Five Things You Must Know About Requirements Planning

A deep dive into requirements planning

Presented in association with:

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What are we going to Talk About?

- Leveraging requirements planning as a value-add activity

- Building & keeping stakeholder commitment

- Talk about INPUTS and ACTION (versus) templates

- Positive actions: Steps that can be taken to effect outcome

About IAG:

14 Years of living requirements excellence:

- Completed over 1,200 requirements projects

- Worked with over 300 of the Fortune 500 companies in the last 14 years

- Trains over 1,200 business analysts annually

- Somewhat in excess of 700 clients using our methods

- 50 staff members all 100% focused on excellence in business requirements

- Annually invested 10% of our revenue in developing our methods, processes and techniques to assure that these are harmonized and industry best practices

Learning Objectives

Illustrate the pitfalls of traditional approaches to Requirements Planning

Deliver guidelines for making Requirements Planning a value-add activity

Know what material must be present in a high quality requirements planning document

Do you see this at your organization?

1. Requirements as a black hole in the Gantt chart

2. Project managers unable to report progress on the requirements effort. Not being able to answer "How do we know we're done?"

3. Business Analysts going to the well of subject matter expertise repeatedly without an end in sight

4. Failing to get the right stakeholders involved at the right time

5. Business Analysts not working on the same page in the same project team

The Requirements Management Plan
more than a babok – pmbok integration

Changes Introduced in 2008 to PMBOK ® - Fourth Edition

Plan Scope process has been replaced with *Collect Requirements*

5.0 Project Scope Management

5.1 Collect Requirements

5.2 Define Scope
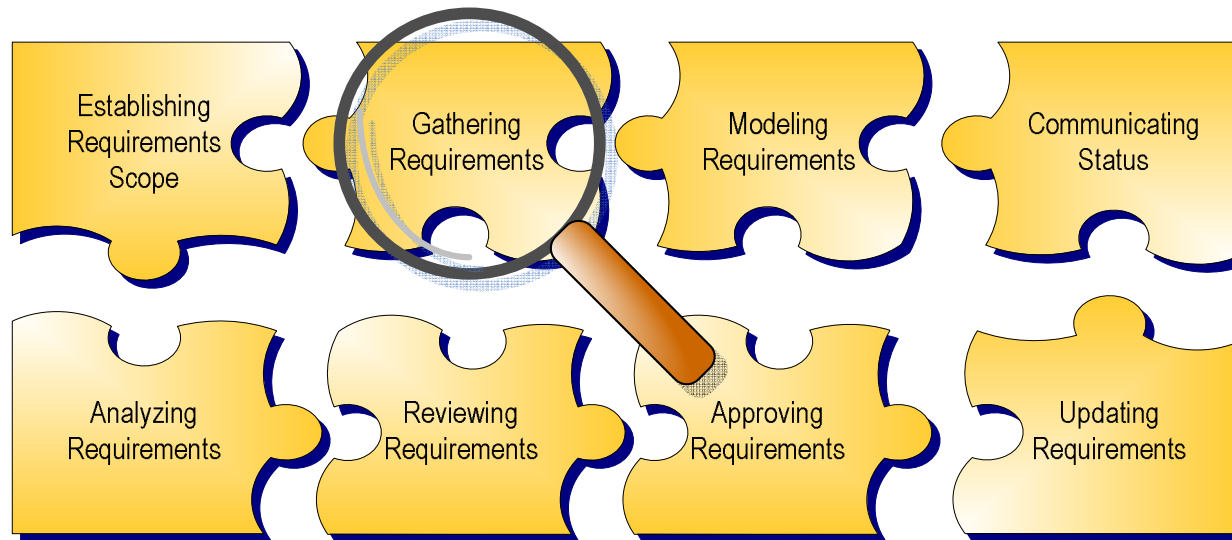
5.5 Control Scope

5.3 Create WBS

5.4 Verify Scope
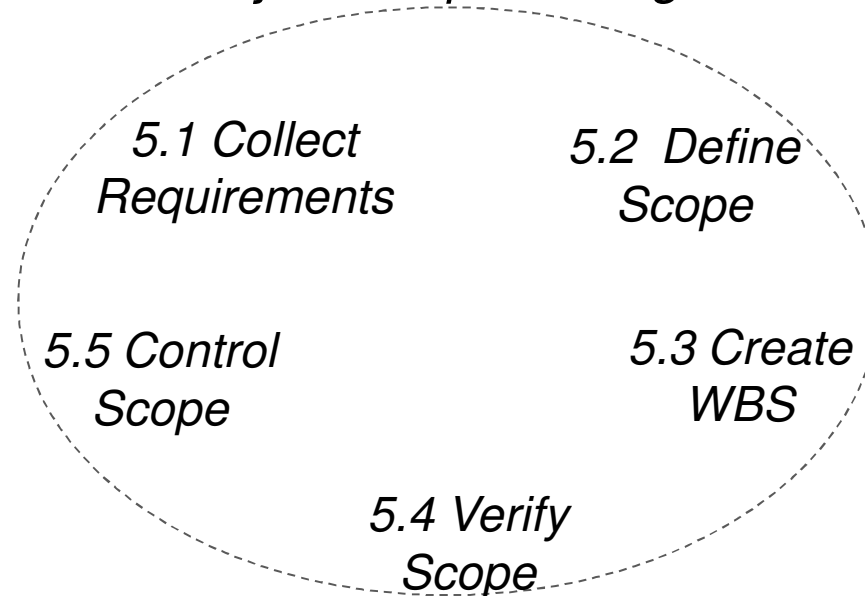
New work product incorporated called "Requirements Management Plan"
Work Breakdown structure (WBS)

What Pitfalls can occur when planning requirements?
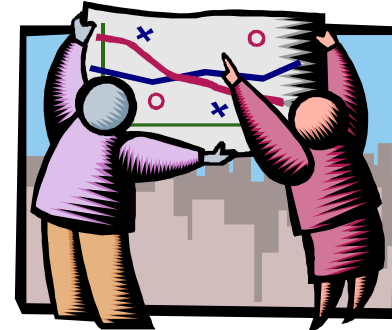
BIG Mistake #1
Thinking Simply Requirements Gathering

*Requirements gathering is only **one** piece of the end-to-end process puzzle.*

BIG Mistake #2
Thinking only Schedule

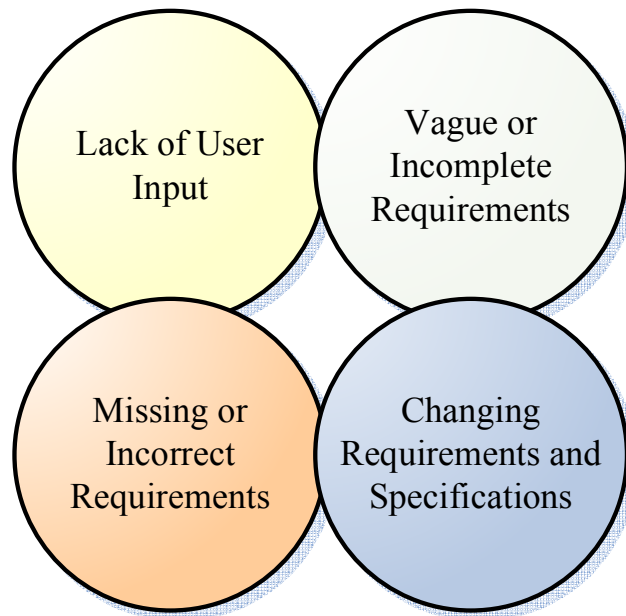**More than a schedule**

Think Strategy

Think Results

BIG Mistake #3
Not Thinking About Risk Management

Why do Projects Fail?

