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Explore Templates

THE BEST RUN **SAP**

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Explore Templates

Identify, prioritize, and roadmap most valuable use cases together with business, IT and end users to further pursue in the Discover phase.

Keystone Activities

Identify a common set of innovation use cases, prioritize and select a use case
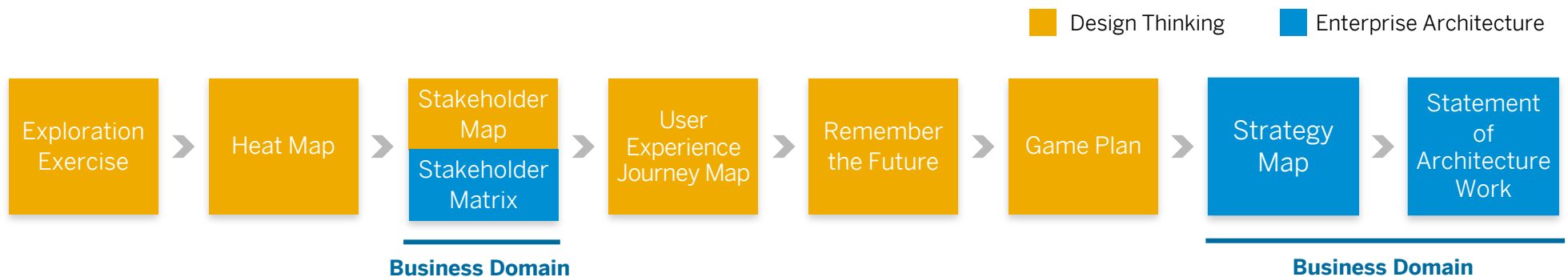to formulate an action plan.

Preparation

People: Include end users, key stakeholders, business and IT during the process.

Place: Dedicate a creative space for both co-design activity.

How-To

Here are the templates to identify the most valuable use cases with your key stakeholders.
We curated the templates in the following order based on hundreds of customer engagements.
Feel free to use the way you find it most useful.

| ■ Design Thinking | ■ Enterprise Architecture |

| Exploration Exercise | > | Heat Map | > | Stakeholder Map / Stakeholder Matrix | > | User Experience Journey Map | > | Remember the Future | > | Game Plan | > | Strategy Map | > | Statement of Architecture Work |

Business Domain (under Stakeholder Map / Stakeholder Matrix)

Business Domain (under Strategy Map / Statement of Architecture Work)

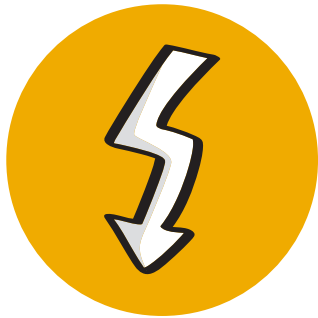# Table of Contents

Exploration **Exercise**

Template | Instructions | Example | Protocol
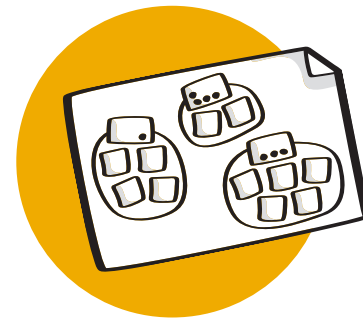
Collect insights about the current situation,
identify the barriers and think about opportunities
to find innovation use cases worth pursuing.

Exploration **Exercise**
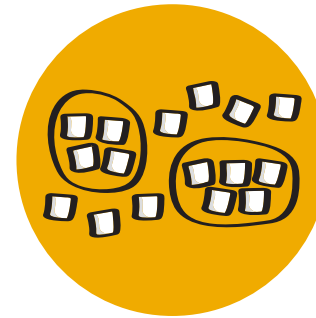
Get a common understanding of the situation

**Issues /
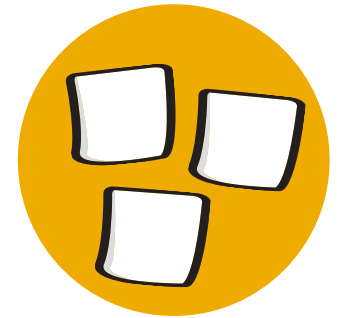Pains points**
Current business
challenges

**Barriers /
Obstacles**
Threats / market
disruption

Wishes
Ideas / Future

Cluster Use Cases
Categories

Dot Voting
Willingness to invest

Exploration Exercise Instructions

Duration

60-80 minutes

Number of Participants

2-8 participants

Why & What

Collect insights about the current situation, identify the barriers and think about opportunities to create clusters of use cases worth pursuing.

Find a more defined problem to solve.

Create a shared view of the current problem.

Fast evaluation of a group of insights based on full team perspectives.

How to use it

1. Collect facts about the current situation.

2. One participant at a time shares out to the team his sticky notes and put them on a wall / whiteboard.

3. List potential barriers.

4. Each participant shares out to the team.

5. Brainstorm the ideal future.

6. Each Participant shares out to the team.

7. Group similar themed post-it notes into clusters and give them a name. Each cluster forms a use case that could be pursued.

8. Each participant gets a set of small dot stickers to vote on the use cases.

9. After the vote, call out the use cases that had a significant number of votes.

10. Have a discussion around the top use cases.

Tips & Tricks

Remind to the participants to use color coded sticky notes for each exercise.

Try to already cluster the sticky notes into themes during the participants' share out.

