; EPIC BRIEF ;

Template and Guide
with Example

TH;NKLOUDER

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>

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)

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 Design

Provide 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

; EXAMPLE ;

Automated Prescription Renewal (Epic-101)

Product Manager	Jane Q Product
Product Owner	Jeff O'Product
Parent Initiative	Improve Customer Retention & Lifetime Value

Problem Clarity

The process of prescription renewal is time-consuming and prone to delays for patients, doctors, and pharmacists, causing frustration and potential lapses in necessary medication regimens.

The lack of automation and the need for in-person or telephonic communications for renewals lead to inefficiencies and miscommunication among parties involved.

A solution is needed that streamlines and automates the prescription renewal process, ensuring timely reminders to patients, enabling online renewals, expediting doctors' approvals, and allowing pharmacists to prepare medications in advance.

Persona-Based Epic

As a patient
I want to receive automated reminders for prescription renewals
So that I never forget to renew my prescription

Note: this version of the Epic could require separate epics for the Doctor and Pharmacist Personas. Use your best judgement and understanding of what is Potentially Releasable to craft Persona-Based Epics. For example, if you would potentially release an Epic that ONLY satisfies the Patient, this might be a preferable approach. If you would NOT release an Epic until the Doctor and/or Pharmacist personas also have a solution, consider the Platform-Based Epic for further refinement.

For the remainder of this Example Brief, let's move forward with a Platform-Based Epic instead.

Platform-Based Epic

In order to *streamline and automate the prescription renewal process*
the *current prescription management system*
needs to *integrate automated reminders, enable online renewal submissions and approvals, and facilitate pharmacists in preparing medications in advance*
So that *patients can seamlessly renew prescriptions, doctors can efficiently approve them, and pharmacists can timely prepare medications, ultimately improving patient care and reducing the risk of medication non-adherence.*

Acceptance Criteria

1. **Automated Reminders:**
   - Patients can set the frequency of reminders (daily, weekly, monthly).
   - Reminders include the name of the medication and the date it needs to be renewed.
   - Reminders are sent via the patient's preferred communication channel (e.g., email or text message).

2. **Online Prescription Renewal:**
   - Patients can securely log in to the system.
   - Patients can select the prescription they want to renew.
   - Patients can enter and save payment information.
   - Patients can confirm the renewal and receive a confirmation message.

3. **Doctor's Online Approvals:**
   - Doctors can securely log in to the system.
   - Doctors can view the patient's medical history and current medications.
   - Doctors can approve or deny the renewal request with a minimal number of clicks.

4. **Pharmacist's Preparation:**
   - Pharmacists can securely log in to the system.
   - Pharmacists can view prescription renewal requests.
   - Pharmacists can prepare medications in advance and notify the patient when they're ready for pickup.

5. **Prescription Renewal Tracking:**
   - Patients can view the status of their renewal requests (pending, approved, denied).
   - Patients can see an estimated date for when the medication will be ready.
   - Patients can receive notifications when the status of their renewal request changes.

6. **Pharmacy's Automated Receipt of Renewals:**
   - Pharmacies can receive and process prescription renewal requests.
   - Pharmacies can verify patient information.
   - Pharmacies can confirm the renewal.
   - Pharmacies can send a confirmation to the patient.

7. **Integration and Security:**
   - The system should be integrated such that doctors, pharmacists, and patients' data are connected.
   - All user data and communications should be secure and compliant with relevant healthcare regulations.

Strategic Alignment: Success Measures

STRATEGIC ALIGNMENT from the Business Perspective

1. **Revenue Growth from Increased Prescription Renewals:**
   - *Measurement*: Monitor the revenue generated from prescription renewals before and after the implementation of the Automated Prescription Renewal Service.
   - *Success Criteria*: Achieve at least a 10% increase in revenue from prescription renewals compared to the baseline before the system implementation.
   - *Consideration*: Assess if the increase in revenue is directly correlated with the efficiencies gained through the automated renewal service. This could include factors like more patients using the online renewal system, leading to more renewals and revenue.

2. **Improvement in Net Promoter Score (NPS) Among Patients:**
   - *Measurement*: Conduct NPS surveys among patients to gauge their likelihood to recommend the pharmacy to others.
   - *Success Criteria*: Achieve an improvement of at least 40 basis points in the Net Promoter Score among patients compared to the baseline before the system implementation.
   - *Consideration*: NPS can be influenced by various factors, not only the automated prescription renewal service. It's important to assess if the NPS improvement is a result of the new service or other factors.

