**Alpha/Beta Automation and Centralization Project**

**Executive Summary**

Today, the Alpha/Beta testing process at athenahealth relies heavily on manual interventions from Client Recruitment and Product Operations (PrOps) teams. Tasks such as list generation, content creation, customer marketing/CSM coordination, and Salesforce synchronization are operationally intensive and time-consuming. Additionally, LaunchDarkly toggling, Jira task creation, and survey management are prone to human error due to their complexity. This proposal outlines an initiative to fully automate and centralize this process into a single platform where Product Owners can independently manage their Alpha/Beta testing. The goal is to significantly reduce operational overhead, streamline workflows, and accelerate feature testing and deployment cycles.

**Business Value**

* **Reduced Operational Overhead:** By automating manual processes, PrOps and Client Recruitment can focus on higher-value strategic tasks such as deeper client engagement, proactive market research, and enhanced Feature roadmap planning.
* **Accelerated Testing Cycles:** Product Owners gain direct control, enabling faster execution and iterations.
* **Improved Data Accuracy & Consistency:** Centralized automation eliminates manual errors and ensures data integrity across platforms (Salesforce, Snowflake, LaunchDarkly, Jira).
* **Enhanced Visibility & Reporting:** Automated survey management and built-in dashboards provide real-time feedback loops, enhancing decision-making.

**Current Challenges**

* High manual workload in list processing, content creation, customer marketing coordination, and Salesforce updates.
* Time-consuming manual creation and management of Jira Epics and Issues.
* Inefficient management of client opt-in/opt-out processes and SFPI baseline tracking.
* Complexity in handling client lists and various recruitment workflows, including randomization and filtering processes, which automation will address through standardized data handling, automated randomization methods, and integrated filtering capabilities.

**Proposed Automated Workflow**

**1. List Generation & Curation (Completed):**

* Automated generation and curation of lists via an intuitive web UI.
* Integration with existing data sources (Snowflake, dashboards).

**2. Automated Content Creation (In development):**

* Auto-filled templates based on Feature/ Salesforce data for emails and recruitment messaging.
* Integrated AI-driven content suggestions for messaging optimization.

**3. Form & Survey Automation:**

* Automatic creation of Opt-in/ Opt-out form (migrate to Qualtrics).
* Inclusion of SFPI questions in Opt-in/ Opt-out surveys to establish baseline satisfaction more consistently.
  + Note: we do no not currently have parity between clients surveyed for baseline/ alpha/beta and this will resolve that.

**4. Jira Integration:**

* Automatic Epic creation upon Alpha/Beta initiation.
* Auto-generation of Jira Issues for each wave (Alpha 1, Alpha 2, Beta 1, Beta 2, etc.…).
* Subtasks automatically populated for specific action steps (CSM approval, customer marketing coordination, etc.).

**5. LaunchDarkly & Salesforce Integration:**

* Automated list uploads and synchronization to LaunchDarkly (if possible. If not, an exportable excel file).
* Auto-sync participating clients to Salesforce Alpha/ Beta object directly from LaunchDarkly.

**6. Opt-Out Management:**

* Self-service client opt-out mechanism (exploring Qualtrics), automatically updating LaunchDarkly, Salesforce and Reporting.

**7. Post-Test Survey Automation:**

* Automatic triggering of satisfaction surveys via Qualtrics for Alpha/ Beta satisfaction (user input required to determine timing).
* Integrated analytics for easy baseline versus post-test comparisons.

**Project Implementation Plan**

**Phase 1: Discovery & Requirements Gathering**

* Document full requirements, refine workflows, and finalize integration logic.

**Phase 2: Backend Infrastructure & API Development**

* Extend existing Node.js backend (server.js) with new automated endpoints.
* Develop APIs for Jira, LaunchDarkly, Salesforce, and Qualtrics integration.

**Phase 3: Frontend & UI Development**

* Expand existing UI to include new automation features and management dashboards.
* User-friendly interfaces to support Product Owner self-service.

**Phase 4: Integrations & Automation**

* Develop seamless automation scripts for Jira issue/Epic creation.
* Establish continuous integration with LaunchDarkly, Salesforce, and Qualtrics.

**Phase 5: QA & Testing**

* Comprehensive testing across the entire workflow and integrations.
* Validate functionality and data accuracy.
* Alpha/ Beta testing with PrOps.

**Phase 6: Launch, Training & Documentation**

* Deploy solution to production environment.
* Training sessions and documentation provided to Product Owners.

**Timeline**

* **Total Implementation Time:** Approximately 5-6 months
* **Expected Launch:** 25.11

**Key Outcomes**

* Product Owners autonomously manage Alpha/Beta testing with minimal operational support.
* Significant reduction in manual operational tasks for Product Operations.
* Faster, error-free, and data-driven Alpha/Beta testing process.