Exploration Exercise Example

Current business challenges:
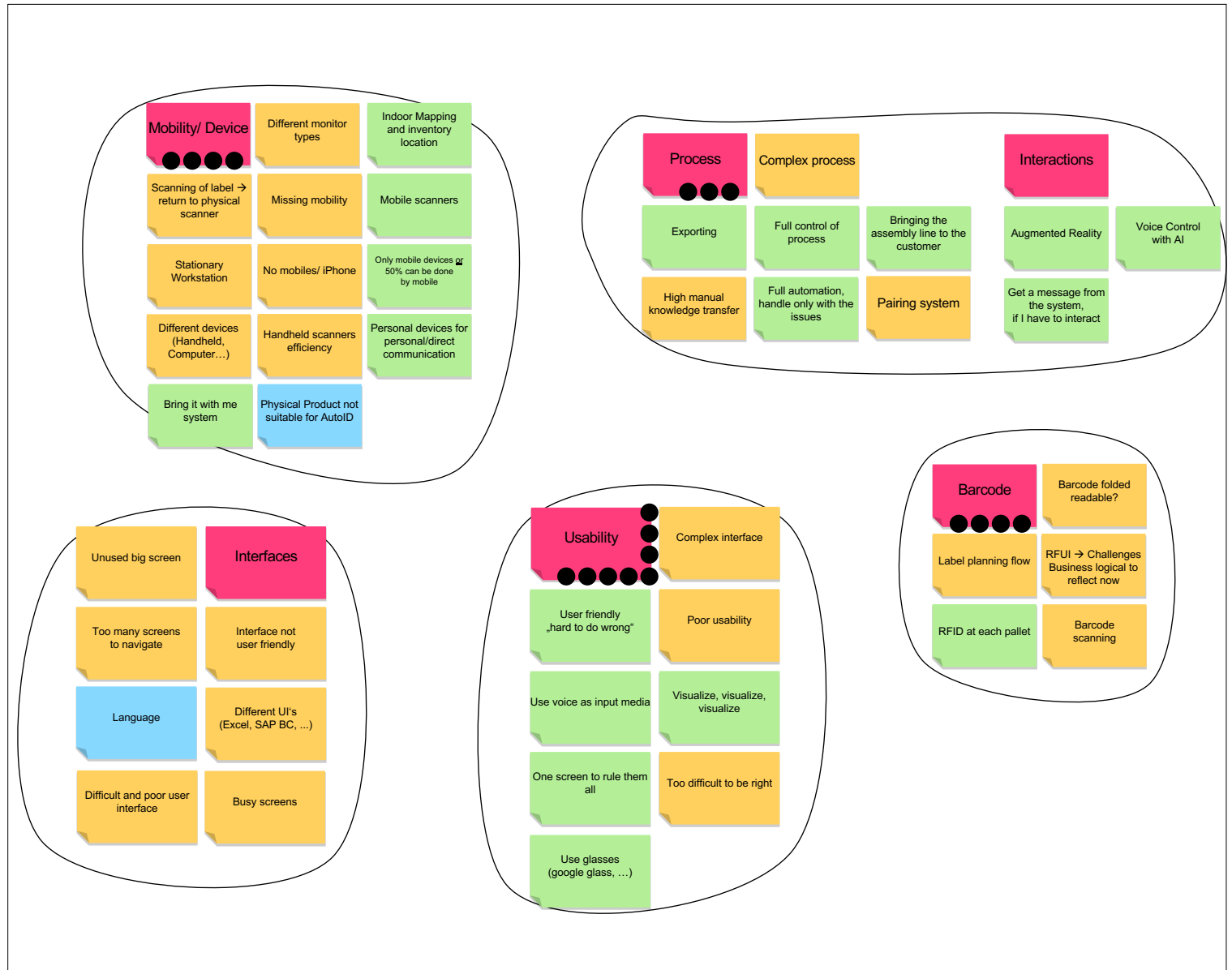
Issues

Threats / market disruption:

Barriers

Wishes / ideas:

Wishes

Willingness to invest on cluster categories with voting dots:

Use Case Name

Mobility/ Device ●●●●
- Different monitor types
- Indoor Mapping and inventory location
- Scanning of label → return to physical scanner
- Missing mobility
- Mobile scanners
- Stationary Workstation
- No mobiles/ iPhone
- Only mobile devices or 50% can be done by mobile
- Different devices (Handheld, Computer…)
- Handheld scanners efficiency
- Personal devices for personal/direct communication
- Bring it with me system
- Physical Product not suitable for AutoID

Process ●●●
- Complex process
- Exporting
- Full control of process
- Bringing the assembly line to the customer
- High manual knowledge transfer
- Full automation, handle only with the issues
- Pairing system

Interactions
- Augmented Reality
- Voice Control with AI
- Get a message from the system, if I have to interact

Interfaces
- Unused big screen
- Too many screens to navigate
- Interface not user friendly
- Language
- Different UI's (Excel, SAP BC, ...)
- Difficult and poor user interface
- Busy screens

Usability ●●●● ●●●●●
- Complex interface
- User friendly „hard to do wrong"
- Poor usability
- Use voice as input media
- Visualize, visualize, visualize
- One screen to rule them all
- Too difficult to be right
- Use glasses (google glass, …)

Barcode ●●●●
- Barcode folded readable?
- Label planning flow
- RFUI → Challenges Business logical to reflect now
- RFID at each pallet
- Barcode scanning

Exploration Exercise **Template**

Current business challenges:

Issues

Threats / market disruption:

Barriers

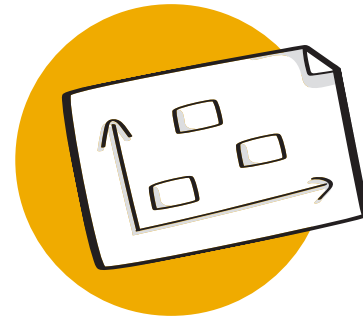Wishes / ideas:

Wishes

Willingness to invest on cluster categories with voting dots:

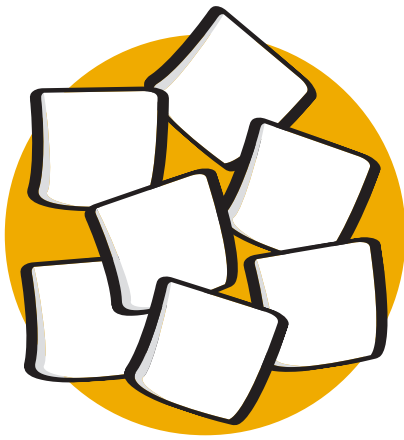**Use Case Name**

Free Wall or Flip Chart paper

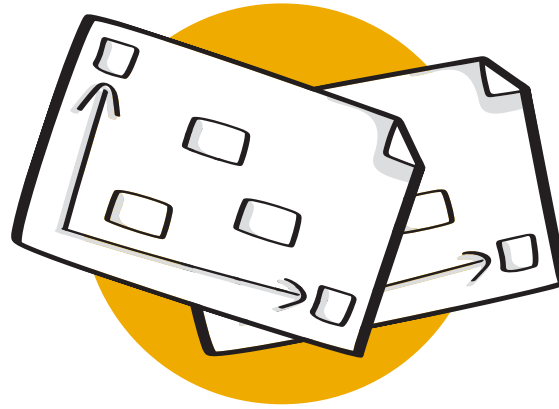# Heat **Map**

Template | Instructions | Example | Protocol

Collaboratively get input and buy-in on the priority of innovation use cases to create forward momentum.
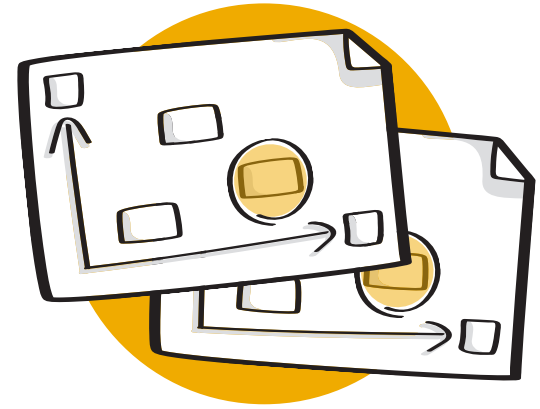
Heat Map

Prioritize & make decisions on the innovation use cases that have the most value

**Choose
the relevant
evaluation criteria**

**Prioritize your
use cases against
the criteria**

**Decide
on the use case
to focus on**

Heat Map Instructions

Duration

20-40 minutes

Number of Participants

2-10 participants

Why & What

Collaboratively get input and buy-in on the priority of use cases to create forward momentum.

Evaluate & Prioritize use cases based on several criteria.

Make decisions on the use cases that have the most current value.

How to use it

1. Collect your top voted use cases on sticky notes from the exploration exercise.

2. Choose two axes criteria that make sense for the customer and situation. Suggested are "Value for Company", "Value for employee", "Complexity", "Costs", "Effort", "Reach", …

3. Have the team select one sticky note at a time, evaluate it against the two axes, and then place it on the heat map.

4. Repeat the evaluation with different axes criteria (like "Complexity" vs "Time") to facilitate the final use case decision.

