Fundamentals of Business Analysis

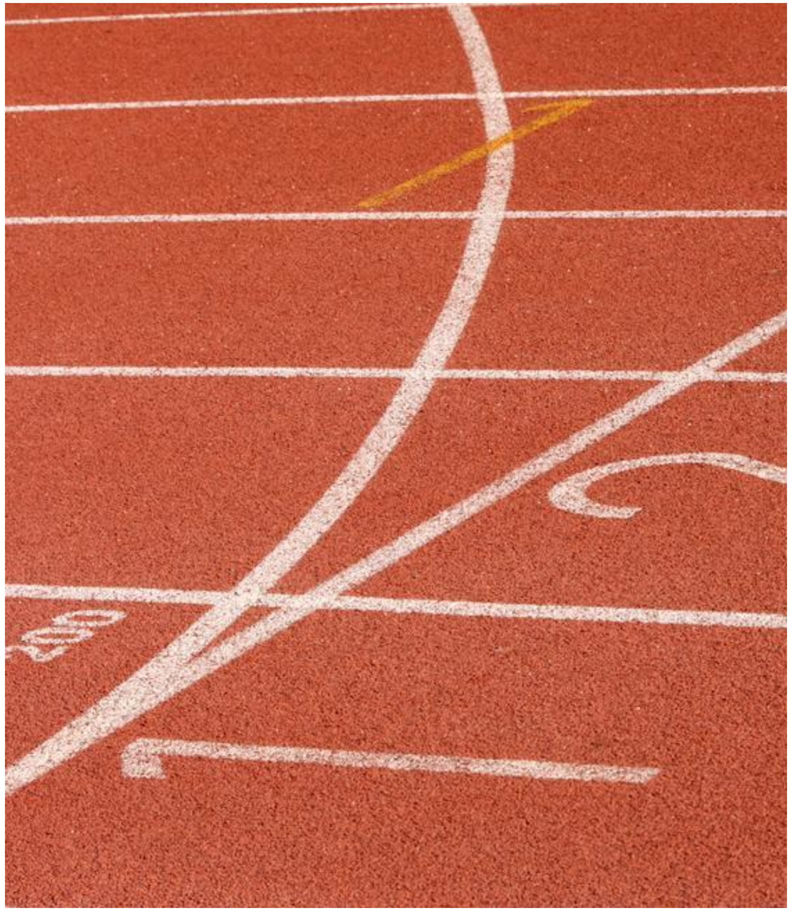
Finalizing Requirements

Finalizing Requirements

By now, we have done all the “real work” of the analysis phase of the project.

We now have a solid requirements document.

It’s now time to finalize it.

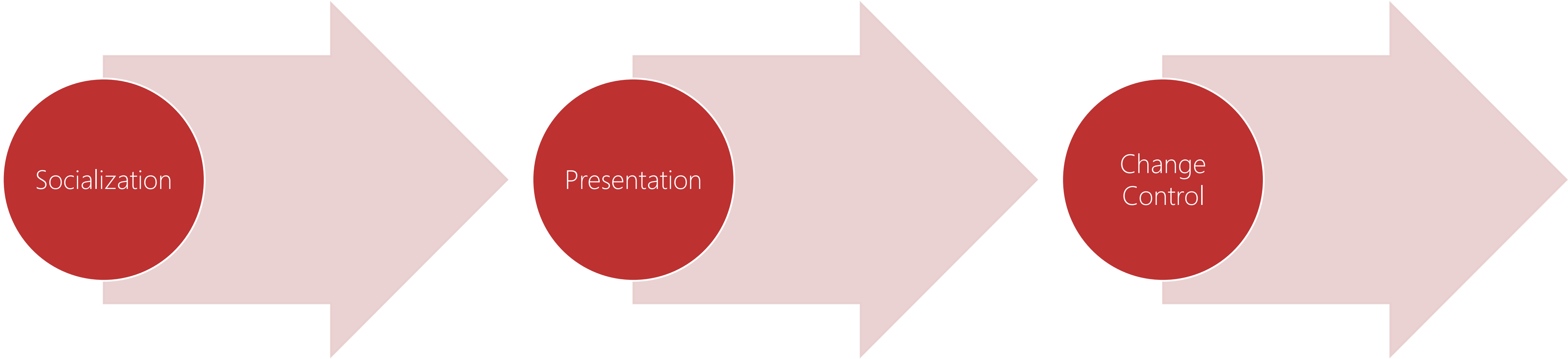


Finalizing Requirements

Finalizing means a few things:

1. Stakeholders are bought into the solution — Socialization
2. The requirements are complete and of high quality — Presentation
3. We have baselined the requirements — Change Control

Finalizing Requirements



Fundamentals of Business Analysis

Socialization

Socialization

You've worked hard for a while to create your requirements document…

You're ready to present…

And people start to throw up obstacles left and right.

The solution to this problem is requirement socialization.

