Release 3: How Do You Buy?

Effectively use techniques for acquiring digital service solutions in your solicitation or acquisition strategy.

# Iteration 3.A: Developing an Acquisition Strategy

In this iteration, you will learn how to develop an acquisition strategy and an acquisition plan for agile and digital services. You will study key elements of each, including pricing, security, evaluation methods and more. You will also look at challenges that change agents encounter and share lessons learned from experts with the class as a whole. Finally, you will receive a list of what you can and cannot share with vendors as you work on your acquisition strategy and plan.

| PO # | Performance Objective | Learning Activity | Comments | New/ Reuse | Badge Level | Seat Time |
| --- | --- | --- | --- | --- | --- | --- |
|  | N/A – ALL | * **Iteration Pre-Assessment (formerly release scenario staging)**   https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015\_T1/courseware/cc2f78a334f24c17940c2164df6740a6/2adbd6c6cb9341b1b41accbdef51308e/ |  | Update from Release 3 RSS from pilot | n/a | 30 minutes |
| 3.1 | Identify how to develop an acquisition strategy for digital services. | * Refine the pilot **Preparing to Buy: The Acquisition Strategy/Plan – Part 1** online learning from release 3.a: (<https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015_T1/courseware/da397bdc9d4b4ae3be72e2240b5379f0/2c038fec05db4a3bad2fdbc416dbed0d/>). * Specific updates will include:   + A brief recap of what was discussed in the classroom including how the Lean canvas approach can be used.   + Focus just on strategy and move the acquisition plan information to objective 3.5.   + Move the content that discusses security (last tab) to the security-focused objective 3.4.   + Adjust the wording to talk about reviewing the strategy options available to find the one to develop.   + See DHS Innovation Lab, HHS Idea Lab/Buyer's Club on the acquisition plan – look for information/examples.   + Ensure we reinforce these key themes that relate to each phase of the digital services acquisition lifecycle, focusing in on how to employ them at this stage:     - How is this unique in the context of digital services acquisition? Will be more interaction overall in how you plan interaction with vendor base. Should be interacting with vendors and the program office to create hypotheses - to put together a product that will do XYZ, this is how we'll go about our acq strategy/plan - can we meet with your vendors to have a dialogue? Will this help us gain our goals?     - Idea of creating a plan and sticking to it no matter what needs to change; should be iterating; should all relate back to the goal of the product.     - Ask vendors if this plan would be overly restrictive or would make it difficult for you to quote us...if asking for full SOWs or IT project vs. just a prototype, how costly, is that a massive investment, are you not going to bid, what makes you think this is rigged and what doesn't? Formulating hypotheses and testing them with the goal of your product vision in mind.     - Are we on track or what are we not thinking about? Then, we could change the acq plan accordingly - find things we didn't initially consider.   + The lean acquisition canvas is a way to capture the main points in the acquisition strategy/plan in a quick reference format that provides a high-level vision for the acquisition. The idea of using lean approaches stems from the Lean Startup methodology, which was originally designed as a way to create and manage startups and get products into customers’ hands more quickly and efficiently using a “build-measure-learn” cycle. These “lean” approaches (called “lean” for a reason—because they favor testing and experimenting over elaborate upfront planning) are quickly being adopted by businesses large and small, and by various fields; for instance, you may have read about applications of lean methodologies to user experience (UX) design as part of the Gold-level readings in Release 1. These lean approaches were used to develop the “lean canvas” approach for writing “lighter,” more effective business plans. (You can read more about the lean startup concept here, lean canvas here, and more from the creator of lean canvas Ash Maurya here. There are even tools to help you build virtual lean canvases!)   + These concepts can be applied to acquisition as well. Typically, the acquisition strategy and acquisition plan are seen as paperwork exercises; they are lengthy documents that are difficult to wade through, and they don’t help to get IPTs and all members of the team on the same page or working towards the same vision.   + [show images to connote this idea – similar to old school waterfall approaches where all this time is spent planning upfront and then requirements change/user needs change/etc. and the strategy/plan becomes outdated…or where you send out a 40-page doc that no one reads so it does no one any good and is just a rubber stamp]   + The lean acquisition canvas approach seeks to make acquisition strategies and plans great again! By that, we mean the approach will bring the acquisition strategy and plan to the forefront of the team’s visioning and help get everyone on the same page (literally and figuratively). By presenting a high-level overview of the major components of the acquisition strategy and plan, it allows teams to more easily talk through decisions and tradeoffs as they work to realize the product vision. | Brent/Traci – any additional readings to include here? We need to have silver/gold readings for all objectives as part of our updated assessment/feedback framework so that participants have silver activities that are tailored to their unique learning needs. | Expand on existing | Bronze | 30 minutes |
