Vanier College
Continuing Education

04 Requirement Gathering and Approaching a Client

System Development

420-940-VA Sect 87414

Teacher: Jay Patel

Content

- **Requirement Gathering in Planning Phase: High Level Overview**

Requirement Gathering in the Planning Phase

- In the Planning Phase, requirement gathering focuses on capturing high-level requirements that outline the overall goals, constraints, and expectations for the project.
- The objective is to define what the project should achieve, establish clear business objectives, and lay the foundation for the detailed analysis in the next phase.
- Creation of a high-level **Business Requirements Document (BRD)** and validation of the project's scope with stakeholders.

Step-by-Step Requirement Gathering

1. **Initial Client Meeting**:
   - Schedule a kickoff meeting with the client to understand their goals for the project.
   - Clarify project objectives, key features, and expectations at a high level.
2. **Stakeholder Identification**:
   - Identify key stakeholders who will use or be impacted by the system.
   - Define their roles and interests in the project.
3. **Workshops and Focus Groups**:
   - Conduct workshops or focus groups to gather input from multiple stakeholders.
   - Encourage stakeholders to provide insights into current pain points and desired features.
4. **Existing System Review**:
   - Analyze the current system to identify inefficiencies and areas for improvement.
   - Gather data on how the new system can integrate or replace existing workflows.
5. **Requirement Documentation**:
   - Summarize the findings and document them in a **Business Requirements Document (BRD)**.
   - Include high-level functional and non-functional requirements, as well as assumptions and constraints.

How to Approach the Client for Requirement Gathering

1. **Initial Engagement**:
   - Approach the client at the beginning of the Planning Phase, immediately after project approval, to ensure alignment.
   - Present an agenda for the kickoff meeting to discuss project goals, timelines, and stakeholder involvement.
2. **Ask Open-Ended Questions**:
   - Engage the client with open-ended questions to encourage detailed responses about their needs.
   - Example Questions:
     - What are the main challenges with the current grading system?
     - What key functionalities do you expect from the new system?
3. **Clarify Expectations**:
   - Use the initial meetings to clarify expectations, scope, and constraints such as budget and deadlines.
4. **Frequent Follow-ups**:
   - Plan regular check-ins to ensure the client's evolving needs are addressed throughout the Planning Phase.

Outcome of Requirement Gathering in the Planning Phase

Deliverables from Requirement Gathering

- **Business Requirements Document (BRD)**:
  - A high-level summary of functional and non-functional requirements for the grading system.
- **Stakeholder Map**:
  - A document identifying key stakeholders, their roles, and their needs.
- **Preliminary System Scope**:
  - A brief scope statement outlining what the system will deliver and any exclusions or constraints.

Content

- **Requirement Gathering in Planning Phase: High Level Overview**
- **Conducting first Kick Off Meeting With Client**

Conducting first Kick Off Meeting With Client

Purpose:

The purpose of this meeting is to establish a common understanding of the project objectives, gather high-level requirements, and identify key stakeholders. This meeting will help align the project team and client on the expectations and goals for the project.

Suggested Length:

- **Duration**: 1.5 to 2 hours
- **Reason**: This allows sufficient time to discuss the project scope, gather initial requirements, identify stakeholders, and clarify any uncertainties, without overwhelming participants.

Attendees

Client-Side:

- Project Sponsor (decision-maker)
- Key Stakeholders (e.g., faculty members, administrative staff, IT team)

Project Team:

- Project Manager
- Business Analyst
- Technical Lead (optional)

Suggested Agenda:

Agenda Item	Time	Lead
Welcome and Introductions	10-15 mins	Project Manager
Project Overview and Objectives	15-20 mins	Client / Project Sponsor
High-Level Requirement Gathering	30-40 mins	Business Analyst
Stakeholder Identification	10-15 mins	Project Manager
Timeline, Scope, and Constraints	20 mins	Project Manager
Next Steps and Follow-Up Actions	10 mins	Project Manager

Introduction and Welcome

Introduction and Welcome (10-15 mins):

- Purpose: Introduce the project team and key client stakeholders.
- Discussion Points:
  - Introductions of all attendees.
  - Overview of the project's background and objectives.
  - Explain the purpose of the meeting and expected outcomes.

Project Overview and Objectives (15-20 mins):

- **Purpose**: Establish a shared understanding of the high-level project goals.
- **Discussion Points**:
    - What problem are we trying to solve with the new Student Grading System?
    - What are the key business goals and priorities for the client?
    - Success criteria for the project (e.g., automation of grading, improved reporting, integration with existing systems).

High Level Requirement Gathering

High-Level Requirements Gathering (30-40 mins):

- **Purpose**: Begin gathering initial high-level requirements from key stakeholders.
- **Discussion Points**:
  - Ask open-ended questions to uncover key features and functionalities.
  - Example Questions:
    - What are the main pain points with the current grading system?
    - What features are most important for faculty, administrators, and IT staff?
    - Are there any specific performance, security, or scalability concerns?
  - Focus on understanding the key functional and non-functional requirements.
  - Document all responses for follow-up and deeper exploration in future meetings.

Stakeholder Identification

Stakeholder Identification (10-15 mins):

- **Purpose**: Identify all key stakeholders who will be involved in the project.
- **Discussion Points**:
  - Who are the primary users of the system (faculty, administrative staff)?
  - Who will be responsible for making decisions or providing feedback during the project?
  - Establish the roles of different stakeholders (decision-makers, end-users, IT support).

Timeline, Scope and Constraints

Timeline, Scope, and Constraints (20 mins):

- **Purpose**: Discuss the expected project timeline, overall scope, and any initial constraints.
- **Discussion Points**:
    - Expected timeline for completing the project.
    - Any known budgetary, technical, or regulatory constraints that should be considered.
    - Highlight any assumptions or potential risks that may affect the project scope.

Next Steps

Next Steps and Follow-Up Actions (10 mins):

- **Purpose**: Conclude the meeting by outlining the next steps and follow-up actions.
- **Discussion Points**:
  - Schedule follow-up meetings or workshops for further requirement gathering and stakeholder engagement.
  - Confirm the timeline for documenting the high-level requirements and preparing the Business Requirements Document (BRD).
  - Assign actions, such as gathering additional data, providing existing system documentation, etc.

Tips for Running the Kickoff Meeting:

- **Prepare in Advance**:
  - Create a clear meeting agenda and share it with the client before the meeting.
  - Prepare questions that will help guide the discussion and elicit detailed responses.
- **Engage All Stakeholders**:
  - Encourage participation from all stakeholders to ensure that different perspectives are considered.
  - Make sure to ask both open-ended and specific questions to gather insights.
- **Document Everything**:
  - Take detailed notes during the meeting, including any requirements, assumptions, or constraints mentioned by the client.
  - Use the meeting outcomes to create the initial high-level requirements documentation.
- **Stay Focused**:
  - Keep the discussion focused on high-level requirements and avoid diving too deeply into technical details (those will be covered in later phases).
- **Clarify and Summarize**:
  - At the end of each agenda item, summarize key points to ensure that everyone is aligned on the discussion outcomes.

Thank You!