Lack of User Input

Vague or Incomplete Requirements

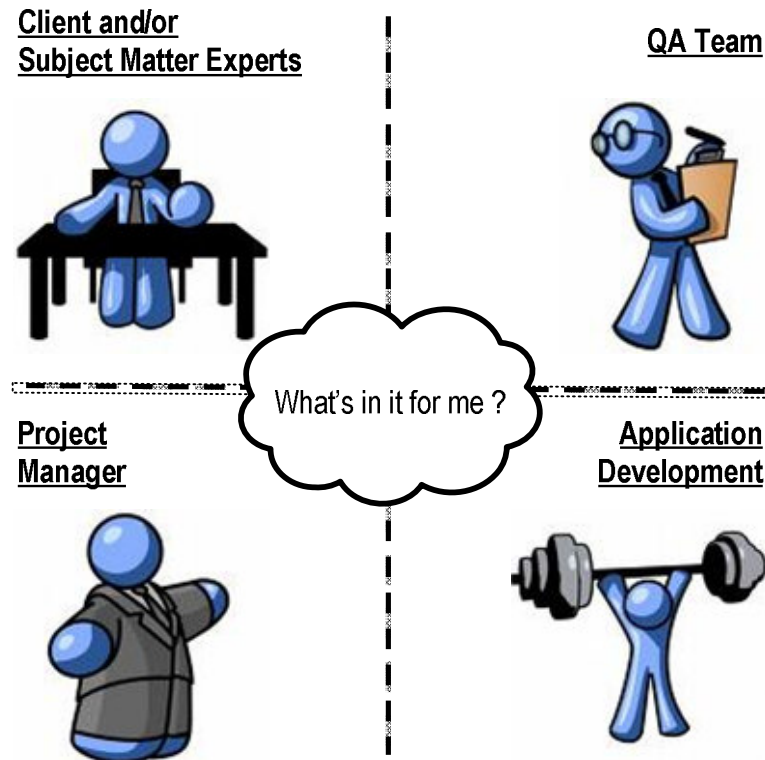Missing or Incorrect Requirements

Changing Requirements and Specifications

Risk Mitigation

How well do your Requirement Management Plans address common project failure risks associated to requirements?

How can I use Requirements Planning to add value to the project?

Key Meta Principle
Think Value-Add from a Stakeholder View

Client and/or
Subject Matter Experts

QA Team

What's in it for me ?

Project
Manager

Application
Development

Be prepared to explain to each stakeholder in requirements planning what good process for requirements is, and why this is a benefit to them.

Value-Add Guideline #1
Set and Manage Stakeholder Expectations

*Use requirements planning to set expectations **directly**. Use the process and work product to let stakeholders know:*

What   ➡   Expected contribution

When   ➡   Timing

Where   ➡   Location

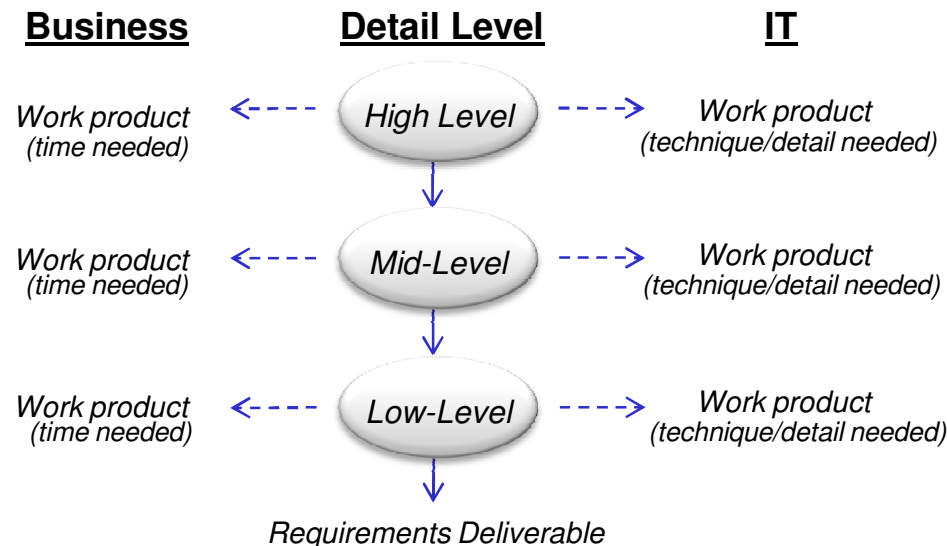How   ➡   Type of engagement

Why   ➡   Rationale

*Use requirements planning to set expectations **indirectly***

Value-Add Guideline #2
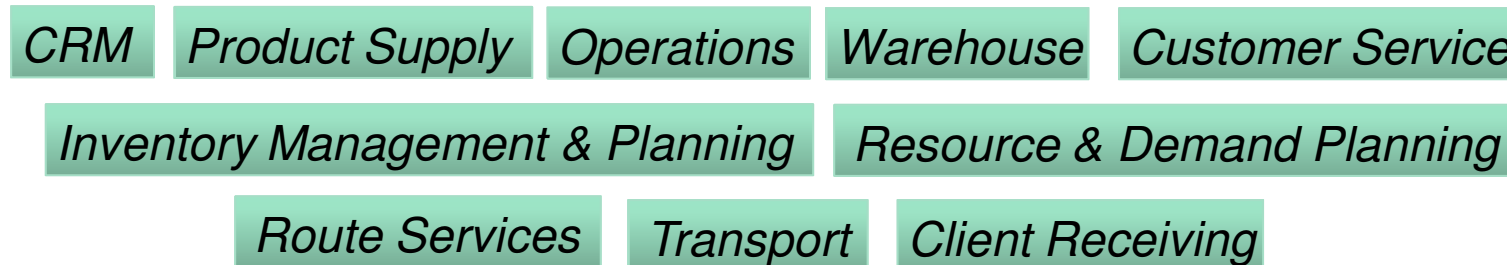## Use Requirements Planning to confirm Resource Estimates

