



## SETUP YOUR ENGAGEMENT

# Five steps to a project that runs itself.

Every PDNA engagement starts the same way. The first five steps take you from a blank slate to an active engagement — schedule on the calendar, SOW costed — usually in a single afternoon. Each step feeds the next.

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### Create the Project

- Use the pre-built Library of Flows, Swim-lane Roles, Value Streams, Sub-Value Streams, User Stories and Acceptance Criteria.
  - › Or use our AI Project Wizard — enter your unique requirements and AI populates a custom library for you.
  - › Or import your own data.
- Review your starting-point data and finalize your Value Stream list.

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### Create the Team

- User Creation — by entry or CSV import.
- Team Creation — assign users and contractors to the project and establish each one's role.

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### Team Assignments

- Use the Matrix to assign each user and consultant to every Value Stream — in their appropriate project role.
  - › One click cycles the cell: Required → Optional → For Info → Replaceable. Every downstream screen reads from this Matrix.

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### Project Scheduling

- Use RPM to drag and drop activities onto the Calendar — creating Milestones, Meetings, Workshops, and Scheduled Work.
- Review each event for its detailed agenda and participation.
- Review the full Project Schedule across Calendar, Week, 2-Week, List and Matrix views.



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### Create the SOW

- Use the SOW Builder to fill out SOW Header information, ensure linkage to the project, and set status to Active once the project is ready for time entry.
- In the SOW Builder, import the scheduled Project Activities to create SOW detail line items for all work to be accomplished.
  - › The program calculates all resource load and costs automatically.

#### RUN YOUR ENGAGEMENT

## Now you're ready to start the project.

Once setup is done, the engagement runs itself off the schedule. Preparatory meetings orient the team. Two-to-three Analysis sprints walk every Value Stream through current state, future state, and Team-Leader handoff. Delivery runs from the calendar; the Administrator module handles the billing.

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### Preparatory Meetings

- Preparatory Meetings are scheduled to prepare the team for the methodology, their participation levels, and expectations.

## 7

### Analysis Sprints — Value Stream Workshops

- Run 2–3 Sprints of Value Stream Workshops:
  - › Sprint 1 — current state.
  - › Sprint 2 — future-state changes.
  - › Sprint 3 — finalize and prepare Team Leaders to take ownership of their assigned Value Stream requirements and flow.
- All Sprints:
  - › Use PDNA Workshop Flow Calendars to lead each Value Stream team through workshops — evaluating every step and requirement they have today, identifying what's wanted in Future State.
  - › Sessions run as 4-hour Workshops. Some Value Streams will need more than one session in each Analysis Sprint.



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## Leadership Presentation & Implementation Plan

- Team Leaders and Project Management present implementation details, risks, and opportunities to Leadership.
- Activities are added to the Project for the remaining phases:
  - › Team members are assigned to those Activities the same way as in Analysis.
  - › Events (Milestones, Meetings, Workshops) are created for the remaining phases of the project.
  - › This can be performed live in a Project (Design through Go-Live) Planning Session.
- The resulting detailed Project Schedule is applied to the SOW — or create a new Implementation SOW.

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## Begin Design Phase & Modeling Sessions

- Run the scheduled sessions on the updated RPM Calendar — Design, Build, Test, and Go-Live.

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## Timesheets & Administrator

- Timesheets are filled in for actual activity capture:
  - › Consultants use the entries for billing.
  - › Clients use the same entries for resource burn analysis.
- The Administrator module is used to manage accounting — approvals, invoices, payments, and the live SOW Burn-Down Report.

### THE PATTERN

**Do the ten steps once. The engagement runs itself for the next six months.**

PDNA is built so the work you put in at kickoff pays back every week of the project. The Matrix means no re-asking 'who attends?' The RPM means no maintaining a separate plan. The SOW Burn-Down means no Friday spreadsheet. Set it up right — then deliver.