July 15,2020

**Modern Application Playbook Checklist (Beta)**

**Citizen Services’ OCIO-ES IMB**

[https://bcgov.github.io/CITZ-IMB-playbook](https://bcgov.github.io/CITZ-IMB-playbook/)

**A picture containing clock, soccer

Description automatically generated**

**Purpose**

This document is a tool that can be used along with the Modern Application Playbook to aid teams in preparing for transitioning of their solutions from ideation, project approval through development and into lifecycle support and sustainment.

This document will be reviewed annually and updated based on user feedback and experience gained in transitioning projects.

Feedback is welcomed and should be submitted [here](https://bcgov.github.io/CITZ-IMB-playbook/feedback).

**Contents**

[Play 1 Ideate Solutions That Meet the Needs of Business 3](#_Toc45633568)

[Play 2 4](#_Toc45633571)

[Successfully Navigate the Project Intake Process 4](#_Toc45633572)

[Play 3 5](#_Toc45633576)

[Building Your Team 5](#_Toc45633577)

[Play 4 6](#_Toc45633581)

[Ready, Refine, Sprint… 6](#_Toc45633582)

[Play 5 8](#_Toc45633611)

[Transition to Operations 8](#_Toc45633612)

[Play 6 9](#_Toc45633614)

[Continuous Product Improvement 9](#_Toc45633615)

[Play 7 10](#_Toc45633630)

[Sustainment Lifecycle 10](#_Toc45633631)

**Play 1**

**Ideate Solutions That Meet the Needs of Business**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Promote Innovation from Within** | **Comment** |
|  | Understands the Business Mandate |  |
|  | Understands User needs |  |
|  | Does not exhibit bias |  |
|  | Encourages Creativity |  |
|  | Team Collaboration Activity |  |
|  | Generates Visualization |  |
|  | Number of ideas generated |  |
|  | Results of Peer Review Submission |  |
|  |  |  |
|  | **Step 2: Engage Your Stakeholders** | **Comment** |
|  | Develop and tested prototypes |  |
|  | Generated persona based scenarios and user stories |  |
|  | Stakeholder prioritization exercise completed |  |
|  |  |  |
|  | **Step 3: Proposal Presentation** | **Comment** |
|  | Prepared for pre-inception work |  |
|  | Product Roadmap developed |  |
|  | Has Business Unit approval to proceed |  |
|  |  |  |

**Play 2**

**Successfully Navigate the Project Intake Process**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Obtain Business Unit Endorsement** | **Comment** |
|  | Follows defined initiation process |  |
|  | Created Business / Concept Case (as required) |  |
|  | Working with Project Secretariat Senior Business Consultant |  |
|  | Operating model has been developed |  |
|  | Sustainment Lifecycle has been pre-defined |  |
|  |  |  |
|  | **Step 2: Follow the Ministry IM/IT Project Intake Process** | **Comment** |
|  | Submit project initiation Process |  |
|  | Project registered in the Divisional Project Tracking System |  |
|  | Present to Architecture Review Board (ARB) |  |
|  | Present to the Project Review Board |  |
|  |  |  |
|  | **Step 3: Determine Project Resourcing** | **Comment** |
|  | The project an internally managed initiative |  |
|  | The project requires a partnership agreement / memorandum of agreement |  |
|  | Common understanding of the “Definition of Done” exists |  |
|  |  |  |
|  | **Step 4: Provide Regular Updates** | **Comment** |
|  | For IM/IT Capital projects – Quarterly reporting |  |
|  | For Ministry projects: Monthly reporting |  |
|  | Project updates are published in the Ministry project tracking system |  |

**Play 3**

**Building Your Team**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Go Agile** | **Comment** |
|  | This project will be run using the Agile methodology |  |
|  | Team members and stakeholders have taken Agile training |  |
|  |  |  |
|  | **Step 2: Augment your team with experience** | **Comment** |
|  | Your project has identified the roles that are required |  |
|  | A Security and Privacy officer is part of your team |  |
|  | You have identified a Product Owner |  |
|  | You are aware of the SprintWithUs and CodeWithUs procurement vehicles to augment your team |  |
|  |  |  |
|  | **Step 3: Introduction to the Product Vision** | **Comment** |
|  | All team roles have been defined and allocated |  |
|  | The team understands the approval process for signing off on deliverables |  |
|  | The product owner has presented the solution vision to the team |  |
|  | The clients attitude and approach to risk and change is understood |  |
|  | The team has a list and understanding of the tooling they require |  |
|  | A reporting strategy for communicating progress to stakeholders has been identified |  |
|  | The Project Inception Agenda has been created |  |
|  |  |  |
|  | **Step 4: Project Inception** | **Comment** |
|  | The teams values have been created and are on display |  |
|  | A team agreement has been mutually agreed upon |  |
|  | The “way of working” has been identified |  |
|  | A common “definition of done” has been agreed upon |  |
|  | Virtual/Physical team space has been agreed upon |  |
|  | The development environment has been defined and procured |  |
|  | Am initial backlog of requirements/stories/features has been created |  |
|  | A prioritization of user stories has been completed |  |
|  | Acceptance criteria for each story has been defined |  |
|  |  |  |