5. Estimate the required monetary & human investments for each top clusters.

6. Discuss and decide on theuse case to focus on.
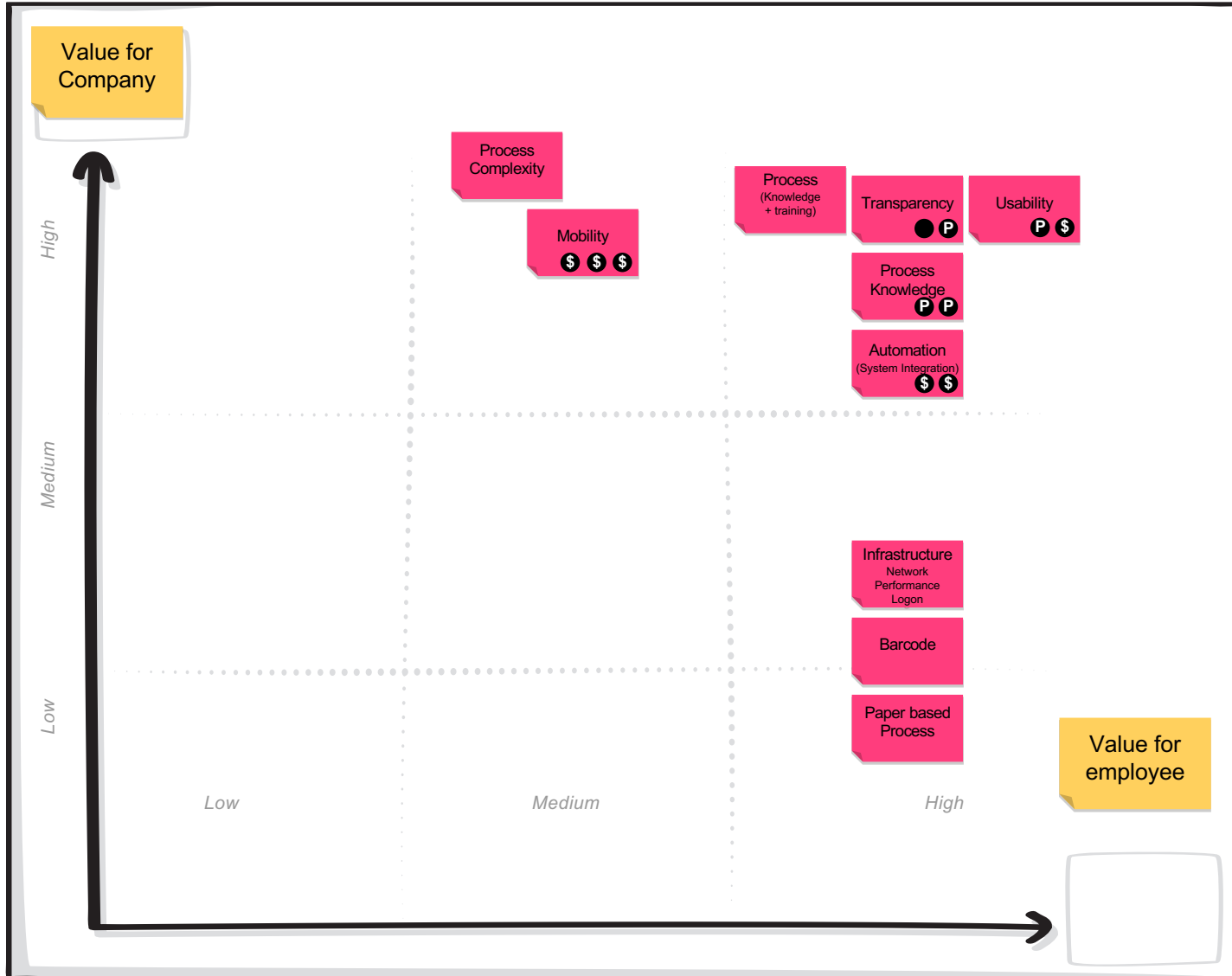
Tips & Tricks

Always think of value to the user created not only to the business.

Heat Map Example

Required Investments:

$ Monetary

P People

Value for Company

High

Medium

Low

Low   Medium   High

Value for employee

Process Complexity

Mobility
$ $ $

Process (Knowledge + training)

Transparency
● P

Usability
P $

Process Knowledge
P P

Automation (System Integration)
$ $

Infrastructure
Network
Performance
Logon

Barcode

Paper based Process

Heat Map Template

Required Investments:

$ Monetary

P People

Value

Complexity

Market Leader

Costs

Time

Reach

Efforts

Risk
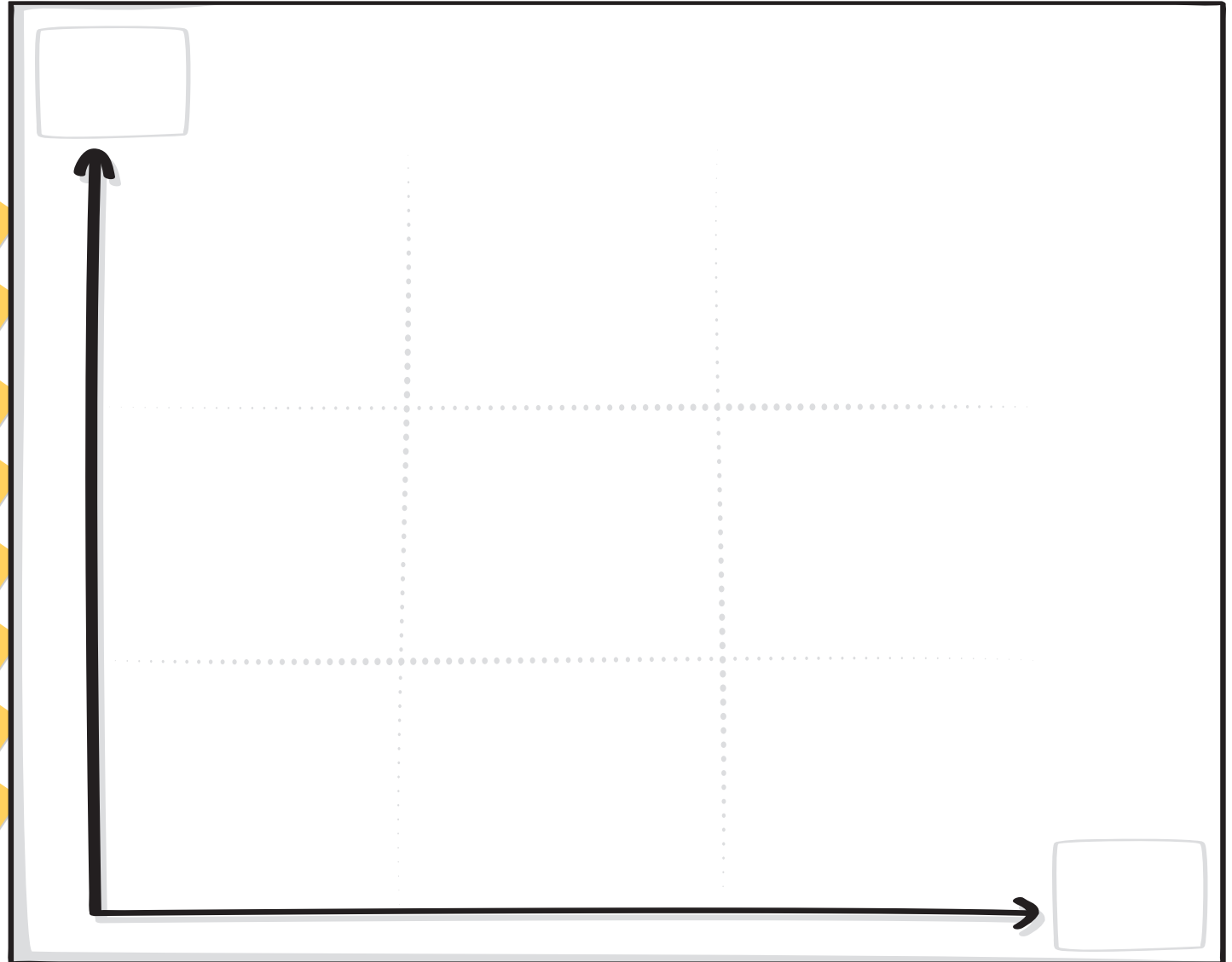
Stakeholder **Map**

Template | Instructions | Example | Protocol
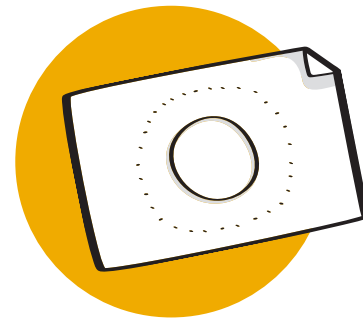
Understand key stakeholders around the use case
and how they interact and influence each other.

Stakeholder **Map**

What are all the Stakeholders involved around the use case?

Identify the business user / scenario

Capture all of the relevant stakeholders
direct/indirect, internal/external

Mark how they interact and influence each other

Stakeholder Map **Instructions**

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Duration
30-60 minutes

Number of Participants
2-10 participants

Why & What

Understand key stakeholders around the use case and how they interact and influence each other.

Bring alignment among team members around the organizational context of the project. Make assumptions transparent.

Stakeholder mapping defines the roles of people and their relationships in a "human-centered system" view.

It provides a way of visualizing the many dynamics in play, including motivations, influence and relationships.

