Sample Vision and Goals Statements

Introduction

The project **Vision** is a brief summary of the goals and scope of the project, i.e., what the project will accomplish and what is its focus. It should give some understanding as to why the project exists and call out guiding principals for the project as they relate to strategic objectives of the organization. A good vision provides guidance both about what a project is, and what it is not. The vision may be qualitative and does not need to be measurable, but it should be traceable to specific project goals that are measurable.

Goals are the desired results of the project from a business perspective, i.e., what is the project accomplishing. Describe "what" is to be accomplished, not "how". Remember the goals must be SMART (Specific, Measurable, Attainable, Relevant, and Timely). Try to be as quantitative and precise as possible.

Normally the Vision and Goals are defined by the project sponsor (authority) and is included in the **Project Charter**. However, if one doesn't already exist, you should create one for you own protection.

The following sections provide include two sample vision and goals statements using the "Business Requirement + Strategy" format. The samples are from:

- Defect Tracking System – This sample was extracted from a prior version of Construx's Requirements Boot Camp seminar. The labs in that seminar were based on building a Defect Tracking System.
- Data Warehouse Implementation – The second sample came from the Charter Document that Construx helped a client develop. To date, they had invested approximately $750k in implementing data warehousing and Online Analytical Processor (OLAP) tools. It was generally accepted that OLAP's potential for supporting information-based decisions was largely untapped. The client wanted to maximize this investment by using OLAP in making business decisions

The third example is from an Embedded Device case study used in Construx's Quality Planning Seminar. The labs in that seminar were based on building an embedded digital light processor. The vision and goals statements use the Planguage format. One key difference in this example is it uses a scale (target, stretch, failure) rather than a single point measure.

From Defect Tracking System Case Study

The following has been extracted from a prior version of Construx's Requirements Boot Camp seminar. The labs in that seminar were based on building a Defect Tracking System.

Vision

Increase the productivity/efficiency of our software development processes by using quantitative defect metrics.

To support this vision, we will:

- Create a defect tracking system that will be used consistently by all projects to collect and report on defect data, while still allowing teams to define a workflow that fits their development processes.
- Produce quantitative defect metrics to improve our visibility of the status of active projects and to create explicit release criteria.
- Maintain historical information about our defect totals and trends to better predict and manage future projects.

Measurable Goals

G1 Increase productivity/efficiency

G1.1 At least 75% of the total defects detected are identified during upstream reviews (i.e. requirements and design reviews)

G1.2 The average cost (effort and duration) to fix a defect decreases by an order of magnitude

G1.3 The total number of Severity A (i.e. show stoppers) identified as design or coding defects are reduced on each project

G2 Used consistently throughout the organization

G2.1 Team members use the defect tracking system on an almost daily basis throughout the project and especially during a defect correction cycle

G2.2 Software engineers are able to use the tools without guidance within two weeks of being introduced to them

G2.3 Once trained, software engineers can switch to another project's defect tracking workflow with no more than one hour of guidance

G3 Fits team's development processes

G3.1 Project teams can teams can setup a workflow in under an hour

G3.2 Teams can save their workflow definitions and use them to setup future projects

G3.4 Teams integrate defect tracking with other systems/data they use to track projects

G3.3 Teams export data into the Excel spreadsheets they use for analysis, reporting and charting

G4 Improved visibility of the status of active projects

G4.1 Daily use of reports to track progress of defect correction

G4.2 The expected vs. actual defect trend rates is tracked on all projects

G4.3 Defect reports are used to approve releasing systems

G4.4 No reports of defects that have been inadvertently dropped

G5 Better predict and manage future projects

Historical data is used on all projects to:

G5.1 Predict rework rates and drive estimates for corrective activity effort

G5.2 Predict expected defect trend rates and drive test and quality planning

G5.3 Create explicit release criteria

From an Data Warehouse Implementation Project

This example came from the Charter Document we created for a local client. To date, they had invested approximately $750k in implementing data warehousing and Online Analytical Processor (OLAP) tools. It was generally accepted that OLAP's potential for supporting information-based decisions was largely untapped. The client wanted to maximize this investment by using OLAP in making business decisions

Vision

Improve the timeliness and quality of decisions by providing the decision maker with access to pertinent information.

To support this vision, we will

- Promote general acceptance of the data warehouse Online Analytical Processor (OLAP) as a tool for information-based decisions at all management levels
- Provide access and support to anyone who wants to use OLAP to support their decision needs.

Measurable Goals

G1: Promote use and acceptance

Provide successful examples of OLAP solving the following business problems:

G1.1 <Specific problem was defined>

G1.2 <Several more>

G2: Increase trust in information available

G2.1 Executive Council request OLAP reports 90% of the time for their presentations

G2.2 100% of the sites are either polled or accounted for in an exception report within 3 days of month end

G3: Provide Training to OLAP Users

G3.1 Training is provided for three levels of OLAP users <Levels were defined>

G3.2 90% of training participants pass standard assessment tests confirming Level I, II, III abilities

G4: Provide Support to OLAP Users

G4.1 Support experts are trained to Level II training specifications and are available to Level I users

G4.2 90% of questions regarding use of OLAP tool are resolved within 1 business day

G4.3 90% of technical issues are resolved within 1 business day

From an Embedded Device Case Study

This example came from a case study in Construx's Quality Planning Seminar.

Vision: Improve our customer satisfaction by increasing battery life through correct screen lighting of our handheld device

Goals

Customer Satisfaction

Gist	How satisfied the customer is with our handheld device
Measure	Mean Satisfaction Score from our customer satisfaction survey given six months after purchase
Target	10% improvement from current satisfaction survey results
Stretch	15% improvement
Failure	< 8% improvement

Usability

Gist	How easily can an end customer adjust the key lighting parameters
Measure	Time required to train a typical end customer to adjust the standard three parameters
Target	Two minutes or less of training
Stretch	Zero minutes
Failure	> 10 minutes

Reliability

Gist	Does not cause the screen to go blank
Measure	Number of use scenarios that generate blank screens;
Target	Zero in the top 80% of use scenarios
Stretch	Zero in top 95% scenarios
Failure	> 1 in the top 50% scenarios

Functionality

Gist	Adjust the light display as necessary
Measure	% of correct adjustments to changing light conditions;
Target	95% of 50 correct adjustments in an automated 10 light level test
Stretch	99%
Failure	85%
Measure	Number of severity-1 (subsystem does not work), severity-2 (subsystem mostly works),

	or severity-3 (subsystem works but data gets corrupted) defects released to production
Target	No sev-1, sev-2, or sev-3 level defects
Stretch	No sev-1, sev-2, or sev-3; failure
Failure	No sev-1, > two sev-2 with workarounds, > three sev-3 with workarounds
Measure	Number of sev-4 defects (inconvenient) per 1,000 LOC be released to production
Target	2
Stretch	0
Failure	>10