**Play 4**

**Ready, Refine, Sprint…**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Develop a Release Plan** | **Comment** |
|  | Refined the (initial) backlog |  |
|  | Defined the product release schedule |  |
|  | Documented dependencies |  |
|  |  |  |
|  | **Step 2: Develop Your Conceptual Architecture** | **Comment** |
|  | Developed and document the system architecture, components and relationships |  |
|  |  |  |
|  | **Step 3: Adhere to Modern Application Principles** | **Comment** |
|  | The project is cloud based or cloud ready |  |
|  | The solution is being developed to conform to [12 factor](https://en.wikipedia.org/wiki/Twelve-Factor_App_methodology) |  |
|  |  |  |
|  | **Step 4: Set up Your Technical Infrastructure** | **Comment** |
|  | The team has IDs and access rights to all required systems |  |
|  | The team communication channel has been defined and set up  (ex: MS-teams/ Rocketchat/ Slack) |  |
|  | Documentation repository has been created and setup, all team members are aware of the structure |  |
|  | The technical environments have been setup and tested |  |
|  |  |  |
|  | **Step 5: Identify Your Development Workflow Processes** | **Comment** |
|  | The development workflow has been documented |  |
|  |  |  |
|  | **Step 6: Set Up, Document, and Implement Your Tooling (Code Repository, Pipelines, Automation)** | **Comment** |
|  | The team has access to and knows how to publish to the code repo |  |
|  | The team has a shared understanding of the code delivery process |  |
|  | The product Delivery Manager has verified all processes |  |
|  | An application security framework review has occurred |  |
|  |  |  |
|  | **Step 7: Educate Your Business Stakeholders** | **Comment** |
|  | The business stakeholders regularly are updated on the project’s status, budget and features |  |
|  | Change management processes are being followed |  |
|  |  |  |
|  | **Step 8: Now Sprint…** | **Comment** |
|  | Sprint 0 has occurred, and the team is able to start working |  |
|  | Sprint ceremonies are being followed and documented for review |  |
|  | With each sprint the Scrum master is looking for opportunities to improve the team’s efficiency |  |
|  |  |  |
|  | **Step 9: Conduct Code Reviews** | **Comment** |
|  | Are the code review results posted for all to review? |  |
|  | Is there a need to modify coding standards? |  |
|  | Do the automated code testing processes reduce the need for manual reviews? Are the logs being read? |  |
|  |  |  |
|  | **Step 10: Complete User Acceptance Testing and Remediate Defects** | **Comment** |
|  | Are the tests being maintained? Reviewed? What is the % of pass to failure? What is the process to remediate defects? What is the mean time to remediation? |  |
|  |  |  |
|  |  |  |
|  | **Step 11: Deploy and Promote Through Your Environments** | **Comment** |
|  | How many pull requests are occurring during a sprint? Is this related to package/feature sizes? |  |
|  | How often are the environment logs being reviewed? |  |
|  |  |  |
|  | **Step 12: Demonstrate Your Products Frequently and Obtain User Feedback** | **Comment** |
|  | How often are product & feature demos being held? How many features are deprecated as a result of feedback from demos? How many features are changed as a result of demos? |  |
|  |  |  |
|  |  |  |
|  | **Step 13: Monitor and Measure the Development Process** | **Comment** |
|  | System / event monitoring validates expected performance and availability metrics |  |
|  | The deployment pipeline is being monitored and measured |  |
|  |  |  |
|  |  |  |

**Play 5**

**Transition to Operations**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Review the Memorandum of Understanding** | **Comment** |
|  | Are changes required? |  |
|  | Are commitments being upheld? |  |
|  |  |  |
|  | **Step 2: Complete Knowledge Transfer** | **Comment** |
|  | Does a knowledge transfer plan exist? How often has it been reviewed? Are changes required? |  |
|  | Do roles exist to inherit the body of work? |  |
|  | Is there an education plan for the staff receiving the work? |  |
|  |  |  |
|  | **Step 3: Validate Operations Processes** | **Comment** |
|  | Does the transition document include a “rebuild/install” document? |  |
|  | Has a clean build on a different local environment been validated? Does it match the documentation? |  |
|  | Has the change management plan and processes been reviewed? |  |
|  | Have all the operations processes been validated? Deficiencies identified and a remediation plan initiated? |  |