A   BASELINE: Pick a common unit of work your company understands (use case, user story, event)

B   DETERMINE estimate assumptions

1. Total scope of analysis – how many of that unit of work exist?

2. How long, on average, to analyze each element in the scope?

C   PLAN your iterations and hand-off point (entity and detail level):

Business	**Detail Level**	**IT**
Work product *(time needed)*	High Level	Work product *(technique/detail needed)*
Work product *(time needed)*	Mid-Level	Work product *(technique/detail needed)*
Work product *(time needed)*	Low-Level	Work product *(technique/detail needed)*

Requirements Deliverable

Value-Add Guideline #3
Plan to Communicate Progress, Plan to communicate with Transparency

Supply-Chain Systems

| CRM | Product Supply | Operations | Warehouse | Customer Service |

| Inventory Management & Planning | Resource & Demand Planning |

| Route Services | Transport | Client Receiving |

- Trip editing
- Driver payroll
- Regional scheduling
- Carton optimization
- Carrier optimization

Unique stakeholders/actors
Activities always happen

1. Fidelity creates manageability
2. Elements have stakeholders that want to participate
3. Plan has credibility
4. Plan is MEASURABLE for project managers & executive
5. Closed loop for process improvement

Value-Add Guideline #4
coordinating business analysis effort

Communicate what is needed for analysis in these 5 areas:

Focus: process level, business-activity level, task/function level

Style: formal/semi-formal

Detail: High/Medium/Low Level (comprehensiveness of use case)

Visibility: Black versus white box (degree to which internal behavior
                of system and calculations/algorithms are defined)

Type: Business versus System/Design

Communicate the GOAL of analysis

Communicate specialized techniques or tool standards that must be used

"Set Team Strategy"
"Set Work Division"

Value-Add Guideline #5
Think Lessons Learned

Use it as a tool to <u>apply</u> lessons learned

<u>Last time</u>	<u>This time</u>
Narrative documents	Documents with models
No models	
Eliciting only using interviews	Mix of elicitation techniques
	Peer reviews

Use PLANNING as a tool to <u>capture</u> lessons learned

What material needs to be in a high quality requirements planning document?

High-Quality requirements plan Ingredients

1. ## Project Resources

   ▪ Describe and document stakeholders and participants in the requirements process

   ▪ Include respective roles and responsibilities for each participant

2. ## Strategy for Each Activity

   • Determine the choice (best approach) for every stage of the requirements delivery process where different techniques can be applied

   • Don't forget tool usage !

3. ## Communications Approach

   • Describe and document how ongoing communication will be handled with business, technology partners, and project management

High-Quality requirements plan Ingredients

4.   Work Products

- Describe and document what artifacts will be produced by the requirements delivery process

- Consider the production of work products that will augment a specifications document

5.   Work Plan

- Describe and document a detailed schedule using a work breakdown structure (WBS)

6.   Work Division Strategy

- Describe and document approach to distribute and coordinate work effort when more than a single Business Analyst is assigned to a project

Example Structure of a Planning Document (IAG Engagement)

Closing Thoughts

- Think value-add when you think of requirements planning

- It's a process, not a document

- Use requirements planning to set you apart from the pack

- Track results against planning and tune how you plan the requirements effort

Learning Objectives

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IAG Consulting
How do you engage us?

We are solely focused on business and software requirements discovery and management

Core Competency: *Elicitation*

A deliverable from IAG is:
   Clear, Accurate and Complete

Work with clients in 4 modes:

- Requirements Discovery and Management
- Analyst Professional Development
- Best Practices Implementation
- Turn-key Center of Excellence

PMI REP: 2858

IAG Consulting

Category 3

Course #: IAG809

Thanks

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