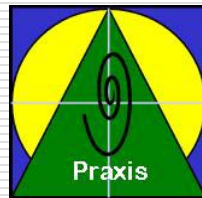


# Requirements Definition

---

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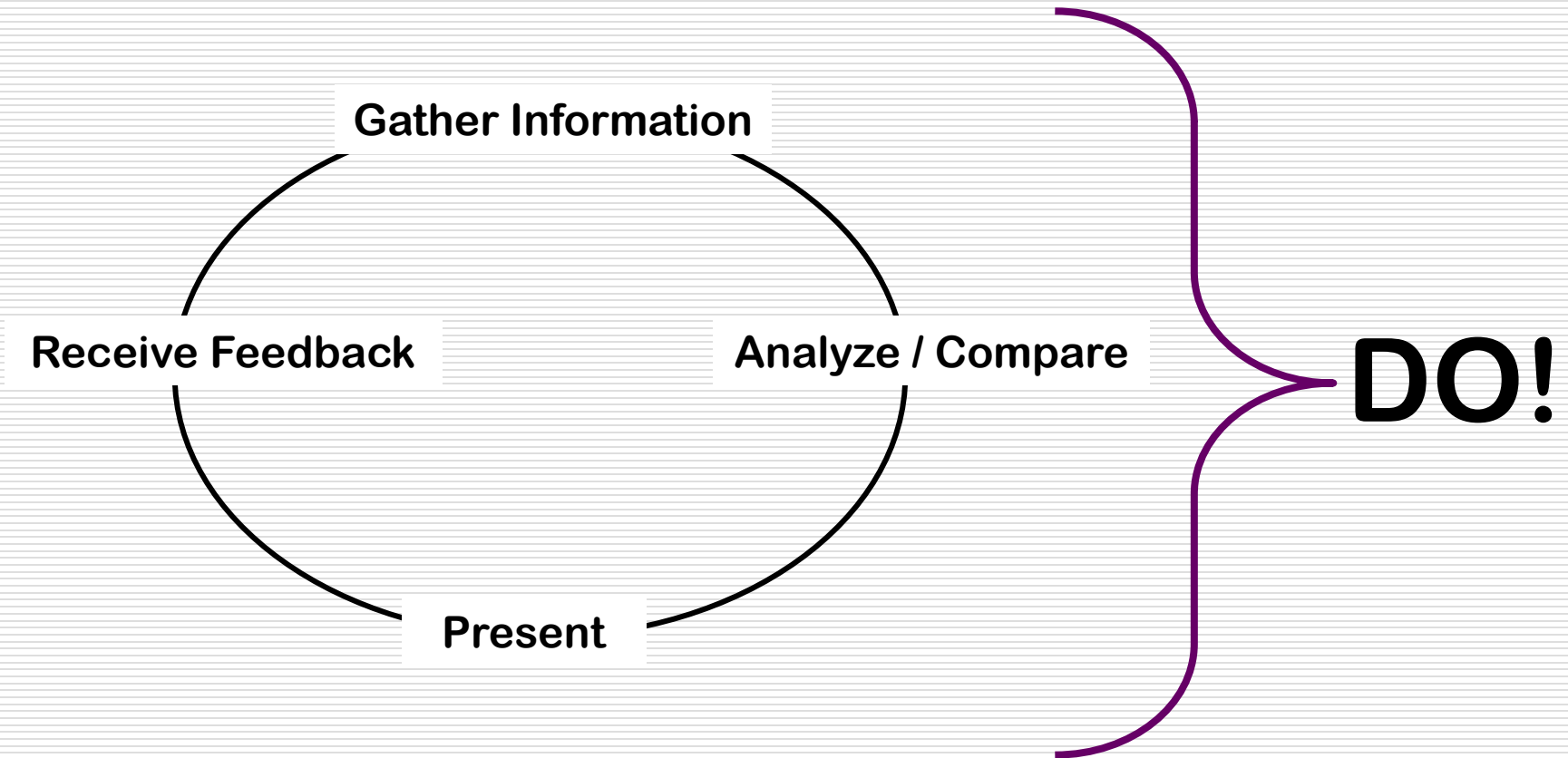
# Why even discuss this?

