



Requirements Management Beyond Training: Looking at Organizational Capabilities

Most business analysis training focuses on the business analyst role and the capabilities associated with performing that role. But focusing on training assumes that the organization will support this role with;

- standard deliverables,
- recommended techniques that work within the organization's culture,
- processes that manage expectations around deliverable handoffs,
- flexibility depending on the type of project and project risks,
- tools for collaborative sharing and archiving,
- measures for quality and
- prioritization procedures.

Any gap between improved individual capabilities and organizational capabilities can hinder the performance of the organization as a whole. To close the gap, training can be tailored to the organizational support that is currently in place (otherwise the focus is on industry standards) or training can be supplemented with activities to improve the organizational capabilities to provide the needed support. Change takes time, and every organization's starting point is different. If you are at step one today, it will require iterative roll outs of deliverables, processes, techniques and tools to get you to step three. Let's consider the following approaches depending on your current state.

1. No project, system or requirement processes in place

Before a requirements management process is addressed there needs to be support from the project management processes. We can help you identify and develop the key project deliverables and system deliverables that impact the requirements management processes. Below are some sample project and system deliverables impacting the requirements management process:

- Project Charter - containing the scope statement, stakeholders, context diagram, assumptions and constraints.
- Project Plan – upfront involvement and considerations of requirements management in the estimating process, identification of deliverables and work effort.
- Project Risk Management Plan – ensuring requirement risks are addressed.
- Project and Product Quality Plan – upfront involvement in defining defect measures for product quality, identifying the appropriate level of detail necessary for requirement management documentation, and ensuring plans for traceability of requirements to design/development solutions.
- Test Plan – determination of what is acceptable deliverables as input to the testing processes and traceability from the requirement to the test case.

If your team cannot influence these processes, then the requirements management plan identified in the following step will need to be expanded to include many of these components. At this step you may introduce just a few key requirement deliverables to begin the process of change. This may



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impact your business organization, so building buy-in early is critical for acceptance to future changes.

2. Some project and system processes are in place, but no (or limited few) requirement management deliverables

A quick assessment of current deliverables helps determine how to best integrate the requirement management processes into existing processes.

We can help you build this plan at an individual project level template if standard organizational processes are not consistent or more flexibility by project is required. Sample contents of the requirements management plan ¹ at the project level:

- Requirements Management Road Map – a graphic showing the touch-points with key deliverables in the project plan.
- Purpose by Type of Project – you may have more than one template depending on the project and processes used.
- Project Context - Relevant project content to help in orientation (from Project Charter).
- Requirements Approach to:
 - Elicitation – Techniques to gather requirements that are relevant for this type of project (facilitated workshop, interviews, document review with SME follow-up, etc).
 - Documentation – Which levels of requirements are necessary to document for this project (Business, User and Solution). Requirement attributes to be captured (prioritization, business impact, volatility, etc.), how requirements will be organized and where they will be documented.
 - Validation and Communication - Validation methods to be used, who will validate and how they will get validated.
 - Traceability – The level of traceability required for this project and who performs the traceability checks.
 - Change Control – How changes to requirements will be managed.
- Appendix with requirement management deliverable templates required for this project with real project examples of each type of requirement to be captured and a glossary of business terms commonly used in the requirements.

Again, iterations of deliverable additions and flexibility by type of project are key to change acceptance.

3. Some project and system process in place, some requirements management deliverables

A quick assessment of current deliverables can help determine the extent of effort in building the requirements management plan. At this point we can help you get ready for standardization at the organizational level. Sample contents of the requirements management plan at an organizational level:



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- Requirement Key Principles for the Organization – Provides strategic guidance as to the value of requirements management within the organization.
- Requirements Management Road Map – similar graphic as at the project level, but shows touch-points with organizational standardized processes.
- Project Type Decision Tree – provides guidance by project type as to which templates, techniques and tools are relevant.
- Decision Trees for Requirement Documentation and Management Reporting - determining requirement level, depth of detail and which attributes to capture.
- Checklists for Requirement Quality; Structure, Terminology, Review Processes.
- Gathering Technique Suggestions Depending on Project Characteristics.
- Tools and Tool Features to Use for Documentation, Collaboration, Archiving and traceability.
- Procedures for: managing change, mitigating risk, managing requirement conflicts
- Location and Access to Requirement Management Deliverables Templates and Examples.
- Additional Considerations;
 - communicating requirements in a distributed team environment,
 - applying requirements management in an iterative, RUP or Agile environment,
 - communicating requirements to vendors or to offshore resources
 - integrating requirements management processes when external processes are used (such as a vendor's).
- Appendix;
 - List of Techniques,
 - Tools,
 - Location and Access to Deliverable Templates and Examples.

Having an organization that can support the business analyst role and the requirements management process will greatly improve project success. There is a wealth of research to substantiate this in the industry....Lighthouse Consulting Partners can be there to help you make it happen.

¹The requirements management plan establishes an orderly method by which the goals of requirements management will be achieved. It communicates essential information to project and organizational participants and helps newcomers get up to speed. Consequently, the plan is a living document, which needs to be updated and supplemented throughout its life.

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