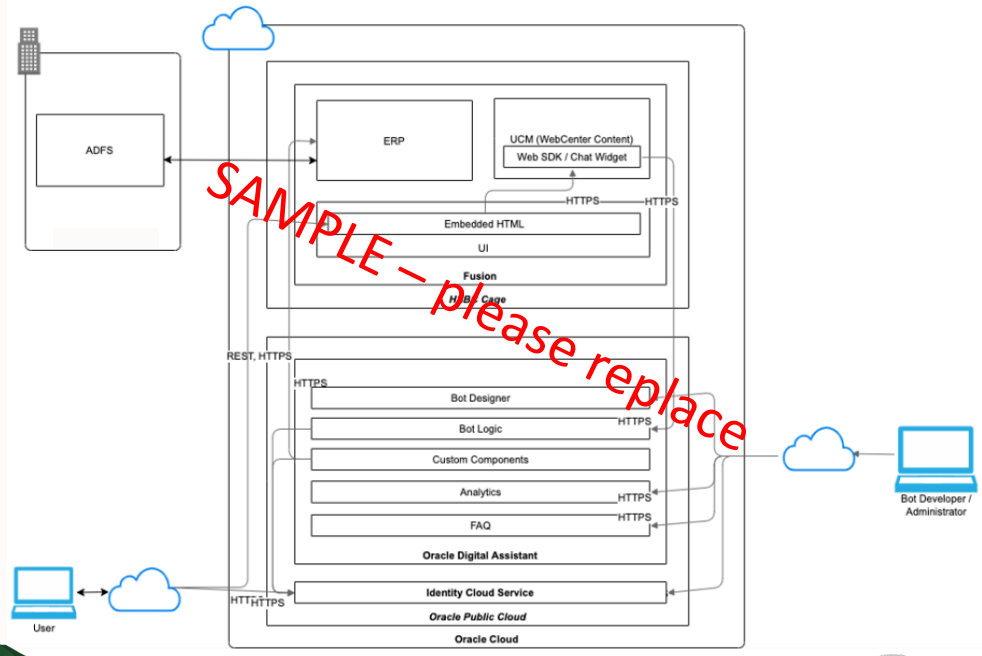

Figure 1: Logical Current Architecture

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Solution – Future State Architecture

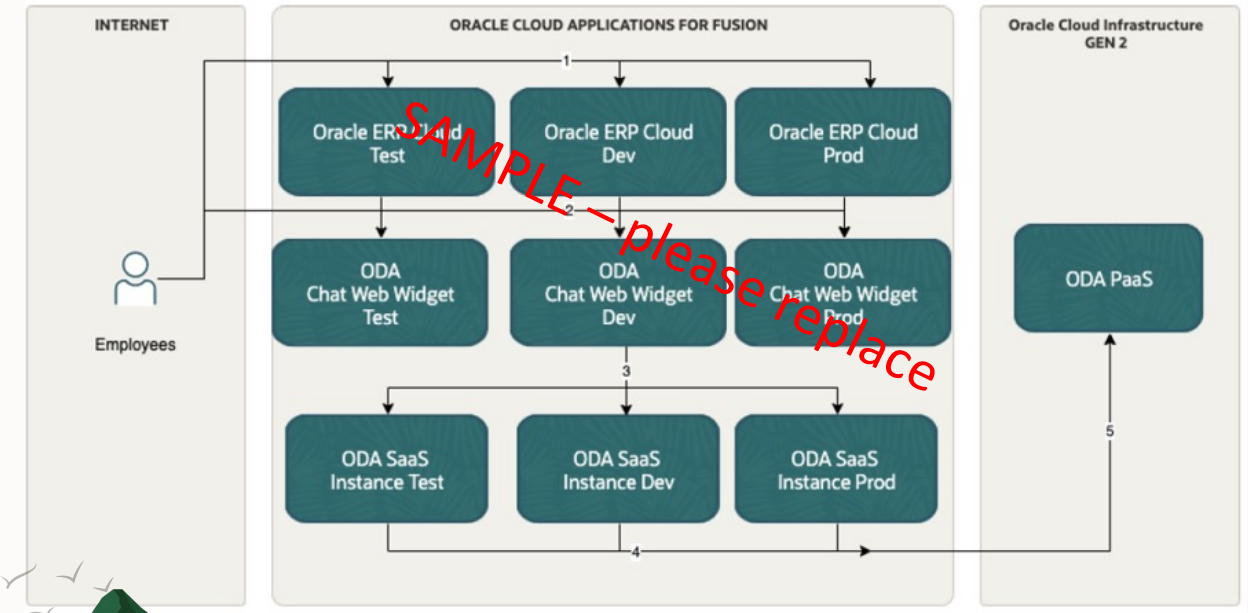

Figure 2: Logical Future Architecture

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Workload Architecture Document (WAD)

Objectives	Success Criteria	Included Activities / Lift Scope

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Workload Architecture Document (WAD)

