MIS 3504

Digital Design and Innovation Studio

2: UNDERSTANDING PROJECT WORK AND THE PEOPLE INVOLVED

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Photo: Installation by Jenny Holzer, US Pavillion, Venice Biennale 1990

PROJECT work

As IS

- # What is a **requirement**

- # How would you document one?

"A requirement is a condition or capability needed by a stakeholder to solve a problem or achieve an objective" IIBA Business Analysis Body of Knowledge (BABOK)

What is the best way to document a requirement?

a) A sentence ("The system shall…")
b) A structured sentence (as in a business rule)
c) A structured text template
d) A table or spreadsheet (list of stakeholders)
e) A diagram (workflow)
f) A model (ERD)
g) A prototype or simulation
h) A graph

What are the **core requirement** components

Core Requirement Components

Business Rules

Data (Attributes Entities)

Processes (or Use Cases)

External Agents (or Actors)
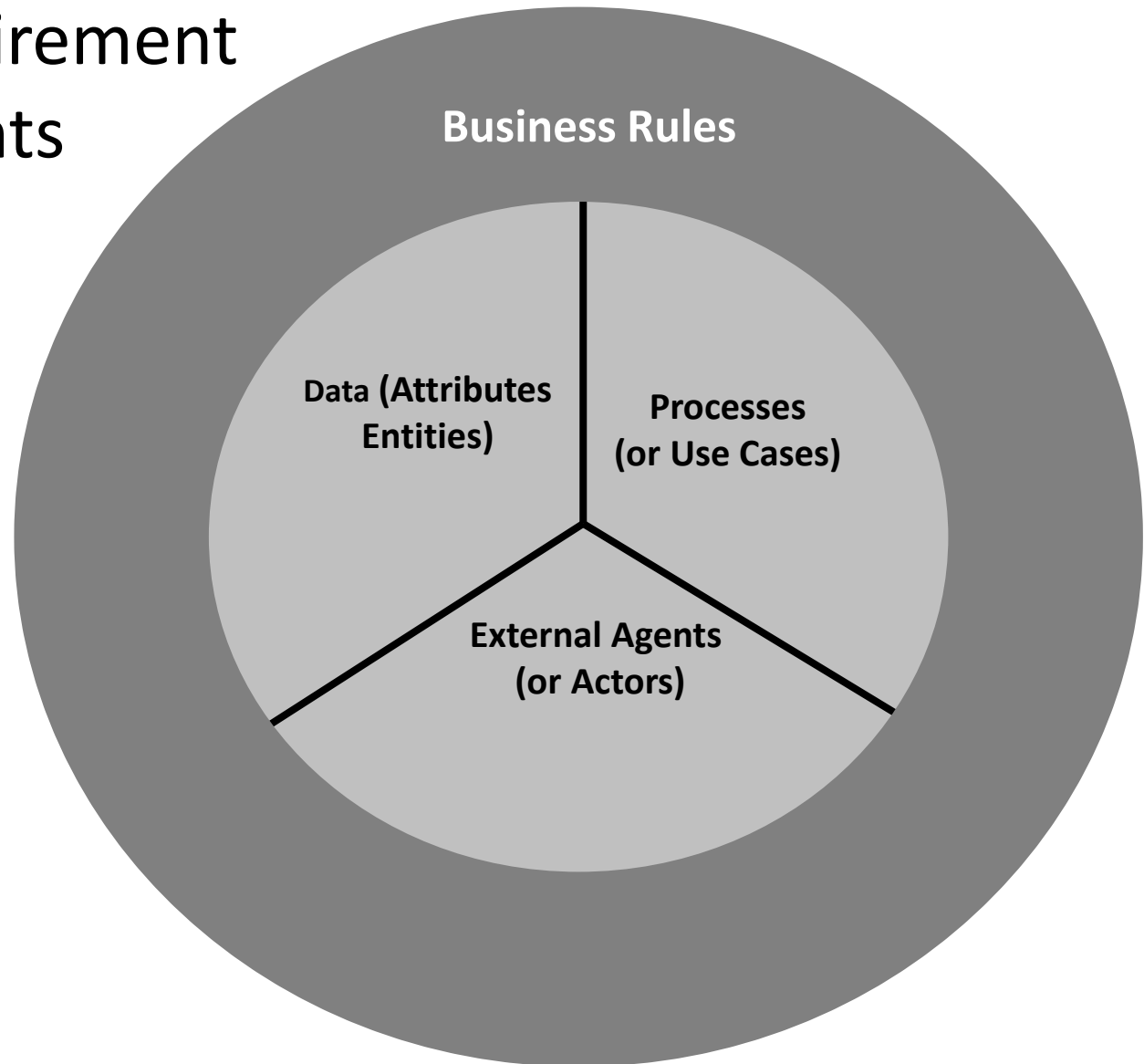
Core Requirement Components

