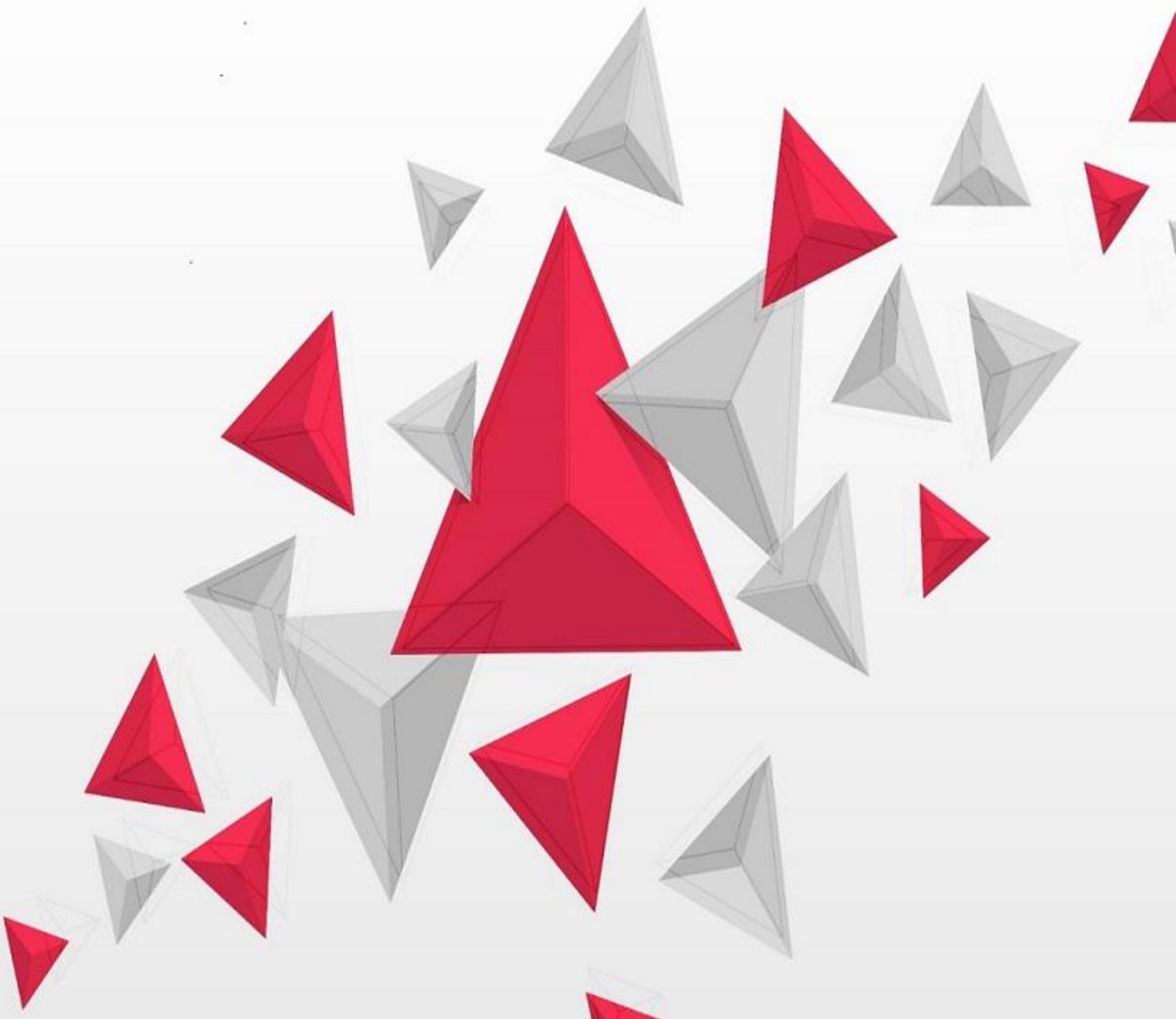


Requirement Management Plan

Guide Book





REQUIREMENT MANAGEMENT PLAN – INTRODUCTION

Suppose you are planning a holiday trip with your friends or family, and you have been made the trip's coordinator. Now since the success of the trip depends on how well you arrange and organize things, you start to plan for the trip:

1. You zero down the destination and the length of your trip.
2. Next, you come up with the overall budget, followed by booking the tickets and hotels
3. Then, you create a list of the places and attractions you would like to cover during your trip.
4. Last, you carefully pack your backpack while considering the country and the weather

What would happen if you do not list down the places you would like to visit or fail to consider the weather while packing your luggage? Well, you will still be able to enjoy your trip, but it will be accompanied by a bit of confusion, last-minute decisions, and possibly frustration!