* Review the [IMB Application Transition Checklist](https://bcgov.github.io/CITZ-IMB-playbook/docs/IMB-Application-Transition-Checklist.pdf)

**Play 6**

**Continuous Product Improvement**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Incorporate Feedback** | **Comment** |
|  | How frequently is product usability being reviewed with end users and stakeholders? |  |
|  | How is feedback being categorized? |  |
|  | What percentage of feedback is actioned? |  |
|  | As a result of feedback being incorporated into the product do you see greater adoption ? Usage? User satisfaction? |  |
|  | Are the target metrics being met? Can some be deprecated? Others added? |  |
|  |  |  |
|  | **Step 2: Maintain Product Vision** | **Comment** |
|  | How frequently are the stakeholders being asked to reaffirm the product vision? |  |
|  | What is on the Kanban? How big is the backlog? How often is backlog grooming occurring? Are there any noticeable trends? |  |
|  |  |  |
|  |  |  |
|  | **Step 3: Conduct Process Improvement Reviews** | **Comment** |
|  | What is the typical size of tasks? What is the optimal size for the team to maintain its velocity? |  |
|  | Based on code reviews and analysis of user flow through the solution are there any features that can be deprecated? |  |
|  |  |  |
|  | **Step 4: Prioritize Bugs and New Feature Requests** | **Comment** |
|  | What is the current bug count? |  |
|  | Has the defect log been reviewed? Are the types of bugs being lowered? In what modules do they most frequently occur? |  |
|  | How long does it take to remedy identified issues/bugs? |  |
|  |  |  |
|  | **Step 5: Ongoing Code/Build/Deploy/Release Management** | **Comment** |
|  | Are code reviews identifying fewer issues? |  |
|  | When was the documentation last reviewed? |  |
|  | Has the image build timing been reviewed can it be optimized? |  |
|  | Has the release roll back plan been validated? |  |
|  | Has the STRA/PIA been reviewed for updates based on platform updates or feature changes? |  |
|  | Has a dependencies test been conducted? |  |
|  |  |  |
|  | **Step 6: Skills Retention Requires a Plan** | **Comment** |
|  | Does the project have a roles-based succession plan? |  |
|  | Is there an opportunity to onboard temporary assignment or co-ops? |  |
|  | Do team members communicate their skill-enhancement activities through lunch time learning or webinars or other channels? |  |
|  |  |  |
|  | **Step 7: Communicate Your Success** | **Comment** |
|  | What blogs, newsletters, webinars do the team use to inform the community and potential stakeholders? |  |
|  |  |  |

**Play 7**

**Sustainment Lifecycle**

|  |  |  |
| --- | --- | --- |
|  | **Step 1: Maintain a Happy User** | **Comment** |
|  | Has a product review been undertaken that affirms goals and objectives are being met from both the end user and the business’ perspectives? |  |
|  | Has a market survey of similar products been conducted? How does this solution compare? |  |
|  | Based on user and stakeholder feedback and available analytics are there any features that are desired are there features that can be deprecated? |  |
|  | Review product roadmap & release schedule, prioritize new feature opportunities. |  |
|  |  |  |
|  | **Step 2: Maintain Product Funding** | **Comment** |
|  | Have the current budget assumptions been affirmed? |  |
|  | Are there opportunities to lower costs? |  |
|  |  |  |
|  | **Step 3: Maintain Vendor/Partner Relationships** | **Comment** |
|  | Are there changes to existing vendor/partnership agreements? Do they impact the product roadmap? |  |
|  | Are there any changes to licensing that impact the product roadmap? |  |
|  | Are there any changes to platform support agreements that could impact the product roadmaps? |  |
|  |  |  |
|  | **Step 4: Continuously Improve Overall Lifecycle** | **Comment** |
|  | List what process reviews have been done and where improvements where identified |  |
|  | List improvement experiments undertaken and describe lessons learned |  |
|  |  |  |
|  | **Step 5: Maintain Product Integrity & Quality** | **Comment** |
|  | Reviewed defect log for improvement opportunities |  |
|  | Reviewed platform release cadence aligned with product releases for possible feature impacts |  |
|  |  |  |