Actors/Agents: individuals, departments, business areas or systems inside or outside the organization

Data: is information

People, Products, Locations and the information about them

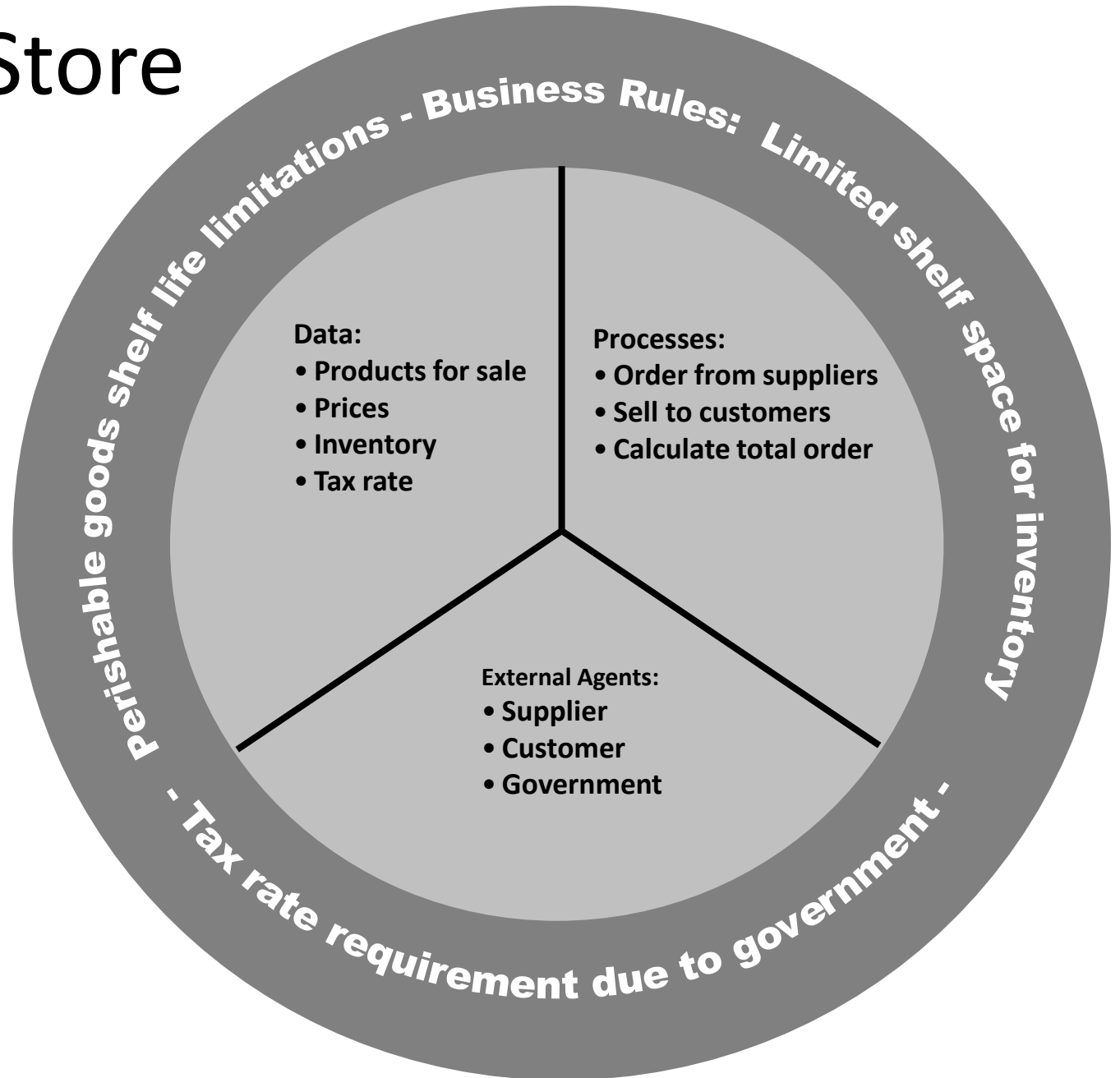Processes: automated or manual activities

