

A photograph of a pond with several green lily pads floating on the water. In the center, a white water lily flower is in full bloom, showing a bright yellow center. The water is dark blue and reflects the sky and the surrounding greenery.

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