

ARCHITECTURE PLAYBOOK

How-To Guide

Everything you need to get started with structured architecture governance.

- 01 Architecture Assessment
- 02 ADR Library
- 03 Architecture Roadmap
- 04 Document Templates
- 05 Projects & Workspace
- 06 RAID Log
- 07 Governance Forum

WHAT IS COMPASS?

A framework for architecture excellence

COMPASS gives your team structured tools to assess, decide, and govern architecture at every stage.

1 Assess

- Score domains across 5 architecture areas
- Identify gaps and maturity levels
- Generate targeted roadmap items

2 Decide

- Record every architecture decision as an ADR
- Capture context, options considered, and rationale
- Link decisions to projects and assessments

3 Govern

- Maintain a live roadmap of improvements
- Track risks with an integrated RAID Log
- Enforce standards through a Governance Forum

GETTING STARTED

Up and running in 3 steps

01

Sign in Using your Microsoft account

Visit the COMPASS Playbook and sign in with your organisation Microsoft account. Free tier access is available immediately — no setup required.

02

Create a project Your first workspace

From the Projects page, create a new project with a name, phase, and business domain. Projects are the anchor for assessments, ADRs, RAID items, and roadmap cards.

03

Run an assessment Baseline your architecture

Open Architecture Assessment and score your first domain. The results feed directly into suggested roadmap items — giving you an instant action plan.

MODULE 1

Architecture Assessment

Baseline your architecture maturity across five domains and turn gaps directly into roadmap actions.

MATURITY LEVELS

- 1 — Initial
- 2 — Developing
- 3 — Defined
- 4 — Managed
- 5 — Optimised

01 Open Architecture Assessment

Select Architecture Assessment from the sidebar. Choose an existing project from the dropdown or create a new one before starting.

02 Score each domain

Rate all five domains — Application, Data, Technology, Integration, and Business Architecture — on a scale of 1 (Initial) to 5 (Optimised).

03 Capture evidence

For each domain score, add notes that justify the rating. Evidence makes reviews credible and surfaces the specific gaps that need closing.

04 Identify gaps

Review the gap analysis panel. Low-scoring domains are automatically highlighted as priority areas requiring roadmap attention.

05 Generate roadmap items

Click Generate from Sources on the Roadmap page. COMPASS converts your assessment gaps into pre-populated, categorised roadmap cards ready to prioritise.

MODULE 2

ADR Library

Capture every architecture decision permanently so future teams understand the why behind every choice.

ADR STATUSES

- Proposed
- Accepted
- Deprecated
- Superseded

01 Open ADR Library and click New ADR

Navigate to ADR Library from the sidebar. Click New ADR and choose the project this decision belongs to.

02 Write a clear, decision-verb title

Titles should describe the choice made, not the problem. Example: Use PostgreSQL as the primary data store — not Database Selection.

03 Document the context

Explain the situation, constraints, and pressures that made this decision necessary. Include the business driver and any relevant timeline factors.

04 State the decision and options considered

Clearly record what was decided and briefly describe any alternatives that were considered and rejected, with the reason why.

05 Record consequences and set the status

List trade-offs, downstream impacts, and implications for future decisions. Set status to Proposed, Accepted, Deprecated, or Superseded as appropriate.

MODULE 3

Architecture Roadmap

Plan, prioritise, and track architecture improvements from assessment gaps to delivery.

AVAILABLE VIEWS

- Board — Kanban columns
- Timeline — Gantt chart
- Priority Matrix — effort vs impact

01 Open Architecture Roadmap

Navigate to Architecture Roadmap from the sidebar. The default view is the Board — a four-column Kanban (Backlog, In Progress, On Hold, Complete).

02 Generate items from assessments

Click Generate from Sources. COMPASS reads your assessment gaps and active projects, then suggests pre-populated roadmap cards grouped by domain. Select the ones you want and confirm.

03 Add or edit items manually

Click New Item to create a card from scratch. Set the title, category, priority (Critical / High / Medium / Low), owner, and target date.

04 Switch views to suit the audience

Use Timeline view for a Gantt-style delivery plan, or Priority Matrix to compare effort versus impact. Each view shows the same underlying items.

05 Update status as work progresses

Drag cards between columns on the Board, or edit the status field directly. Use filters by category, priority, or owner to focus the view.

MODULE 4

Document Templates

12 ready-to-use templates covering the full architecture practice. Export, customise, and reuse across every project.

EXPORT FORMATS

- Markdown — Confluence, Notion
- CSV — Excel, Google Sheets
- draw.io XML — diagram tools

01 Open Document Templates from the sidebar

The templates library opens showing all 12 available templates. Use the category filter to narrow the list by type — Architecture Patterns, Decisions, Assessment, or Operations.

