



Zarządzanie inicjatywami i wymaganiami w projektach IT

Spotkanie 2

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Czym się będziemy zajmować?

Co już było:

1. Zarządzanie wymaganiami
2. Przegląd oprogramowania

Czym się będziemy zajmować?

Co będzie:

1. Przegląd oprogramowania – cd.
2. Zarządzanie wymaganiami – przegląd wytycznych – cd.
3. Case study – zarządzanie wymaganiami
4. Zarządzanie inicjatywami

Oprogramowanie

**Dalsze programy (komercyjne)
przydatne przy zarządzaniu
wymaganiami:**

1. Enterprise Architect
2. Visual Paradigm

Zarządzanie wymaganiami - wytyczne

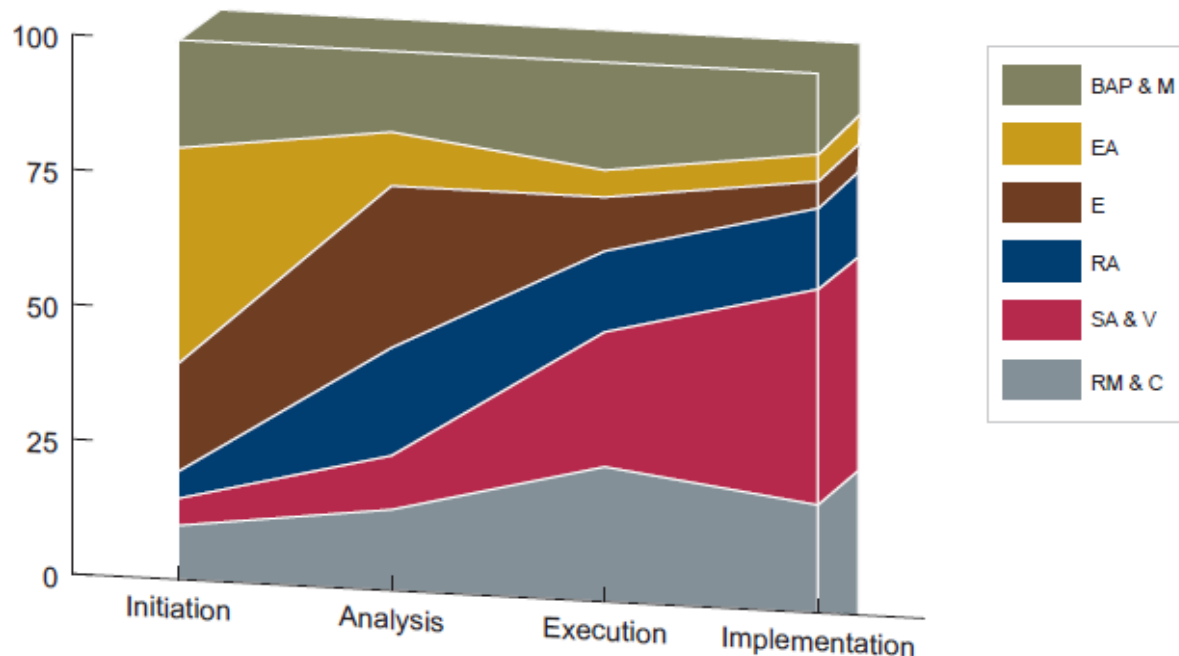
BABOK (Guide to the Business Analysis Body of Knowledge)

- International Institute of Business Analysis (IIBA)
- Zbiór powszechnie akceptowanych dobrych praktyk z zakresu analizy biznesowej

Zarządzanie wymaganiami - BABOK

Obszary wiedzy:

- BAP & M – Business Analysis Planning and Monitoring
- EA – Enterprise Analysis
- E – Elicitation
- RA – Requirements Analysis
- SA & V – Solution Assessment and Validation
- RM & C – Requirements Management and Communication



Źródło: The Guide to the Business Analysis Body of Knowledge™ Version 2.0 Framework

Zarządzanie wymaganiami - BABOK

Business Analysis Planning and Monitoring:

- Identyfikacja interesariuszy
- Ustalenie technik analizy
- Ustalenie procesu zarządzania wymaganiami
- Ustalenie sposobu oceny postępu prac

