

FRIENDS Framework: A Project Manager's Guide

Introduction

Welcome to the FRIENDS framework—a comprehensive, structured approach to requirements gathering and project component management. FRIENDS is an industry-agnostic adaptation of SAP's RICEF model, designed to ensure nothing falls through the cracks when scoping, planning, and executing complex projects.

As a Project Manager, FRIENDS will become your mental checklist for comprehensiveness. It provides a systematic lens through which to view every aspect of a project, from technical infrastructure to human processes.

What is FRIENDS?

FRIENDS is an acronym representing seven critical categories that encompass virtually every component of a business system or process improvement project:

- **F** - Forms
- **R** - Reports
- **I** - Integration/Interfaces
- **E** - Enhancements
- **N** - Non-Technical
- **D** - Data
- **S** - Set-Up

Think of FRIENDS as a framework that answers the question: "*What do we need to account for in this project?*" Each letter represents a dimension of work that must be identified, planned, and delivered.

Why Use FRIENDS?

Comprehensive Coverage

FRIENDS ensures you consider all aspects of a project—technical, operational, and procedural. It prevents the common pitfall of focusing solely on system functionality while overlooking critical support processes or infrastructure needs.

Structured Thinking

By organizing requirements into clear categories, FRIENDS provides a mental model for decomposing complex projects into manageable components. This structure aids in work breakdown, resource planning, and tracking deliverables.

Cross-Functional Communication

The framework provides a common language between business stakeholders, technical teams, and operations. When you say "We need to address the Forms category," everyone understands you're talking about data entry points and documentation.

Flexibility

FRIENDS can be reordered as **FINDERS** (Forms, Integration, Non-Technical, Data, Enhancements, Reports, Set-Up) depending on project priorities or sequencing needs. The categories remain the same; only the emphasis changes.

The Seven Components of FRIENDS

F - Forms

What It Covers: All forms and data entry points in the system or process.

Forms represent how information enters your system. This includes both paper-based and digital forms, whether they're embedded in commercial software or custom-built.

Key Considerations:

- **Paper Forms Analysis:** What forms are currently in use? What workflows do they follow? Who approves them? Where are they stored?
- **System Forms:** Which forms need to be embedded in the system (e.g., patient registration, customer intake)?
- **Custom Forms Development:** What forms need to be built using a forms engine or custom development?
- **Transformation Requirements:** Which paper forms need to be digitized?

Example Deliverables:

- Forms inventory and analysis
- Forms design specifications
- Approval workflow diagrams
- Forms testing and validation plans

R - Reports

What It Covers: All output mechanisms for data analysis, presentation, and decision-making.

Reports are how information leaves your system in a consumable format. This category spans operational dashboards, compliance reports, financial statements, and ad-hoc data exports.

Key Considerations:

- **Administrative Reports:** Management dashboards, operational metrics, compliance reporting
- **Performance Metrics:** Turn-around time (TAT) reports, service level indicators, efficiency measures
- **Financial Reports:** Budget tracking, revenue analysis, cost reports
- **Embedded vs. Custom Reports:** What comes with the system vs. what needs to be built?
- **Data Exports:** Requirements for extracting data for external analysis

Example Deliverables:

- Report requirements catalog
 - Report mockups and specifications
 - Data source mapping
 - Report distribution and access matrix
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I - Integration/Interfaces

What It Covers: All system interconnections, data exchanges, and communication protocols between applications.

Integration is the glue that connects disparate systems. This category addresses how data flows between your project's system and other enterprise applications.

Key Considerations:

- **Standard Protocols:** HL7 (healthcare), EDI (supply chain), REST APIs, SOAP services
- **Custom Integrations:** Proprietary connections between systems
- **Third-Party Connections:** Vendor systems, payment gateways, external databases
- **Data Direction:** Inbound, outbound, or bidirectional flows
- **Frequency and Volume:** Real-time vs. batch processing requirements

Example Deliverables:

- Integration architecture diagram
 - Interface specifications document
 - Data mapping and transformation rules
 - Interface testing and validation plans
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E - Enhancements

What It Covers: System modifications, customizations, and improvements beyond standard functionality.

Enhancements represent the gap between what the system does out-of-the-box and what your organization needs. This category captures the results of gap analysis and defines custom development requirements.

Key Considerations:

- **Gap Analysis Results:** Documented differences between system capabilities and business requirements
- **System Customizations:** Modifications to existing functionality
- **Custom Modules:** Net-new functionality that must be developed
- **Process Optimizations:** Changes that improve efficiency or user experience

Example Deliverables:

- Gap analysis documentation
 - Enhancement requirement specifications
 - Custom module design documents
 - Development and testing plans
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N - Non-Technical

What It Covers: Operational, procedural, and human-centric components of the project.