Business rules: guidelines, constrains or policies governing the actor/agents, data and process

Exercise: As a team discuss and identify the Core Requirements for a Grocery Store:

- Processes

- External Agents (Typically People)

- Data

- Business rules.

Give examples of each and how they relate to each other.

Grocery Store Example

Perishable goods shelf life limitations - Business Rules: Limited shelf space for inventory - Tax rate requirement due to government -

Data:
- Products for sale
- Prices
- Inventory
- Tax rate

Processes:
- Order from suppliers
- Sell to customers
- Calculate total order

External Agents:
- Supplier
- Customer
- Government

DESIGN INQUIRY / 5 questions to answer:

1. **what** inspired you (good or bad)
2. **who** are the affected stakeholders
3. what are their **unmet needs** +
   why are they important
4. what is your **solution**
5. what **resources** do you need to
   create and sustain your solution

Projects vs. Operations

- What is a **project**

- What differentiates a project from other operational work activities?
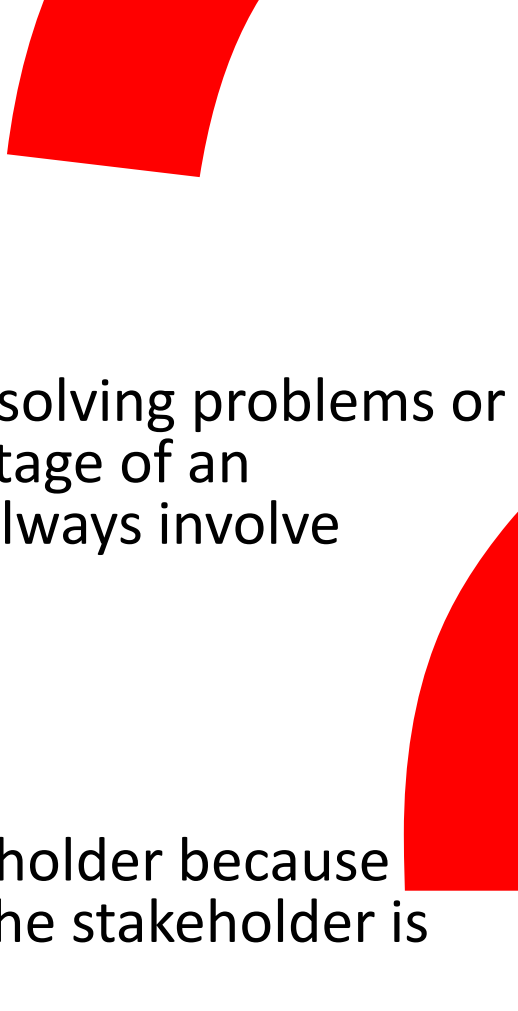
Project vs Operations

1. Temporary endeavor
2. Specific start and completion dates
3. Undertaken to create a unique product or service which brings about beneficial change or added value.

What are the implications?

- Outside the current state
- Need to bring it to a conclusion at some point
- Money being invested toward some end
- People know if they ignore you, you might go away

Operations is work done to sustain the business

- # What is a **product**
  - A product is the result of a project.

