INFO 8440 Project Client and Course Needs,Team Deliverables

For: Project 1 | Executive Dashboard |

As your Senior BA for this Project, I am writing this document to convey important requirements of your work for the project. I have been talking with OHT Management, and we've agreed upon some key needs for your project work.

This list of needs replaces any previous lists of needs that you have received.

This is the complete list of deliverables for your project work, as of the date of printing. Written communications between your team and your professor / Senior BA / OHT after this date regarding any of the points below are to be considered as applying to your project work as well.

ID #	Name	Need / Deliverable Details
Known Client Needs		***These are the needs that OHT has been able to identify as of now.***
1	Business Success Metrics	OHT potentially could become bankrupt. Thus Billy Bob is not willing to hire an outside business/management consultant to guide OHT away from the danger. However, OHT needs to know what standard advice might come from consultants regarding the management of a small (under 500 employees) business in challenging times. The metrics that are suggested, the data needed to create the metrics, and the interpretation of the metrics are all needed, at a minimum, for at least 6 metrics.
2	Executive Attitudes - As-Is	OHT's executive team of Vice Presidents (VPs) currently do not meet on a regular basis. Instead, Billy Bob meets individually with each executive to discuss relevant issues. There is the: - Manufacturing VP - Facilities VP - Human Resources VP - Marketing VP - Finance VP - IT VP Each executive needs to declare: - their measurements of success in business operations - their attitudes toward change, and cooperation in management - their visions for a better managed OHT - any other issues or ideas that would be relevant to this project As of Dec, 2017, OHT is in crisis, so Billy Bob wishes to meet with all the executive at least 3 times per week, to look into the issues that are dragging the company down.

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3	Executive Data Used, As-Is Gifts and Skills, Learning Styles	The Finance department currently provides each executive with monthly finance reports on paper. Each executive has their own profile of use of those monthly reports. Each executive must declare: - the monthly reports that are used, and what content is taken from those reports - the exposure to computer based methods of report circulation - their evaluation of their computer skills, and understanding of dashboard technology - their preferred style of learning about new concepts, and implementing new methods.
4	Corporate Data and Knowledge Management Strategies	The management of business data and knowledge in its many forms has several options. The Executive need a written briefing on technology and issues including (but not limited to) Data Lakes, Data Marts, Data Warehouses, Enterprise Resource Planning systems, Transaction Processing Systems, and Dashboard Query tools. A SWOT analysis of each technology as it might apply to OHT in its time of crisis is required. Executive and Analytical Dashboards must be explained and compared. Billy Bob was recently at a convention, and saw PowerBI in action. The graphical display of business data amazed him, and he decided that OHT needs to use metric visualization.
5	Implementing a OHT Executive Dashboard	OHT needs a detailed plan to implement an Executive Dashboard for 5 metrics, at minimum, to be used by all the executive during regular (3 times per week) meetings. This plan must include education for the executive on metrics and the use of the dashboard. A business analyst will be used to help implement the Dashboard, and support the Executive in the first weeks of its use. OHT also needs guidelines for the BA to follow as a trusted advisor to the Executive Team.
6	Develop Executive Dashboard	OHT needs your team to produce an executive style dashboard using the metrics that your team has identified, and drawing data directly from the TrackR Data Generation engine. It must be capable of being refreshed and immediately showing the new data generated by the DataGen Engine. It must support executive operation, not analyst operation!

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7	Executive Decision Making As-Is and To-Be, and Data Sources As-Is Profiles	Your team needs to do a AS-IS and To-Be profiles (principles, process flow, pseudo code, persons / roles / actors and interactions) for the Executive Decision Making operations within OHT. As well, all the data sources in the TrackR data generation system must be listed, and described in detail (both data and structures).
8	User Interface Specs	As well, a detailed set of standards for the user interface of the executive dashboard (ie navigation, colours, fonts, etc) needs to be created. The specs must use wireframes and prototypes, as well as text, to explain the navigation standards that your team is proposing.
9	Agile Methodology Education	OHT executive need basic education on Agile Development environment and methods. Then, they need to have guidelines and guidance on how to evolve the dashboard and its metrics.
10	Ongoing Support	The Executive dashboard's operation depends on properly operating board room technology, links to the corporate databases, and executive skills. Identify several risks to regular successful operation of the Executive dashboard, and how to mitigate those risks.
Conestoga INFO 8440 Course Needs		*Conestoga College and INFO8440 require you to address and deliver the following:*
20	Standard Report Packaging	Letter of Transmittal, Cover Page, TOC, Doc History, Page Hdrs, Ftrs Numberings
21	Primary Audience Guidance	Executive Summary, Assumptions, Conclusions
22	Elicit info from Client	RFIs, Unanswered Questions, Background and Overview of Client, Systems and Actors, Business Challenges, Current Brand Status, Actors and Interactions
23	Support Submitted Work	Detailed References for all Sources of Knowledge, RFI report included as an Appendix.
24	INFO 8440 Project Scope	INFO 8440 Project Scope - Updated as Needed
25	Regular Management and Reporting	**Regular** Project Management and Time+Effort Reporting thru meetings and RACI Workbook submission

