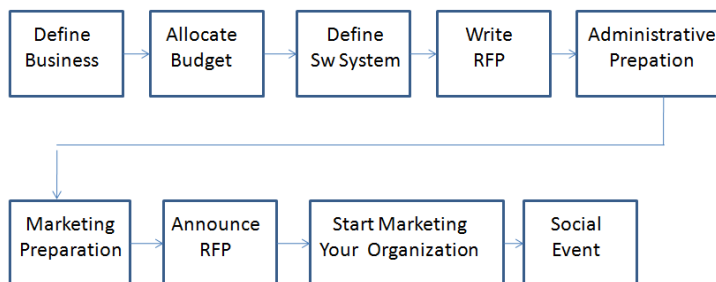# Assignment 2
Define Business and Issue Request for Proposal

Deadline: See separate date specification

Roles involved

- Process Owner: Mrs. Mira Kajko-Mattsson
- Process Executors
    - External Consultant: Mr. Bengt Koren
    - No-fee Financial Advisor: Mr. Bengt Koren
    - Practitioners: IV 1300 Students

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│  Define  │──▶│ Allocate │──▶│  Define  │──▶│  Write   │──▶│ Administrative│
│ Business │   │  Budget  │   │Sw System │   │   RFP    │   │   Prepation   │
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│Marketing │──▶│ Announce │──▶│ Start Marketing│──▶│  Social  │
│Preparation│  │   RFP    │   │Your Organization│  │  Event   │
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   Before you start reading this assignement, be aware of the fact that reality starts now and you cannot escape it. Before taking any step, you must start collecting effort using the template in Appendix F**. The clock starts ticking at the moment you start reading this document.**

Process

   In this phase, you are mainly going to play the role of both a supplier and a customer. Therefore, you will conduct activities that are relevant for these two main roles. As a customer, you will define your business, define a system supporting it and write a **R**equest **F**or **P**roposal (RFP). As a supplier, you have to prepare for the future. Therefore, you will have to conduct tasks aiding you in meeting future software development challenges. During the second BCPM phase, you will do the following:

1. *Define Business*: You, as a customer and supplier, will have to define and evaluate your business, create a business process, business strategies, and business goals. The best way to describe business is that you decide to be IT developer both as a supplier and customer. Even if your profession is to develop software, you may still be an acquirer of some software products developed by other IT companies. When doing it, follow the guidelnes in Appendix A.
2. *Budget Allocation*: You will have to have a budget so that you may evaluate your efficiency and productivity. Define your budget by following guidelines in Appendix B.

3. *Define Software System.* Now, when you, as a customer, know your business, you are mature for defining the system that will support your business. For some reason, you cannot develop it on your own. Therefore, you will have to outsource its development. When doing it, follow the guidelines in Appendix C.
4. *Write RFP:* After, you have defined the system, you, as a customer, must write an *RFP*. When doing it, follow the template in Appendix F.
5. *Administrative Preparations*: Even if you have made some administrative preparations, you, as a supplier, are still not ready for your future software development work. You do not have any processes and plans in place. Please follow the guidelines in Appendix D for finding out what needs to be done.
6. *Marketing Preparations*: You, as a supplier organization, wishes to be attractive to your customers. Please follow the guidelines in Appendix H.
7. *Announcing RFP*: After you, as a customer, have created an RFP and prepared yourself for future software development challenge, you announce the RFP to the world. Before announcing the RFP, make sure that you keep everyting confidential. The external consultant will provide you with instructions for how to annouce your RFP.
8. *Start marketing your company*: The minute after you have announced your RFP to the world, you change hats and become a suppler, at least for this task. Now, it is a matter of life and death to win a contract. Use your marketing tricks (posters or other means) to make your company visible to the world. Here, you market your organization and motivate why you are the best supplier in the world.
9. *Social event*: Companies do not always have social events. Usually, they have them when major steps are achieved. Therefore, issuing an RFP may or may not be celebrated in the industry. In your case, it should be celebrated. You, as a customer, have done an enormous job. So, celebrate that you have succeeded to issue an RFP.