3. **Patient Retention and Acquisition:**
   - *Measurement*: Track the number of returning patients using the pharmacy services as well as the number of new patients acquired.
   - *Success Criteria*: Achieve an increase in both patient retention and new patient acquisition rates compared to the baseline before the system implementation. Set specific percentage targets for both.
   - *Consideration*: The automated service should not only improve experience for existing patients but also serve as a value proposition for attracting new ones. This can indirectly impact revenue as well.

SUCCESS CRITERIA from the Stakeholder Perspective

1. **Reduction in Prescription Renewal Processing Time:**
   - *Measurement*: Track the average time it takes from the moment a patient submits a prescription renewal request to the moment it is approved and processed.
   - *Success Criteria*: Achieve a 10-15% reduction in the average processing time of prescription renewals compared to the baseline before the system implementation.
   - *Specific Goal*: The automated reminders sent to patients should contribute to at least half of this reduction.

2. **Reduction in Patient Wait Time at Pharmacy:**
   - *Measurement*: Monitor the time patients spend waiting at the pharmacy for a prescription to be refilled after they have arrived.
   - *Success Criteria*: Reduce the number of patients who must wait for more than 15 minutes for a prescription refill by 50% compared to the baseline before the system implementation.

3. **Improved Medication Compliance Tracking for Doctors:**
   - *Measurement*: Track doctors' utilization of the system for reviewing patient prescription renewal history and compare the level of insights gained with the baseline.
   - *Success Criteria*: Doctors should report improved understanding and insights into patients' medication compliance, with at least a 20% increase in cases where renewal frequency data positively impacted their analysis of medication efficacy.

4. **Increase in On-Time Prescription Renewals:**
   - *Measurement*: Monitor the percentage of prescriptions that are renewed by patients before or on the date they are due.
   - *Success Criteria*: Achieve an increase in the percentage of on-time prescription renewals by 15% compared to the baseline before the system implementation.

5. **Patient, Pharmacist, and Doctor Satisfaction:**
   - *Measurement*: Conduct surveys or interviews to gauge satisfaction levels among patients, pharmacists, and doctors regarding the new Automated Prescription Renewal Service.
   - *Success Criteria*: Achieve an average satisfaction score of 8 out of 10 or higher among all user groups, with specific mentions of reduced wait times and better insights into medication compliance.

Backbone Stories *(or Features)*

Backbone Story 1:
As a patient, I want to receive automated reminders for prescription renewals so that I never forget to renew my prescription.
- The patient should be able to choose the frequency of reminders (daily, weekly, monthly).
- The reminders should include the name of the medication and the date it needs to be renewed.
- The reminders should be sent via email or text message.

Backbone Story 2:
As a patient, I want to be able to renew my prescription online so that I don't have to call my doctor's office.
- Patient must be able to select the prescription they want to renew
- Patient must be able to enter payment information
- Patient must be able to confirm the renewal

Backbone Story 3:
As a doctor, I want to be able to approve prescription renewals online so that I can save time and improve patient care.
- The doctor should be able to access the online renewal requests through a secure portal.
- The doctor should be able to see the patient's medical history and current medications.
- The doctor should be able to approve or deny the renewal request with just a few clicks.

Backbone Story 4:
As a pharmacist, I want to be able to see prescription renewal requests online so that I can prepare the medication in advance.
- The pharmacist should be able to access the online renewal requests through a secure portal.
- The pharmacist should be able to see the patient's name, medication, and renewal date.
- The pharmacist should be able to prepare the medication in advance and notify the patient when it's ready for pickup.

Backbone Story 5:
As a pharmacy, I want to be able to receive automated prescription renewal requests so that I can process them quickly.
- Pharmacy must be able to receive and process prescription renewal requests
- Pharmacy must be able to verify patient information
- Pharmacy must be able to confirm the renewal
- Pharmacy must be able to send a confirmation to the patient.

Backbone Story 6:

As a patient, I want to be able to track the status of my prescription renewal and refill so that I know when it will be ready.
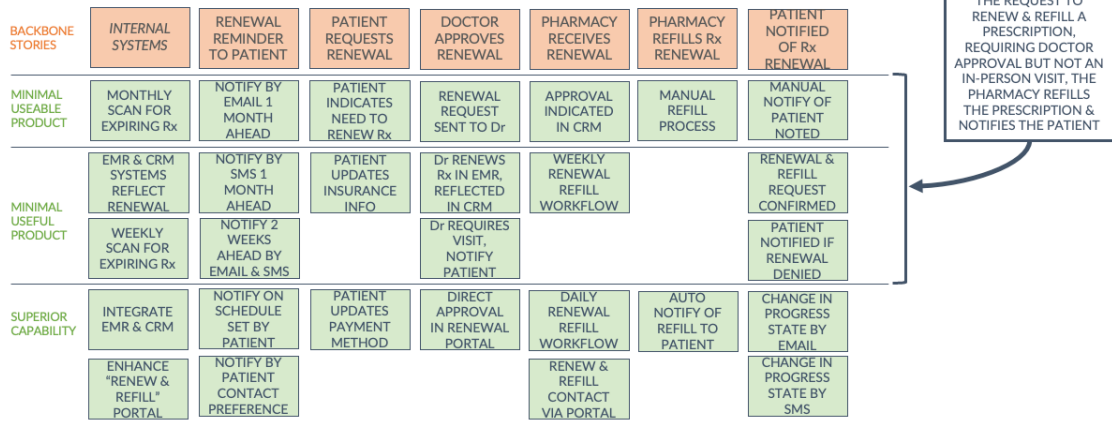
- The patient should be able to see the status of their renewal request (pending, approved, denied).
- The patient should be able to see an estimated date for when the medication will be ready.
- The patient should be able to receive notifications when the status of their renewal request changes.

INITIAL PRODUCT INCREMENT VISION

Draft detailed Stories for Solution Design, Planning & Backlog Refinement

EXAMPLE STORY MAP FOR EPIC BRIEF
AUTOMATED PRESCRIPTION RENEWAL
{BUILDS ON EXISTING REFILL WORKFLOW & NOTIFICATION CAPABILITIES}

THE EPIC
"Next Most Useful Product Increment"

PATIENT IS NOTIFIED OF AND COMPLETES THE REQUEST TO RENEW & REFILL A PRESCRIPTION, REQUIRING DOCTOR APPROVAL BUT NOT AN IN-PERSON VISIT, THE PHARMACY REFILLS THE PRESCRIPTION & NOTIFIES THE PATIENT

BACKBONE STORIES	INTERNAL SYSTEMS	RENEWAL REMINDER TO PATIENT	PATIENT REQUESTS RENEWAL	DOCTOR APPROVES RENEWAL	PHARMACY RECEIVES RENEWAL	PHARMACY REFILLS Rx RENEWAL	PATIENT NOTIFIED OF Rx RENEWAL
MINIMAL USEABLE PRODUCT	MONTHLY SCAN FOR EXPIRING Rx	NOTIFY BY EMAIL 1 MONTH AHEAD	PATIENT INDICATES NEED TO RENEW Rx	RENEWAL REQUEST SENT TO Dr	APPROVAL INDICATED IN CRM	MANUAL REFILL PROCESS	MANUAL NOTIFY OF PATIENT NOTED
MINIMAL USEFUL PRODUCT	EMR & CRM SYSTEMS REFLECT RENEWAL	NOTIFY BY SMS 1 MONTH AHEAD	PATIENT UPDATES INSURANCE INFO	Dr RENEWS Rx IN EMR, REFLECTED IN CRM	WEEKLY RENEWAL REFILL WORKFLOW		RENEWAL & REFILL REQUEST CONFIRMED
	WEEKLY SCAN FOR EXPIRING Rx	NOTIFY 2 WEEKS AHEAD BY EMAIL & SMS		Dr REQUIRES VISIT, NOTIFY PATIENT			PATIENT NOTIFIED IF RENEWAL DENIED
SUPERIOR CAPABILITY	INTEGRATE EMR & CRM	NOTIFY ON SCHEDULE SET BY PATIENT	PATIENT UPDATES PAYMENT METHOD	DIRECT APPROVAL IN RENEWAL PORTAL	DAILY RENEWAL REFILL WORKFLOW	AUTO NOTIFY OF REFILL TO PATIENT	CHANGE IN PROGRESS STATE BY EMAIL
	ENHANCE "RENEW & REFILL" PORTAL	NOTIFY BY PATIENT CONTACT PREFERENCE			RENEW & REFILL CONTACT VIA PORTAL		CHANGE IN PROGRESS STATE BY SMS

TH;NKLOUDER

{For the example, assume the Epic and Backbone Stories have been through several steps of elaboration to identify how the team would likely implement the solution, resulting in a draft of the Detailed Stories for implementation – note how these Detailed Stories are anchored by the Backbone Stories in the Story Map… the Detailed Stories would be managed in Jira and linked to this parent Epic based on the "Potentially Releasable" Product Increment that would be "most useful" to the affected persona(s):