Assumptions / Not Included	Pre-requisites

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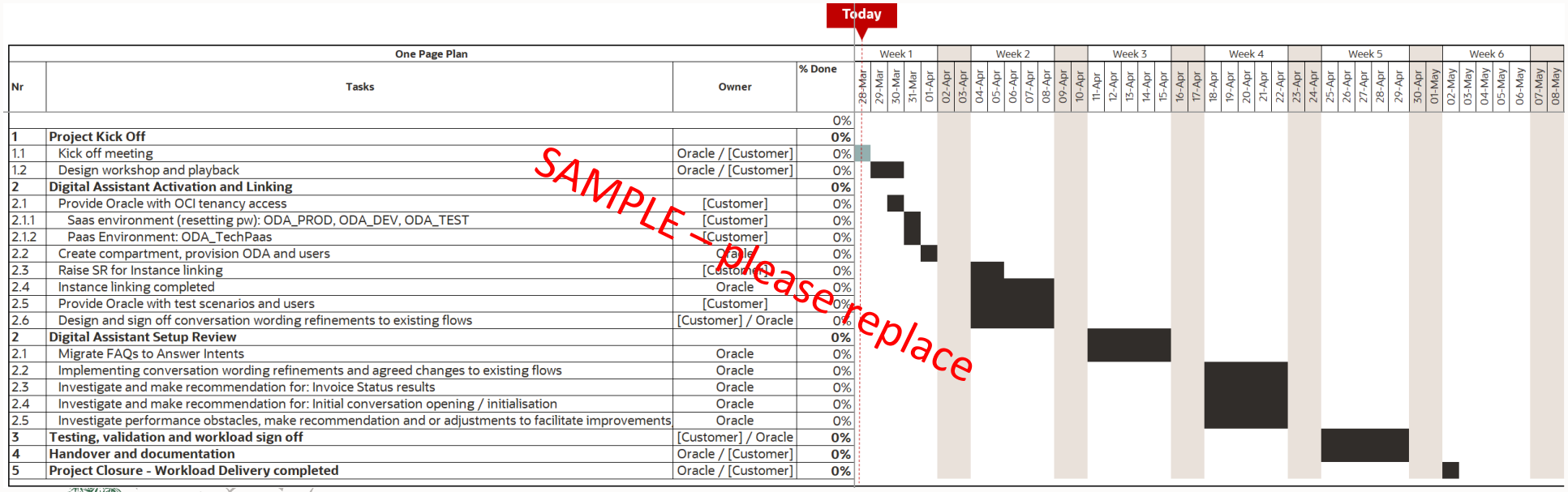
Project Timeline



One Page Plan			
Nr	Tasks	Owner	% Done
			0%
1	**Project Kick Off**		**0%**
1.1	Kick off meeting	Oracle / [Customer]	0%
1.2	Design workshop and playback	Oracle / [Customer]	0%
2	**Digital Assistant Activation and Linking**		**0%**
2.1	Provide Oracle with OCI tenancy access	[Customer]	0%
2.1.1	Saas environment (resetting pw): ODA_PROD, ODA_DEV, ODA_TEST	[Customer]	0%
2.1.2	Paas Environment: ODA_TechPaas	[Customer]	0%
2.2	Create compartment, provision ODA and users	Oracle	0%
2.3	Raise SR for Instance linking	[Customer]	0%
2.4	Instance linking completed	Oracle	0%
2.5	Provide Oracle with test scenarios and users	[Customer]	0%
2.6	Design and sign off conversation wording refinements to existing flows	[Customer] / Oracle	0%
2	**Digital Assistant Setup Review**		**0%**
2.1	Migrate FAQs to Answer Intents	Oracle	0%
2.2	Implementing conversation wording refinements and agreed changes to existing flows	Oracle	0%
2.3	Investigate and make recommendation for: Invoice Status results	Oracle	0%
2.4	Investigate and make recommendation for: Initial conversation opening / initialisation	Oracle	0%
2.5	Investigate performance obstacles, make recommendation and or adjustments to facilitate improvements	Oracle	0%
3	**Testing, validation and workload sign off**	[Customer] / Oracle	**0%**
4	**Handover and documentation**	Oracle / [Customer]	**0%**
5	**Project Closure - Workload Delivery completed**	Oracle / [Customer]	**0%**

SAMPLE – please replace

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Governance/Meeting Schedule/Reporting

Meeting Name	Purpose	Frequency	Attendees	Meeting Organizer	Proposed Time
Daily Standup	Review daily task and issue status	Daily	Project teams		
Weekly Review	Project status and progress tracking	Weekly	[Customer] and Oracle Project team		
Stakeholder Review	Milestone review	Biweekly / Monthly	Key stakeholders		

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Lift Work Begins - Next Steps

#	Action	Owner	Status	Due Date
1				
2				
3				
4				
5				

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Thanks

[Name]

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