So, there seems definite merit in planning your activities before boarding the plane for a holiday, and the requirements of a project are no different. Even they need to be prepared and agreed to well in advance!

The complete process of gathering the requirements, their analysis, documentation, approval, change requests, and overall management is governed by a plan called the 'Requirement Management Plan (RMP)'.

This plan is created in the project 'planning phase' and becomes an integral part of the project documentation, especially for the Business Analyst and the Project Manager.

Next, let's see some of the significant aspects of this document.



ASPECTS OF A REQUIREMENT MANAGEMENT PLAN DOCUMENT

1. The first characteristic of the RMP is that it lays out all the techniques and approaches **utilized throughout the project against the requirement analysis**, requirement gathering, and documentation activities.
So, you can expect the RMP to contain the details like - how the requirement is to be gathered through interviews and brainstorming, whether use cases or user stories are to be created for documentation, and which root cause analysis technique is to be used to prevent the re-occurrence of a problem.
All these decisions are made to ensure everybody knows beforehand what technique to use and eliminate any chances of uncertainty and indecision *during* the project.
2. The second aspect is '**Requirement Traceability**'.
Okay, not an issue if you are reading the word 'traceability' for the very first time. 'Trace' means to find something through investigation, much like a detective. Traceability is verifying the history or location of an item by employing recorded documentation, like you tracking your shipment on a courier website.

Requirement Traceability is the ability to see the association between different requirements and how requirements are mapped to other documents like use case documents and test cases.

Documents like **Requirement Traceability Matrix** (also called RTM) or Coverage Matrix are used to track the requirement throughout the project, and their details are contained within the RMP.

The benefits of having Requirement Traceability are multifold like:

- i. It allows thorough impact analysis in case of any changes or modifications to the existing requirements,
 - ii. It helps in validating whether all the elements are covered as per the project scope, and
 - iii. It aids in associating requirements to their equivalent use and test case documents.
3. Another critical aspect of an RMP is '**Configuration Management**'.
Again, I know that sounds kind of a big word, so let's first see what configuration management is. 'Configuration' is an arrangement of some parts or elements in a particular form, well, much like the configuration of the mobile phone you keep discussing. And, **Configuration management is the process of handling changes to these configurations to make sure they function as expected over time**. So, the configuration management is responsible for ensuring your iPhone features precisely as before, even after installing a new update.

Configuration Management or CM is used in various disciplines like s/w configuration management, server configuration management, but in our RMP, the Configuration management is in terms of project documentation only. So, you can expect it to contain details like:

- i. Where are the project artifacts like word documents, diagrams, models, etc... are to be stored? Will it be an online repository like SharePoint or a local shared drive within the organization
 - ii. How are the versions of the documents to be maintained? Through a sub-versioning tool or iterating records with newer versions
 - iii. What are the document naming standards or conventions to be followed in the project so that the documents are easily identifiable?
 - iv. Process of adding and deleting documents
4. The fourth aspect of an RMP is listing down the **requirement categories** or **requirement types**.
Requirements are not only for the business; there are other categories as well like:
 - requirements from the perspective of a user will be 'user requirements,'
 - requirements from the perspective of the system will be 'functional requirements,'

- requirements that specifically cater to the technology will be housed under 'technical requirements'
- requirements that define the attributes and operation of the system being developed are 'non-functional requirements' like usability, scalability, and security.

The RMP will contain an extensive listing of all these areas.

5. Now, we are going to discuss the last and most crucial part of the RMP, i.e., the **Change Management** section.

With the constant evolution in technology and shifts in the way how businesses operate, change is inevitable. However, one cannot shy away from the fact that changes bring in a lot of disturbance to the stability of an application, and if managed improperly, it might bring in utter chaos.

