Writing the Right Requirements

A detailed look into creating SharePoint requirements from the Decision Makers perspective.

Eric Riz, Concatenate Inc.

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Have you ever wondered why SharePoint requirements are so difficult to create when engaging a business or project team? When an individual creates a "wish-list" for a product or service they require, the list is typically short, sweet and to the point. However, when a team gets together, and people begin to discuss their collective needs, the same list becomes exhaustive and difficult to navigate. At the end of that effort, the Project Manager is left with a convoluted mess of both needs and wants, while the end product still seems months (or longer) away from the pending reality that is the implementation and effective use of SharePoint.

This whitepaper sets up the right environment for you to engage your business. It will address proper elicitation and prioritization requirements as well as how to document and action your requirements into meaningful, tangible, actionable statements which your Developers can begin working on.

As Project Manager, the first question to ask when defining SharePoint requirements is what initial functionality is needed to increase efficiencies. The Project Manager must explain to his project team and end users that SharePoint is not just a "thing" or "system"; rather, it is a collection of products and must be viewed by the business in the same way that Microsoft Office is. Simply stating that the business "needs" document management is the same as saying the business needs Microsoft Word; a simple statement with a huge impact. What is the maturity of the business? What systems are currently in use? How is information being stored? How will you re-train end users?

On any requirements effort, it's important to provide an appropriate amount of consulting, training and explanation in order to equip the business with the SharePoint knowledge to make the necessary requirements decisions. Henry Ford famously said, "If I had asked people what they wanted, they would have said a faster horse." Before cars became a universal form of transportation, horses were the accepted method – it was the frame of reference people could articulate. To put that into the SharePoint context, if you don't see the vision of SharePoint and understand what its capabilities are, how can you define your requirements?

What initial functionality is needed to increase efficiencies?

Here are some proposed steps to get your SharePoint requirements written right!

Engage the Entire Business

Start your project by holding a "town-hall" to gain some excitement about what SharePoint is all about and how it will move the company towards their long-term vision and strategy. Show some examples of where SharePoint has been deployed and talk through how the implementation has changed that business for the better. This will plant the seed in the minds of business users of how SharePoint can help; as well as draw ideas and thoughts which will lead to requirements.

Defining Phase 1

The best way for companies to prepare requirements is to start with a core group of business participants who have been selected because of their knowledge and understanding of the corporate strategy and position. From their perspective, draw out high level objectives that SharePoint will accomplish; whether that's streamlining or converting document management, integrating BI, leveraging search or increasing productivity and collaborating through the use of MySites.

Creating a User Community

With the direction for the project now set, begin creating a user community which will be responsible for drawing out the requirements further. When creating the community, include participants who are new to the company as well as those who have been with the company for years. Hold a kick-off meeting to introduce the concepts and direction for the project, including the objectives for your requirements sessions.

Know Which Questions to Ask

Before holding your first requirements session, create a list of qualitative and quantitative questions which you're going to pose to your users. Simply sitting down and asking what they want will surely end in frustration and failure for everyone. Defining the core processes and workflows which the business operates on will allow people to conceptualize what they do and how they can change or modify those steps in SharePoint.

Working with the Team

When working with your team on eliciting and prioritizing requirements, your first task is creating a measurable baseline and common understanding of the goals and expectations for your requirements. Without this common framework and measurement, you and your team are destined for failure. Think of this as the equivalent of preparing for a trip. Before leaving home, you would have your initial requirements in hand; the duration of your trip, the weather at your destination, your planned activities while away and what clothes you needed to pack. These are your variable requirements, those which you have no control over and have external dependencies (you can pack all you'd like, but the airline can still lose your luggage). Next you would confirm that your fixed requirements are in place; these are things that you would have a difficult time replacing while away; such as cash, medication, glasses or contact lenses. The point is, what takes priority on your list and what makes one item more important than another? This is the question your team needs to ask to be efficient and effective when writing requirements.

My recommendation for requirements creation is to start with the most common component within SharePoint, the portal. The SharePoint portal is the foundation of almost every deployment as it provides and fosters a starting point/login page for all departments. From my experience, it is the most understood concept within the SharePoint world, as most users appreciate what an Intranet is and it's more than likely that your portal will replace some type of internal system.

To create your baseline, study and understand the component you are deploying first; in this case the Portal. Then reach out to your business units and secure representation from each in order to have an initial meeting and set some objectives. When you begin creating your baseline and common framework, it is critical to appreciate the different focuses and views that each of your Business Unit (BU) representatives have. You have no amassed a team that looks at the SharePoint world through a very different lens than you do. Your Finance team will have different interests and anticipated outputs to you or the Human Resource team. Furthermore, you will not be aware of the experiences that each has encountered in the past. For example, John may have been an intricate part of another SharePoint rollout with another firm.