Socialization

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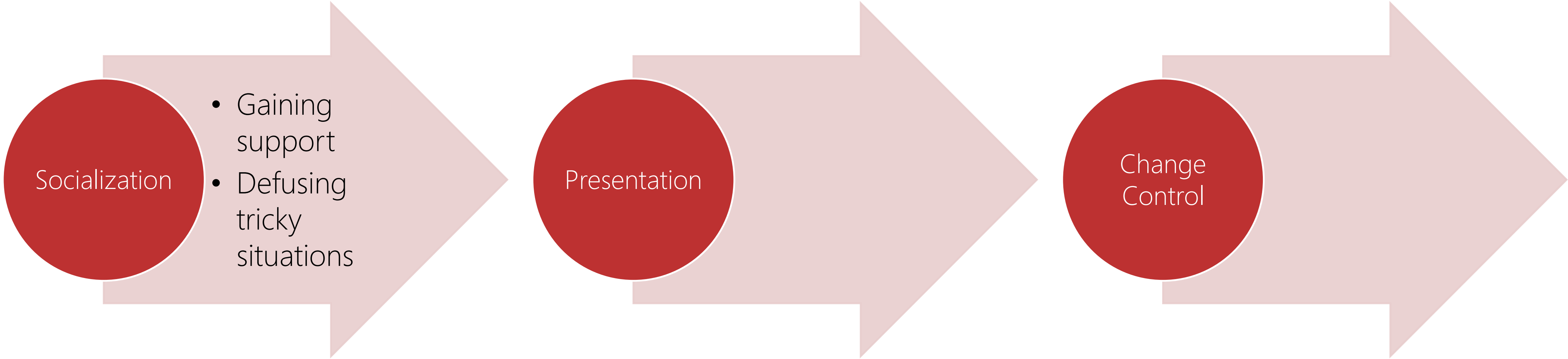

Socialize your requirements with…

People who have strong opinions about the problem or solution

People who will be negatively impacted by your solution

People facing political/organizational dynamics

Socialization

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We got Karen's input in the decision-making… Karen, do you have anything to add?

Then Karen would jump in to defend his solution.

I should have socialized my requirements!

Socialization

The easy way to figure out who to socialize your requirements with...

1. What are the non-ideal aspects, and who will they affect?
2. Are their any "tricky" stakeholders that are senior?
3. Work with your boss/project sponsor to determine who has a positive/ negative political stake in the project

Fundamentals of Business Analysis

Presentation

Presentation

During the finalizing phase, you are likely going to be under schedule pressure.

Despite this, it is critical to focus on ensuring requirements are complete and high-quality.

Your tool to accomplish this is the requirements walk-through.

Presentation

A walk-through is simply a meeting where you walk through your requirements with your stakeholders.

A good walk-through makes it easy for stakeholders to approve your document.

Here's how you do it.

Presentation

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1. Set it up. Try to do it in person.
2. Send the document to everyone about a week in advance.
3. Have the meeting.
4. After the meeting, make and edits and redistribute the doc.
5. Follow up with the approvers.

Presentation

Business requirements

Walk through them in order.

(It’s nice to mention the source and rationale.)

User requirements

Go through them in order.

Summarize when you can.

Presentation

UR-21

The X report will have a column for Beverage ID.

UR-22

The X report will have a column for Beverage Name.

UR-23

The X report will have a column for Beverage Unit Cost.

UR-24

The X report will have a column for Beverage Total Sales.

Presentation

Business requirements

Walk through them in order.

(It’s nice to mention the source and rationale.)

User requirements

Go through them in order.

Summarize when you can.

Functional requirements

[same as user requirements]

Nonfunctional requirements

Go through them by category.

Explain each category.

Presentation

A picture is worth 1,000 words.

Sometimes.

Some graphics are good to show your stakeholders, the ones that will help them to understand.

Some graphics are questionable… They might actually hinder your stakeholders' understanding.