Deliverables

The assignement will result with the following deliverables:

- *Business Plan*
- *Description of a system*
- *Request for Proposal*
- *The plans as defined for each role*
- *Changes made to the roles, if relevant.*
- *All the minutes of the meetings.*
- *Effort required for each of the second phase in the BCPM.* The effort should be provided for each task and individual practitioner/student and it should compile the results for the whole company.
- *The company's expenditures so far to be delivered by Financial Mananger.*
- *Experience gained during this phase.* Here, you list problems, good sides of the BCPM process phase, important decisions made and motivations behind the decisions.

Appendix A Defining Business

The term "business" stands for a company or an enterprise whose main purpose is to realize some business mission. Business may be for-profit or non-profit. On this course, you are a for-profit company. Your main goal is to earn money by providing goods or services to your customers. When running business, you have to create a business plan.

To write a plan is very important. The companies who decide on not to write a business plan should consider an old wise saying "*fail to plan can mean plan to* fail". For this reason, irrespective of its size and age, it is important that each company makes a business plan. Such a plan serves the following four critical functions:

- It aids management or entrepreneur to focus on and clarify their business and prospects.
- It provides a basis for planning business in the future.
- It serves as a platform for discussing/negotiating with various stakeholders, such as contractors, banks, investors, customers, etc. For instance, if you are seeking external financial support, the plan functions as a sales tool.
- It offers a benchmark against which the actual performance will be measured and reviewed.

Your plan identifies the ultimate goals of your business. By planning, you show that you have carefully considered your business and its development and by realizing the plan, you have proved that you have achieved your ultimate goals. Your business should be realistic and it should carefully describe your long-term business expectations. You will use it for evaluating your business performance in order to find out whether you have succeeded or failed. However, you should keep in mind that a good plan will not always guarantee success. But, lack of it will definitely guarantee failure.

It is very difficult to create a good business plan. The process of business planning is going to be a very painful activity for you. It is also a very painful activity for the experienced business managers and entrepreneurs. However, it is a critical activity and an important exercise. The act of planning forces you to understand what your company wishes to achieve, in what way and when. It also helps you to detect hidden business opportunities. Actually, the process of creating a business plan may be even more valuable and useful than the business plan itself. It forces you to think, discuss, research on and analyze your business. It is a clear evidence that you know your business and its future directions. Therefore, you may better approach your customers, suppliers, products, contractors and competitors.

Your business plan should consist of the following items:

- *General business description*: Provide a general description of your overall business. Here, you describe the location of the company, number of employees, and identify the market sector in which your company is currently engaged. The sectors to be specified may be (1) manufacturing, (2) crafts, (3) retail distribution, (4) IT, (5) services, (6) non-for-profit, (7) other that you might feel is missing.
- *Detailed business description*: Here, you provide a detailed description of your business mision and business process.
    - *Business mission*: Description of what your overall business is really doing and what it is going to do in the future. What business do you perform and what does/will make your business competitive?
    - *Business process*: Provide a detailed description of your business process. Specify in greater detail what does your business do, what roles are involved, what do these roles do and when, what is the flow of information. You may use advise from http://publib.boulder.ibm.com/infocenter/dmndhelp/v6rxmx/index.jsp?topic=/com.ibm.wbit.h

elp.bpel.ui.doc/concepts/cunder.html or other websites to define your business process. The process should be described in text and supported by a graph. There are no requriements on the modelling tool to be used to draw the business model. You may create simple graphs. It is important however, that these graphs are easy to understand.

Figure 1. Example of a business model taken from
http://publib.boulder.ibm.com/infocenter/dmndhelp/v6rxmx/index.jsp?topic=/com.ibm.wbit.help.bpel.ui.doc/concepts/cunder.html