"PATIENT IS NOTIFIED OF AND COMPLETES THE REQUEST TO RENEW & REFILL A PRESCRIPTION, REQUIRING DOCTOR APPROVAL BUT NOT AN IN-PERSON VISIT, THE PHARMACY REFILLS THE PRESCRIPTION & NOTIFIES THE PATIENT"

Priority

RICE (Reach, Impact, Confidence, Effort)
- **Reach (R):** 100
- **Impact (I):** 75
- **Confidence (C):** 33
- **Effort (E):** 16
- **RICE Score:** [(R + I + C) / E] = **13**

Assumptions:

- **Pharmacy Integration**: It is assumed that pharmacies have the necessary technology infrastructure and capabilities to integrate with the Automated Prescription Renewal Service for receiving and processing online prescription renewals using existing Interfaces and Integrations to process Prescription Refills for Patients.

- **Regulatory Compliance**: The implementation of the Automated Prescription Renewal Service is assumed to be compliant with healthcare regulations, such as HIPAA, that govern the handling and sharing of patient health information.

- **User Accessibility**: The patient, doctor, and pharmacist users are assumed to have access to internet-enabled devices and be proficient in using web-based platforms for interacting with the Automated Prescription Renewal Service.

- **Reliable Notifications**: The service assumes a reliable third-party service for sending out notifications (e.g. SMS, email) to patients regarding their prescription renewals, and that patients' contact information is up-to-date.

Dependencies:

- **CRM-EMR Integration**: A critical dependency is the successful integration between the Salesforce CRM system and a common Electronic Medical Records System, such as Epic Systems. This integration is vital to ensure that patient data is synchronized between the systems, allowing for accurate and timely prescription renewal processing.

- **Mobile App API Development**: There is a dependency on the development and availability of APIs for the existing mobile application to communicate with both Salesforce CRM and the EMR system. This is essential for allowing patients to request prescription renewals and receive notifications through the mobile app.

- **Data Migration and Mapping**: As a dependency, ensuring proper data migration and mapping between the CRM, EMR, and mobile application is required. This involves verifying that all systems have consistent data models and that data transferred between them is accurate and secure.

Constraints:

- **Regulatory Compliance**: The Automated Prescription Renewal Service must comply with healthcare regulations such as HIPAA in the United States. This constraint requires that patient data be handled with high levels of security and privacy, possibly limiting the speed of development and implementation.

- **Resource Availability**: The development and integration of this service may be constrained by the availability of key personnel with expertise in the EMR system, given our Time & Materials Contract with ACME Consulting for development on this platform. Timelines for implementation might need to be adjusted based on the availability and allocation of these specialized resources.

Risks:

- **Business Risks:** The introduction of the Automated Prescription Renewal Service may not be as well-received by patients as expected, leading to lower than anticipated adoption rates. Additionally, competitors may launch similar services, diluting the market share.

- **Technical Risks:** The integration of Salesforce, the EMR system, and the mobile application may encounter unexpected issues, leading to delays or compromises in functionality. Security vulnerabilities may also be introduced as sensitive patient data is handled through the system.

- **Validation / Verification Risks:** There might be a discrepancy between what the system is built to do and what it actually needs to do, or it may not meet regulatory requirements. The failure to effectively validate the requirements or verify the system against those requirements can lead to non-compliance or a system that doesn't meet user needs.

- **Organizational Risks:** Internal resistance from staff members who are accustomed to the existing prescription renewal process may hinder the adoption and effective use of the new system. Additionally, the organization may not have sufficient training resources to ensure that all relevant staff members are proficient in using the new system.

- **Dependency Risks:** Delays or issues in the delivery from third-party systems such as Salesforce or the EMR system could impact the timelines and functionality of the Automated Prescription Renewal Service. Furthermore, changes in the APIs or features of these third-party systems might necessitate unplanned adjustments to the service.