---

- ❑ 80/20 Rule
- ❑ Covey – “Start with the end in mind.”
- ❑ “The map is not the territory...”
- ❑ Communication / Relationship helps when something doesn't go as planned
- ❑ Effective Requirements Definitions are more than technical requirements

# Requirements Definition is a circular process

---



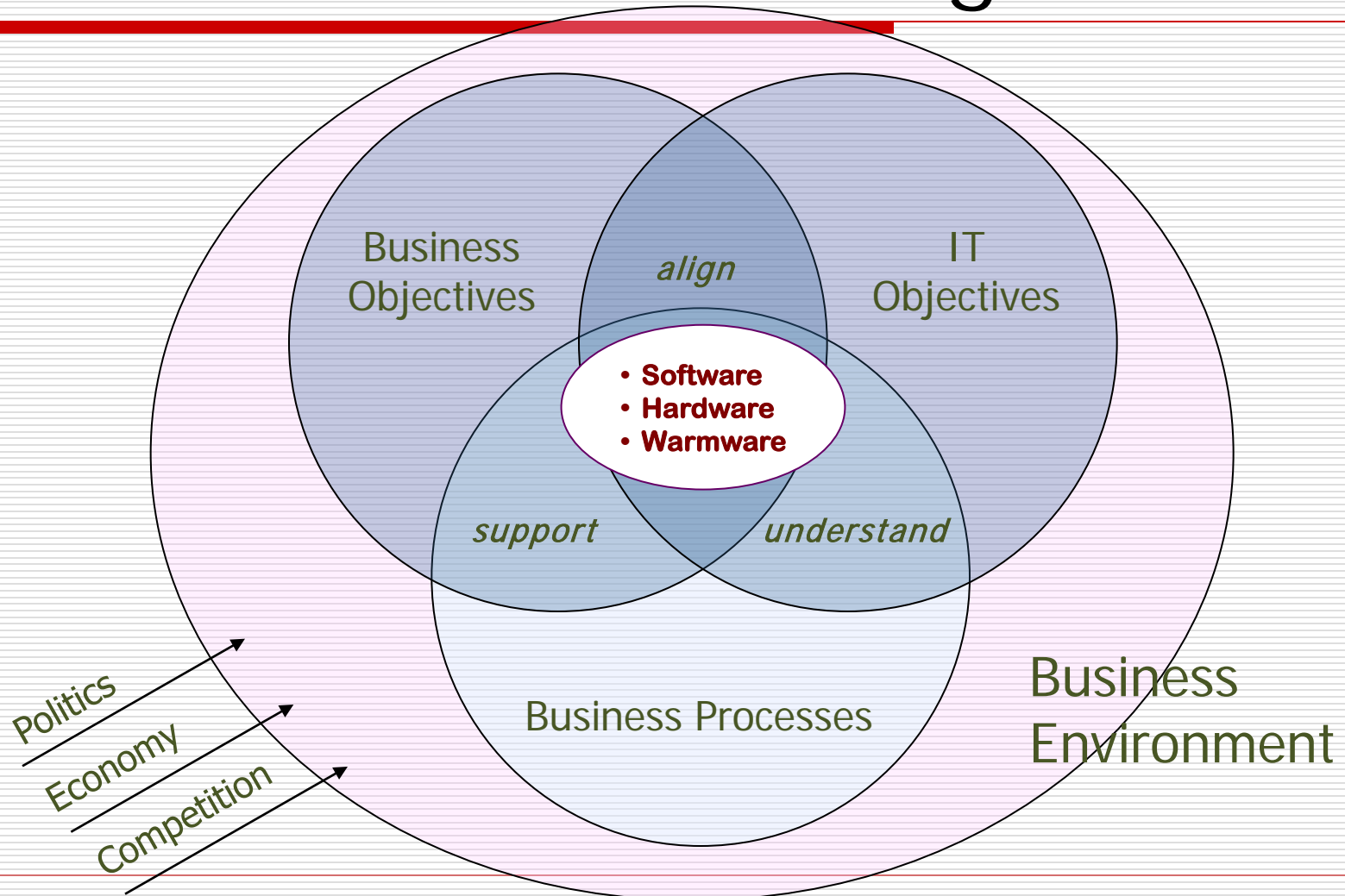
# Elements of Requirements Definition

---

- Software
  - Hardware
  - Warmware
  - Business Objectives
  - IT Objectives
  - Business Processes
  - Business Environment
- 
- Timing

