GATHER REQUIREMENTS

Clear, actionable requirements lay the foundation for a successful project. When you take the time to understand what stakeholders truly need, your team is positioned to deliver the right solution with confidence. Strong requirements are one of the best ways to prevent project delays and missteps. It's often the role of the project team to lead this effort by working closely with the sponsor, employees/users, project team, and subject matter experts. The process below can help guide that work.

FOUR STEPS TO DEFINE AND MANAGE REQUIREMENTS

1. Define the high-level requirements.

Do this with the sponsor and/or steering committee while writing the Project Charter.

- Start with the "why." What problem are we solving, and who benefits?
- Capture the broad vision and key requirements

2. Elicit specific requirements.

Do this with employees/users and subject matter experts.

- Meet with users directly to understand how this project impacts their daily work
- Ask "why," "what," and "how" to uncover what your users really need
- Use tools like interviews, workshops, observations, and document review

3. Define and prioritize the requirements.

Do this with the project team and subject matter experts.

- Distill ambiguous input from users into specific, categorized, and verifiable requirements
- Use a consistent format (e.g., Waterfall list, Agile user stories)
- Prioritize using the MoSCoW method

- Flag unrealistic or out-of-scope items

4. Validate and approve the requirements.

Do this with the sponsor and/or steering committee.

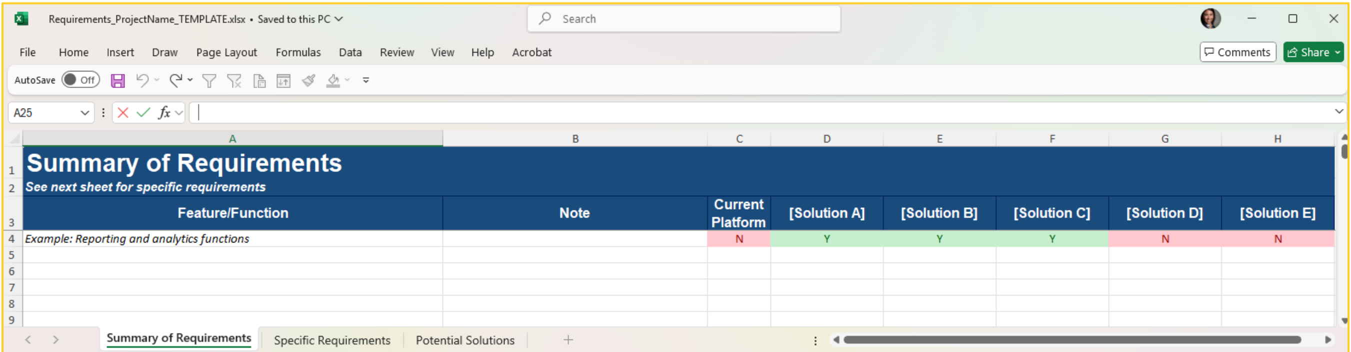
- Present the final list of detailed requirements
- Confirm prioritization and constraints
- Iterate as needed until there is agreement

Requirements Gathering Excel File Format

If you use Excel to define and manage requirements, here is a format to consider.

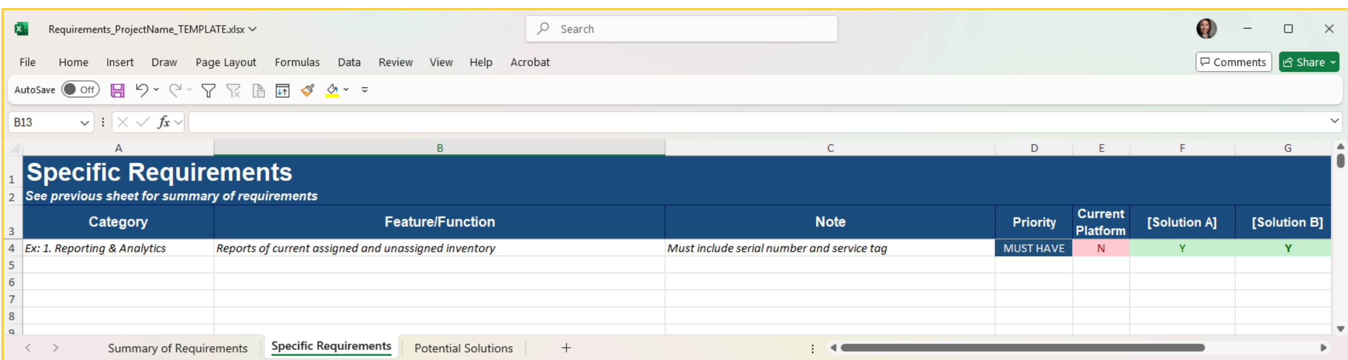
Tab 1: Summary of Requirements

List the features/functions that are required, along with any notes. *Example: Reporting and analytics functions.* Use the columns to denote which solutions include those features/functions.



Tab 2: Specific Requirements

For each category, like Reporting & Analytics, list the specific features/functions required, notes, and priority. *Example: Reports of current and assigned and unassigned inventory. Must include serial number and service tag. Must Have.* Use the columns to denote which solutions have those specific features/functions.



Tab 3: Potential Solutions

Set up these columns: Product/Solution, Benefits, Disadvantages, and Status. Then work with the project team to evaluate the solutions.