How to use it

1. Identify the business user / scenario

2. On individual post-it notes, capture all of the relevant stakeholders that may be affected by or cause impact in the user challenge/scenario.

Discuss with your team to be sure you have an exhaustive list

3. Place stakeholders on your stakeholder map appropriately, visually displaying their relation to the problem

Tips & Tricks

Think internal & external

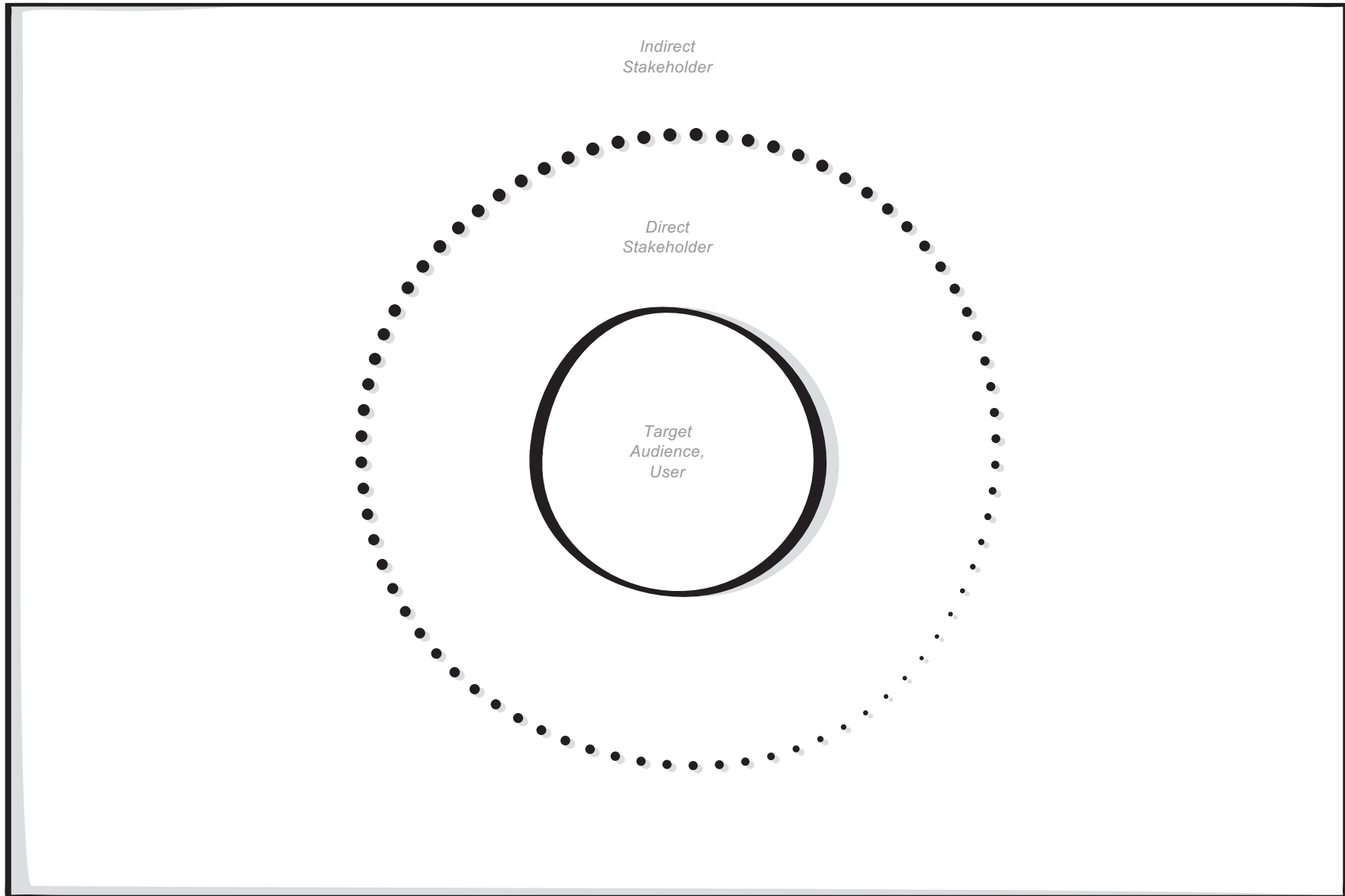Throughout the project, refer back to the map often to ensure

you are maintaining contact with all relevant parties.

Add to the map as needed, if the focus of the project shifts or new stakeholders are identified.
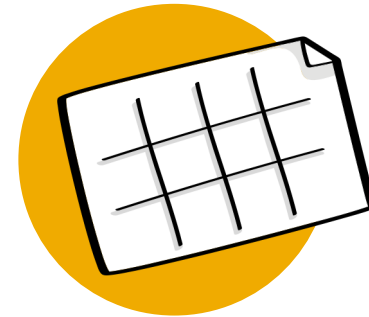
Stakeholder Map Example

Stakeholder Map *Template*

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Indirect Stakeholder

Direct Stakeholder

Target Audience, User
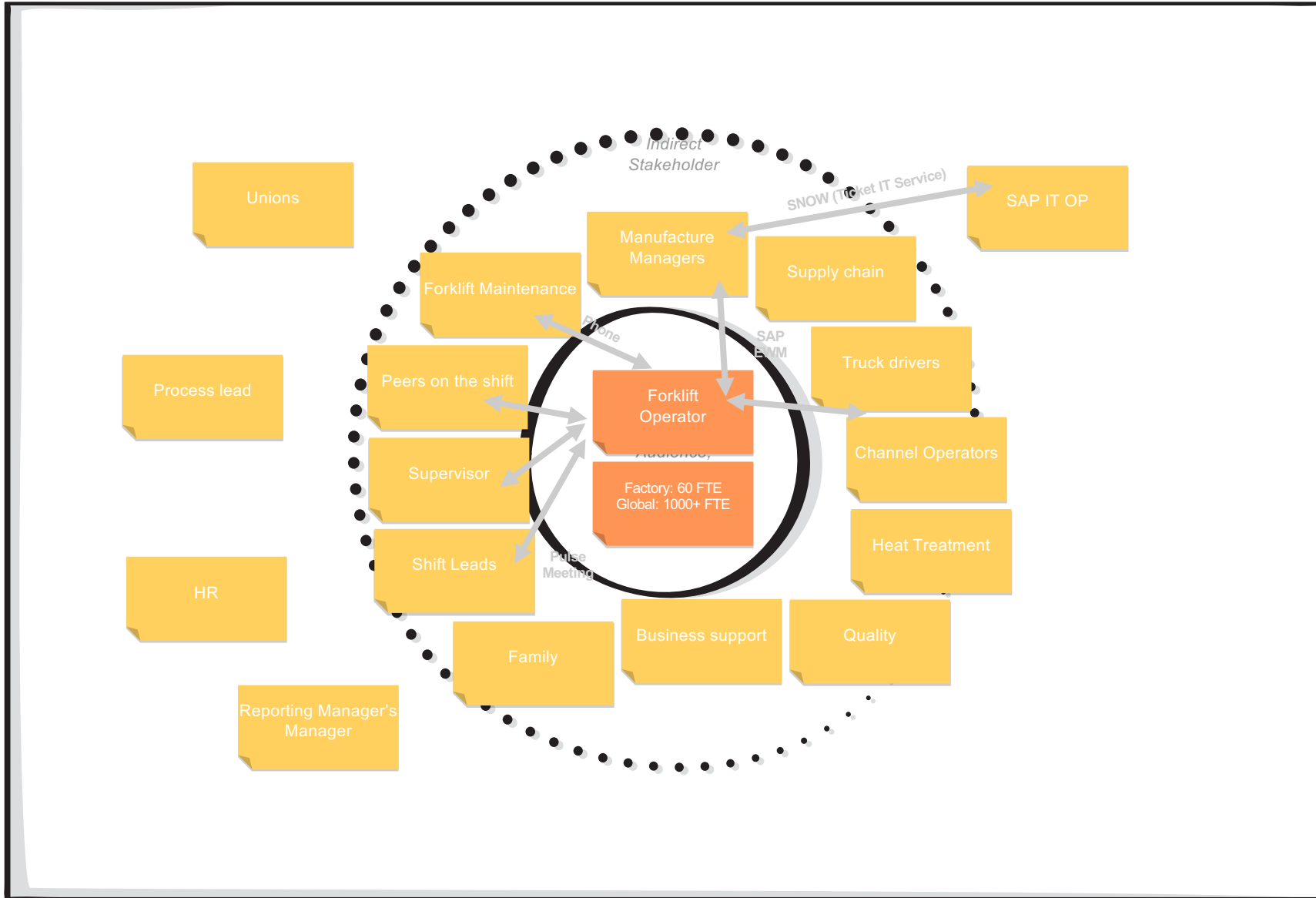
Stakeholder Matrix

Instructions | Template | Example

Understand key stakeholders for your architectural work and manage support for your architecture.