- *Current business evaluation using SWOT*: Evaluate your current business situation and list *SWOTs* (<u>s</u>trenghts, <u>w</u>eaknesses, <u>o</u>pportunities, and <u>t</u>hreats (risks)). Identify at least one item for each swot. However, you may have many items for each swot. Strenght and weaknesses apply to company's characterics. They mainly deal with the matters concering organizational resources, expertise, finances, productivity, organizational structure, capacity, efficiency, and processes. An example of a strenght might be the fact that the organization has a well-defined software development process. A weakness might be that the company does not have any skilled developers at the moment. Regarding the opportunities and threats (risks), they may be both internal and external. An example of an opportunity might be that if you change to another business segment or another type of a product, you might become more competitive, and thereby, make more profit. However, such a change may also lead to threats (risks) such as that you might lose business because you do not possess enough expertise to develop another type of a product. Other threats might be purely uncontrolled such as, for instance, earthquakes.
- *Business vision*: Description of what your business is going to look like in five years. Write in future tense.
- *Corporate values*: Describe values that govern the operation of your business and its relationship with your customers.

- *Business objectives*: Describe the achievements and progress to be achieved within the next five years. Examples of achievements and progress might be:
  - o *Business prospect*: Rate your business according to the following: (1) should achieve exceptional growth, (2) should achieve moderate growth, (3) no growth at all, (4) is going to underperform but still stay in business, (5) very poor prospects for survival. Provide a rationale (explanation) behind your rating.
  - o *Market prospect:* Rate your product/service in terms of price, quality or other benefits according to the following: (1) very superior to most competitors, (2) superior to some competitors, (3) in line with competition, (4) inferior to some competitors, (5) very inferior to most competitors, (6) no view on this question. Provide rationale behind your rating.
  - o *Strength of the marketing function:* Describe how strong/effective is the marketing function within your organization according to the following: (1) marketing plays a leading role in the business overall development, (2) marketing is an important part of the sales function, (3) marketing is weak and has very limited role/influence, (4) marketing function does not really exist, (5) no view on this question. I advise you to have some marketing. Otherwise, you make your marketing manager unemployed.
  - o *Competiveness of your business's operations:* Describe your competiveness according to the following: (1) better than most competitors, (2) better than some competitors, (3) in line with competition, (4) worse than some competitors, (5) worse than most competitors, (6) no view on this question.
  - o *Profitability:* Describe how profitable is your business according to the following: (1) very profitable (annual return of above 25%), (2) moderately profitable (annual return in range 10% - 25%), (3) limited profitability (10%), (4) break even, (5) loss making, (6) not-for-profit organization, (7) no view on this question.
- *Define key strategies and plan how to achieve them*: Using SWOT list, define strategies. Strategies are the rules and guidelines that help you achieve your business mission and objectives. Here, you may have to go back to your business mission and vision and revise it. List major strategies covering the following:
  - o *Business strategy*: Business Strategy focuses on how to compete in a particular industrial business. It concerns strategic decisions about the structure of the organization, choice of products, choice of customers and meeting their needs, gaining advantage over competitors, exploiting or creating new opportunities and the like. An example of a business strategy is a decision on whether to move to an adjacent market or whether to extend the customer portfolio. When defining your business strategy, define whether your business is going to follow organic/inorganic growth, diversification wrt business, diversification with respect to customer, diversification with respect to market, or diversification with respect to product type.
  - o *Customer strategy*: Every company should have a clearly articulated strategy on how to value, serve and retain customers. *Customer Strategy* focuses on identifying customer segments and on aligning to these segments by creating sub-strategies for each customer segment. Each sub-strategy focuses on understanding the customers and their needs, and management of the relationships with the customers. The business value is often strongly dependent on the value of the services provided to the customers. When defining your customer strategy describe the following: (1) segments of customers and types of business they are doing, (2) your ways of trying to understand each customer segment and their needs, for instance, via common workshops, meetings, market surveys, etc., and (3) ways of managing customer relationships, for instance, by arranging social events, by having formal meetings every second month, etc..
  - o *Product Strategy:* Product strategy is a marketing plan for a product based on the characteristics of the market, desired positioning of the product within the market, and profit objectives. At the *Business Strategic Level*, one considers whether the product can

successfully deliver business opportunity, its cost in relation to business value, users' technical literacy, and the like. Here, you specify the following: (1) types of products, (2) desired positioning of the product within the market in terms of types of business segments, types of customer segments, customer location and distribution (worldwide, only in Europe), and (3) profit objectives motivating how the product is going to realize your business objectives.

