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| EPIC NAME (and ID) | |
| Product Manager  (or Epic Owner) | <Enter Epic Owner Name> |
| Product Owner  (or ‘Assignee’ of the Epic) | <Enter Product Owner Name> |
| Parent Initiative | <Identify superordinate Initiative> |

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| **Description Field in Jira**  *(Assuming minimal customization of the baseline Jira Epic field/screen schemas;  where custom fields have been implemented, separate where appropriate)* |

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| Problem Clarity Before an Epic can move forward for Roadmap or Release Planning, it’s essential to have clarity and shared understanding of the problem to be solved. An Epic should solve a customer problem in such a way that it directly contributes to resolving an Initiative and achieving a Strategic Goal or Objective.  [The specific issue] is causing [specific negative impacts] for [specific stakeholders or personas], due to [underlying causes]. A solution is needed that [primary criteria for success].  **The specific issue**: Clearly define the problem. Avoid vague descriptions.  **Specific negative impacts**: Describe the adverse effects of the problem. How is it affecting the customer, the business, or the stakeholders?  **Specific stakeholders or personas**: Identify who is being impacted by this issue. Is it a particular customer segment, an internal team, or another stakeholder group?  **Underlying causes**: Briefly touch on the root causes of the issue. This helps in understanding the problem in depth and could lead to better solutions.  **Primary criteria for success**: What would constitute a successful resolution to the problem? Define this concisely. Persona-Based Epic Identify the impacted persona(s) or capabilities, articulate the need or want to be addressed, and define what a successful solution would look like for the affected persona.  **As a…** <Identify the persona(s) for whom this Epic will solve a problem here>  **I want to…** <Identify the action, change, enhancement, or other modification that the impacted persona wants/needs here>  **So that…** <Describe the benefit/outcome/expression of capability improvement here>  ***-OR-*** Platform-Based Epic Identify the capabilities to be enabled or modified, articulate the impacts to new or existing platforms or components to deliver a solution that satisfies the need or want to be addressed.  **In order to...** <Enable some capability>  **The** <Platform/System/Current Capability> **needs to...** <Exhibit or perform in some different manner>  **So that...** <A defined outcome or improvement can be achieved> Acceptance Criteria Define the specific conditions that must be met for the Epic to be considered complete. This involves outlining the functional and non-functional requirements, and any other criteria essential for delivering the desired solution for the impacted persona(s) or platform capabilities.  **Functional Acceptance Criteria**  **Non-Functional Acceptance Criteria** Strategic Alignment: Success Measures Outline the measurable outcomes or results that signify the successful achievement of the Epic’s objectives. These should be quantifiable indicators that are directly tied to Objectives and Key Results (OKRs) and/or Product Strategy and Goals, wherever possible. These may be related to financial outcomes, customer satisfaction or retention goals, regulatory/compliance needs, or any other specific strategic or operational goals. Backbone Stories (or Features) Delineate the primary user stories or key features that are essential for fulfilling the objectives of the Epic. These should directly address the customer needs and offer the most value in terms of achieving the defined success criteria, while also forming the basis for what will be developed in the Next Most Useful Product Increment.  *(As the Stories are elaborated and prioritized for Product Increments, those will be entered in Jira (or other tools) to connect with the Epic – the “features” or Backbone Stories here are intended to guide discussions, NOT define the detailed Stories against which the engineering team will be developing – refer to the example for an example of detailed Stories that would be in Jira)* |
| **Additional Fields in Jira, Jira Align, Confluence, or other Tools**  *(Could also be copied into the Description if that is the primary source of data)* | | |

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| Priority Assign a priority score using a chosen prioritization technique (e.g., RICE, WSJF, or your own) to indicate the relative importance and urgency of this Epic compared to others in the backlog.  **Option 1 - RICE (Reach, Impact, Confidence, Effort)**   * **Reach (R):** <Enter the relative reach hypothesis> * **Impact (I):** <Enter the relative impact hypothesis> * **Confidence (C):** <Enter the confidence this hypothesis will solve the problem> * **Effort (E):** <Enter the rough estimate of team-weeks of effort> * **RICE Score:** [(R + I + C) / E]   **Option 2 - Weighted Shortest Job First (WSJF)**   * **Business Value (BV):** <Enter relative business value number> * **Time Criticality (TC):** <Enter relative urgency number> * **Risk Reduction (RR):** <Enter relative risk reduction number> * **Opportunity Enablement (OE):** <Enter relative opportunity number> * **Rough estimate of effort (Effort):** <Enter rough estimate of team-weeks of effort> * **WSJF Score:** [(BV + TC + RR + OE) / (Effort)] |
| Assumptions:  * + <Enter key assumptions and descriptions here>  Dependencies:  * + <Enter dependencies or refer to an external dependency management plan here> |
| Constraints:  * + <Enter major constraints here>  Risks:  * + **Business Risks:** <Enter text here>   + **Technical Risks:** <Enter text here>   + **Validation / Verification Risks:** <Enter text here>   + **Organizational Risks:** <Enter text here>   + **Dependency Risks:** <Enter text here> |
| Solution DesignProvide a high-level recommendation for how the Epic can be implemented to address the problem statement. Include a brief architectural overview, depicting the key components and their interactions, to offer insight into how the solution will be structured and integrated within the existing system.Overview & Recommendation   <Enter text here> High-Level Architectural View (Optional)   <Insert diagrams here> |
| Reference Materials & Attachments |