![AppHaus logo]

Stakeholder **Matrix**

What are the Stakeholders involved in the architecture? How do you engage with the stakeholders?

Identify stakeholders
Who are users affected by the aspired solution? Who has influence on your architecture? Who is interested in its success?
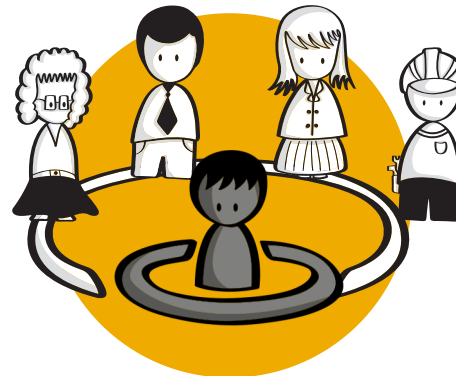
Understand stakeholders
Analyze and categorize your stakeholders. Who needs to support you? Who has potential to disrupt? Who needs to be informed?
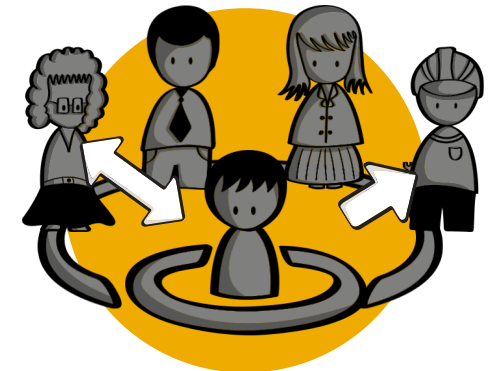
Manage stakeholders
Based on your analysis, define your approach to stakeholder management. How do you regularly engage with your stakeholders?

Stakeholder Matrix
Instructions

Duration
approx. 30-60 minutes

Number of Participants
- **Business Units**
- **Roles**
- **Users**

Why & What

The purpose of stakeholder management is to ensure support for your architecture and improve its quality by addressing the concerns of your stakeholders.

You use stakeholder-specific architecture views being created with the toolkit to adequately communicate your architecture.

How to use it

1. Based on the use-case (request for architecture work), identify users, business units, parts of your organization, or a board area that are affected by the architecture or can influence your architectural work. List all stakeholders that are interested in the success of your architecture.

2. Understand each stakeholder's interest and concerns.

3. Derive the type of engagement you would like to have with the stakeholders. Do you need regular meetings every week to discuss the status of your architecture? Or is a monthly update via email enough?

Tips & Tricks

Think internal & external.

Use attributes like "*Key Player*", "*Keep satisfied*", "*Keep informed*", and "*Minimal effort*" to categorize stakeholder engagement. Your communication and interaction with a key player is pro-active and very regular. You want to make sure that this stakeholder is always informed, included in important decisions and regularly updated. Your interaction with a stakeholder with minimal effort is more of a reactive style, instead.

You can also decide which work products of the Lean EA toolkit are of interest for a specific stakeholder and you want to share, respectively. Associating work products with stakeholders can also be done at a later stage in your architecture development process.

Stakeholder Matrix Template

Stakeholder	Concern(s)	Engagement	Work Products *
Name and corporate function of the stakeholder	Describe stakeholder's interests and concerns	Define engagement type: key player, keep satisfied, keep informed, minimal effort	Your work products that are of stakeholder's interest

Source: TOGAF Standard, Version 9.2

*Can be added at a later stage, when you have more details about your project.

Stakeholder Matrix Example

Stakeholder	Concern(s)	Engagement	Work Products
Paul Jung (CEO)	Understand how IT helps to advance business by supporting company's goals and objectives.	Keep satisfied	• Strategy map • Statement of Architecture Work
Julie O'Brian (CFO)	Enterprise-level adoption of automation, leveraging analytics and connecting with other business units.	Key player	• Strategy map • Statement of Architecture Work • Solution context
An Liu (Director Business Development)	Identify and successfully deliver projects that implement growth opportunities.	Key player	• Statement of Architecture Work • Solution concept

Remember the Future

Template | Instructions | Example | Protocol
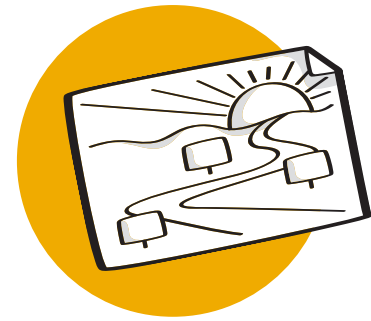
Set up a vision of success for the use case and milestones that will help you achieve that vision.

Remember the Future

Set-up a Vision and understand your definition of success for the use case
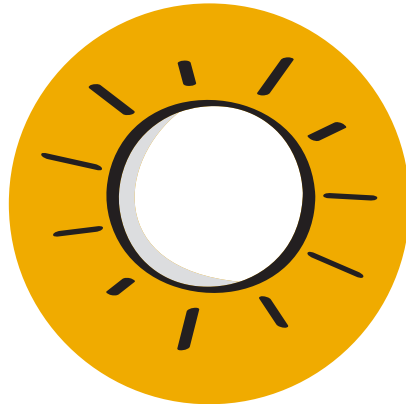
**Brainstorm the vision
for the use case**
"It is 2021 and …"

**Describe the actions
to achieve it**

Remember the Future Instructions

Duration

30-45 minutes

Number of Participants

2-8 participants

Why & What

Set up a vision of success for the use case and milestones that will help you achieve that vision

Define a plan how to move forward.

Helps to overcome political landscapes by creating an aligned vision of the future within the team.

Anticipates a future scenario, where a challenge has been successfully solved by the team.

Looking back from this point of success, the method drives ideation of needed steps and activities to get there.

The definition of a future scenario sets a common vision and guiding star for the team.

How to use it

1. Layout a future scenario with a silent brainstorm:

"It is 2020 and _____"

"What happened?"

2. Share out the results and discuss a final statement.

3. Silent brain dump with focus on actions/decisions that were taken in the timeframe until the future scenario happens:

"What have you done to achieve this?"

