



2019



Data Science and AI

Documentation



Why Document things?

- People easily forget what was said or agreed which can lead to misunderstanding, confusion and wasted time
- Trying to achieve an objective without documentation creates a very high risk of failure, job loss and reputational damage
- The quality of your thinking is demonstrated by the quality of your written documentation
- Other people will duplicate your work in the future if there is no documentation to rely on
- Great documentation results in project approval, promotion and remains an artefact of your success for years to come



Remembering Your Objective

DEFINE, DESIGN, DELIVER

- You are the solution
- **Define** the issue (problem or opportunity?)
- **Design** the solution
- **Deliver** the results



3Ds mapping to Documentation

Typical Document Sections	3xDs stage
Background & Objectives	Define
Assumptions	Define
User Stories and Requirements	Define
Open Questions/Out of Scope	Define
Designs, Mockups, Flow Charts etc	Design
Tasks	Deliver
Results and Conclusion	Define



Writing Style - SAW!

Short

- Sentences - use full stops. Avoid using “and”
- Paragraphs - break them up. Use bold, sub-headings & lists

Active voice

- Active (subject performs action): *“Customers believed their account was suspended when they saw the alert”*
- Passive (subject receives action): *“It was believed by customers that their account was suspended when they saw the alert”*

We focused

- Generally refer to “we” and not “I”



When to Document

Waiting until the end of a project to write things up doesn't work. So record and document continuously:

- At the start of a project
- When stakeholder feedback has been obtained
- During project meetings
- If a project decision has been taken - record it!
- At the completion of a project
- After the results of a project have been obtained



What to Document

- Project briefs - capture verbal briefs in writing and email
- **Project plans - continually maintain**
- Meeting minutes - attendees, agenda, decisions, tasks
- Designs - wire frames, flow charts, screen designs, architecture
- **User requirements - [persona, feature, reason]**
- Functional requirements - technical detail
- Tasks - person and due date
- Presentations - beginning, middle & end



Where to Document

- Confluence
- MS Office
- Google Docs



How to Document

- Use logical structure
- Always have a beginning, middle and an end
- Use a [project document template](#)
- Remember to use a SAW
- Remember to Define, Design and Deliver.



Define



Document Macro

Data Science Institute of Australia

Project Name

Start Date:21-05-2019

Epic	Database Management
Project status	(Requirements, Development, Testing, Complete, On Hold)
Client	Internal or External
Project owner	
Developers	
Stakeholders	Names/Functions
Design complete	(Date)
Code complete	(Date)
Testing complete	(Date)
Release date	(Date)



Background and Objectives

Background

Provide context on this project and explain how it fits into your organization's strategic goals

Objectives

List project goals and the metrics you'll use to judge its success

Objective	Metric
<i>e.g., Simplify the user experience</i>	<i>e.g., Customer satisfaction score increases</i>



Assumptions

Assumptions

List any assumptions you have about your users, technical constraints, or business goals (e.g., Most users will access this feature from a tablet)



User Stories & Requirements

User Stories & Requirements

Ref #	Name	User Story	Functional Requirements	Notes
1	<i>e.g., Must be mobile responsive</i>	<i>e.g., As a PM, I want to check on my team's progress from the train station so I can maximise productivity</i>		
2		<div></div>		



Open Questions

Open Questions

Question	Answer	Date Answered
<i>e.g., How might we make users more aware of this feature?</i>	<i>e.g., We'll announce the feature with a blog post and a Summit presentation</i>	



Out of Scope

Out of Scope

List the features discussed which are out of scope or might be revisited in a later release.



Risks

Risks

List any major risks associated with the project, and identify their likelihood and impact. If mitigation strategies are devised, list those too.

Risk	Likelihood	Impact	Mitigation
e.g., Customers will churn if they don't understand how to use the product	Medium	High	Test UX before design sign-off Include Tutorial elements in product



Design



Designs

User interaction and design

Add mockups, diagrams, or visual designs related to these requirements. Type /image to upload a file.



Deliver



How to deal with time estimates?

“How long will it take?”

- Answer a question with a question - “When do you need it?”
- If an executive gives you a poorly defined request and demands to know how long it will take. You can respond by saying:
 - “I can design & deliver something that will meet your objectives fast, but I’ll need to define the project in more detail, then I can give you an exact timeframe....
 - “So tell me, what is the primary objective?”
- Projects should never be longer than 6-8 weeks
- If projects get too long then break them into phases
- A 3-month project is a warning that project definition might be poor or ill-conceived.



Tasks

Tasks

List the tasks and ensure that every task has a person assigned to the task and the due date of the task is noted. Break large tasks into smaller ones.



Results & Conclusions

Results and Conclusions

1. *Revisit the Background and Objectives of the project and report on whether and to what extent the project achieved the objectives.*
2. *Draw conclusions and demonstrate insight.*
3. *Present options for next steps and*
4. *make a recommendation about which option to follow.*



Fail to plan, plan to fail

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Presentations and Review