# How the elements fit together

---



# Immediate Functional Questions

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## Look and feel

- Colors – What are the branded colors to be used?
- Pictures – Are their particular types of pictures to be used?
- Usability – Will it be easy for the End Users?  
Is it intuitive?

## Usability

- Navigation - Where? Duplication?
- How many clicks are acceptable to get to the “meat”?

## Personalization

## Animation and Social Media

---

# What they won't think about

---

- ❑ What type of programming getting that functionality will take
- ❑ How many hours it will take to decide on the appropriate modules
- ❑ System Integration
- ❑ Tables
- ❑ Platforms, Hosting, etc.
- ❑ ...it can't be done easily



# Business Objectives - Talking Points

---

- ❑ What does the business want to accomplish by implementing the new website?
- ❑ What portions of the business will the new website serve and in what way?
  - How major is this change?
  - How important is this change?
  - How does it relate/compare to other changes?
- ❑ What is the culture of the business in relationship to change?
- ❑ WHEN does the website have to go live?



# IT Objectives - General

---

- ❑ What ROI is expected and when?
- ❑ What time commitment will this change demand?
  - Who can be dedicated?
  - Do those functional people want to be involved?
  - Will external resources be needed?
  - If so, for how long?
- ❑ How does this change impact other IT projects already planned / working?
- ❑ Is your security compliant? (PCI, HIPPA)



# IT Objectives – Drupal (1 of 3)

---

- Why is Drupal the best platform?
  - Be able to explain this to multiple levels of management and new users.
- Who knows Drupal?
- What modules will fit the business processes best? And, how long will it take to figure that out?
  - Create a list of how the functionality of Drupal modules fit the business processes and functionality.



# IT Objectives – Drupal (2 of 3)

---

- What about hosting?
- What interfaces with other systems will the website have to support?
  - CRM
  - Transaction – inventory, sales, registrations
  - Memberships
  - Promotions / Marketing
  - Financial Reports
  - Web Analytics



# IT Objectives – Drupal (3 of 3)

---

- Who is required for testing the usability?
  - Will they be available when the website is?
- Who determines roles & permissions?
- Who will train the new users?
- Who will maintain the databases?
- Who will decide when upgrades are appropriate?
- How long should existing and new websites run parallel... and how?

# Business Processes

---

- Which business processes will be affected?
- What business decisions do these processes support?
- How are these decisions made?
- Who makes them?
- What other processes are touched by these processes? When? How?
- Who (specifically) is involved in each process?
- How will the website affect their work?

# Data & Interfaces

---

- Membership / Event / Subscription sites:
  - How old is the data?
  - Where does it reside now?
  - What format is it in?
  - When End Users put data into the website, where is it expected to go?
  
- Interfaces
  - What other business systems must the new website interface with?
  - How? How often?
  - Will those interfaces still be necessary?
  - What happens when those systems are changed?

# Warmware (the people involved)

---

- ❑ What is the general level of ability to welcome (or at least accept) change?
- ❑ What is the perceived “level of need” for this change?
- ❑ Who talks to whom? (the hidden trails of information ...and acceptance)
  - Stakeholder maps
  - Change Agents
- ❑ Who is in charge of the change?
- ❑ How does the current organizational structure relate to the business processes involved?

# Hardware & Software

---

## **Must be considered together due to co-dependence**

- Where is it best to host? Internal? External? Why?
- How is it best to set up multiple environments for development, testing, sandbox, and production... and keep them in sync?
- What is acceptable Performance?

## The Big One...

- Customizations?



