Set up the engagement in an afternoon.

Five steps. Each one feeds the next — the methodology, the team, the calendar, the SOW.

PDNA is built so the first sitting takes you from a blank slate to an active engagement with the schedule and SOW already populated. Pick a methodology library, build the team, decide who attends what, drop the activities onto a calendar, and let the SOW Builder cost it. Steps 1-5 are the setup loop — you only do them once per engagement.

1

Create the Project

Start from one of PDNA's pre-built methodology libraries — Flowcharts, swim-lane roles, Value Streams, Sub-Value Streams, User Stories, and Acceptance Criteria are already there. Or use the AI wizard to generate a custom library from your unique requirements. Or import your own data. Review the starting point and finalise your Value Stream list.

2

Create the Team

Add Users by entry or CSV import — consultants, client team members, and contractors. Build the Project Team by assigning each user a role (project_admin / manager / contributor / viewer) and marking each as Client or Consultant.

3

Assign the Team to Value Streams (the Matrix)

Open the VS Assignment Matrix. People down the left, Value Streams across the top. Click any cell to cycle Required / Optional / For Info / Replaceable. One decision per person per VS — every Scheduler event, resource rollup, and SOW estimate downstream reads from this Matrix.

4

Schedule the Project (RPM)

Drag activity templates from the methodology library onto dates in the RPM drag-drop calendar. Each drop becomes a Milestone, Meeting, or Workshop event with attendees auto-populated from the Matrix. Review each event's agenda and participation. Five synchronised views — Calendar, Week, 2-Week, List, Matrix — show the same plan.

5

Build the SOW

Use the SOW Builder for header detail and link it to the project. Import the scheduled Project Activities to auto-populate the SOW line items — every workshop, meeting, and milestone becomes a line with the resource hours and cost already calculated from your rates. Activate the SOW when the project is ready for time entry.

Now run the engagement on the methodology.

Three Analysis sprints, a Leadership decision, then Design → Build → Go-Live — all on the calendar.

Once setup is done the engagement runs itself off the schedule. Preparatory meetings orient the team. Three Analysis sprints walk every Value Stream through current state, future state, and Team-Leader handoff in 4-hour workshops. A Leadership session locks the implementation plan and extends RPM through Design, Build, Test, and Go-Live. Timesheets capture the actuals and the Administrator module manages billing and burn-down.

6

Prepare the Team

Run the scheduled preparatory meetings. Orient consultants and client members to the PDNA methodology, their participation level, and what each workshop expects of them.

7

Analysis Sprints (×3) — Workshop the Value Streams

PDNA Workshop Flow Calendars lead each Value Stream team through every step and requirement. Sprint 1 captures current state. Sprint 2 designs future state. Sprint 3 finalises and hands ownership to the Team Leader. Sessions run as 4-hour workshops; complex Value Streams may need multiple sessions per sprint.

8

Leadership Presentation & Plan

Team Leaders and Project Management present implementation details, risks, and opportunities to Leadership. Decisions made here drive the rest of the plan.

9

Extend the Plan & SOW through Go-Live

Add Design, Build, Test, and Go-Live activities to the project. Assign team members the same way as Analysis. Schedule the new events on RPM — this can be done live in a planning session. Apply the resulting schedule to the existing SOW, or create a new implementation SOW.

10

Run Delivery — Timesheets, Burn-Down, Administrator

Deliver from the scheduled RPM calendar. Consultants log Timesheets for billing; clients use the same entries for resource burn analysis on the SOW Burn-Down Report. The Administrator module handles approvals, invoicing, payments, and the live billing-truth view by SOW line.