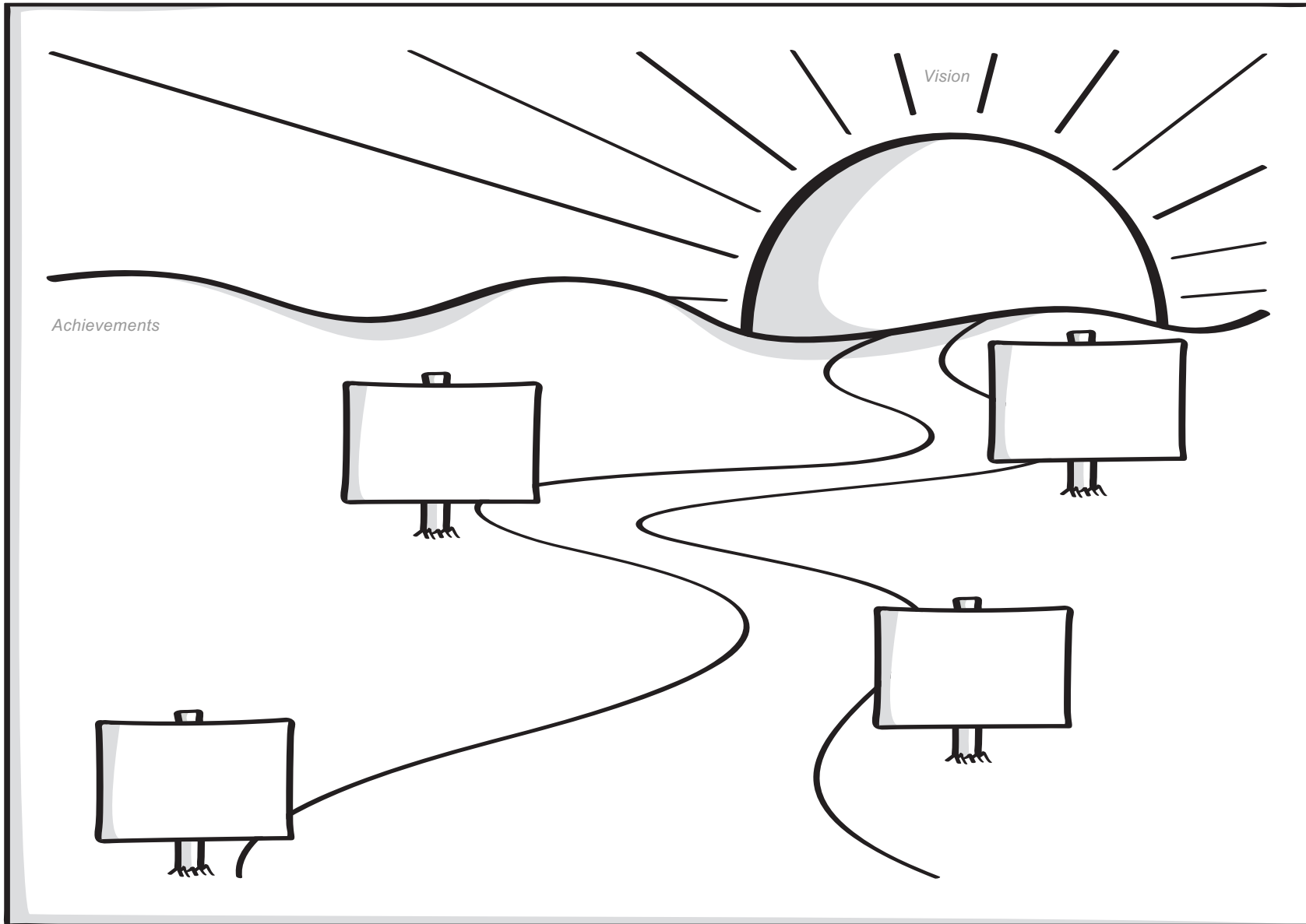4. Share out the results and agree on the achievements.

Tips & Tricks

You can do the activity with a shorter time frame (at the end of the year) as well a longer one (in 5 years).
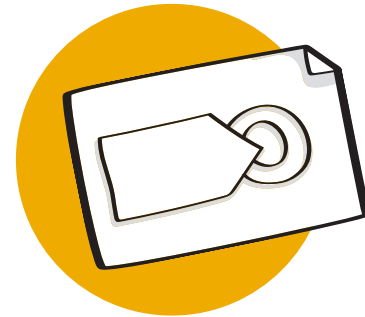
Remember the Future Example

Remember the Future Template

Vision

Achievements
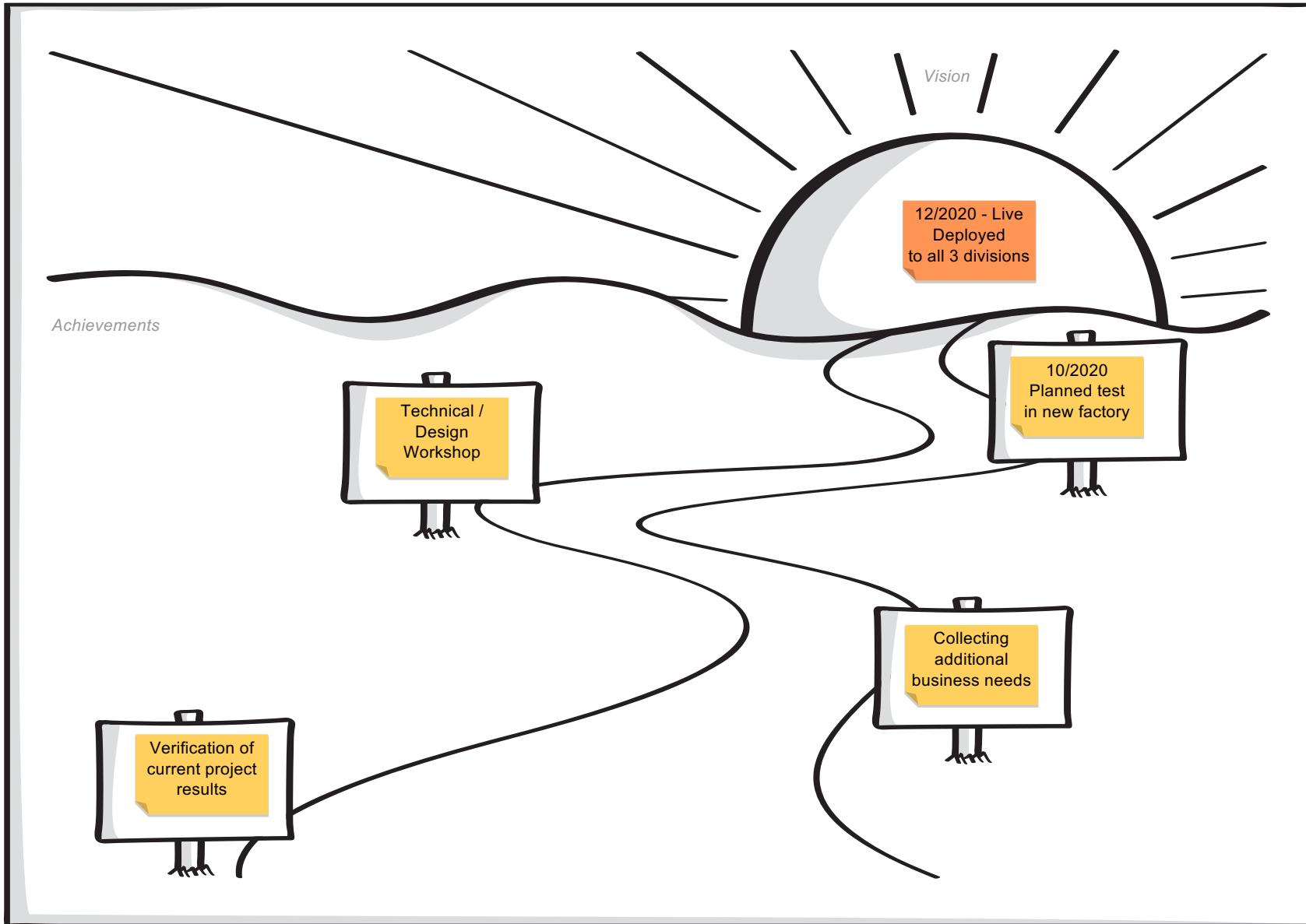
Game **Plan**

Template | Instructions | Example | Protocol

Get a deeper understanding regarding vision,
success factors, challenges, resources and phases
that will be needed for the project.

Game Plan

Shows you how you'll get where you want to go with the project.

Define the vision, objectives & deliverables

Write down the steps, activities & responsible individuals

Identify the criteria of success and the challenges

![AppHaus]

Game Plan
Instructions

Duration
30-60 minutes

Number of Participants
2-8 participants

Why & What

The Game Plan shows you how you'll get where you want to go with the project.

It helps visualize the streams and track outcomes.

Get a deeper understanding regarding vision, success factors, challenges, resources and phases that will needed for the project.

Get consensus around specific tasks required to complete the project.