# Example Documentation

## Data Source Summary

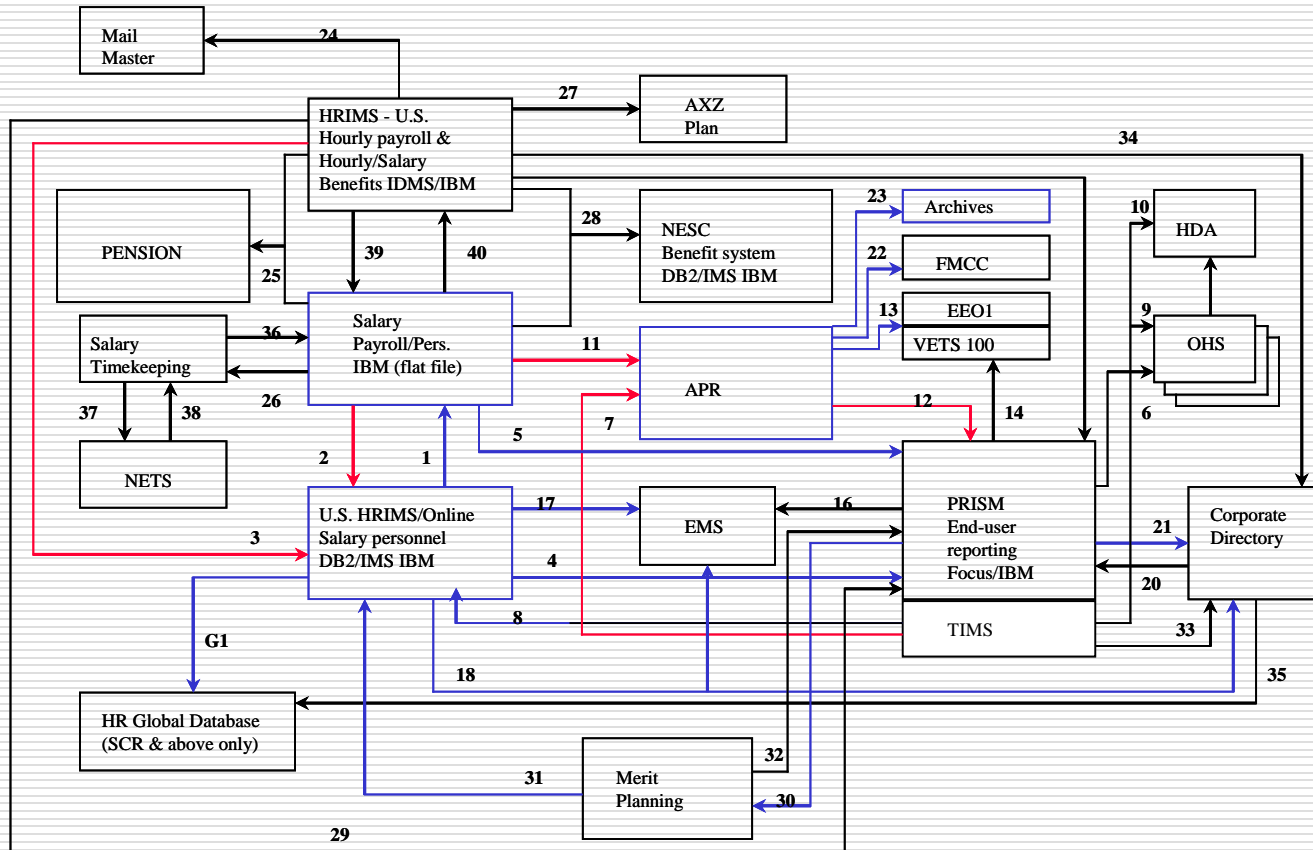
Dept	Applicability to Intelligence Fusion		
	High	Medium	Low
Diversity, Personnel Relations, Work Life	Harassment Hotline	HR Audits	External Analysis Diversity Focus Groups Discipline Database Resource Groups
Education, Training and Development	Smile Sheet Reports Training Evaluation "Smile Sheets"	Management Reports	Semi-Annual Meetings Customer Complaints File
Equal Employment & Workforce Planning	Work Force Planning Separation Assessment Interview		Employee Complaints Compliance Reviews
HR Customer Center / NESC	CMS- Genesys Database Customer Center Survey Merit Planning survey Scopus Case Management Retirement Survey Fidelity site usage reports NESC Composite Database IVR Customer Satisfaction Survey	Customer Center Reports  Fidelity Reports	Customer Survey (1998) CSR Focus Groups HR Customer Center Department Emails Compensation Planning Focus Groups Compensation Planning RAPID Fidelity Survey Fidelity Quality Report Informal Networking Sessions
HR Web Planning and Development	HR Online Database		
International Services			Global Policy Weekly Meetings Phone/Email Questions Electronic Bulletin Board Customer Survey
Personnel Research and Development	360 Assessment Survey Pulse Survey	PDC Survey Leadership Development Web Profile and Optional Feedback Form Web Survey System	Separation Program Survey Performance Management - Formal Feedback Mayflower Organization (benchmark)
Salaried Recruitment & Assessment	ATS Database		1997 Selection Process BPR Focus Groups 1996 Recruiting BPR Focus Groups Informal Feedback Biannual Benchmark Meeting
Security & Fire Protection	Investigation Reports		Emergency Response Plans Central Monitoring Operating Statistics Insurance Inspection Reports Fire Inspection Reports Incident Reports Informal Feedback
Vehicle Service Operations	Customer Survey - Vehicle Maintenance/Repair Customer Survey - New Lease Vehicle Receipt		Ford Engineering Feedback