- *Future business evaluation using SWOT:* Using SWOT, evaluate your future business. By looking into the future using the SWOT list may make you review your business plan.
- *Major goals*: Define major goals that are **VERY** achievable in the next five years in terms of sales, customer segments, business segments, products, technologies, employment, and profit. The goals should be quantifiable, consistent with each other and achievable. Example: to achieve sales of 5 million SEK in five years, to increase employment by 25%.

Appendix B Budget Allocation

Each company has a budget which corresponds to a plan comprising both savings and spendings. It is stated in monetary terms, such as, for instance, Swedish krona. Your task is to get a budget allocated by your *No-Fee Financial Advisor*. In order to know how much money you need, you must first provide a forecast of revenues and expenditures. You do it on the basis of your business model. You then evaluate the business plan from the financial perspective. The budget describes all the planned expenses and revenues. It is a basis for deciding on how to save and how to spend. It should cover AT LEAST the following:

	Planned	Actual	Difference
Expenses • Salaries • Office rent • Insurance • Advertising • Telephone • Travels • Social events • Repairs and maintenance • Licenses • Other (you are free to choose)			
Profit • Net sales • Services • Other (you are free to choose)			
Net income			

Appendix C Software System Definition

Now, when you have defined your business and you know what budget you have, you may specify the system that you need for supporting your business. Using various techniques for requirements discovery (see Appendix I), start identifying requirements. At this step, you try to identify the high-level requirements. You do not need to describe them in detail. However, you should make sure that you have specifed the main functionality, the main non-functional requirements, end-users, and a traceability matrix, if necessary.

Each requirement needs to be documented. There are different ways of documenting requirements. At this early stage, we suggest that you document them using the pattern in Figure 2. Regarding the reference, you probably do not have any reference to any detailed specification yet. Therefore, you may leave it empty in the very first step.

- **Description of the requirement:** what
- **Rationale**: why
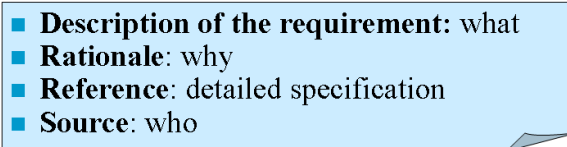- **Reference**: detailed specification
- **Source**: who

Figure 2. Template for recording requirements

After you have specified the requirements, you will have to motivate why the product will improve your business. Here, you must determine the following:

- Price you are willing to pay
- Date when you wish the system to be implemented and delivered to you.
- Constraints that you wish to impose on your suppliers. For instance, the supplier should be located in Kista because (here you motivate your constraint).
- Check that the system to be developed fulfills your business mission. Therefore, you must match it against the business plan.

Appendix D Administrative preparations

To define business and a software system supporting it is not enough. One must be prepared for taking over the system. Even if you are playing the acquirer role at this step, you are going to be a supplier as well. For this reason, you must make sure that you are prepared for running your business. Although you will be supported by *Process Owner* and *External Consultant*, you will have to look at the domain of your processes so that you may take a critical look at them and make suggestions for improving them. For this reason, the following preparations must be made:

1. **Define processes for implementing software systems**

   1.1 Lifecycle process model

   You as a process owner, must create a life-cycle process model. Fortunately, a lot has been given to you. The process model your company is going to follow is ICT Business Cycle Process Model (BCPM). The BCPM is however defined on a very coarse-grained level. So you and your colleagues will have to make it more detailed. Your task will be to (1) first document the overall BCPM, just as it is and (2) assist your colleagues in detailing its specific phases and processes.
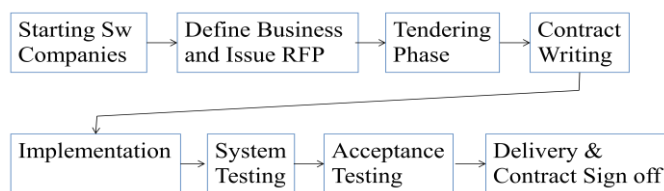
   1.2 Implementaiton

   By implemention, we mean the lifecycle phase during which you implement the already specified and designed components. This is the domain of mainly a project manager and developer.