How to use it

1. Define the vision for the project.

2. Describe the objectives & deliverables of the action plan.

3. Highlight what is out of scope.

4. Write down all the steps and related activities to complete the objectives

5. Identify the individuals and team in charge of the tasks.

6. Identify the criteria of success and the challenges in order to accomplish the vision through all the activities.
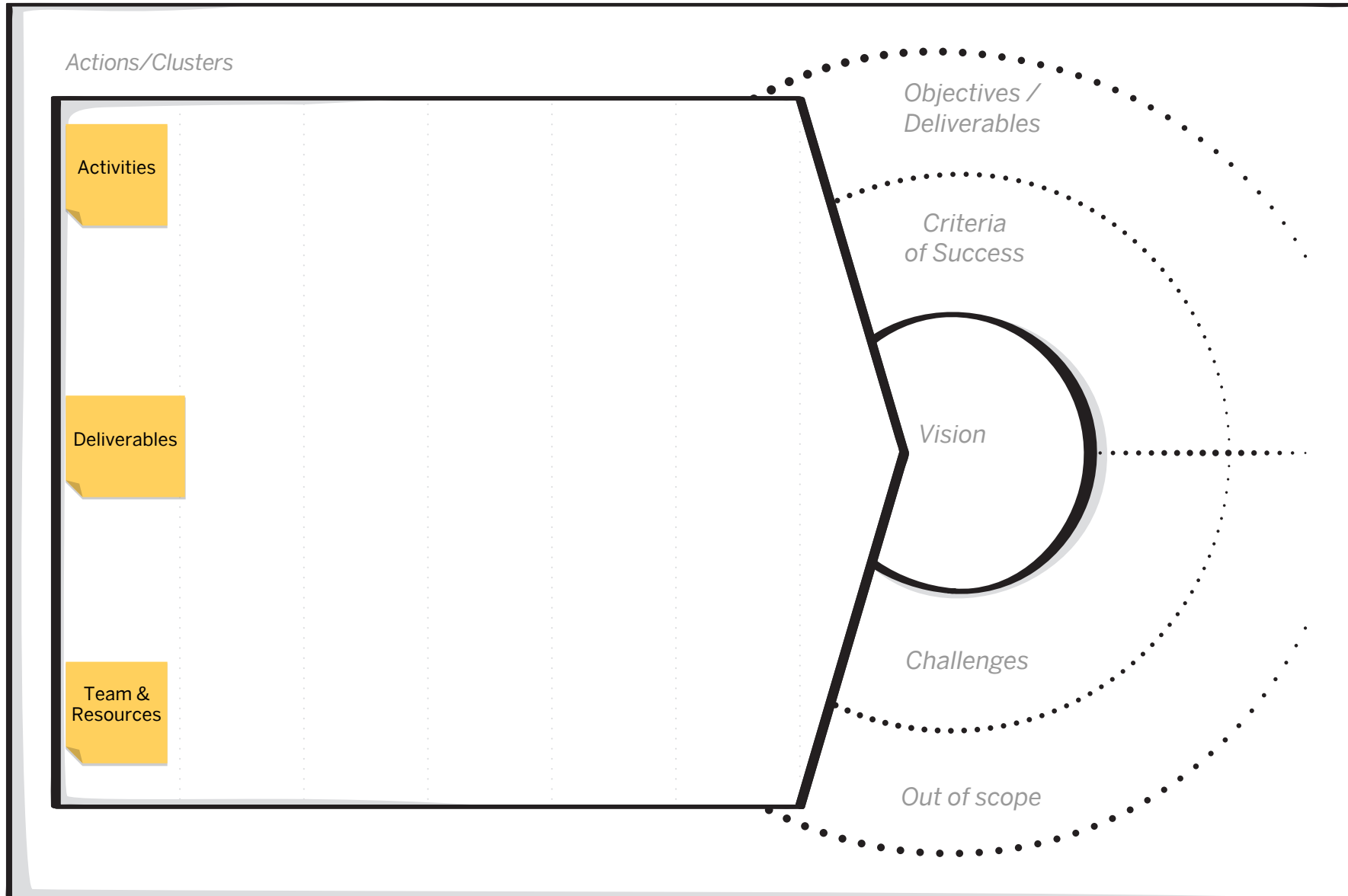
Tips & Tricks

It is useful track follow-up action items.

Game Plan Example

Actions/Clusters

| Project Setup | Technology | Discover | Design | Deliver |

Activities — Kickoff — User research Interview — Interaction design — Define test approach

Deliverables — Feedback loop — Define group of users for live app — Clickable design prototype — Visual guideline

Team & Resources — Project lead

Objectives / Deliverables: Secure Productivity, Minimize wrong data input on channels, Usability Easy system usage, Effective logistic

Criteria of Success: Acceptance of end user, Easy Adoption

Vision: Become attractive workplace, Less/No Training

Challenges: Hardware ability, Project priority

Out of scope

Game Plan **Template**

Actions/Clusters

Activities

Deliverables

Team & Resources

Objectives / Deliverables

Criteria of Success

Vision

Challenges

Out of scope

Strategy Map

Instructions | Template | Example

Understand the business impact of your architectural work.
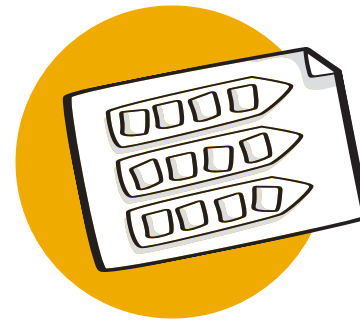
Strategy **Map**

Visualize the strategic intentions of your organization through goals, drivers, and objectives.

Understand Strategy
Gather the strategic intentions of your company and your organization.

Understand Goals
Gather the strategic goals of your organization and link related drivers, goals and objectives.

Associate your Use-Case
Identify the strategic goal(s), driver(s), and objectives that are supported by your architecture project.*

*This can be done at a later stage, when you have more details about your project.

Strategy Map
Instructions

Duration
approx. 30-90 minutes

Number of Participants
- Corporate Strategy
- Annual Report

Why & What

A Strategy Map is a graphical representation of the organization's goals and objectives. It visualizes the strategic intentions of the organization and de-composes it in related drivers, goals and objectives.

The Strategy Map provides context for your architecture work.

How to use it

1. Note the vision (purpose) of the company.

2. Document external or internal drivers that motivate the company to define its goals. Think about external factors such as market conditions or stakeholder demands. There might be more than one driver for the company or organization.

3. Document the corporate goals that influence the direction where the company is heading.

4. Add strategic goals which are specific goals the company or departments of the company want to achieve. Every strategic goal has associated objectives, that are specific, measurable and time bound. Also, add existing projects or activities that are supporting a strategic goal.

Tips & Tricks

Driver: An external or internal condition that motivates the organization to define its goals, such as customer and market behavior, competitive forces, legislation, etc.

Goal: A formulation of a (strategic) intention or (strategic) direction of the organization.

Objective: Specific, Measurable, Attainable, Realizable and Time bounded (S.M.A.R.T.) formulation of a (strategic) goal, motivates the requirements for a Capability

Depending on your initial understanding of the problem domain, and the details you got from the request of architectural work, you might already be in the position to clearly identify strategic goals and objectives that are specifically supported by your architectural work.

Strategy Map Template

Vision

*Add company's vision statement*

Driver(s)

An external or internal condition(s) that motivate(s) the organization to define its goals, such as customer and market behavior, competitive forces, legislation, etc.