- # What is a **solution**
  - A solution "meets a business need, by solving problems or allowing an organization to take advantage of an opportunity." (IIBA BABOK) Does not always involve computer system!

- # What is a **deliverable**
  - Anything given or presented to a stakeholder because has some value to the stakeholder or the stakeholder is expected to act upon it.
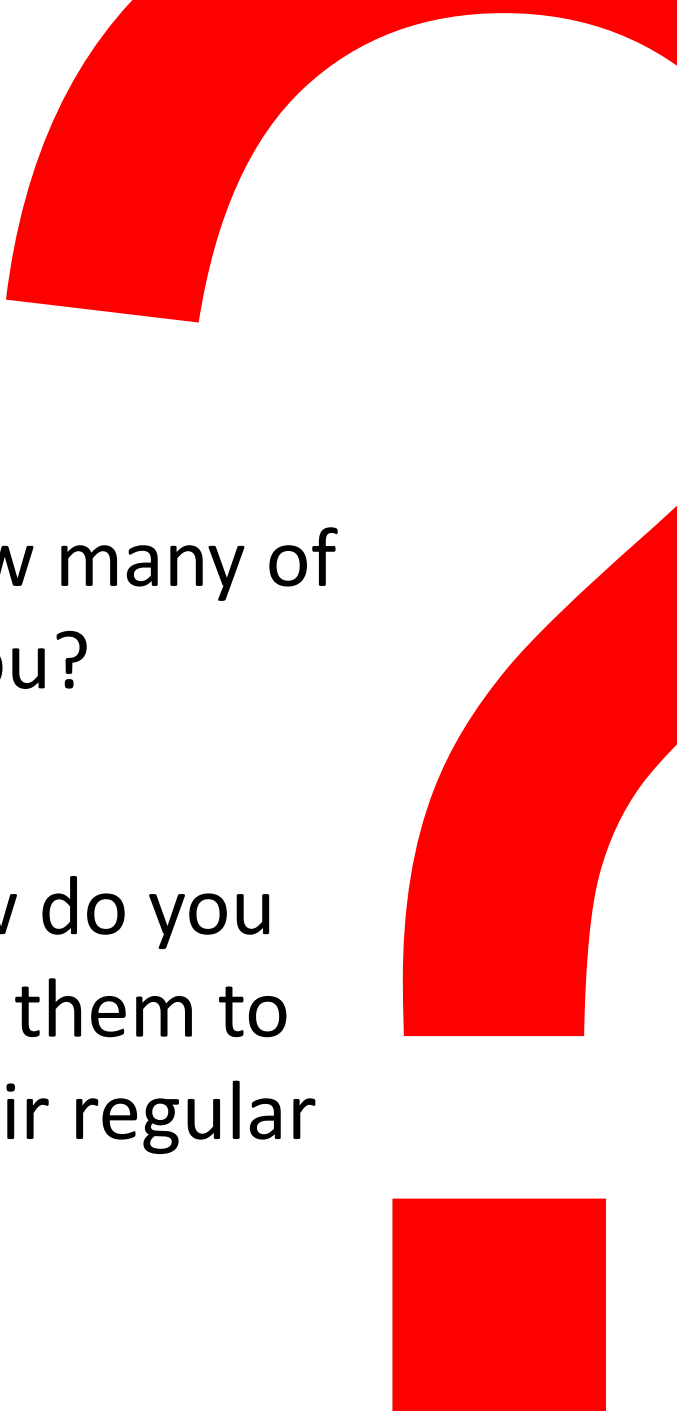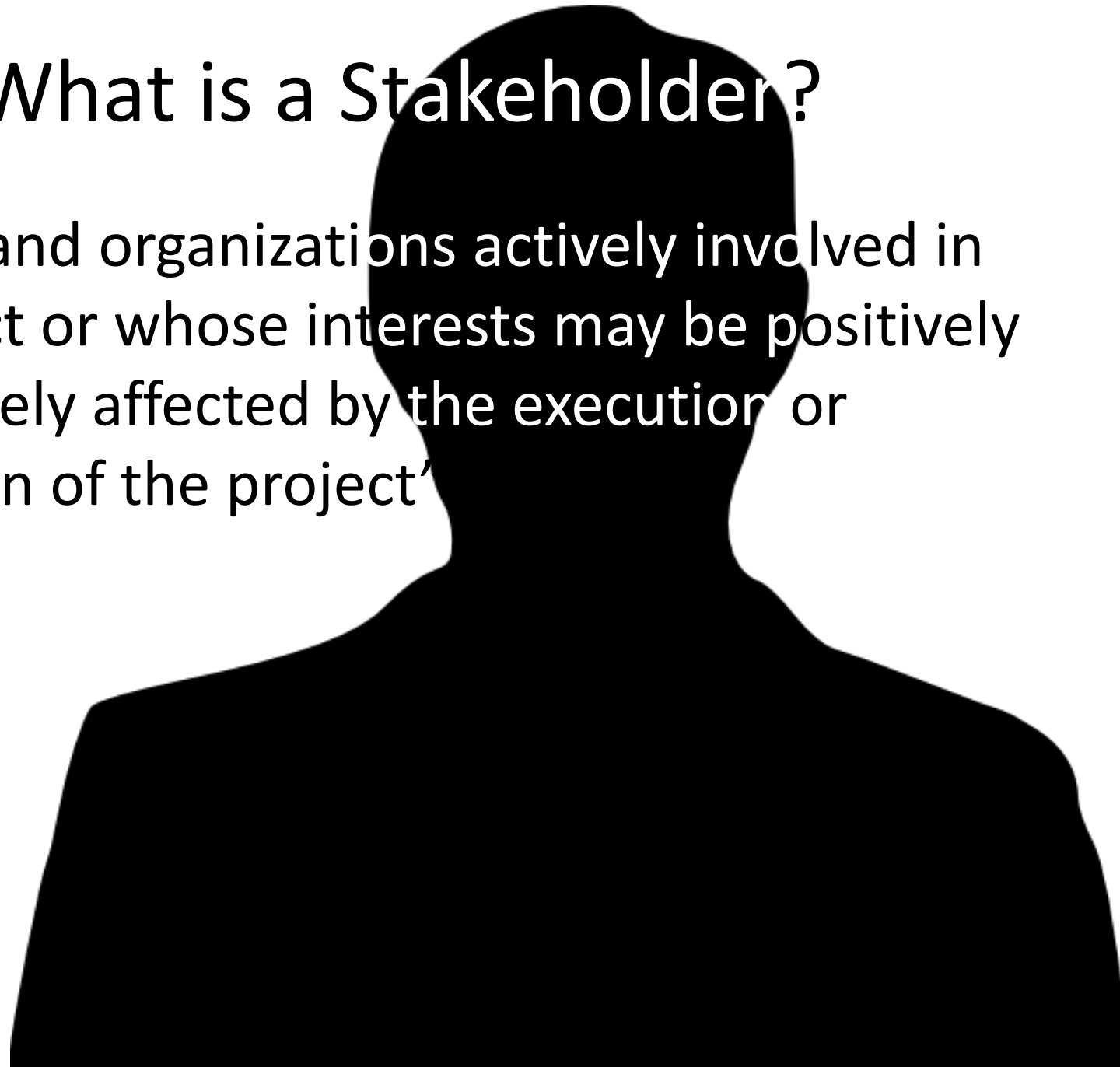
PEOPLE + roles