   Here, as a developer (together with process & quality manager and project manager), you define activities that are necessary for coding software units and for testing them. You also specify the order between the activities. You must also define how you will structure your test cases and assist the testers in defining their overall testing process. This is because you will interact with them while testing the system. Finally, toghether with other roles within your company, such as for instance designers, you will have to determine your strategy, that is, to determine whether you will design and implement the components to be implemented, or whether somebody else will design them and you will only implement them. You will also have to determine whether you will implement and test your own code or whether you are going to only implement and compile code and somebody else will test it. Finally, together with the quality manager, you will have to determine which code will have to undergo formal inspections. Some of the results of this step will have to undergo formal inspections before submitting them to the Advisory Board. This step results in a plan that will be submitted to and decided upon by the Advisory Board (see below). When creating the plan, use the template defined at the end of this Appendix.

Kommenterad [MKM4]: For instance, some activities will have to follow a strict order whereas other activities may be performed in any order.

Kommenterad [MKM5]: Here, I refer to test cases on the developer level. You as a developer write your own code and you are obliged to test it before you send it for integration.

As a project manager, you define how you will manage projects and what information you need for managing them. For this, you need to identify all types of activities that are relevant for your role (see roles in Lecture 2). Based on your responsiblities, you define your process together with the process manager. You will also have to determine what documents will support your activities and create templates for these documents. Example of a template might be a template for collecting project risks. A very important task is to manage people and risks. It is actually the most difficult task. Here, you may have to define a strategy for how to manage people conflicts and how to attend to project risks. If you feel you have too much to do you may delegate the work to the developer or other role.

Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This step results in a plan that will be submitted to and decided upon by the Advisory Board (to be described below). When creating the plan, use the template defined at the end of this Appendix.

1.3 Testing

By testing, we mean the lifecycle phase during which you integrate the already implemented and unit tested components and test them on the integration, system and acceptance testing levels. This is the domain of the testing manager and tester. However, the testing managers should also be involved in determining how developers will test their components.

Regarding the accepted testing, it may change as soon you write a contract with your partner (acquirer or supplier). So, be prepared for it. For instance, you may agree that your organization assists acquirer in acceptance testing. Therefore, you will have to adapt you acceptance testing process to the customer's acceptance testing process. Even the system testing may be changed depending on your partner's constraint. You, as a testing manager supported by other relevant roles, such as for instance process managers and/or quality managers, will define the overall testing strategy. Together with the process manager and testers, you will define the overall testing process and you will assist high level management in various important activities.

When defining your testing process, you define activities that are necessary for testing the whole system. In your process, you must identify components such as testing strategies, test plans, test procedures and test cases. Also, in agreement with the developers and project management, you will define how you will provide feedback on the testing results to the developers, that is, in co-operation with *Configuration Manager*, you must define your problem management process and templates for describing the process.

Finally, you have to create a plan for how your testing process will be managed and how its effectiveness will be assessed. Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This step results in a plan that will be submitted to and decided upon by the Advisory Board (to be described below). When creating the plan, use the template defined at the end of this Appendix.

1.4 Design

When defining the design process, you, as an architect and designer, will have to define activities necessary for creating architecture and design. You will also have to specify how the architecture and design is going to be documented and you will have to create templates for recording information about architecture and design. Finally, you have to create a plan for how your design process will be managed and how changes to the architecture will be managed. Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This step results in a plan that will be submitted to and decided upon by the

Advisory Board (tbd below). When creating the plan, use the template defined at the end of this Appendix.

2. **Define processes suppoING the implementation**

By process support, we mean the processes that support your development work. On this course, we will have the following processes:

2.1 Configuration Management

By configuration management, we mean a process of managing all the changes to the software system. You must define the configuration management process, be able to identify SCIs (software configuration items) and their granularity. You should also determine how the versions of your SCIs are going to be managed and recorded. Just because SCIs may be anything (requrement, design document, etc.), you will have to interact with all the roles in order to determine how their respective components will be managed.

