Get Your Project Off to a Good Start

Solicit, record, monitor and control requirements
The Project Management Institute

- **International Organization**
  - Over 300,000 members world-wide
  - Presence in 69 countries
  - Over 75 Communities of Interest
  - Offer several recognized credentials

- **The Long Island Chapter**
  - Initiated in 1999
  - Chartered in 2000
  - Over 850 members
  - Mission:
    - To advance our Long Island area project management practitioners' skills, by providing a forum for networking, mentoring, training and lessons learned in day-to-day project management activities.
The Foundation

Definitions
- Requirement
- Requirements Management
- Stakeholders

Tools and Techniques
- Roles & Responsibilities
  - Understanding Stakeholders
- Requirements Collection
  - JAD, QFD

Outputs
- Requirements Traceability Matrix
What is a Requirement

- A documented “need” of what a particular product or service should be or perform.
  The features and functions.
  - Identifies necessary attributes, capabilities, characteristics or qualities of a product needed for it to have value and utility for a user
  - Sets of requirements are used as inputs for the design stages of product development
What is Requirements Management?

- The process of documenting, analyzing, tracing, prioritizing and agreeing on requirements and then, controlling change and communicating to relevant stakeholders.
  - A continuous process throughout a project.
Who are Stakeholders?

- Project stakeholders are those entities within or outside an organization which:
  - Have a vested interest in the successful completion of a project.
  - May have a positive or negative influence in the project completion.
Tools to Manage & Gather Requirements

- Stakeholder Register
- Responsibility Assignment Matrix (RAM)
- Requirements Collection
  - Interviews
  - Focus Groups
  - Facilitated Workshops
  - Creativity Techniques
- Managing Requirements
  - Requirements Management Plan
  - Requirements Traceability Matrix
Stakeholder Analysis

The process of systematically gathering and analyzing quantitative and qualitative information to determine interests, influence, and expectations of stakeholders, such as:
- Relevance to their functional area of responsibility
- Value rating of relative importance related to cost vs. schedule
- Tolerance for Risk
- Explicit Acceptance Criteria

A Stakeholder register is used
- As a guide to understands how to interact
- To “Balance” conflicting needs
- To identify what to communicate to each individual stakeholder
Roles and Responsibilities

**Responsibility Assignment Matrix (RAM)**

- Shows type of responsibility for groups and/or individuals.
- Graphically links the work to be done to those doing it.

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<th>Y</th>
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**P** = Participant  
**A** = Accountable  
**R** = Review  
**S** = Sign-Off
Requirements Collection Methods

- Cyclical:
  - Proto-Typing
  - Spiral
- Waterfall
- Agile
Soliciting Requirements

- Interviews
- Focus groups
- Facilitated workshops where Stakeholders attend sessions to identify cross-functional requirements
  - Joint Development Sessions (JAD)
  - Quality Function Deployment – aka The Voice of the Customer
Joint Application Development

- JAD methodology involves the client or end user in the design and development of an application
- Employs a succession of collaborative workshops called JAD sessions
Quality Function Deployment

- Quality must be “designed into” the product, not “inspected in”
- Quality is defined as meeting customer needs and providing superior value
Other Requirements Solicitation Techniques (Elicitation)

- Group creativity techniques
- Questionnaires and Surveys
- Observations
- Prototypes
The Requirements Plan

- Documents the process of how requirements will be analyzed, documented and managed throughout the project:
  - How requirements will be planned, tracked and reported
  - How requirements will be initiated
  - How requirements will be authorized
  - Serves as a guide through the project
  - Serves as a historical record for leverage-ability / reuse
The Agile Approach

- Phases of an Agile Methodology
  - Envision – Collaborates to outline the overall vision for the project
  - Speculate – Conjectures on possible methods of creating the product that was envisioned
  - Explore – Builds the first iteration of the product
  - Adapt – Walk through the outcome of the iteration to determine changes – incorporate lessons learned
  - Close – Delivers the first product and reviews the overall product
Agile Development Requirements Collection

Tools used to harvest and record stakeholder needs:

- User Story
  - Card – Feature Statement
  - Conversation – Elaboration of needs
  - Confirmation – Test cases
- Task List – Backlog of User Stories
- Story points
- Velocity
- Burn-down
Skills You’ll Need

- Progressive elaboration
  - The continuous addition of extra material, illustration or clarifying detail that refines and makes initial scope statements more granular

- Active Listening
  - Requires the listener to understand, interpret and evaluate what is heard
The Requirements Matrix brings it all together. It:

- Sevres as a means to track requirements from inception, creation and through customer acceptance
- Links requirements to their origin and traces them throughout the project life cycle
- Helps ensure that each requirement adds business value
- Used to craft Test Scripts as validation of requirement satisfaction
Acceptance

- Formalized acceptance of the project scope by the stakeholders is key

- Facilitated by clear and concise identification of the project’s success factors. The project is over when:
  - External customer takes procession
  - Owner takes occupancy
  - Process turned over to operations / maintenance
Panel Discussion

- Ms. Gerri Stepanek – VP Professional Development – Government
- Mr. Jeffrey Stern – Director of Communications - IT
- Mr. Tom Caprariello – Director Special Events - Finance
- Ms. Carol Reynolds – Panel Moderator
Additional Information

For additional information visit:

www.pmi.org or

for the Long Island Chapter, visit:

www.pmilic.org