Inquiry no.1

Who are the **affected** stakeholders

or

Who are the people who have something to gain or lose because of your project?

What is a Stakeholder?

"Persons and organizations actively involved in the project or whose interests may be positively or negatively affected by the execution or completion of the project"

- As a Business Analyst (BA), how many of these stakeholders work for you?

- If they don't work for you, how do you get them to do what you need them to do? After all, they all have their regular job to do too.

Project roles

- What is a "Project Sponsor"?
  - He/she is the "boss" of the project. Ultimate decision maker.
- What is the project sponsor's roles and responsibilities?
  - Secured funding and has specific objectives for that funding.
  - Sponsor determines success/failure of the project.
  - Do you know what motivates your sponsor, their personal biases, their areas of expertise and personal experiences?
  - Sponsors remove barriers to the success of the project.
- How do you communicate with the sponsor?
  - Brief, focused, to the point – 1 page status reports, dashboards, and executive summaries

- What is a "Project Manager"?
  - usually first person assigned to project
  - responsible for planning the project and ensuring team follows the plan
- What is the project manager's roles and responsibilities?
  - manages changes, handles problems, keeps project moving
  - MANAGES PEOPLE, MONEY, RISK AND PROJECT SCOPE
  - chief communicator to sponsor and management
  - helps clear obstacles
- Can **the BA also be the PM?**
  - PM is more of director than BA is. – directs team, gives assignments, makes sure people working on tasks – requires STRONG MANAGEMENT SKILLS
  - BA more focused on listening and analyzing – requires STRONG INVESTIGATIVE SKILLS

- What is a subject matter expert (SME)?
  - Managers manage people but they may not always know in detail exactly what their people do or how processes are performed.   Do they seem to know area? Generalities v exceptions, specific work flows, etc.
  - If this happens, discuss with your PM. Give the manager, "an out"…"I know that you are very busy running the department and that your time is tight, would you like me to work with one of your key people on this project? If insist on being the SME, don't embarrass, take information, check it with others,

- What makes an SME an expert?
  - Experts are a precious resource in a department. Don't be surprised if they assign a person who is not an expert.   Diagnose: Clueless or just new? If former discuss with your PM. If later, as who they talk to – suggest working together to build expertise, If there are problems, quietly and diplomatically escalate.

- Is the manager of a department always an expert on what goes on in their department?
  - **Speak with others in the department to validate the information you are getting.**

- What are other technical roles

  IT Architect

  IT Developer

  Data Administrator/Architect/Analyst
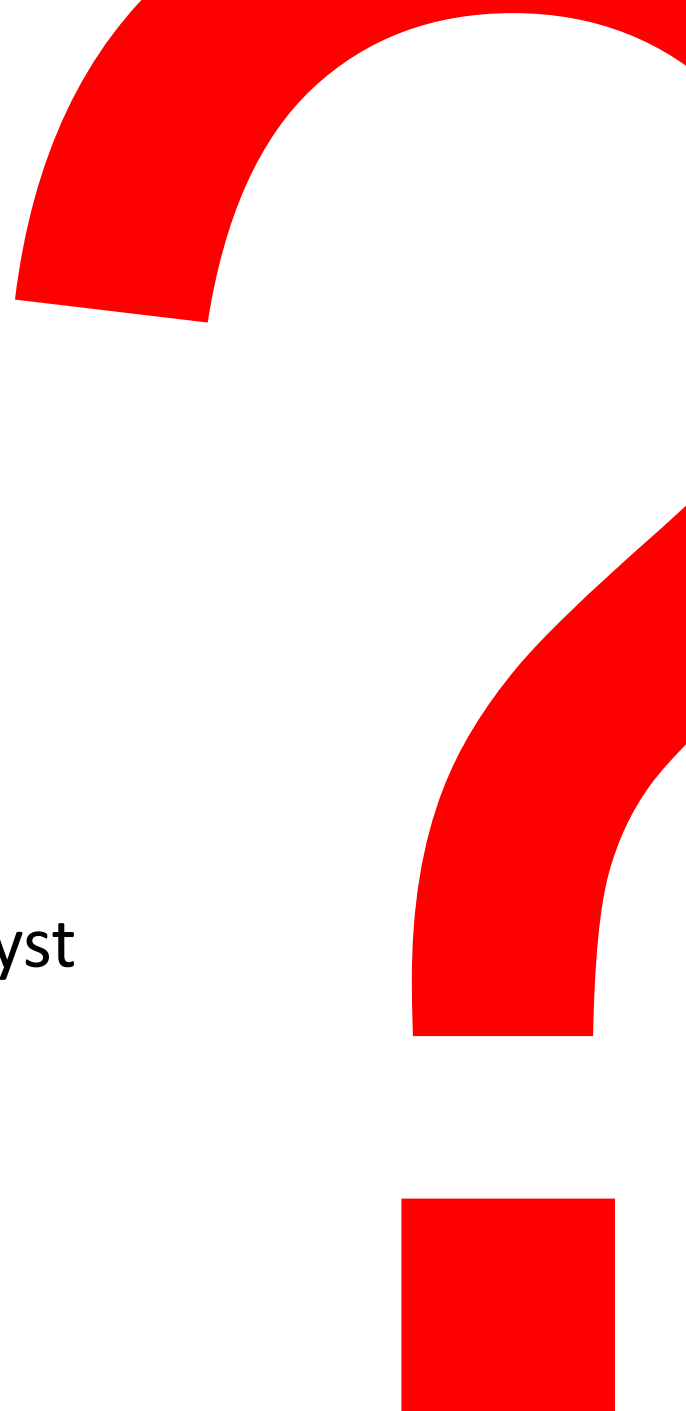
Who is important to the Project