Non-Technical encompasses everything that supports the system but isn't the system itself. This is where process documentation, organizational change management, and support structures live.

Key Considerations:

- **Policies and Procedures:** Standard operating procedures, governance documents, compliance policies
- **Manual Processes:** Workflows that remain paper-based or require human judgment
- **Help Desk Requirements:** First-line support structure, escalation procedures, knowledge base
- **Support Structure:** Ongoing operational support model, maintenance procedures

Example Deliverables:

- Standard operating procedures (SOPs)
- Training materials and job aids
- Help desk scripts and knowledge articles

- Organizational change management plans
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D - Data

What It Covers: All data-related components including structure, quality, migration, and governance.

Data is the lifeblood of any system. This category ensures that data is properly defined, cleansed, migrated, and maintained.

Key Considerations:

- **Master Data:** Core business entities (customers, products, employees, vendors)
- **Reference Data:** Lookup values, code sets, configuration data
- **Data Migration:** Moving data from legacy systems to the new system
- **Data Quality Standards:** Validation rules, cleansing procedures, quality metrics

Example Deliverables:

- Data dictionary and data model
 - Data quality assessment report
 - Data migration strategy and mapping
 - Data validation and reconciliation procedures
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S - Set-Up

What It Covers: Technical infrastructure requirements needed to support the system.

Set-Up addresses the physical and virtual infrastructure that underpins the application. This includes hardware, networking, and deployment architecture.

Key Considerations:

- **Server Infrastructure:** Application servers, database servers, backup systems
- **Workstation Needs:** End-user hardware specifications, peripheral requirements
- **Printer Configurations:** Networked printers, label printers, specialized printing needs
- **Network Requirements:** Bandwidth, security, connectivity, VPN access

Example Deliverables:

- Infrastructure architecture diagram
 - Hardware specifications and procurement list
 - Network topology and configuration
 - Deployment and installation plans
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How to Apply FRIENDS in Your Projects

1. Initial Scoping

Use FRIENDS as a checklist during project initiation. Walk through each category and ask: *"What requirements fall under this category?"* This ensures comprehensive scoping from day one.

2. Requirements Gathering

Structure your requirements workshops and interviews around FRIENDS categories. Dedicate time to each area, ensuring stakeholders think broadly about their needs.

3. Work Breakdown Structure (WBS)

Organize your WBS using FRIENDS categories as Level 2 work packages. This creates natural groupings for work planning and resource allocation.

4. Tracking and Reporting

Use FRIENDS categories in your project dashboards and status reports. Stakeholders can quickly understand progress across all dimensions of the project.

5. Risk Management

Identify risks within each FRIENDS category. This structured approach prevents blind spots in risk identification.

FRIENDS vs. FINDERS: Choosing Your Order

The framework can be applied in two sequences:

FRIENDS Order: Forms → Reports → Integration → Enhancements → Non-Technical → Data → Set-Up

FINDERS Order: Forms → Integration → Non-Technical → Data → Enhancements → Reports → Set-Up

Choose the sequence that aligns with your project's priorities or natural workflow. Some projects start with infrastructure (Set-Up first), while others begin with forms and user interaction. The key is consistency within your project.

Common Pitfalls to Avoid

1. Focusing Only on the "I" and "E"

New PMs often fixate on Integration and Enhancements (the technical glamor work) while neglecting Non-Technical components like training, documentation, and support structures. Remember: a technically perfect system that users don't understand or can't support will fail.

2. Treating Data as an Afterthought

Data migration and quality are frequently underestimated. Allocate sufficient time and resources for the "D" category—bad data will undermine even the best system.

3. Ignoring Infrastructure Until It's Too Late

Set-Up requirements often have long procurement lead times. Address the "S" category early to avoid delays when you're ready to deploy.

4. Assuming "Standard" Reports Are Sufficient

Rarely do out-of-the-box reports meet all stakeholder needs. Invest time in the "R" category to understand true reporting requirements.

Practical Tips for Project Managers

- 1. Create a FRIENDS Checklist:** Develop a standard checklist template for your organization. Use it in every project kickoff.
- 2. Assign Category Owners:** For large projects, assign a workstream lead for each FRIENDS category. This ensures focused attention and accountability.
- 3. Use FRIENDS in Meetings:** When stakeholders say "We need this system to...", immediately categorize the request into a FRIENDS category. This trains your team to think structurally.
- 4. Document in FRIENDS Structure:** Organize your requirements documentation, deliverable registers, and project plans using FRIENDS categories. Consistency

aids comprehension and maintenance.