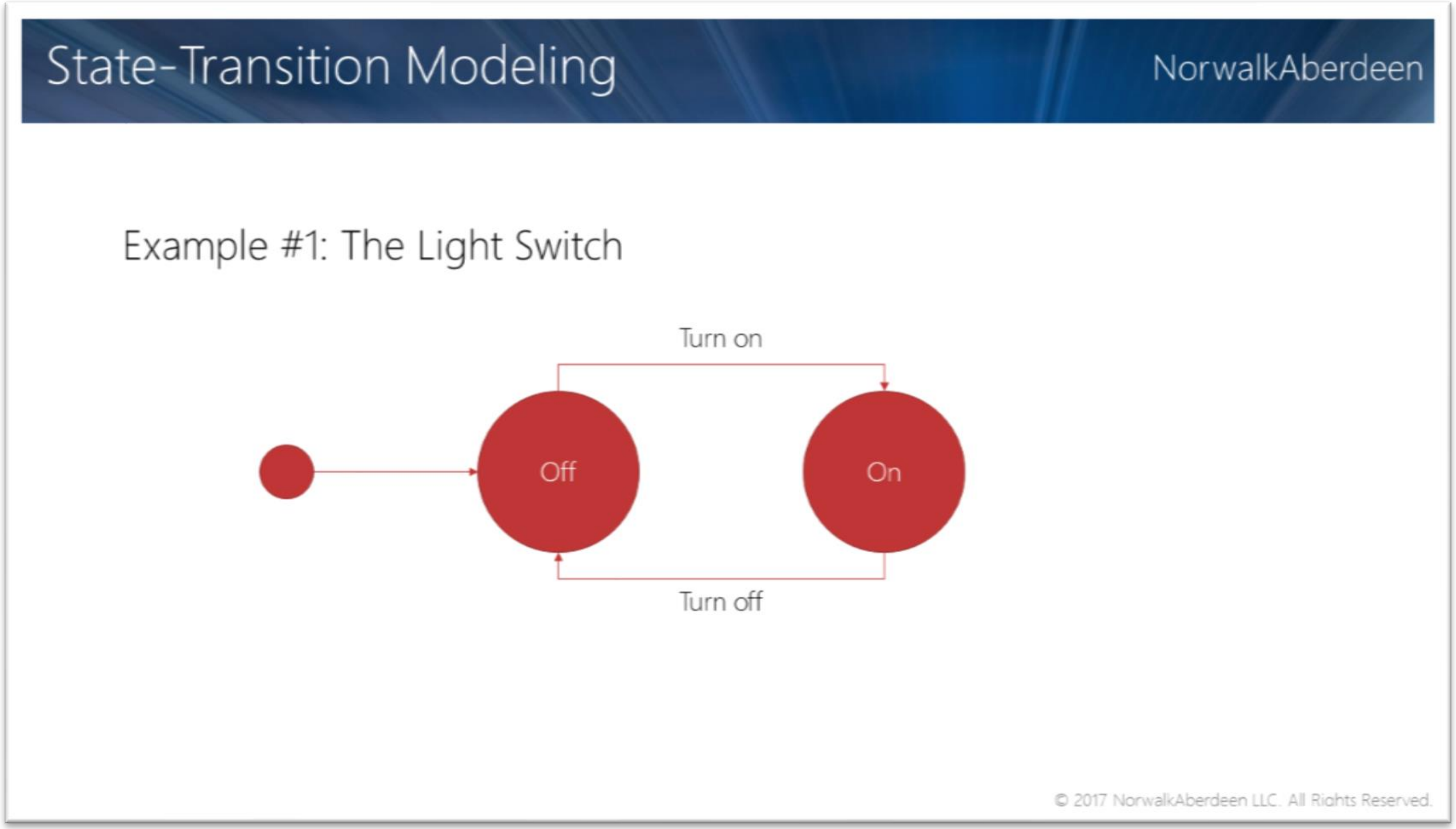
Presentation

Good

- Flowcharts
- Swim lane flowcharts
- Use case diagrams

Questionable

[Everything else]


State-Transition Modeling
NorwalkAberdeen
Example #1: The Light Switch
Turn on
Off
On
Turn off
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To wrap up the walk-through, ask three smart questions:

"Is there anything major that is either wrong or missing?"

"In order to move forward with the project, we'll need approval from [your list of approvers]. Do we need to add or remove anyone?"

"Does anyone on the list see any problem with approving the document by [date]?"

p.s. walk-throughs are boring.

p.p.s. yes, you have to do them anyway.

Fundamentals of Business Analysis

Change Control

Change Control

The requirements are complete.
The walk-through is done.
Now what?

Now, it's time to wrap things up, by...
Getting the document approved and
Instituting change control.

Change Control

Who needs to approve the document?

It will be unique to your organization and project.

To make the list, work with your PM and boss.

Then double-check the list with your project sponsor.

BTW, you need to know who the approvers are when you send out the first draft of the requirements doc. Then verify the list during the walk-through.

Change Control

After the walk-through, you are now in gathering-approvals mode.

Right after the walk-through, send out an e-mail letting the approvers know the deadline for approval.

Follow up with people until they approve.

Escalate to your PM when necessary.

Change Control

Approvals are usually considered an official record of the company.

So get them all in e-mail.

Every single time.

How to store approvals:

- As PDFs
- In a centralized network location
- With the current version of the requirements

Change Control

After all the approvals are gathered, the document is frozen.

That means that people can't make changes to it.

Our fancy word for this is baseline.

e.g. "The requirements are baselined" or "Let's baseline the requirements already, jeez."

After this happens…

WOOT!

The analysis phase of the project is complete!

however…

Change still happens.

And sometimes our requirements need to change too.

Change Control

Change control is the mechanism that enables requirements to change in a (well) controlled way.

It's pretty simple.

Change Control

1. You draft a change request
2. Managers review it
3. They approve it or reject it
4. If they approved it, you update the requirements, and communicate the change to the team

Give yourself a pat on the back.

You're done with Section 6 on Finalizing Requirements!
(actually, you will be after the quiz)