| 3.4 | Identify evaluation methods and criteria on cost and pricing, terms and conditions, security concerns (cyber), and data rights to evaluate vendor maturity and ability to deliver a product that solves a given need and given the definition of success. | * **Online Learning: Preparing to Buy: The Acquisition Strategy/Plan – Part 2** (original content in Pilot materials from release 5.b): https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015\_T1/courseware/62b1a853dad94e1e8cd00c9b18eb1bc4/c5f47c5f967242d4b0912c33a8a949ca/.   + Updates will include some small wording tweaks and updated references to other online learnings.   + Update to ensure it covers ALL components of the associated performance objective.   + Ensure it conveys this point from Traci’s feedback: During this phase, you must understand what your customer wants and finds important to help guide the creation of the RFQ – could use the Digital Services Playbook play checklists to understand what is important for the customers or how to prioritize how they want to evaluate.   + Have 1-2 pages about pricing considerations * *In the Release 3 Classroom, there will be a session that will focus on pricing for agile and different considerations associated with it, as the government is still experimenting with this and not much content exists. The session will include examples of current approaches. Brent/Traci to present.* * Use the following Pilot activities for Silver/Gold options?   + 18F BPA submissions (original content in Pilot materials from release 5.b): <https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015_T1/courseware/62b1a853dad94e1e8cd00c9b18eb1bc4/92c0b7748705493ca78136e94104c3c9/>   + NEW: Research Activity: Students should research examples of eval criteria used in challenges or other similar digital services acquisitions that could be used in their own work.     - Have students try posting in the Wiki; include instructions on how to use the Wiki from the pilot Release 2. | Brent/Traci, what readings/activities would you like to include here? We need to have silver/gold readings for all objectives as part of our updated assessment/feedback framework so that participants have silver activities that are tailored to their unique learning needs. | New and Reuse | Bronze and Silver/Gold? | 2 hours |
| 3.2 | Select an acquisition strategy that supports your customer's needs for a digital acquisition. | * **Case study: Develop an Acquisition Strategy based on the threaded scenario.** Have participants submit their acquisitionstrategy for the MAP case study as individuals. Then, during the Release 3 classroom, during Day 1 review, review themes from what we saw in their acquisitionstrategy submission and discuss as a team. * Select the solution you feel is best (COTs/proprietary/open source); you don’t have to develop out the solution your team researched during the Release 2 activity. Feel free to reach out to other teams to ask them to share their market research if you do select a solution other than the one your team researched. * Submit a completed acquisition lean canvas tool for your selected solution. * *Add a note to the Day 5 Release 2 classroom slides to tell participants that they will be using this tool to complete an activity in Iteration 3.A.* | Brent/Traci, what readings/activities would you like to include here? We need to have silver/gold readings for all objectives as part of our updated assessment/feedback framework so that participants have silver activities that are tailored to their unique learning needs. | New | Bronze | 3 hours |
| 3.3 | Identify strategies and communication methods to apply at different phases of the change lifecycle. | * Introductory content to build off of information presented in the Release 2 Classroom. * **Continuing to Develop Your Influence Skills Online Learning.** Edit the following to flow from introduction information. The content should focus more on taking action.   + Preparing for and Having an Influence Conversation (original content in Pilot materials from release 4.b): <https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015_T1/courseware/b76c0a6f6b8e4b4c944f86cb6e927ba8/1845838559f3433fabf32bad1c2e785a/>   + Difficult Conversations (original content in Pilot materials from release 4.b): <https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015_T1/courseware/b76c0a6f6b8e4b4c944f86cb6e927ba8/f31984a2db0f4a81b2da7a4007da5bf2/> * **NEW: Blogging Activity.** Have students think about change-related challenges. Have them go talk to experts about lessons learned and write a storytelling blog post (removing names of experts) that will provide good information to the whole class.   + The CIO Problem Parts 1 and 2 reading from Release 1.B as an example of how to tell a story about a challenge in a way that encourages the reader to seek a solution.   + Does not have to be a long blog post: ½ - 1 page long.   + Provide instructions to participants for getting set up in the blog, pulling from the instructions provided in the pilot [here](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2015_T1/courseware/ee98b671d8674d4eb6f551369522c32d/0fde5dbecd7b498fb0b818b76ca204de/).   + 3.A storytelling webinar to support learners in this activity. | Brent/Traci, what readings/activities would you like to include here? We need to have silver/gold readings for all objectives as part of our updated assessment/feedback framework so that participants have silver activities that are tailored to their unique learning needs. | Reuse and New | Bronze | 2 hours |
|  |  | * **LDA – ICF/ASI update with next steps** |  |  |  |  |