Begin by drawing from various experiences and requirements model focuses (who, what, when, where, why, and how) as well as the different points of view your participants have. Explain what the end goal is and what your goals are for the project. Elicit feedback from your participants and embrace the conversation and experiences of your team. Explain and work through some concepts and explore how simple business tasks get done in common ways. How do people view information, have work assigned to them and report status? Once these processes are mapped out, you can create some use cases to depict the commonalities and display them to your BU's as such. It's important that these are seen as common to the business to gain acceptance and create a unified approach to your requirements gathering.

Next, set the objective and define the level of detail you expect from your requirements; it is important to communicate your strategy and set your scope level and an iterative approach; this takes your scope-level or high-level requirements down to detailed-level requirements. I recommend using a top-down horizontal strategy which involves working together to deliver a set of models at roughly the same level of precision, checking their quality, and then moving down to the next level of detail. This method can accelerate the group's mutual understanding of the requirements and reduce rework going forward.

Finally, prioritize your deliverables and engage your BU's in order to predict exactly how long it will take to deliver each piece of functionality. Your success in this phase will be measured by how well your requirements have been created and whether or not your users are engaged in the process. Remember, without engagement you will fail.

TALK THE TALK

A common practice in requirements sessions is to get the team together and simply talk through how your existing portal or intranet operates, while an analyst sits in the corner and furiously attempts to capture the information. Though this approach is unstructured and takes a strong Project Manager to control the session, it can uncover some valuable information on the high-level needs you'll want to build into SharePoint. The difficult part will be documenting the information in a format to appropriately leverage the information and have it be useful in the overall process.

In order to have meaningful and results-driven requirements sessions, follow these steps to success:

Plan Ahead

The adage "measure twice, cut once" is poignant when planning and executing requirements sessions. Spend time measuring the needs of business users and the strategic objectives the business has outlined SharePoint to provide. Create a schedule that shows when and where participants should meet, the details of the meeting and the anticipated outcome for each session; also be sure to invite participants well in advance to ensure their availability. Finally, when planning your meeting, set each session up for no more than 2 hours. Enforcing the 2 hour rule ensures that participants are fresh and remain interested in the conversation.

Discuss

Start the session by outlining your objectives and expectations to the group. Show some sample Portals which have been developed in SharePoint (email me for some screen-shots) to build excitement for what you're about to undertake. Discuss the importance of having transparency in your communication and that each point is a stepping stone towards a formidable SharePoint solution. Then begin by asking some high level questions to generate thought and feedback. How will the Portal change the day-to-day work completed by staff? How can you best leverage Portal functionality to empower users?

Create the Right Environment

In order to create practical requirements statements, create the right environment for creative thought. As the PM or team lead, hold your session in a boardroom or conference room with ample wall space; have lots of "Sharpies" and Post-it Notes on hand. Next, put divide the room into sections identified as "Business Requirements", "Stakeholder Requirements", "Functional Requirements" and "Non-Functional Requirements". By preparing the room as such, you have created a structured approach to the creation of each requirement. Participants now must qualify each of their needs into a specific category where it is most relevant.

Structure

Invite participants to use one Post-it per requirement, and ask them to use as many words as possible to describe their need. This eliminates non-descript answers like "effective" and "user-friendly"; both of which have multiple uses and meanings depending on the author and the person responsible for interpreting the requirement.

Interact and Share

When you feel you have an appropriate number of Post-it's on the walls (there is no maximum); begin reading through the requirements aloud. By reading them, you are building buy-in and adoption as your participants hear each requirement. After reading 10 aloud, ask if anyone in the room has a comment about what they have heard. Focus on eliminating a minimum of 20% of the requirements due to overlap or lack of necessity – remember that not all requirements are going to be aligned to the projects focus.

With the walls full of Post-it's, being documenting the requirements in your tool of choice, such as Excel (though my personal recommendation is to create lists in SharePoint with the appropriate Content Types – use the Business, Stakeholder, Functional and Non-Functional headings described above). Then perform and complete your analysis on the ideas shared and requirements gathered. Remember that not each requirement is going to be possible for implementation; some may be unnecessary while others may be best suited for another phase or project entirely.

Regardless of the documentation format you choose, circulate the information and ensure that Stakeholders and End-Users alike have had an opportunity to review. In the past I have seen surveys created to measure Stakeholder feedback – which was a well-received method of feedback. Once you have feedback and you have categorized your requirements into the appropriate categories, you are ready to begin finalizing your list and moving forward to begin scoping development effort.

Conclusion

Writing effective and efficient requirements for SharePoint is a critical task which must be completed early on in your deployment. This paper has addressed some introductory steps and concepts to get your project team and requirements processes moving in the right direction. Ensure you have effective communication plans built, and strategies deployed in order to engage your business and technical teams through the entire project.

Concatenate, Inc.

160 Eglinton Avenue East

Suite 400

Toronto, Ontario, Canada

M4P 3B5

Tel. (416) 972-0202

www.concatenateinc.com