Tasks	Purpose	Inputs	Outputs
Conduct Stakeholder Analysis	Identify stakeholders who may be impacted by a proposed initiative or who share a common business need. This task includes determining appropriate stakeholders for the project or project phase, and analyzing stakeholder influence, authority (approve, sign off, veto), and project attitude.	<ul style="list-style-type: none"> • Organizational Standards • Defined Business Problem/Opportunity 	<ul style="list-style-type: none"> • Stakeholder list • Stakeholder roles and responsibility designation
Plan Business Analysis Activities	<p>Determines which activities are required to define the solution to a business problem, how those activities will be carried out, the work effort involved, and an estimate of how long the activities will take.</p> <ul style="list-style-type: none"> • Identifies business analysis deliverables • Determines the scope of work for the business analysis activities • Determine tasks for the business analysis activities in the Knowledge Areas: Enterprise Analysis, Elicitation, Requirements Analysis, Solution Assessment and Validation. Detail will vary from KA to KA. • Identifies task dependencies, and interfaces between tasks • Develop estimates for BA work (time, skill level, complexity of tasks, etc.) 	<ul style="list-style-type: none"> • Stakeholder list • Stakeholder roles and responsibility designation • Organizational Standards 	<p>Business Analysis Plans for:</p> <ul style="list-style-type: none"> • Enterprise Analysis • Business Analysis Planning and Monitoring • Elicitation • Requirements Analysis • Solution Assessment and Validation • Requirements Management and Communication

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Business Analysis Planning and Monitoring (cd):

Tasks	Purpose	Inputs	Outputs
Plan Business Analysis Communication	Determine what information the various stakeholders need to be provided about the results of business analysis and the forms it should take (verbal, written, etc). It includes considerations for, as well as constraints, impacts, durability and trade-offs of different communications media.	<ul style="list-style-type: none"> Stakeholder list Stakeholder roles and responsibility designation Business Analysis Plan(s) 	Business Analysis Communication Plan
Plan Requirements Management Process	Describes how to determine the appropriate requirements process for a particular initiative. It describes how we determine what is currently in place, and how to create the process if it doesn't exist. It includes determining whether and how requirements are changed, which stakeholders need to approve (instead of the actual approval of requirements), as well as who will be consulted on, or informed of changes, etc. It also includes the approach to requirements traceability and determining which requirements attributes we will capture.	<ul style="list-style-type: none"> Organizational Standard Business Analysis Plan(s) 	Requirements Management Plan
Plan, monitor and Report on Business Analysis Performance	Determine which metrics will be used to measure the work performed by the business analysts. It includes how we track, assess, and report on the quality of the work performed by business analysts and take steps to correct any problems that may crop up. If problems are identified, determine appropriate corrective action (which may feed into the development of future plans on this or other projects).	<ul style="list-style-type: none"> Organizational Performance Standards Actual Performance Metrics Business Analysis Plan(s) Requirements Management Plan 	<ul style="list-style-type: none"> BA Performance Assessment Lessons Learned Process improvement recommendations

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Enterprise Analysis:

- Ustalenie wyzwania
- Zdefiniowanie zakresu rozwiązania

Tasks	Purpose	Inputs	Outputs
Identify Business Need	<ul style="list-style-type: none"> • Evaluate the internal and external environment <ul style="list-style-type: none"> ◊ Internal: <ul style="list-style-type: none"> → Define/refine current/future business architecture → Assess the current state of technology (infrastructure and applications) ◊ External: <ul style="list-style-type: none"> → Benchmark analysis → Competitive studies • Fully define business problem/opportunity 	<ul style="list-style-type: none"> • Business Architecture • Business Goal(s) 	Defined Business Problem/Opportunity
Determine Solution Approach	<ul style="list-style-type: none"> • Identify potential solutions • Analyze feasibility of options • Recommend viable business solution • Validate with decision makers 	<ul style="list-style-type: none"> • Business Architecture • Defined Business Problem/Opportunity 	Solution Approach
Define Solution Scope	<ul style="list-style-type: none"> • Context diagram • Product Breakdown Structure 	<ul style="list-style-type: none"> • Business Architecture • Defined Business Problem/Opportunity • Solution Approach 	Solution Scope
Develop the Business Case	<ul style="list-style-type: none"> • Define project objectives and expected business benefits • Develop project scope • Estimate time, cost, resources • Analyze cost vs. benefit • Evaluate risk 	<ul style="list-style-type: none"> • Business Architecture • Business Goal(s) • Defined Business Problem/Opportunity • Solution Scope 	Business Case

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Zarządzanie wymaganiami - BABOK

Elicitation:

- Identyfikacja i opisanie potrzeb interesariuszy

Tasks	Purpose	Inputs	Outputs
Prepare for Elicitation	Prepare for elicitation by ensuring all needed resources are organized and scheduled for conducting the elicitation activities.	<ul style="list-style-type: none"> • Stakeholder list • Stakeholder roles and responsibility designation • Either (Defined Business Problem/ Opportunity) or (Business Case and Solution Scope) • Elicitation plan 	<ul style="list-style-type: none"> • Scheduled resources • Supporting materials
Conduct Elicitation	Meet with stakeholder(s) to elicit information regarding their needs	<ul style="list-style-type: none"> • Supporting materials • Either (Defined Business Problem/ Opportunity) or (Business Case and Solution Scope) • Organizational standards 	<ul style="list-style-type: none"> • Elicitation activity results • Assumptions, constraints, risks, issues • Documentation based on technique (e.g., interview notes, workshop results, survey responses, etc.)
Document Elicitation Results	Record the information provided by stakeholders for use in analysis.	<ul style="list-style-type: none"> • Elicitation activity results 	<ul style="list-style-type: none"> • Stated requirements
Confirm Elicitation Results	Validate that the stakeholder's intentions have been correctly captured and understood.	<ul style="list-style-type: none"> • Stated requirements 	<ul style="list-style-type: none"> • Validated stated requirements

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Zarządzanie wymaganiami - BABOK

Requirement Analysis:

- Badanie poprawności i dopracowywanie pozyskanych wymagań
- Ustalenie zgodności z potrzebą biznesową

Tasks	Purpose	Inputs	Outputs
Organize Requirements	Structure and organize a set of requirements into logical sets. The organization may be based on defining multiple "levels" of requirements, packaging related functions together, and so forth.	<ul style="list-style-type: none">• Business Case• Solution Scope• Requirements	Structured requirements
Prioritize Requirements	Determine the business priority of requirements (including voting, ranking, benefit analysis and so forth). Identify logical dependencies between requirements and requirements packages.	<ul style="list-style-type: none">• Requirements• Business Case	Prioritized requirements
Specify and Model Requirements	Describes standard practices for writing textual requirements and creating models or diagrams. Specific models are addressed as techniques. Includes capturing the requirements attributes.	Requirements	Specified or modeled Requirements
Determine Assumptions and Constraints	As we analyze stakeholder requests we will find that some of their desires are not properly requirements but are rather based on assumptions regarding what the solution team is capable of delivering. These should be captured and assessed but are not properly requirements .	Stakeholder Statements	Assumptions and Constraints
Verify Requirements	Determine that the requirements are correctly and completely defined.	Specified or modeled Requirements	Verified requirements
Validate Requirements	Validate that a requirement will satisfy a business need.	Verified requirements	Validated requirements

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Solution Assessment and Validation:

- Ocena zaproponowanych rozwiązań i wypracowanie najlepszego

Tasks	Purpose	Inputs	Outputs
Assess Requirements Coverage	<p>Determine how well possible options for solution designs will meet the requirements. The assessment may include a recommendation of a particular solution, rejection of all solutions, or an assessment of possible trade-offs.</p> <p>Examples:</p> <ul style="list-style-type: none"> • RFI/RFP responses • Internal designs • Manual procedures 	<ul style="list-style-type: none"> • Solution Design Option(s) 	<ul style="list-style-type: none"> • Solution Design Assessment
Allocate Requirements	<p>Allocate requirements among releases and/or solutions components. This task ensures that the possible release options are designed in a way to maximize the possible business value given the options and alternatives generated by the design team.</p> <ul style="list-style-type: none"> • Allocate requirements to hardware, software, manual procedures, etc. • Recommend the release/delivery strategy • Understand trade-offs between different implementation approaches 	<ul style="list-style-type: none"> • Solution Design • Validated Requirements 	<ul style="list-style-type: none"> • Allocated Requirements
Determine Organizational Readiness	<p>Determine organizational readiness to effectively operate the new solution</p> <ul style="list-style-type: none"> • Conduct organizational readiness assessment • Recommend ways to optimize the organizational deployment 	<ul style="list-style-type: none"> • Business Architecture • Solution Design 	<ul style="list-style-type: none"> • Organizational Readiness Assessment • Organizational Change Recommendations

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Solution Assessment and Validation (cd):

Tasks	Purpose	Inputs	Outputs
Validate Solution	<p>Validate the verified and deployed solution meets the business need:</p> <ul style="list-style-type: none"> • Define acceptance criteria (including what level of conformance to requirements is acceptable) • Identify defects/shortcomings (this should be distinguished from functional testing) • Analyze impact • Define corrective actions • Validate corrective actions <p>When a problem is identified with the deployed solution (i.e., a failure to meet a requirement whether or not the requirement was correctly specified) determine what is the most appropriate response.</p>	<ul style="list-style-type: none"> • Verified or Deployed Solution • Validated Requirements 	<ul style="list-style-type: none"> • Validated Solution • Defect Impact Analysis • Validated Corrective Actions
Evaluate Solution	<p>Assess the value of the solution as deployed to the business (to determine if the original goals are met). Compare actual vs. expected costs and benefits.</p>	<p>Deployed Solution Performance Metrics</p>	<p>Cost/Benefit Analysis</p>

