

Discovery phase for cloud services Service Definition Document

G-Cloud 14 Framework

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Contact

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About Pilot Works

Pilot Works is a product and service design consultancy which specialises in helping government departments and agencies design policies and services that meet the needs of their users.

We are specialists in running GDS style Discovery and Alpha phases in accordance with the [Government Service Standard](#). We are impartial, platform agnostic and keen to minimise the work needed to meet user needs, so you pay no more than you need to.

Our team is highly experienced and have delivered successful projects for many government and public sector organisations including:

- Government Digital Service
- Crown Prosecution Service
- Department for Education
- Department of Health and Social Care
- Met Office
- National Assembly for Wales
- Registers of Scotland
- UK Hydrographic Office

Discovery phase for cloud services

Typical duration: 6 - 8 weeks

Overview

Our GDS aligned discovery phases are designed to answer fundamental questions about a potential new product or service. These questions cover:

User needs - Who are the users? How do they work with research reports now? What are their underlying needs? How do needs differ between roles and departments? How do needs change depending on the situation or the stage of a process?

Business / policy outcomes and KPIs - Why are we doing this? What benefits are we seeking? How will benefits be measured?

Context and constraints - What are the technical, organisational, legal and policy constraints that the team must work within?

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And then,

Solution shape - What are the core components of the solution (technical capabilities, design principles, content model) that we believe will meet user needs? What are the risky assumptions that underpin our beliefs and how can we test them?

Team and resources - What will be the focus of the Alpha phase and what kind of team and resources will be required?

Further research - What gaps in knowledge remain and how might we gather feedback from users during the Alpha phase?

Our approach

Inception

Project Set up

We'll start by setting up the project space and communications tools and inviting the right people so that we can work together efficiently. We can provide this infrastructure or are happy to use yours.

We'll also request access to any relevant systems or data that we'll need to refer to as part of the discovery, for example DfIDs 'Finder' system as this can take time.

And we'll digest any important background documents so that we are up to speed for the inception workshop.

Inception Workshop

We'll meet at your offices for a workshop session with the core project team and key stakeholders. The aim of the workshop is to create a shared understanding of

- a) Who we are, who does what and how we intend to work together.
- b) What we know already, what we don't know and what is most important to learn as part of the process.

After this workshop the process will split into two parallel tracks. The first focused on user needs, the second on business, technical, and policy constraints.

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Track 1 - User needs

Primary User research

During the inception workshop we will identify the main user groups that the team believes have different needs around the service.

We use a range of methods including depth interviews and contextual observation to build a detailed understanding of your user groups and their needs. Where relevant this often includes people who aren't the end user of your service or policy but are involved in delivering your service e.g health professionals or customer service agents. We manage the recruitment planning and carrying out of research but always encourage client teams to take part and contribute to user research and analysis.

Secondary research

We'll also gather information about user needs from other sources such as any previous user researcher with the same user groups from your or other government departments.

Outputs

We'll combine the data gathered to build a picture of user needs, goals and pain points. The most suitable deliverables can be agreed in the inception workshop, but we find the following deliverables are useful:

- **List of needs** - A prioritised list of high level user needs across all user-groups
- **Experience maps** for each core user journey / task, capturing how people work now in different departments and their pain-points
- **Simple personas** enabling designers coming on to the project to quickly visualise who they are designing for
- **Audio and video clips** to illustrate important insights

Track 2: Technical, policy and legal constraints and goals

Whilst it's important to remain open to innovative solutions it's also important for the team to be clear on the constraints they need to work within as early as possible such as.

What systems and processes does the service need to integrate with? What are the hard and soft policy or legal constraints for the service etc? What are the policy goals for this area and how well are any existing services meeting those goals?

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We explore constraints and goals through:

- Interviews and workshops, with technical staff to map out the technology landscape that the service needs to work within
- Analysing relevant policies, technology documents / strategies and relevant academic research into the policy / service area
- Interviews and workshops with policy teams to understand policy goals and constraints

Sharing research findings

We share insights from both research tracks as we go via regular “show and tells” with the project team and stakeholders. This provides stakeholders with early visibility of findings and an opportunity to feed into prioritisation if they want us to dig deeper into a particular finding or insights.