Key: Blue = Information System, Red = Surveys, Black = Other

# Example Documentation

## System Interface Map

### Current Architecture - U.S.



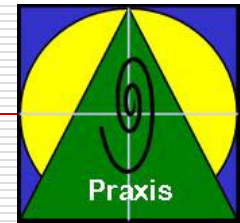
# Lessons Learned

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- ❑ View all information within the context of the business objectives.
- ❑ Question everything. It's the "dumbest" questions that provide great insight.
- ❑ Avoid creating "another initiative" by really knowing what is important to the stakeholders – and meeting it.
- ❑ Communicate. Communicate. Communicate. ... with all levels of stakeholders – both to create the requirements and to achieve the project objectives.
- ❑ Involve the "worker bees" in the initial software tests.
- ❑ Plan. Plan. Plan. Then review the plans on a regular basis with varying levels of stakeholders... and plan for changes in the plan.
- ❑ Know what technology changes (upgrades / patches / new modules) are planned for all involved software and hardware – and how the various vendors implement their changes.

# Thank you!

---



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# APPENDICES

# Example Documentation – Index of Requirements Definition Report

---

1. Executive Summary (including Commitment and Value Proposition)
  2. Existing System and Need for Change
    - a) Business Issues – requirements for change
    - b) Value Proposition for New System
    - c) Business Processes to be affected
    - d) Existing System Map
    - e) Stakeholder Identification
    - f) Company Culture Definition
    - g) Planned Project Phases (in alignment with Business Calendar)
  3. Considerations for Future System
    - a) Comparison of Existing Business Processes with Software Business Processes
    - b) Comparison of Existing Hardware Configuration with New System Configuration
    - c) Cost structures – initial and ongoing
    - d) Software Vendor Analysis – if multiple software is needed, how does it work together to meet customer requirements
    - e) Hardware Vendor Analysis
    - f) Technical Considerations (Projections of changes to technology in next X years)
    - g) Additional Considerations
    - h) Suggested Future System Map
  4. Vendor Proposed Project Approach
    - a) Major Project Phases
    - b) Expected Deliverables in each Phase
    - c) Costs per phase
    - d) Knowledge Sharing requirements
  5. Vendor Selection Process Description
- Appendices:
1. Comparative Process Maps – Current Business and Software
  2. Vendor Analysis
    - a) Financial reports
    - b) Organization that will be working with customer
    - c) History of product changes
    - d) Plans for future product changes
  3. Reference Accounts and Contacts