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Requirements Management and Communication:

- Zapewnienie efektywnej komunikacji i zarządzanie zmianą

Tasks	Purpose	Inputs	Outputs
Manage Solution and Requirements Scope	<p>Baseline and manage changes to business case, solution and requirements</p> <ul style="list-style-type: none"> • Approve requirements (according to the approval authority stated in the Requirements Management Plan) • Baseline requirements • Manage formal and informal change control on requirements • Control multiple versions of requirements work products • Manage requirements conflicts and issues 	<ul style="list-style-type: none"> • Stakeholder roles and responsibility designation • Requirements • Requirements management plan 	<ul style="list-style-type: none"> • Approved Requirements • Decision Record
Manage Requirements Traceability	<ul style="list-style-type: none"> • Trace requirements (update and maintaining relationships between requirements components) • Perform impact analysis when changes are requested and supply this information to the change control process (in previous task) • Support the allocation of requirements to the solution in Solution Assessment and Validation. 	<ul style="list-style-type: none"> • Requirements 	<ul style="list-style-type: none"> • Traced Requirements
Maintain Requirements for re-use	<ul style="list-style-type: none"> • Select which implemented requirements will be maintained after solution implementation • Name the responsible party who will maintain the requirements (i.e. custodian, librarian) • Facilitate ongoing use of requirements for impact analysis and solution maintenance • Facilitate re-use of requirements on related projects to encourage enterprise consistency of business models 	<ul style="list-style-type: none"> • Implemented requirements 	<ul style="list-style-type: none"> • Maintained/re-used requirements

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Requirements Management and Communication (cd):

Tasks	Purpose	Inputs	Outputs
Prepare Requirements Package	<ul style="list-style-type: none">• Determine appropriate format for requirements (v1.6 task)• Create a requirements package (V1.6 task)	<ul style="list-style-type: none">• Requirements• Business analysis communications plan	<ul style="list-style-type: none">• Requirements package (e.g., executive summary, formal documentation, RFI, RFP, etc.)
Communicate requirements	<ul style="list-style-type: none">• Interaction with all stakeholders before, during and after projects.• Each KA involves communication that will be noted here• Interaction with solution team to assure that requirements are correctly understood and implemented	<ul style="list-style-type: none">• Requirements package• Business analysis communications plan	<ul style="list-style-type: none">• Communicated requirements

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Metody gromadzenia wymagań

Wywiady

Analiza dokumentów

Ustalanie interfejsów

Obserwacja

Reverse Engineering

Kwestionariusze

Przypadki użycia

Prototypy

Odgrywanie ról

Techniki grupowe:

- Spotkania (jako podsumowanie/feedback) dla danych gromadzonych w inny sposób
- Grupy focusowe
- Burza mózgów
- warsztaty Joint/Rapid Application Development (JAD/RAD)

Case study

Gromadzimy wymagania dla systemów:

- Grupy do 6 osób
- Sugerowana technika to burza mózgów (uwzględniająca role)
- Prezentacja wyników w formie mindmap itp. mile widziana
- Czas na przygotowanie 45 minut
- Prezentacja – max 5 minut na grupę

Krótkie przypomnienie zasad burzy mózgów:

- Jasny cel/definicja obszaru, który nas interesuje
- Limit czasu; brak limitu pomysłów
- Uczestnicy i facilitator
- Ustalenie kryteriów do późniejszej oceny pomysłów
- Podczas sesji pomysły nie podlegają dyskusji, krytyce, czy ocenie
- Zapisujemy wszystkie pomysły
- Stawiamy na kreatywność. Nadbudowywanie na pomysłach innych jest OK
- Po zakończeniu sesji dyskutujemy i oceniamy pomysły
- Lista zbiorcza (potem do wysłania)
- Priorytetyzacja pomysłów

Case 1:

- Pracujesz dla Profeo. Masz za zadanie zaplanować zmiany w serwisie, które pozwolą na skuteczne konkurowanie z Goldenline

Case 2:

- Jan K. – znany polski biznesmen planuje otwarcie prywatnej szkoły biznesu w Warszawie. Ustal wymagania dla serwisu, który będzie obsługiwał studentów studiów podyplomowych

Case 3:

- Twój zleceniodawca chce wejść na rynek księgarni internetowych. Chce skorzystać z dobrych praktyk liderów (Merlin, Empik) i uniknąć ich błędów.