02 Select a template to preview

Click any template card to open the full content in the viewer. Read through the structure and sections to confirm it matches your need before using it.

03 Export in your preferred format

Click Export and choose Markdown (for Confluence or Notion), CSV (for Excel or spreadsheets), or draw.io XML (for architecture diagrams). The file downloads immediately.

04 Customise for your project

Open the exported file in your target tool and fill in the project-specific sections. Each template includes placeholder guidance text to indicate what to write in each section.

05 Store the completed document with the project

Once completed, attach the document to your project record or your organisation's document management system. Reference it from the relevant ADR or roadmap item.

MODULE 5

Projects & Dashboard

Manage your full delivery portfolio. Every assessment, ADR, RAID item, and roadmap card is anchored to a project.

DELIVERY PHASES

- Discovery
- Alpha
- Beta
- Live
- Decommission

01 Open Projects from the sidebar

The Projects dashboard shows all active and completed projects with their phase, status, domain, and last-updated date. Use the search and filter bar to find specific projects.

02 Create a new project

Click New Project. Enter a name, select the business domain, choose the current delivery phase (Discovery, Alpha, Beta, Live, or Decommission), and assign an owner.

03 Link all artefacts to the project

When creating assessments, ADRs, RAID items, and roadmap cards, always select the relevant project in the Project dropdown. This keeps all artefacts traceable to a single source.

04 Track project status

Update the project status (Active, On Hold, Complete) as delivery progresses. The dashboard reflects the current state of your entire portfolio at a glance.

05 Review the full project record

Click any project to see its linked assessments, ADRs, RAID items, and roadmap cards in one place. Use this view for project reviews, governance updates, or handovers.

MODULE 6

RAID Log

Track all Risks, Assumptions, Issues, and Dependencies in one integrated log — linked to projects and visible across the team.

ITEM TYPES

- R — Risk
- A — Assumption
- I — Issue
- D — Dependency

01 Open RAID Log from the sidebar

The RAID Log shows all Risks, Assumptions, Issues, and Dependencies in a single filterable list. Use the Type filter to focus on one category at a time.

02 Create a new RAID item

Click New Item. Select the type (Risk, Assumption, Issue, or Dependency), enter a clear title describing the item, and link it to the relevant project.

03 Set priority, owner, and status

Assign a priority level (Critical, High, Medium, Low), an owner responsible for the item, and an initial status (Open, In Progress, Resolved, or Closed).

04 Add detail and mitigation plan

Use the description field to record the full context, potential impact, and — for risks — the planned mitigation or contingency action. Include a target resolution date.

05 Review and update regularly

Review open RAID items in each governance forum or sprint review. Update the status and add resolution notes as items are closed. Archive resolved items to keep the log actionable.

MODULE 7

Governance Forum

Maintain standards, record forum decisions, and schedule architecture reviews — the central record of your governance activities.

FORUM TABS

- Standards — principles and policies
- Forum Decisions — recorded outcomes
- Review Meetings — agendas and minutes

01 Open the Governance Forum from the sidebar

The Governance Forum contains three tabs: Standards (architecture policies), Forum Decisions (recorded outcomes), and Review Meetings (scheduled sessions and minutes).

02 Add and maintain architecture standards

In the Standards tab, create entries for each architecture principle or policy your organisation follows. Assign a category, owner, and status (Draft, Active, Retired).

03 Record forum decisions

After each governance meeting, log the decisions made in the Forum Decisions tab. Include the decision title, rationale, outcome, participants, and the date. Link to any related ADRs.

04 Schedule and document review meetings

Create review meeting records with agenda items, attendees, and outcomes. Use the minutes field to capture key discussion points, actions, and owners.

05 Run governance reviews on a regular cadence

Use the monthly governance forum to review open RAID items, new ADRs pending acceptance, roadmap progress, and any standards changes. Consistency is what makes governance effective.

• COMPASS

You are ready to start

Architecture excellence is a journey. COMPASS gives you the structure to make it measurable, repeatable, and visible across your organisation.

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TIPS FOR SUCCESS

01 Start with an assessment

Use Architecture Assessment to baseline your first project before building a roadmap.

02 Write ADRs in the moment

Capture decisions as they are made — context is lost quickly and retrospective ADRs lack detail.

03 Run monthly governance forums

Review roadmap progress, open RAID items, and new ADRs in a regular governance cadence.

04 Use templates consistently

Adopt the Document Templates for all architecture artefacts to maintain quality standards across teams.