Understand your stakeholders - including their motives, personal biases, expertise, and experiences!

Exercise:

Warehouse stakeholder case

Read the case

Work with your team

Review your notes and:

Identify all the stakeholders associated with this project and explain why you think they are a stakeholder.

Identify the subject matter experts associated with this project and explain why you think they are SME's.

What further questions would you ask each stakeholder and SME?

Consider:

Who are your stakeholders?

Ask yourself:

Are they the stakeholders for YOUR project?

Common Stakeholder Mistakes

- Company stakeholders are not likely to be project stakeholders (closeness to the project)
- *Roles* are as likely stakeholders as *individuals* but often forgotten
- SME's probably are stakeholders if they are assigned to the project from the organization. You can be both!
- Lower level roles in the organization are often missed
- Groups that interact with the organization are often missed

Warehouse Case

You have recently been assigned to a project that is focused on improving warehouse operations. The project sponsor, North America's General Manager, has told you that this is her top priority. She pointed out that customer service has taken so many orders for product that isn't available that they have had $20MM in orders cancelled by the customer when they found out that delivery would be late. The plants are unhappy because their master production schedule is interrupted about 20 times a week with rush orders. The carriers are raising rates because it takes so long to load their trucks as the warehouse tries to locate the needed product. Having the wrong inventory also costs the business as the product's shelf life means it has to be sold at a loss if more than 6 months old and scrapped if older than 9 months.

Customer orders are taken by a customer service representative using a new order system, he then checks for the availability of inventory using a separate old inventory system and places a reservation against that inventory. Customer service has no interest in changing out their new system and has told the project so. The shipping team at the warehouse prints the pick list and shipping papers from their inventory system. Warehouse personnel also record inventory as it arrives from the manufacturing sites. After orders are picked and the prepared for shipment, they are loaded onto the carriers trucks for delivery to the customer which the shipping personnel confirm in their inventory system so that the CSR's can check if needed. When there is a pending order and no inventory, the customer service team calls the plant and asks them to make a rush order. Rush orders are delivered to the warehouse and often loaded directly onto the carrier's trucks. Paperwork is often created manually to ensure prompt delivery.

- Identify the Stakeholders in this case, use the Stakeholder Analysis template
- Identify the Core Requirements in this case, use the Core Requirements template

Stakeholder Analysis: Template

Project Stakeholders Template			Team Number/ Name				
Stakeholders	Stakeholder Name/Title	Stakehold Project Role	Responsibilities	Interest in project	Success Criteria	Concerns	Technical Proficiency/Work Environment Constraints
• Project sponsor • Project manager • Other Business Analysis • SMEs • Quality Assurance analyst • Usability professional • IT Architect • IT developer • Data DBA/Architect/analyst • Database administrator • Vendor							

See pages 62-63 in Memory Jogger

Core Requirements Template

Core Requirements Template	Team Number/ Name		
Process / Use cases	External Agents / Actors	Data - Entities and Attributes	Business Rules