5. **Review Cross-Category Dependencies:** Integration (I) often depends on Data (D). Enhancements (E) may require new Reports (R). Map these dependencies explicitly.
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Conclusion

The FRIENDS framework is more than an acronym—it's a mindset for comprehensive project management. By systematically addressing Forms, Reports, Integration, Enhancements, Non-Technical, Data, and Set-Up, you ensure that no critical aspect of your project is overlooked.

As you gain experience, FRIENDS will become second nature. You'll instinctively ask: *"Have we covered all seven categories?"* This disciplined approach is what separates reactive project management from proactive, strategic delivery.

Remember: A complete project isn't just about delivering technology—it's about delivering a **holistic solution** that people can use, systems can support, and data can flow through seamlessly. FRIENDS keeps you honest and complete.

Quick Reference: FRIENDS at a Glance

CATEGORY	FOCUS AREA	KEY QUESTION
F - Forms	Data entry points	How does information enter the system?
R - Reports	Data outputs	How do we extract and present information?
I - Integration	System connections	How do systems talk to each other?
E - Enhancements	Customizations	What needs to be built or modified?
N - Non-Technical	People and processes	What procedures and support do we need?
D - Data	Information assets	What data do we manage and migrate?
S - Set-Up	Infrastructure	What hardware and network do we need?

Practical Advice: Using FRIENDS Effectively

FRIENDS is a **requirements gathering tool**—one component of your broader project management methodology. Think of it as a structured checklist that helps ensure you don't miss critical requirements categories during discovery. Here's how to use it effectively and what to watch out for.

Remember: FRIENDS Organizes Requirements, Not Your Entire Project

FRIENDS helps you systematically **identify and categorize what stakeholders need**. It's not:

- A project lifecycle methodology (use PMBOK, PRINCE2, Agile, etc. for that)
- A prioritization framework (use MoSCoW, Value vs. Effort, or business case analysis)
- A substitute for stakeholder management or change management
- A delivery sequencing tool

Use FRIENDS during discovery and requirements phases, then integrate those requirements into your chosen project methodology for planning, execution, and delivery.

What to Watch Out For

1. Don't Let Category Debates Slow You Down

Some requirements will fit into multiple categories. Is a custom dashboard a Report (R) or an Enhancement (E)? Does data validation belong in Data (D) or Enhancements (E)?

Advice: Pick the most logical category and document it there. If a requirement spans multiple categories, note the cross-reference and move on. The goal is completeness, not perfect taxonomy.

Watch Out For: Teams spending more time arguing about categorization than actually gathering requirements.

2. Link Requirements to Business Objectives

FRIENDS helps you capture *what* stakeholders want. Always ask *why* they want it and tie each requirement back to business objectives.

Advice: For each FRIENDS category, maintain a traceability matrix:

- Requirement ID
- FRIENDS Category
- Description
- Business Objective/Benefit
- Priority

Watch Out For: Collecting a comprehensive FRIENDS inventory that doesn't deliver business value. Just because you've covered all seven categories doesn't mean you've solved the right problem.

3. Apply FRIENDS Iteratively in Agile Environments

If you're working in an Agile methodology, don't try to complete all FRIENDS requirements upfront. Instead, use it within each iteration or release.

Advice:

- Use FRIENDS to ensure each sprint/release considers all relevant categories
- Ask: "For this iteration, have we addressed Forms, Reports, Integration, etc. as needed?"
- Build incrementally across categories rather than completing one category at a time

Watch Out For: Forcing a "gather all requirements, then build" approach that conflicts with iterative delivery.

4. Explicitly Address Security and Compliance

Security, privacy, and compliance requirements aren't explicitly called out in FRIENDS, but they're critical.

Advice:

- Create a cross-cutting "Security & Compliance" checklist that applies to every FRIENDS category
- Ask security/compliance questions for each category:

- Forms (F): What sensitive data is being collected? What access controls are needed?
- Integration (I): Are we using secure protocols? Is data encrypted in transit?
- Data (D): What privacy regulations apply? How long do we retain data?
- Set-Up (S): What network security measures are required?

Watch Out For: Treating security and compliance as afterthoughts that only appear in the "Non-Technical" category.

5. Manage Cross-Category Dependencies

Requirements in different FRIENDS categories often depend on each other. Integration (I) requirements need Data (D) definitions. Reports (R) need Forms (F) to collect the data being reported.

Advice:

- Map dependencies between categories during requirements gathering
- Use a dependency matrix or visualization to show linkages
- Sequence your detailed analysis based on dependencies (e.g., define Data structures before designing Reports)

Watch Out For: Siloed requirements gathering where each category is analyzed in isolation without understanding impacts on other categories.

6. Don't Neglect Non-Technical Requirements

Technology-focused teams often rush through the "N - Non-Technical" category, treating it as less important than Forms, Reports, and Integration.