We will also highlight early and make a recommendation to stop work if we don't think the project should continue into Alpha e.g. if there isn't a genuine user need or if the problem can't be solved at a viable cost.

Exploring solutions

Having gathered evidence of user needs and clarified constraints, we can begin to explore potential solutions. There are a number of ways we can do this including:

Vision and principles workshop

Capturing a vision statement describing the outcomes the service is designed to deliver, and a set of principles to guide development.

User Story Mapping workshop (aka journey mapping)

Stepping through core user journeys for the new service, capturing and prioritising user stories at each step. Defining the scope of the first release.

Sketching workshops

Focussing on key moments in the journeys where the choice of solution is not obvious and may have wide reaching implications. Sketching ideas as a group and choosing which to explore further during the Alpha phase.

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Preparing for Alpha

Alpha planning and handover workshop

In the final workshop we'll recap on what we have learned about user needs and constraints, and review our user story map and solution sketches, plus any associated feedback from users.

We'll then map the risky assumptions underpinning our ideas and agree a plan for testing them in the Alpha Phase.

Final report: Discovery pack

In the final week of the process we will produce a Discovery pack, collating all that we've learned into a series of linked documents. Including:

- Project report including research summary, methodology and findings
- Personas for main user types
- Prioritised list of user needs
- User Story Map(s)
- Service vision and KPI's
- Audio and video clips and research notes
- Plan and team shape for the Alpha phase

Delivery management and ensuring quality

We ensure that our projects are delivered successfully and to a high quality by:

- Employing our well proven process for running successful discoveries in line with the Service Standard
- Having a "discovery lead" who is experienced at leading discoveries and is responsible for project managing the discovery
- Ensuring that all activities are designed to meet the criteria set-out in the Service Standard and evaluation guidelines.
- Assigning staff who are highly experienced in their discipline and at working as one team with staff from public sector organisations and other suppliers
- Ensuring that all deliverables are peer reviewed and checked before they are sent to clients.

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- Actively soliciting feedback about our work and processes from clients on a regular basis including running regular retrospectives during project delivery so we can make improvements as we go

Knowledge and skills transfer

Provided your staff have capacity we will work with them as one team for the discovery. This helps to create a shared understanding of the problem space, users and their needs. We also document all findings in a discovery pack.

We actively share our skills with client's staff by pairing with them on tasks and providing one to one coaching and mentoring.

Pricing

Each discovery is different so please contact us and we will be happy to give you a cost based on our SFIA rate card.

Other services

This service can be combined with other services such as our "Alpha Phase for cloud services".

Case studies and client feedback

Please see our website for case studies from previous discoveries and other projects.

<https://pilot.works/case-studies>

Testimonials

"We worked with Pilot Works on the discovery for Healthy Start. They brought a wealth of experience and worked as one team, not on their own. They were great at sharing their knowledge and skills and delivered a discovery inline with the Service Manual."

Matthew Harrington - Lead Product Manager - The Department of Health and Social Care

"Pilot Works mobilised at short notice to help us understand and prioritise user needs for two of our high profile services. Not only did they provide clarity on the needs, they also worked collaboratively with our team demonstrating their user-centred approach in action. We would be very happy to work with them again."

Anna Daniel, Head of Strategic Transformation, The National Assembly for Wales

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“The project has been delivered to a very high standard, and we’ve all very much enjoyed working with Pilot Works over the last six weeks. The tangible deliverables will of course be very valuable to us as we move forwards in the programme, but we’ve also received a great deal of additional benefit in terms of skills and knowledge transfer for which we’re very grateful.”

John Cockburn - Programme Manager, The Department of Health and Social Care

“Thank you to Pilot Works, they helped build the foundations for our vastly improved online offer. They took a logical approach and created a clear picture of requirements of different user groups, based on their stage in the buying cycle. This gave us a clear framework for content which we built the page style sheets and overall site map around. It’s not an approach we’ve adopted before, but the simplicity and clarity of the work helped us hit the planned go live date and importantly created a far more efficient online platform; bookings have risen by nearly 40%”

James Ingham - Managing Director, National Trust Holidays

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