You have to define how each change is going to be reported and managed. Regarding problem management, you will assist testers and developers in defining a problem management process.   Finally, you have to create a plan for how your configuration management process will be defined and managed. You may also have to define strategies. Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This step results in a plan that will be submitted to and decided upon by the Advisory Board (tbd below). When creating the plan, use the template defined at the end of this Appendix.

2.2 Documentation Management

By documentation management, we mean a process for managing all the documents. These documents may deal with the system or process. You, as a documentation manager, must define the layout of the organizational documents and define how all the documents will be identified and recorded so that they do not get lost.

First, you must have a common layout for all the documents within the organization. Such a layout should include information on Document type, Document Id, Document title, Document Owner, Created by (original author), Changed by (may be another author), Date when it was written/changed, Version ID, Document Status (under construction, under review, ready). Such a document should also have company name and logo.

Second, you must identify documents that are not amenable to the above-mentioned layout. This applies to documents recording decisions, contracts, and minutes of the meetings and other.

Third, together with the quality and process management, you will have to agree on what should be documented.

Fourth, you as a documentation manager together with the quality and process manager must check all the templates as suggested by other roles within your organization and make sure that they are consistent with your templates. For instance, you as a documentation manager, have agreed that everybody will record effort for each task in man-hours. Effort is important because you want to evaluate the efficiency of your process. However, the templates you get from other roles do not have effort. Therefore, you must check whether your expectations are met in all the templates defined within your organization.

Fifth, you should define an overall documentation process. Such a process should be adapted to each individual process within your company. For instance, you go through the

testing process and together with the testing manager and process manager agree upon what should be documented and why.

Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. However, just because you will be involved in aiding other roles in determining what to document in their respective processes and why, you may participate in the inspections that cover, for instance, a particular process where your role would be to evaluate the process from the documentation perspective. This step results in a plan that will be submitted to and decided upon by the Advisory Board (see below). When creating the plan, use the template defined at the end of this Appendix.

2.3. Quality management and process management

Quality may imply many things. You, as a quality manager, have to define quality standards and make sure that everybody follows them. In the role of a process manager, you are also responsible for the organizational processes which you develop together with each role that is active within the respective domain (tester, developer, etc.). When developing processes, you will have to express your opinion about the process. You may also have to cooperate with the role responsible for measurement in order to agree upon on how to measure quality and processes in the best way.

To facilitate your work, you will have to create a plan covering strategies, process and product quality standards and processes, plans for how to monitor quality and what measures should be taken in cases when the process is not followed. Finally, you are responsible for all process improvement and for providing guidance on how to effectively utilize the process.

Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. However, just because you will be involved in aiding other roles in defining their processes, you may participate in the inspections that cover, for instance, a particular process where your role would be to evaluate the process from the quality perspective. This step results in a plan that will be submitted to and decided upon by the Advisory Board (see below). When creating the plan, use the template defined at the end of this Appendix.

2.4. Measurement management

To perform measurement within an organization is a difficult task. You, in the role of a measurement manager, will have to define on what to measure and why. Your suggestions will have to be agreed upon with all the groups concerned. For instance, if you measure effort in clock hours, you have to make sure that everybody agrees upon measuring it, upon ways of measuring it and that everybody measures it. You will also collect all the measurements from the respective processes, analyze them and take appropriate measures, if necessary.

Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. However, you will have to assist other roles in defining their processes and suggesting process measurement. Therefore, you may participate in the inspections that cover, for instance, a particular process where your role would be to evaluate the process from the measurement perspective. Regarding the product quality, you will have to choose a small number of qualities that your products will follow. Right now, you do not know your customer requirements. Therefore, you may agree on common attributes such as correctness, programming style, etc. Your choice of product quality attributes will have to be inspected and agreed upon with other roles. This step results in a plan that will be submitted to and decided upon by the Advisory Board (see below). When creating the plan, use the template defined at the end of this Appendix.