Corporate Goal(s)

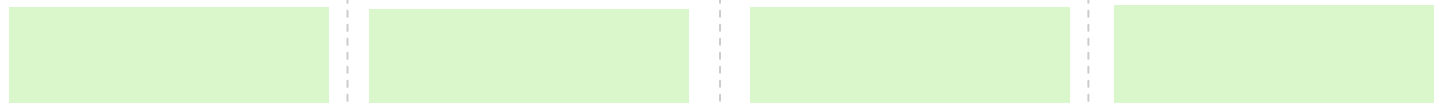*Add a formulation of intention(s) or direction(s) of the company or organization.*

Strategic Goals
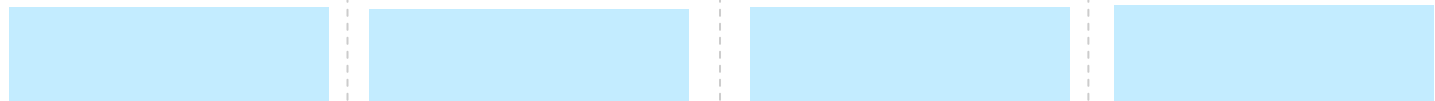A formulation of a strategic intention or strategic direction of the organization
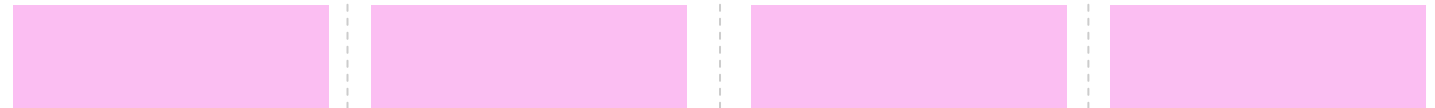
Objectives
Specific, measureable, attainable, realizable, and time-bound formulation of strategic goal

Projects & Initiatives
Exisiting project or initiative supporting the strategic goal, implementing the objectives defined

Strategy Map Example

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Rocket Chips Inc.

Vision

Create world-changing technology that enriches people's lives.

Driver

Unleash the potential of artifical intelligence by reliable, sclable,trusted data processing inspired by quantum computing.

Corporate Goal

Global market leader in technology optimized for machine learning algorithms.

Strategic Goals	Fast and effective approval of business initiatives and research & development projects to support massive growth as well as innovation and adaptability	Engineer solutions for our customers' success with reliable, cloud-to-edge computing inspired by quantum technology	Provide new digital services supporting AI as a service	Sell digital services to customers via a marketplace. Offer API Hub to consume services
Objectives	▪ Reduce average time of approval from 25+ days to 2 days ▪ Automatic processing of at least 25% of requests with confidence	▪ Improve training speed of massive data sets by 75% until 2022 ▪ Reduce power consumption by 50% until 2022	Offer AI based services via APIs out of own data centers	A marketplace will be created to so sell services to stakeholders
Projects & Initiatives	▪ Global Growth Initiative 2025	▪ Quantum Flagship Initiative	▪ Digital Agenda 2023 ▪ Data Center Strategy	▪ Digital Agenda 2023 ▪ Project STELLAR

Statement of
Architecture Work

Instructions | Template | Example

Define the scope of your architectural work
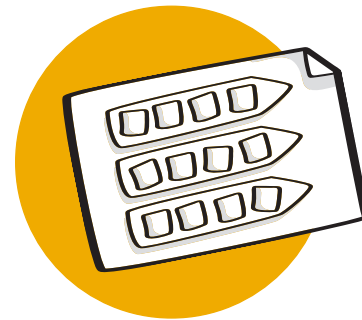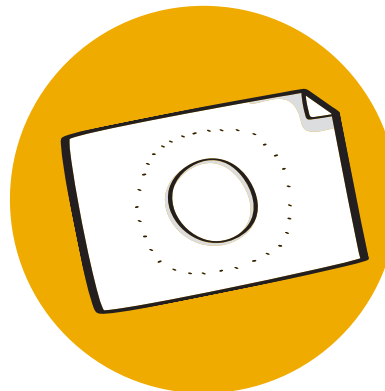
Statement of Architecture Work

Identify the scope and the business reason for your architecture

Understand context

What is the (business) reason of your project? How does it support the company's goals?
Understand the architecture request and business background.

Define scope

What is your project about? Describe the scope including a high-level vision of the target architecture.

Acceptance Criteria & Roles

Think about acceptance criteria of your project and ways to check them. Who is participating in the project with which responsibility?

Statement of Architecture Work
Instructions

Duration
approx. 60 minutes

Number of Participants
- **Strategy Map**
- **Request for Architecture Work (Use-Case)**
- **Stakeholder Matrix**

Why & What

The Statement of Architecture Work defines the scope and approach that will be used to complete an architecture development. The Statement of Architecture Work is typically the document against which successful execution of the architecture project will be measured.

You can consider the Statement of Architecture work as a "Document of Understanding". It helps to regain focus on the scope and avoids *scope creeping*. As it is formally agreed upon, the Statement of Architecture Work helps you to officially say NO to requests or requirements coming up throughout the architecture development that are out of scope.

How to use it

1. Define the title of your project and briefly summarize the reason for the architectural work including the business background. Use the Strategy Map as input.

2. Describe the architecture project with a focus on what is in scope of your architecture. One or two sentences with a clear description can be enough.

3. Visualize the project description and scope, with a simple high-level sketch of your architecture vision.

4. Add project roles and their responsibilities throughout the architecture development. Use the stakeholder matrix as input.

5. Define which stakeholders are responsible for accepting and approving your architecture. Use the Stakeholder Matrix as input.

6. Define key milestones of the architecture development.

Tips & Tricks

You can consider the Statement of Architecture work as a direct reaction to the identified use-case, i.e., the request of architecture work. You take insights from the Strategy Map as input for writing the Statement of Architecture Work.

Involve your key stakeholders.

Aligning on the scope of work, roles and responsibilities, and the necessary approvers will set expectations on resource needs and project timelines for the project.

Looking at the template for the Statement of Architecture Work, it can be divided into two parts:
(1) Rows 1 to 4 describes the aspired solution or use-case that was previously identified and articulated via the request of architecture work.
(2) Rows 5 to 7 have project management characteristics.

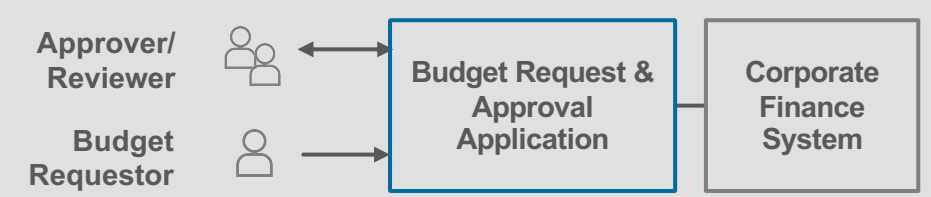# Statement of Architecture Work
Template

1. Title	*<Title of the project>*
2. Architecture project request and background	*<Short description of the reason for the project and its background>*
3. Architecture project description and scope	*<Brief description of the project and its scope>*
4. Overview of architecture vision	*<Provide a high-level picture of the target architecture, including core functional components and users / roles>*
5. Roles, responsibilities, and deliverables	*<List all the roles and their responsibilities in the project>*
6. Acceptance criteria and procedures	*<Describe the acceptance criteria and acceptance procedures of the project>*
7. Architecture project plan and schedule	*<Provide the main milestones and their schedule for delivering the project>*

Source: TOGAF Standard, Version 9.2

Statement of Architecture Work
Example

1. Title	Budget Request & Approval Solution
2. Architecture project request and background	To support the Global Growth Initiative 2025, design, develop, and operate a solution to support the financing of more than 2000 employees working on business dev. and R&D projects worldwide.
3. Architecture project description and scope	Plan for the development of a finance request & approval workflow aplication integrating with the existing finance system.
4. Overview of architecture vision (high-level-architecture)	
5. Roles, responsibilities, and work products	▪ **Business Architecture**: Director Business Development (Rocket Chips), Financial Analyst (Rocket Chips), Lead Architect (you) ▪ **Technical Architecture**: Lead Architect (you), Technical Architect (Vendor), Lead Developer (Rocket Chips), Head of IT (Rocket Chips) ▪ **Work products**: All artifacts from Lean EA toolkit without Architecture Principles, Risk Analysis and Use-Case Blueprint Diagram. Delivery format and content via PowerPoint and Word.
6. Acceptance criteria and procedures	▪ Approval for business architecture: Director Business Dev. (Rocket Chips), CFO (Rocket Chips) ▪ Approval for technical architecture: Head of IT (Rocket Chips)
7. Architecture project plan & schedule	▪ Architecture Roadmap work product, proposal for license and implementation effort