Solution Design

Overview & Recommendation

The Automated Prescription Renewal Service aims to streamline the prescription renewal process by allowing patients to renew prescriptions online and receive automated reminders. It involves the integration of an existing mobile application, a Customer Relationship Management (CRM) system (Salesforce), and an Electronic Medical Records System (e.g., Epic).
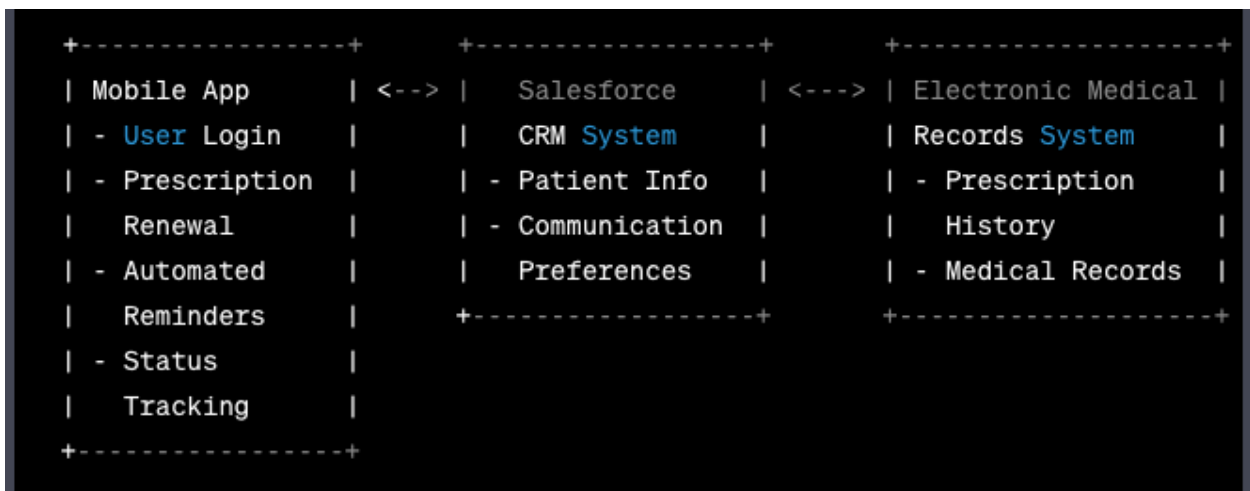
Our recommendation is to build an intuitive user interface within the existing mobile application. This interface should allow patients to securely log in, view their medication history, request prescription renewals, and set up automated reminders.

On the backend, the system will need to communicate with Salesforce for CRM functionalities such as managing patient information and communication preferences. In addition, it will need to interface with the Electronic Medical Records System to access and update prescription information.

To maintain security, especially with sensitive patient data, we recommend implementing robust encryption and authentication protocols. Also, ensure compliance with healthcare regulations such as HIPAA.

Furthermore, doctors and pharmacists should have a separate secure portal. This portal will allow them to view and manage prescription renewal requests, see patient history, and communicate with patients if necessary.

High-Level Architectural View

```
+-----------------+       +-----------------+       +--------------------+
| Mobile App      | <-->  |    Salesforce   | <---> | Electronic Medical |
| - User Login    |       |    CRM System   |       | Records System     |
| - Prescription  |       | - Patient Info  |       | - Prescription     |
|   Renewal       |       | - Communication |       |   History          |
| - Automated     |       |   Preferences   |       | - Medical Records  |
|   Reminders     |       +-----------------+       +--------------------+
| - Status        |
|   Tracking      |
+-----------------+
```

The mobile application serves as the main interaction point for patients. Through APIs, it communicates with Salesforce, which holds the CRM data. Salesforce is also interconnected via APIs with the Electronic Medical Records System, which contains prescription histories and other medical records.

This architectural design is built on secure communication channels and adheres to data protection standards. With an emphasis on security, efficiency, and user experience, this structure aims to revitalize the prescription renewal process.

Reference Materials & Attachments

Refer to the Salesforce ←→ EPIC Systems Data Integration and API Implementation Guides for specific data mapping, triggering and sequencing conditions, and other relevant guides.

Ensure test criteria are current with our latest 2023 HIPAA guidelines found in the corporate compliance repository.

About Us

We are an ensemble of dedicated Agile Practitioners, Coaches, and Trainers, united by a common passion for fostering individual and collective growth through immersive learning and skills development that meet you where you are.

We understand that in today's fast-paced digital world, teams and organizations are under immense pressure to consistently deliver value. Our approach is finely tuned to your needs, striking the perfect balance between innovation and execution. We're not just about theories; we focus on practical, immediately actionable solutions that pave the way for sustained improvements.

Our approach? A harmonious blend of engaging training sessions complemented by precision coaching, aimed at unlocking rapid performance enhancements. But we don't stop there - we stand shoulder-to-shoulder with your teams and extend our support to the leadership team, ensuring a cohesive journey toward Agile mastery.

How can we help?

ThinkLouder is here to be your ally in cutting through the noise and elevating your Agile capabilities. Follow us on LinkedIn and on our website for more useful tools and tips or reach out to us anytime! *We are here to help and happy to connect with you!*

🌐 www.thinklouder.com/precision-coaching/
in www.linkedin.com/company/thinklouder
📧 coaching@thinklouder.com