To make sure all this does not happen, a formal process of introducing and managing changes to the project requirements is defined in the RMP. You can expect this process to describe:

- Who all can suggest or propose changes to the project
- How are the changes requested? For example, does a document like a *change request form* need to be submitted?
- Who will study the impact of such changes on the project and give details on what all areas are affected by this change? Also, are the impacts to be quantified, i.e., is it mandatory to provide exact impact figures (person-hours, dollars, etc..)?
- During analysis, what all impact areas need to be given preference? Is it cost, quality, resources, or schedule?
- If multiple changes are being suggested, how are those changes to be prioritized?
- Who shall be the approving authority for the changes? And in case the approval decisions are to be taken in a group, who will be a part of the group that shall authorize the changes?

All these details should be well explained within this section of the RMP.

Okay, so we have covered all the critical aspects of the RMP document. However, there are other areas as well, like requirement review activities and reporting structure of the individuals authoring the requirements. However, they are self-explanatory, and you will understand them while going through the RMP template available with the course.



AUDIENCE OF THE REQUIREMENT MANAGEMENT PLAN DOCUMENT

In this section, we will talk about the different types of stakeholders whose assistance will be required while creating the RMP and those who will be referencing it:

1. The *Client SPOC or SME* will be consulted to give the details of all the requirements that shall be a part of the project scope
2. The *Project Manager* will use the RMP as a formal document that contains the guidelines for managing requirements and approving requirement documents. Also, RMP will be used as a reference in case of ambiguity around any aspects of the requirements.
3. The *Business Analysts* will make the most substantial use of this document as it contains all the significant guidelines which define the BA's area of work
4. The *Change Management Committee or Change Approval Authority* will use to document to learn about the process of approving changes
5. The *Technical Architect or the Technical Lead* may refer to the document in case there is a mention of technical requirements
6. The *Audit or PMO team* (whether external or internal) will use the RMP document to validate whether the document contains all the necessary information as required by the organization's standards



HOW TO CREATE REQUIREMENT MANAGEMENT PLAN DOCUMENT

RMP is usually created by the Project Manager with assistance from the Business Analyst. However, sometimes a senior or lead Business Analyst is expected to prepare the RMP all by himself with the PM just reviewing and approving the document. In any case, a professional BA should know how to create a comprehensive RMP.

STEP 1

While creating the RMP, the first step is to know if there exists an organization-wide template that should be followed. Usually, companies have pre-defined RMP templates (in line with their procedures and policies) with the details of configuration management, reporting structure, and change management already filled in.

If there is no template, one can refer to the historical documents created for the company's previous projects or get in touch with the PMO team to know about the documentation standards.

STEP 2

Next, based on the project type, one should gather the techniques and approaches that should be followed, list down all the requirement documents that will cover the project scope, and identify whether traceability is to be carried out.

The BA should also discuss with the project office or PMO to learn all requirement tools available and standardize the document accordingly.

STEP 3

An important step is to arrange a meeting with the Client SPOC or SME to gather the different functionalities that the project is expected to implement and meticulously group them under the respective requirement types.

It is usually beneficial to let the SME know about the need for an RMP document and its contents and get their support for the document. Such an activity helps in getting a quick sign-off later.

STEP 4

The last step is to gain the buy-in of the complete project team for the Requirement Management Plan and review it with the key stakeholders and members of the project. The benefits of such an activity are multifold, like:

1. Gaining the approval and support of the internal project stakeholders.
2. Instilling a sense of ownership and responsibility amongst stakeholders
3. Defining the roles, level of involvement, and expectations of different stakeholders.
4. Reducing conflicts relating to project processes and deliverables

Once the RMP is reviewed, it should be approved by the client or any other higher approval authority. Usually, in every organization, there is a formal process to approve a Requirement Management Plan. Any updates to the plan are documented in the version history of the plan document.



REQUIREMENT MANAGEMENT PLAN DOCUMENT - BEST PRACTICES

8 out of 10 times, I have seen that a BA/PM, when asked to create an RMP, takes the company's template, has another project's RMP as a reference, and tries to copy as much information as possible without pondering whether all that information is even required.

Since all the projects are different, the RMP should reflect that, *and* as a best practice, the document tailoring should be performed without fail. For instance, if there is no traceability to be performed, that section can be removed, or if no requirement models are to be created, there is no reason for the requirement modeling section to be there in the document.

Furthermore, if an organization's existing processes are not able to do justice to the project's requirement, one can always request to tailor the process as well.

Remember, a BA should be courageous enough to challenge the existing norms for the project's success rather than just following what is asked for - this is the very trait that will set you apart as an ace business analyst and an actual project leader.