# Example Documentation

## Index for Fit Analysis Report

---

1. Executive Summary (including Commitment and Value Proposition)
  2. Existing System and Need for Change
    - a) Business Issues
    - b) Business Processes
    - c) Existing System Map
    - d) Value Proposition for Change
    - e) Project Timing
  3. Projected Future System
    - a) Criteria for Comparison of Existing Business Processes with Software Business Processes
    - b) Criteria for Comparison of Existing Hardware Configuration with New System Configuration
    - c) Criteria to make short list of software vendors
    - d) Definition of how Software Vendor will be measured
    - e) Definition of how Hardware Vendor will be measured
    - f) Other Decision Criteria
    - g) Projections of changes to technology in next X years)
    - h) Additional Considerations (from Extended Process Maps and any other sources of concern)
    - i) Suggested Future System Map
  4. Proposed Project Approach
    - a) Project Management – Organization, Governance
    - b) Major Project Phases and Deliverables
    - c) Project Communications Plan
    - d) Issues Management Process
    - e) Quality Management Process
    - f) Knowledge Coordination Procedure
    - g) Risk Management Procedure
    - h) Scope Management Procedure
    - i) Progress Tracking Procedure
  5. Change Management Approach
  6. External Communication Plan (external to project and external to company)
- Appendices:
1. Process Maps – Existing and Projected
  2. Project Governance (and/or Technology Governance)
  3. Detailed Project Workplan

# *Example Documentation*

## Index of Project Charter

---

1. Executive Summary (including Commitment and Value Proposition)
2. Program Scope
  - a) Business Goals and Strategies
  - b) Alignment of strategies with departmental goals
  - c) Project Deliverables
  - d) Project Phases
3. Project Management Approach
  - a) Issues Management Process
  - b) Quality Management Process
  - c) Knowledge Coordination Procedure
  - d) Risk Management Procedure
  - e) Scope Management Procedure
  - f) Progress Tracking Procedure
4. Change Management Approach

### Appendices:

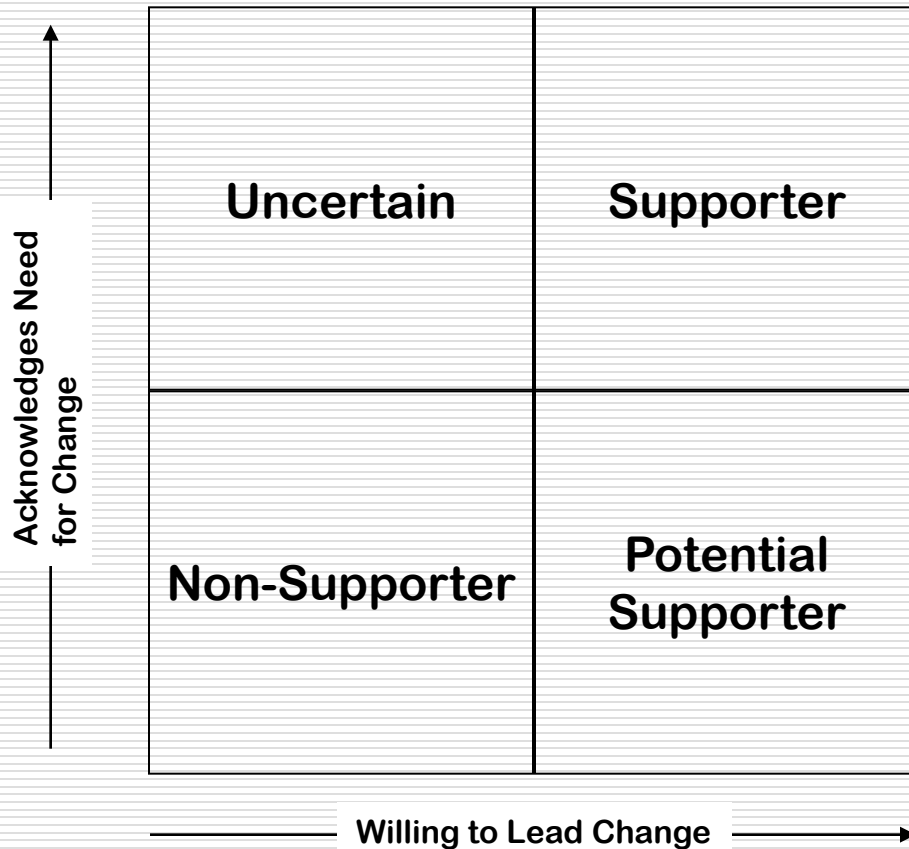
1. Project Assumptions
2. Project Governance (and/or Technology Governance)
3. Operations Model and Enabling Technologies
4. Project Workplan