3 Business Management Roles

3.1 Business management

To run business within an organization is a difficult task. You, in the role of a business manager/product manager (in co-operation with process manager), define the overall business cycle process model (similar to the ICT one - BCPM) and make sure that it is followed. Also, your role is to continuously check your budget and make sure that you are not exceeding it. Your role is to define business plan and make sure that it is followed. On this course, you will have to create a business plan (see Appendix A) in co-operation with other roles.

In addition, you will have to continuously analyze the organization and design business, assess business models and their adherence to current market and technology, specify and/or reviews requirements, specifications, business processes, etc. Therefore, you will create an additional plan for managing those tasks. Let us call it business management plan.

Finally, your role is critical in eliciting requirements. For this reason, you have to create a requirements engineering process and requrements management process. You will also have to use the support of other roles for defining these processes. Finally, do not forget strategies for these processes and plans describing how these processes will be conducted. Also, do not forget risks. This step will result in a requirements engineering and management plan.

Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This applies to the business plan, additional business management plan and requirements engineering and management plan. This step results in a plan that will be submitted to and decided upon by the Advisory Board (tbd below). In addition, the business plan will be submitted to the Board of Directors. When creating the plan, use the template defined at the end of this Appendix.

3.2 Marketing & finance management

In the role of a finance management, you will be responsible for marketing and business financing. You have to be careful and prudent when using money within the organization. You are the one who allocates money to projects and make sure that the business leads to return on investment (ROI). To ensure that nothing goes wrong, you have to define a process used for distributing money to the projects and for imposing checks on resource usage. To be able to do it, you must know the salary of each individual role so that you may calculate the resource spending. Pls observe that the salary of a developer is not the same as the salary of an architect or business manager. Make some inquiries what the salaries might be for the respecitve roles. Do not forget overhead costs. You must also consider other costs such as marketing, office costs, etc.

In the role of a marketing manager, you will perform market research, advertise your company and its products and services, you will build customer relationships and make sure that your company is attractive. You will also have to understand customer business and you have to know your competitors. To make your work efficient, you have to create marketing strategies and marketing process.

This step will result in a financial plan, measurement plan and marketing plan. Some of the results of this step will have to undergo inspections before submitting them to the Advisory Board. This applies to the financial and marketing plans. These two plans will be submitted to and decided upon by the Board of Directors. When creating the plan, use the template defined at the end of this Appendix.

3.3 CEO

You, as CEO, are a very important role. You are the highest-ranking executive and administrator within your organization, and therefore, you are in charge of a total management of your organization. On this course, you will be the highest authority. Due to the fact that it is a course, you will be the supervisor of everybody. In this way, you will learn the company and therefore, you will be able to make the right decisions.

3. Additional Roles

Additional roles will have to be defined to make your business work. These are:

- *Board of directors:* The constellation of the members of *Board of Directors* is already fixed. However, you may change it or you may invite other roles to be present. The invitations must be clearly visible in the minutes of the meetings. The invited roles do not take part in making decisions. Therefore, they should not be present when decisions are being made. They are present only during the moments when they present something to the *Board of Directors*. The board only makes major decisions. They are not concerned, for instance, with how developers code or how the testers test. They are more concerned with the overall strategic matters that influence the business.
- *Advisory board*: The constellations of the advisory board may be fixed or defined on the fly. This board approves all the standards concerning processes, products, qualities, and decisions on various important issues.
- *Change Control Board (CCB):* This board is going to make decisions on all the changes made to the product. Right now, you do not have any product to develop, and therefore, you do not have any CCB. However, you must be prepared that in the future, you will have to create a CCB.

5. Outline of a plan

Except for the business plan, using the organizational document layout template, your plan should include the following:

- Title of a document
- General description and presentation of the domain discussed in the paper (t.ex. documentatin process, product, etc.)
- Description of strategies, if relevant. (for instance, the strategy is that all the unit testing is conducted by developers and all other testing is conducted by independent testers).
- Description of objectives (for instance, the objectives of the testing plan is to create a process and make sure that it is efficient in revealing bugs).
- Description of the process (testing, documentation, other)
- Description of how the process is going to be planned, if relevant
- Description of risks and action plans
- Other

Appendix E Marketing preparations

You, in the role of a supplier, will have to advertise your company. Create a good advertisment strategy for how to make your company visible and attractive to others. The strategy should motivate the level of the necessary marketing and ways of performing it. Create also a poster or other marketing tool that will advertise your company. Make sure that your poster does not fall into the wrong hands at the moment of creating it. For this reason, your work of creating a poster is very confidential. You do not want your competitor to steal your marketing ideas.

