Week 1: Requirements Elicitation and Initial Documentation

Day 1 (Monday): Kick-Off & Preparation

Morning:

Kick-Off Meeting:

Gather key stakeholders (business leads, IT, data team) for a project overview.

Define project objectives and scope.

Afternoon:

Document Review:

Read existing business documents, past reports, and policy documentation.

Identify key process flows and current system architecture.

Set Up:

Gain access to the sandbox environment to understand the “as-is” system.

Day 2 (Tuesday): Initial Stakeholder Interviews

Morning:

Technical Team Meeting:

Meet with IT, data engineers, and CRM administrators to understand the current system’s data flows and integration points.

Document technical dependencies and existing ETL processes.

Afternoon:

One-on-One Interviews:

Conduct individual sessions with key business stakeholders (e.g., customer service and marketing leads) to discuss pain points and high-level requirements.

Capture insights on current business processes and challenges.

Day 3 (Wednesday): JAD Session for “As-Is” Process Mapping

Morning:

JAD Session:

Facilitate a workshop with cross-functional teams (technical and non-technical).

Map out the “as-is” business processes, workflows, and current system interactions.

Afternoon:

Document Session Output:

Consolidate notes from the JAD session.

Begin drafting initial process flow diagrams and noting key requirements.

Day 4 (Thursday): Technical Deep-Dive and System Walkthrough

Morning:

Sandbox Walkthrough:

Conduct a detailed walkthrough of the sandbox environment with technical teams.

Observe and record system functionalities and data extraction processes.

Afternoon:

Create Preliminary Diagrams:

Start developing UML diagrams to capture system interactions and data flows.

Document integration points with CRM and transactional systems.

Day 5 (Friday): Consolidation & Drafting Initial Artifacts

Morning:

Synthesize Findings:

Review notes, interview recordings, and JAD session outputs.

Identify recurring themes, challenges, and potential opportunities.

Afternoon:

Draft Initial Documentation:

Develop initial versions of process maps, UML diagrams, and high-level requirements outlines.

Prepare for internal review next week.

Week 2: Documentation, Reviews, and Finalization

Day 6 (Monday): Formal Requirements Drafting

Morning:

Write Formal Requirements:

Begin drafting the Business Requirements Document (BRD), including business rules, functional, and user interface requirements.

Afternoon:

Update Visual Documentation:

Refine process flows and UML diagrams based on insights from Week 1.

Integrate feedback from initial research into formal documentation.

Day 7 (Tuesday): Internal Review & Refinement

Morning:

Team Review Meeting:

Hold an internal session with both technical and business team members to review the draft requirements and process documents.

Afternoon:

Revise Documentation:

Incorporate feedback and refine the BRD, process maps, and UML diagrams.

Ensure consistency and clarity across all documents.

Day 8 (Wednesday): Stakeholder Review Session

Morning:

Joint Requirements Review Meeting:

Present the refined BRD, process flows, and UML diagrams to key stakeholders (including both technical and non-technical teams).

Facilitate a Q&A session to clarify any ambiguities.

Afternoon:

Feedback Collection:

Gather detailed feedback and document requested changes or additional insights.

Day 9 (Thursday): Incorporate Stakeholder Feedback

Morning:

Update Documents:

Revise the BRD, process maps, and UML diagrams based on feedback from the review session.

Afternoon:

Follow-Up Meetings:

Hold brief follow-up discussions with any stakeholders needing further clarification.

Prepare a revised version of the documentation for final review.

Day 10 (Friday): Final Review and Sign-Off

Morning:

Final Presentation:

Present the final version of the requirements documents and diagrams to leadership and key stakeholders.

Afternoon:

Approval Meeting:

Conduct a final review session to address any last-minute concerns.

Obtain formal sign-off on the BRD and supporting documentation.

Wrap-Up:

Distribute final documentation to all stakeholders and document any post-approval action items.