How to gather information

There are two types of requirements that we usually see in digital products and services.

Functional requirements relate to a product's functionality: its capabilities, usability, features, and operations as they relate to the intended purpose of the product. Often, functional requirements are clearly referenced as such in Functional Requirements Documentation (FRD). an FRD provides a more in-depth elaboration of these requirements, which are gathered as soon as a project kicks off and up until a project begins production.

Non-functional requirements encompass anything not related to a product's functionality: its performance, stability, security, and technical specifications, to name just a few types of non-functional requirements in the digital industry. Typically these requirements uses Business Requirements Documentation (BRD)

While requirements gathering should start as soon as an engagement starts and throughout your entire project life cycle, the bulk of your requirements documentation should land after discovery (content strategy, site mapping, wireframes, designs) and before development.

Steps on how to gather requirements:

1. Take Notes

In every meeting you're in—whether that be internal with your project team or external with your client—always take notes. Before going into your meeting, prepare your notes document to reflect your agenda so organizing the action items and points will be easier. After any meeting, schedule 15-30 minutes for yourself to review your notes. Send your notes to your internal project team. Once the team has given you their blessing, send your notes to your client. Finally, leverage your notes as reference for creating tasks (e.g. JIRA tasks) out of each action item. Save your notes in a shared space.

2. Go Over The Creative Requirements

Provide creative requirements whenever possible. If your timeline and budget allows, creative guidance is invaluable for developers.

3. Make Annotations

Once you've handed off the deliverables from creative to development, it's time to annotate the elements. Only annotate once they are absolutely final. Once your creative is annotated, load the images into your documentation. Do this in an order that makes most sense. If a user journey exists, it's most beneficial to leverage this as guidance for the order in which you organize the annotated designs. If you do not have a user journey to leverage, then organize your annotate page designs in a way that makes sense for your client.

4. Write The Requirements Document

We can organize requirements documentation into four parts:

Annotation: Includes the numbers from your annotated design. If your page design has 8 elements on it, you will have 8 annotations, and your annotation column will have 8 row
Element: Includes element titles, as they relate to each annotation
Functional requirement: Includes a definition (the requirements, spelled out) for each element
Admin/CMS functionality: Define any administrative and/or CMS functionality, as is related to the corresponding element

5. Hold an Internal Review

In this part of the requirements gathering process, you schedule another internal meeting with your project team to review your requirements documentation all together. This is a final internal checks and balances to ensure your understanding of the implementation. This is imperative.

6. Build Out Tasks

Provide the PDF version of the requirements documentation to your development team. Ideally, your developers or development lead will perform the task buildout for the build. At this point, you compare that projection to the timeline that has been communicated to your client previously and manage accordingly if/as needed.

7. Hold an External Review

At this point, you have:
. Written your requirements documentation
. Confirmed the documentation with your internal project team
. Built out development tasks, based on the requirements documentation
. Confirmed the projected timeline through QA, based on the requirements documentation

It's time to present the requirements documentation to your client. Provide this as a PDF to ensure no edits are made. Include a message immediately requesting a meeting to walk through this documentation together. Educate your client. Once the client has confirmed their understanding of the requirements documentation (whether or not they decided to do a walk through with you), it's finally time to receive formal approval.

6 Important Requirements Gathering Techniques

Start Right Away

Make Use of Template

Teamwork Makes the Dream Work

Record Requirements and also learn them

Keep Your Client in The loop

Assume Your Client Knows Nothing