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How to conduct "Prep and Review" style DCO sessions

Pegasystems' proven "DCO (Direct Capture of Objectives) session" process provides project teams with a forum in which to clearly articulate the needs of the business, and to clarify questions before issues arise.

DCO sessions provide a forum in which to clearly articulate the needs of the business

DCO sessions are used to gather and capture the details for a fixed set of user stories. The goal of the DCO session process is to produce an application prototype that is based on the user stories.

One type of DCO session is called "Prep and Review," which is conducted in five stages.

Stage 1: DCO session prep

During this stage, the project team prepares for the DCO session.

Key activities include reviewing the user stories to ensure that they are DCO-ready. Does the project team have enough detail to work with? If the user stories are too abstract, it is difficult to produce a meaningful output during the actual DCO session. If the project team identifies user stories that do not provide an appropriate amount of detail, the team has to take time to capture the necessary information before proceeding.

The project team must document key questions and clarifications, issues, or dependencies left unresolved even after an interview is completed. When the user stories are considered "DCO-ready," the first draft of the process flows and UI mockups can be prepared. These draft versions are presented during the DCO session to help establish a canvas from which to start construction. It is important to link the user story and the artifact that is used to implement it, and also to link the user story to the requirements for which the team is providing a solution.

The DCO session prep stage is complete when the team produces the following output:

- Detailed user stories that are considered DCO-ready
- A "rough draft" mockup of the flows and UIs
- A log of unanswered questions, issues, and dependencies
- A plan for how and when the team conducts the actual DCO session

Stage 2: DCO session

The key activity in this stage is to review the user stories, draft mockups of the flows, and draft UIs with the DCO session participants. The person leading the session, usually a Lead Business Architect, walks the DCO session participants through the scope of the business case using the requirements, user stories, draft flows, and UI components as the canvas for discussion. The goal is to confirm that the user stories have the details that are needed to move the project team to the construction phase.

The feedback from the session participants should be directly captured in the Pega 7 Platform as updates are identified. Although session participants might want to discuss UI design during the session meeting, these topics should be addressed later. The session facilitator should note the concerns of the SMEs and other business owners, as well as keep the session moving forward. This approach allows the delivery team to meet later to discuss the best approach for refining or redesigning the mockups.

The DCO session stage is complete when the team produces the following output:

- Refined user stories with details that are agreed on by all session participants
- Refined mockups of the flows and UIs, with annotations noting the adjustments to incorporate
- Elaborated requirements, user stories, and mockups
- Linking of requirements to user stories, and user stories to the mockup components
- Defined "parking lot" items (for later discussion) and a followup plan

Stage 3: Post-DCO session

Following up on the DCO session is important because in the post-DCO session stage, momentum can be easily lost.

After the DCO session, the team should debrief. When the work is organized, the delivery team updates the artifacts based on the feedback that was received during the session.

If open parking lot items were assigned to SMEs (or other business owners), a member of the delivery team follows up so that these items can be included in the playback. The parking lot items that the delivery team is responsible for must be assigned to owners and tracked to ensure that they are completed by the agreed-on deadline.

After all of the updates are completed, the team should schedule a DCO session playback with the same team. Remember, the playback is short and focused. The goal is always to demonstrate business value and the progress of the solution. The team must assign roles and make sure that all the participants know their part.

The post-DCO session stage is complete when the team produces the following output:

- Refined user stories with feedback from the DCO session incorporated
- Refined drafts of the flows and UIs with feedback from the DCO session incorporated
- A DCO session playback is planned and scheduled

Stage 4: DCO session playback

The DCO session playback is a focused demonstration of the draft flows and UI mockups. This playback is typically delivered to the business and IT stakeholders for discussion, consensus-building, and approval. Playbacks give stakeholders the opportunity to provide feedback that drives the next iterations of development.

The scope of any playback is reduced to only the feedback items that were captured in the DCO session meeting or a previous playback. Any additional feedback should be captured directly in the Pega 7 Platform. Updates to the flows and UIs are not made during the playback unless they have no effect on the meeting. If necessary, additional playback sessions are planned until all feedback items are addressed and the business agrees with proceeding to construction.

The DCO session playback stage is complete when the team has the following output:

- Refined artifacts with no further concerns from the SMEs or other business stakeholders
- Feedback from playback that needs to be addressed or incorporated
- A plan for approvals or to resume "Post" stage activities and schedule the next playback session

Stage 5: DCO session approvals

As previously mentioned, the goal of any DCO session is an agreed-on set of user stories and supporting artifacts. The delivery team assembles the user stories and supporting artifacts and submits them to the business owners for review and approval.

The Approvals stage is complete when the team has the following output:

- Approvals and signoffs on the user stories
- Approved artifacts that are "ready for construction"
- If applicable, unapproved user stories are annotated with concerns and a plan to mitigate

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