Case 4:

- Opracuj wymagania dla serwisu personalizacji WKM

Case 5:

- W ramach firmy planujecie stworzenie systemu do zarządzania wymaganiami oraz pomysłami odnośnie oprogramowania, które tworzycie i sprzedajecie

Case 6:

- Klient (firma ubezpieczeniowa) zleca wykonanie systemu raportującego stan projektu (w tym wypadku status obsługiwanej szkody komunikacyjnej), z którego korzystać będą pracownicy jak i Klienci.

Zarządzanie inicjatywami

Pojęcia:

- Projekt
- Program
- Portfolio

Zarządzanie portfolio projektów:

- Najczęściej organizacja jest zaangażowana w wiele równoległych projektów
- Nie wszystkie z nich są tak samo istotne dla organizacji i nie wszystkie mają takie samo zapotrzebowanie na zasoby
- Jako, że strategia się zmienia może się okazać, że projekt nie jest potrzebny, jest sprzeczny z innym, lub jest duplikatem

O co chodzi:

- Jak zwykle – o pieniądze/ROI
- Ale też o zarządzanie ryzykiem
- Zarządzanie portfolio projektów ma pomóc lepiej osiągać cele organizacji

Zarządzanie inicjatywami

Narzędzia:

- Balanced Scorecard (przykład)
- Przegląd realizowanych projektów
- Architektura korporacyjna

- (z organizacyjnego punktu widzenia) PMO – biuro projektów

Gartner PPM Maturity Model

	Level 0: Nonexistent – ad hoc	Level 1: Initial – reactive	Level 2: Developing – emerging discipline	Level 3: Defined – initial integration	Level 4: Managed – increasing efficiency	Level 5: Optimized – enterprise- orientation
People	Staff assigned to projects on a first-available basis. PPM activity limited to interests and actions of individual managers.	Priority projects get appropriate staffing – everything else is “first available.” Nascent PPM leader role – primarily still an individual manager focus.	PMO(s) established. Programs increasingly managed in-house. Project staffing/resource capacity issues begin to be addressed.	PPM leader role formalized and increasing specialization trend beginning. Shared-resource pools formalized.	Network of PPM leaders exist companywide in a federated model. Centers of excellence improve workload management. Capacity planning enabled.	PPM leaders exist in all areas of the company. Accepted specialization (program, portfolio and strategy) supports maximum performance.
PPM Processes	Projects are assigned to line or staff managers. No formal PPM processes beyond high-level budgeting, except as provided by outside vendors.	All internal processes centered on management of critical projects. Vendors are often responsible for large initiatives.	Project processes in place. PMO(s) organized. Emerging understanding of PPM. Risk now reviewed.	PPM function established. Projects are approved on a portfolio basis. Enterprise architecture (EA) functions involved.	Similar projects managed as programs. Portfolio is actively maintained.	Portfolio extended beyond IT. Comprehensive PMO. Pipeline managed in real time.
Technology	Intermittent use of project schedulers, spreadsheets and other point tools on a “by project” basis.	Project scheduling tools and milestone reporting adopted.	Project collaboration and team workspaces supported.	Portfolio tool is in place. Reporting dashboards.	Workflow added to toolset. Business users adopt tools as useful.	Single, integrated system supports reporting, collaboration and analysis.

Gartner PPM Maturity Model

	Level 0: Nonexistent – ad hoc	Level 1: Initial – reactive	Level 2: Developing – emerging discipline	Level 3: Defined – Initial integration	Level 4: Managed – increasing efficiency	Level 5: Optimized – enterprise- orientation
Financial Management	Projects done without formal cost, benefit or risk valuation.	Projects have budgetary estimates, Actual cost can be estimated. Some benefit statements.	Project cost and labor hours captured. Estimate of benefit made for each project.	Costs are captured and forecast. Benefits are identified and related to strategy in the portfolio.	The portfolio is modeled and appropriately optimized, factoring in risk. Benefit realization is tracked.	Programs have their own financial resources, and full life cycle costing is available.
Relationships	Programs can only be defined and managed with vendor help. IT organization and business communicate ad hoc.	IT organization and business attempt to work together, usually via business analyst involvement and project manager updates.	Role of relationship manager emerges.	Relationship managers viewed as trusted advisors.	Relationship managers are full-fledged consultants to the business.	Social responsibility aspects are considered, as well as impact on supply chain.



Podsumowanie

Materiały do wykładu:
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Podsumowanie

Dziękuję