Make sure that you use catchy words so that you attract new customers!

Appendix F Template for Collecting Effort

In Phase 1, we only created companies. In this phase, however, reality starts and you cannot escape it. Before taking any step, you must start collecting effort using the following template:

- *Date*:
- *Practioner name*:
- *Role*: developer/business manager
- *Task*:
    - *Task name*: writing code/unit testing/creation of a business plan
    - *Task type*: administration/social event/ marketing/ managaement/ designing /implementing/testing/documenting/training within your organization/reading course material/
    - *Task domain*: developer domain/configuration management domain
    - *Task delegated by*: self-to-self/configuration manager, etc.
- *Time*: time spend on the task, in minutes and/or hours

Appendix G Arranging and Recording Meetings

When arranging meetings, you will have to create an agenda. Usually, the agenda consists of the following parts:

- Meeting name
- Meeting date and time
- Meeting place
- Chair
- List of attendees
- Guidelines what attendees should do before the meeting
- Plan and schedule for the meeting
- Signature of the meeting leader

All formal meetings must be recorded. Therefore, you will have to write minutes for each meeting. Use the following template:

AGENDA FOR THE (MEETING NAME/INSPECTION, DECISION, ETC.) MEETING IN THE MATTER OF (MATTER NAME/INSPECITNG BUSINESS PLAN, ETC.)

Date:	Thursday 20 January, 2011
Time:	at. 10:00-15:30 (Swedish time)
Meeting room:	exact name and place of the location

AGENDA

1. Opening of the meeting

2. Electing a member to check the minutes

3. Approval of the agenda (you ask whether anybody would like to change the agenda)

4. Conflict of interests (here, you might be involved in deciding whether your own plan/suggestion should be accepted. Therefore, you will have to be excluded from the decision making).

5. Activity (here, you descrive what activity has been conducted and how it proceeded).

6. Discussion and decision (here, you descrive all the results of the meeting and decisions for further steps).

7. Other matters

8. Signature of the meeting leader.

Before the Meeting

- Create the meeting agenda and distribute it to the parties concerned.

During the Meeting

- Follow the agenda.
- Get a list of meeting members and make sure they know who is who.
    - In cases you meet another company, follow the dress code and make sure that you exchange business cards and shake hands.
- Don't try to write down every single comment -- just the main ideas.

Appendix H

Request For Proposal

- Title of the RFP
- Dates
  - Date of Issuing RFP
  - Deadline for supplier response
- Acquirer Contact Information
  - Legal Name of the Acquirer
  - Primary Contact: One person with ultimate responsibility for preparation of the RFP and contact with the vendors
- Acquirer background
  - Type of business
  - Business vision
  - Number of employees
  - Number of end-users
  - Software system portfolio supporting the business
- Software Product Description
  - General product description
  - Specification of functionality
  - Specification of main non-functional requirements.
  - Description of end-users
  - Description of how the product will improve acquirer's business

- Requested Vendor Information
  - Legal Name of the Vendor
  - Contact Information
  - References from its former acquirers
  - Staffing
  - Recent projects
  - Specification of the recently developed products/applications Business alliances and partnerships
  - Years in the business
  - Skills available
  - Indication of the financial stability of the company
  - Overview of the development process
  - Price
  - Schedule from contract writing to delivery.
  - Sample project plan with a timeline
  - Spec. of the documentation provided
    - Application manuals
    - System administrator manuals
    - Operating system manuals
    - Training manuals
    - System documentation
  - Training offered
    - Duration
    - Location
    - Associated costs

Appendix I

Techniques for requirements discovery

- Requirements Reporting
- Requirements Gathering Meetings
- Scenarios and use cases
- Interviewing
- Viewpoint-oriented elicitaiton
- Ethnography
- SLA negotiations