Advice:

- Give Non-Technical requirements equal time and rigor
- Include operational staff, trainers, and support teams in requirements workshops
- Document policies, procedures, training needs, and support structures with the same detail as technical requirements

Watch Out For: Delivering a technically perfect solution that fails because users aren't trained, processes aren't documented, or support isn't in place.

7. Use FRIENDS for Completeness Checks

One of FRIENDS' greatest values is as a final review checklist. Before closing requirements gathering, walk through each category and ask: "Have we missed anything?"

Advice:

- Include FRIENDS as a formal gate in your requirements review process
- Use it during stakeholder validation sessions: "Let's walk through F-R-I-E-N-D-S to make sure we haven't forgotten anything"
- Create a simple checklist template for each category with key questions

Watch Out For: Assuming your requirements are complete without systematically checking all seven categories.

8. Adapt FRIENDS to Your Project Type

Not all categories are equally important for every project. A data migration project will be Data-heavy with minimal Forms. A reporting dashboard project will emphasize Reports with light Integration.

Advice:

- Scale your effort based on relevance
- For less-relevant categories, do a quick scan rather than exhaustive analysis
- Document why certain categories are out of scope or minimal

Watch Out For: Forcing equal effort across all categories regardless of project type, creating unnecessary overhead.

9. Combine FRIENDS with Stakeholder Engagement

FRIENDS tells you *what* to gather, but your stakeholder management plan tells you *who* to engage and *how*.

Advice:

- Map stakeholders to FRIENDS categories (Who knows about Forms? Who owns Reporting requirements?)
- Use FRIENDS to structure stakeholder interviews and workshops
- Ensure representation from all relevant stakeholder groups for each category

Watch Out For: Gathering technically complete FRIENDS requirements while missing key stakeholder perspectives.

10. Prioritize Within and Across Categories

FRIENDS ensures completeness but doesn't tell you what to deliver first or what fits in your MVP.

Advice:

- After gathering FRIENDS requirements, apply prioritization frameworks (MoSCoW, Must-Have vs. Nice-to-Have)
- Identify MVP scope across all categories (some Forms, some Reports, critical Integrations, etc.)
- Defer lower-priority requirements to future releases

Watch Out For: Treating all FRIENDS requirements as equally important, leading to scope creep and delayed delivery.

Integration with Your PM Methodology

Here's how FRIENDS fits into common project management approaches:

Waterfall/PMBOK Projects

Use FRIENDS during the Requirements Gathering phase:

1. **Initiation** → Identify project scope boundaries
2. **Planning** → **Requirements** → **Apply FRIENDS to gather comprehensive requirements**
3. **Planning** → **Design** → Organize design work by FRIENDS categories
4. **Execution** → Track deliverables using FRIENDS structure
5. **Monitoring** → Report status by FRIENDS category

Agile/Scrum Projects

Use FRIENDS within each iteration:

1. **Product Backlog Refinement** → Use FRIENDS to ensure stories cover all relevant categories
2. **Sprint Planning** → Check: "Are we addressing F-R-I-E-N-D-S in this sprint?"
3. **Sprint Review** → Demonstrate completed work organized by FRIENDS
4. **Retrospective** → Identify gaps: "Did we overlook any FRIENDS categories?"

Hybrid Projects

Use FRIENDS for upfront scoping, then iteratively refine:

1. **Phase 0 - Discovery** → High-level FRIENDS assessment to define scope
 2. **Iterative Delivery** → Detailed FRIENDS requirements gathered just-in-time for each release
 3. **Governance** → Track progress across FRIENDS categories at steering committee meetings
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Quick Tips for Success

Use FRIENDS as a workshop structure - Run dedicated sessions for each category

- **Create templates** - Standardize how you document requirements in each category
- **Assign category owners** - Give team members responsibility for specific categories
- **Review cross-category impacts** - Always ask: "How does this requirement affect other categories?"
- **Keep it simple** - Don't over-engineer the categorization; use it as a thinking aid
- **Validate with stakeholders** - Walk through FRIENDS during requirements sign-off

- **Measure completeness** - Track requirements coverage across all seven categories
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Final Thought: FRIENDS Is Your Completeness Safety Net

Think of FRIENDS as the safety net that catches requirements you might otherwise miss. It's not your entire project management approach—it's a systematic tool that ensures thoroughness during discovery.

The real power of FRIENDS: When a stakeholder says six months into the project, "But we need this critical report!" you can confidently respond, "We walked through Reports (R) in our requirements workshops. This wasn't identified then. Let's treat it as a change request."

Use FRIENDS to be comprehensive, then use your broader PM methodology to prioritize, sequence, and deliver.