# Example Documentation

## Stakeholder Map

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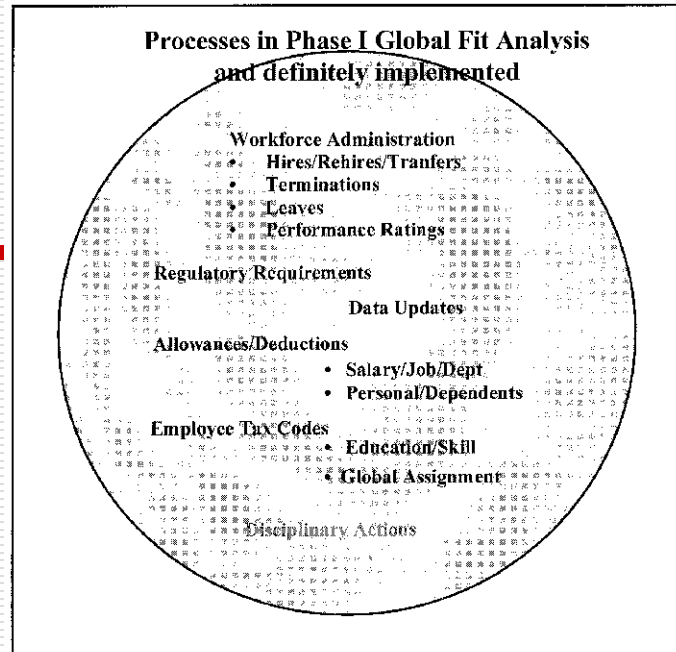
To create your own Stakeholder Map determine what the two key measurements are for your particular company's culture

- Data usually gathered through interviews or a survey tool.
- Stakeholders identified through process mapping

# Example Documentation

---

## Business Process Scope



- Requirements Definition
- RFP
- Project Charter:  
Each should include a clear definition of Business Processes included in Project

Example from completed PeopleSoft implementation

---

## Processes not in the Phase I Global Fit Analysis and not to be implemented



# One way to organize the elements of a Requirements Definition

---

1. Clearly define the need and expectations of the business leaders for the change proposed
  - ❑ How long is this system expected to be in place?
  - ❑ How much support exists for change management and technical implementation?
  - ❑ What are the business process change limitations? (When is inventory being taken? What effect does fiscal year end have on the project? Look thru the future.)
  - ❑ How will project change decisions be made?
2. Map the business processes that will be affected by the change
3. Map the stakeholders in those business processes
4. Map the processes that touch the business processes that will be affected by the change
  - ❑ General Ledger would be affected by a new Accounts Receivable system
  - ❑ Sales will be affected by a new inventory control system
  - ❑ Manufacturing will be affected by a new supply chain management system

## *Documentation*

- **Project Charter**
  
- **Process Maps**
  
- **Org Charts & Stakeholder Maps**
  
- **Extended Process Maps**
  
- **Decision Trees**

# One way to organize the elements of a Requirements Definition (con't)

5. Define the decision points and how the information is delivered for each business process
6. Compare the software processes with the current business processes
  - ❑ Which fits the business objectives better?
  - ❑ Can the software process be effectively utilized without customization?
  - ❑ Is there another software that is closer to an ideal business process for your company?
  - ❑ Is there an existing add-on that will help? Do the two work together well?
7. Present and discuss findings with the stakeholders for a consensus decision.
8. Repeat until consensus on general requirements is achieved.

## *Documentation*

- **Decision Trees (EDM)**
- **Process Maps**
- **System Docs**
- **Application Maps**