

A photograph of a pond with lily pads and a white water lily flower in bloom. The water is dark blue and reflects the sky and clouds. The lily pads are green and round. The white lily flower has a yellow center.

Customer & Customization Scenarios

Floruit Labs: Pond
Collaborative Requirements & Change Management



Introduction

This Customer & Customization Scenario material focuses on common end-user scenarios, and highlights product configuration options and built-in templates that allow teams to implement Pond quickly and in a way that fits their needs.

If you're new to Pond, you'll also want to see our Solution Overview – which offers a general introduction to product features and benefits (see resource links at right).

Additional Resources:

- floruitlabs.com/product to get our Solution Overview, Licensing FAQ, and QuickStart Guide.
- sales@floruitlabs.com with any questions or to request a demo.
- floruitlabs.com/beta to start a free trial account

Scenarios for Pond

Pond flexibly supports a broad range of end-user scenarios; the product capabilities and configuration options most relevant for each customer varies by customer industry and other factors.

Pond offers customization options and re-usable templates to help each customer adapt Pond quickly, easily, and repeatably.

In the following pages, we'll look at recommendations for each example customer scenario.

Common customer scenarios:

- Consulting
- Software Development
- Solution / Service Management

Customization Considerations

Key factors that shape setup and usage of Pond:

- Industry of users' organization
- Type of product or service related to users' project focus
- User functions (e.g. engineering, sales, marketing) involved in a project
- Methodologies and/or approaches in use (e.g. Agile)
- Tools in use that should import/export data with Pond (e.g. issue trackers, project management, CRM, etc)

Customization Concepts

Before describing customization options, let's take a look at underlying concepts in Pond.

- 1) **"Projects"** can be created for a range of purposes: to represent collaboration around a technical product (such as software or hardware), a creative product (such as a graphics or interface design), or a text-based product (such as a contract, agreement, or publication).
- 2) **"Requirements"** are the flexible building-block of all projects. They can be customized to represent: a feature or capability (e.g. "the product must have capability XYZ"), a test plan (e.g. "when product feature XYZ is put through 1-2-3 steps, the following result is expected.."), a proposed segment of an agreement (e.g. "the following service must be provided, per XYZ terms"), or many other uses. Project documents, discussions, and reporting all revolve around requirements.
- 3) **Cross-functional, generic platform:** to engage all stakeholders (technical, non-technical, leadership, etc.), Pond is designed with a minimum of terminology that is function-specific (e.g. engineering-related terms may be foreign to non-technical users) or methodology-specific (e.g. terms tied to a practice such as Agile Scrum). However, Pond gives teams the option of adapting terminology and workflow on a per-project basis, and saving customizations as re-usable templates.

Customization Options

Customize Pond per-project across projects, and save customizations as re-usable templates*:

Project types – can designate relevant requirement types, report views, and user policies.

Requirement types – define required and optional inputs (attributes) for a specific category of requirement (e.g. technical, functional, test, etc).

Report views – define saved views (to run later in real-time) that include any selection of data-points, and optionally a schedule and distribution list for automated report runs.

User policies – define roles and associated permissions (e.g. View, Contribute, Approve, etc). Policies can then be assigned to users when they join a project.

* *Pre-built templates are also available.*

Customization by Scenario

Scenario	Key Solution Needs	Relevant Customizations in Pond
Consulting	<ul style="list-style-type: none">• Seamless inclusion of internal + external users• Fast rollout for new clients and projects• Range of project types	<ul style="list-style-type: none">• Managing user accounts, and per-user project permissions, is the same easy process for internal and external users.• Project and User Policy templates securely segment consulting client access, and allow speedy rollouts – even for large-scale teams.• Requirement and Reporting templates provide underlying customization for Project templates.
Engineering	<ul style="list-style-type: none">• Engage cross-functional users (incl. non-tech)• Align with company / team methodology• Integrate project data with engineering tools	<ul style="list-style-type: none">• Requirement and Project templates allow customization of project terminology, ensuring cross-functional understanding and methodology alignment.• Reporting templates offer views into the project info most meaningful to each user.• Pond content and data can easily be shared with 3rd party tools.
Solution / Service Mgmt	<ul style="list-style-type: none">• Seamless inclusion of internal + external users• Integrate project data with support tools	<ul style="list-style-type: none">• Customizations noted for Consulting and Engineering apply here.• Custom notification rules support task-based workflows that include internal and external users. These can be saved as part of Project templates.