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26	Standard BA Advice and Suggestions	Possible Future Analysis and Development, Measuring Success and Failure, Probable Risks and Benefits of the Suggestions in this Project
27	Presentation	Audience of the Presentation is well defined, and the presentation is appropriate for that audience. Presentation gives highlights of team's work, and regularily encourages audience to refer to the report and supporting materials. Presentation encourages audience to embrace business change thru the suggestions.
28	Business Analyst, not Developer	The team, and each member, must show that they are acting more as BA's, not developers.
29	All Knowledge into the Final Report	All the Knowledge that the Team has collected throughout the entire project should be in the final report, and/or in the accompaning files.
Senior BA Guidance on Deliverables		***Your Senior BA has done some preliminary scoping for you. Below is a list of deliverables, at minimum, that your team must deliver in report(s) and presentation. As you develop the project scope and RACI, you must identify the actions needed to produce these deliverables.***
41	Team Response to OHT Need 1	Your team will provide report and presentation content on a minimum of 6 suggested metrics for small businesses in times of crisis.
42	Team Response to OHT Need 2	Your team will provide report and presentation content on the AS-IS Attitudes of the 6 OHT VPs on the 4 issues mentioned in Need 2.
43	Team Response to OHT Need 3	Your team will provide report and presentation content on the As-Is regular data use, computer skills and knowledge, and learning styles of the 6 Executive VPs as described in Need 3
44	Team Response to OHT Need 4	Your team will provide report and presentation content on the 6, at minimum, business data and knowledge management technologies. Also a SWOT analysis, and a comparison of Executive and Analytical Dashboards must be provided.

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ID #	Name	Need / Deliverable Details
45	Team Response to OHT Need 5	Your team will provide report and presentation content on a suggested plan (background, vision, needs, actions, deliverables at minimum) to implement an Executive Dashboard with 5, at minimum, metrics, as described in Need 5.
46	Team Response to OHT Need 6	Your team will provide report and presentation content, as well as a fully operational executive dashboard, that will meet OHT Need 6 using historical and live data from the TrackR data generation engine.
47	Team Response to OHT Need 6	Your team will provide report and presentation content on the content and structure of the Executive Dashboard, which is, at minimum,: - an annotated list of elements for the dashboard, - pseudo code for parts of the dashboard where actions must be performed, or decisions are made, and - a menu / system map for the of Need 6.
48	Team Response to OHT Need 7	Your team will provide report and presentation content on the As-Is and To-Be states of executive descision making, which is, at minimum,: - process flow diagrams, - pseudo code where actions must be performed, or decisions are made, and - a Gap analysis / identification of faults.
49	Team Response to OHT Need 7	Your team will provide report and presentation content on the content and structure, at minimum, of the data sources in the TrackR Data Generation engine. To meet this part of Need # 7, you will have to create a database relationships diagram with, at minimum, the tables in the TrackR Data Generation engine.
50	Team Response to OHT Need 8	Your team will provide report and presentation content on the detailed specifications (navigation, colours, fonts, etc) for the upgraded user interface. These specs must use wireframes and mockups, as well as text, to explain the navigation principles (from the starting point of the dashboard, back to the starting point of the dashboard, and drilling down or up through different time frames in a metric).

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ID #	Name	Need / Deliverable Details
51	Team Response to OHT Need 9	Your team will provide report and presentation content on the principles and concepts of Agile Development, as per OHT Need 9.
52	Team Response to OHT Need 10	Your team will provide report and presentation content on, at minimum, 4 different risks to successful operation of the Executive Dashboard. Each risk will have 2 or more detailed suggestions for mitigation of the risk.
53	Team Response to Conestoga College / INFO 8440 Needs 20 thru 29	Your team will provide report and presentation content to satisfy, at minimum, the list of topics given in Needs 20 through 29.
54	Team Response to Conestoga College / INFO 8440 Need 22	Your team will provide report (both RFI and Final) and possibly presentation content of: - a list of all involved persons, roles, actors, and systems in the project, - USE CASE Diagram(s) for all in the above list showing their interactions, and - Cockburn templates for all identified interactions.

These needs are what I have as of now. I will update you if anything more comes forward from OHT.

Regards,
Your INFO 8440 Senior BA / Professor