

# Proof of Concept Template

## 1. Project basics

In this first section of your proof of concept template, the project lead should fill in the basic details of the project including the project's name and a list of everyone who will be involved in the proof of concept.

In many cases your PoC will involve testing out a software system that may be used for your product or service development. In this case, you'll want to list the team members of the software company who you will be interfacing with during testing.

**PoC Project Name:** [PROJECT NAME]

**PoC Project Client:** [CLIENT NAME]

Project Member	Company (i.e. internal or external?)	Role in the PoC Project
[NAME]	Internal - [YOUR COMPANY NAME]	[PROJECT ROLE/JOB DESCRIPTION]
[NAME]	External - [COMPANY NAME]	[PROJECT ROLE/JOB DESCRIPTION]

## 2. PoC goals

Consider the goals of your proof of concept. What are you trying to validate? What issues are you trying to identify proactively? Make sure you survey stakeholders in the marketing, product, and IT teams to ensure everyone's goals are thoroughly documented. It's also a best practice to ensure your POC goals align with a larger business plan for your product or service.

As your goals are achieved, document them in the Goal Status column. This will make it easier to develop a PoC summary after work is complete.

	Goal	Goal Status (demonstrated/met)
1	To test whether [TECHNOLOGY/APPLICATION/SYSTEM] can be used to achieve [DESIRED OUTCOME].	
2	To identify any potential issues with using [TECHNOLOGY/APPLICATION/SYSTEM] to achieve [ ]	

### 3. PoC Overview

In this section, provide a written and graphical depiction of the PoC project. Think about how you would, in brief, describe your PoC project to someone who is uninvolved in the project. Provide an adequate amount of detail to support that here. If you will be testing the integration of software systems, show a block diagram.

### 4. PoC Scenarios

Describe the high level scenario(s) that will be demonstrated during your proof of concept. Where applicable, provide a network diagram(s) to support each scenario. If you have specific project requirements you are testing in various scenarios, list them in the Requirements column. Provide comments and document feedback throughout testing in the Comments column.

	Scenario	Requirements	Comments
1	What you will test, demonstrate, or build	Requirements the scenario will fulfill	
2			
3			

## 5. PoC Constraints & Assumptions:

Every proof of concept project will have an inherent set of constraints - whether it be a short time frame, a limited budget, software feature limitations or something else. Be sure to clearly document those here along with any assumptions your team is making.

Experienced product leaders will know that assumptions made early in the project can wreak havoc later, so be sure to lay them out clearly, so you can ensure you are on the same page with management and are able to provide optimal business value.

	Constraints	Implication of Constraint
1	Scope, Budget, Resources, Time, etc	
2		
3		

	Assumption	Source of Assumption
1	Division of Responsibilities, Integrations, Dependencies, etc.	
2		
3		

## 6. PoC Project Timeline:

Use this section to document your intended start date for the proof of concept work along with when you expect to have a demonstration you can show to stakeholders. POCs being iterative in nature mean that you may end up spending much longer than you initially anticipated on your proof of concept. Documenting specific progress dates can help you avoid the project extending longer than it needs to.

What is the PoC start date?	[DD/MM/YYYY]
(First) Demonstration target date	[DD/MM/YYYY]
PoC stages target dates (optional)	[DD/MM/YYYY]

When is the PoC considered completed?

When [COMPLETION REQUIREMENT], the project is considered complete.

## 7. Define success criteria

Explain how you intend to verify that the goals you presented in step #2 have been satisfied. Use the success types listed to identify the category the success criteria falls under. This will help you distinguish between different areas of the proof of concept project more clearly.

As success criteria has been met, provide documentation here.

	Success Criteria Type	Success Criteria Details	Success Criteria Status (met?)
1	Functional, Performance, Scalability, Availability, Service Quality, etc.		
2			
3			

## 8. PoC Results (after POC completed)

After your proof of concept work has concluded, it's time to complete a project wrap up and present your findings to relevant stakeholders and management. As a starting point you should:

- Fill out Goal Status column in step #2
- Fill out Success Criteria Status in step 7

Next, you should document your team's recommendations for a move-forward plan. Consider all of the information gathered during the course of your proof of concept work when documenting your own recommendations. After meeting with management, it's a best practice to document if your recommendations have been approved or rejected here.

	Recommendations	Recommendation Status (approved/rejected/etc)
1	Further testing/validation of [TECHNOLOGY/FEATURE/ETC]	

2	Do/don't move forward with [SOFTWARE VENDOR] for [PROJECT]	
3		