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Project Management

What does the customer really want? – The four steps to success

Dogged investigations – that is how project managers determine project requirements

In future all incoming orders were to be processed automatically. This was the goal with which a SME wholesaler had launched a software project. It was meant to kick off urgently - preferably yesterday. However, the project manager seemed to apply the brakes. He discussed the word “automatic”, a word which was wide open to interpretation. Does this imply that no one would be needed to even supervise the order management process? Or should the computer simply take over routine tasks so that staff would be freed up to serve customers? No one knew exactly what was meant, no one in the sales department, in the customer service department or the admin department had a clue. In the end the project manager invited all departments to a workshop. For a full day he discussed what the words “automatic order processing” held for each and every one present. “If we don’t clear this up now, we will waste a lot of money changing our software over and over again,” he said to justify this exhausting work.

It is very rare that a project sponsor is able to offer a conclusive, crystal clear catalogue spelling out all the expectations of the project deliverables – it does not matter if it is a mechanical engineering, product development or software project. The so called requirements – a catalogue of all the detailed specifications – remain murky and incomplete. Some project sponsors seem to assume that the project manager has intimate knowledge of all their needs concerning the project deliverables or that he can read their minds. With other projects different departments argue over their divergent requirements of the project. Or they agree on unclear formulations that might even include conflicting statements. This is how the project with its manager is send down a slippery slope and often the project manager is made responsible for this.

Experts urgently recommend to project managers to be insistent when defining project requirements and to go about this in a methodical way. If necessary experienced project managers will

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wrestle with the client over weeks until a clear picture of the assignment emerges. Research proves that the time invested in defining requirements pays off later. “Diligently defined project deliverables will significantly reduce the cost and time needed to complete the project,” confirms Egon Hren, senior consultant for next level consulting.

Some companies work with specialised requirements engineers, who compile all requirements in a comprehensive way, formulate them precisely and then reconcile the catalogue in detail with the project sponsor’s expectations. “Most times the project manager himself must do this work”, Egon Hren explains.

For this task he recommends the following tried and tested four steps.

Step One: Identify all requirements

The information given in the client’s specifications document is rarely sufficient. Expert project managers use these first client specifications as a basis to launch into their own dogged investigation. They will ask for figures, performance characteristics, expectations regarding the functional scope and design as well as processes. They want to understand the strategic objectives behind the client’s project. A first rough overview can then be assembled using all of these different puzzle piece.

Many project managers like to conduct one-on-one interviews for their research. They run through a standardised questionnaire with the different client departments and other stakeholders. Apart from these interviews they also organise workshops which serve to work through the requirements with all stakeholders in detail. Workshops follow the round table principle, all participant align themselves to formulate consistent requirement. “Workshops afford useful insights into the interests of the sponsor”, says Egon Hren. The project manager picks up valuable information about the reasons and motivation for specific requirements. In addition experienced project managers make their own observations that enable them to draw conclusions about required specifications. “With a business software for example the project manager can identify established processes. This is how he can deduct further requirements and objectives for his project,” he adds.

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Step Two: Document all requirements

During his research the project manager collected a lot of information. Now he needs to document this in a structured and understandable way. He words each requirement with precision and in neutral language and underpins it with data and target values. For example: A computer application should be “free of barriers”. What useful information does such a requirement offer exactly to the programmer and the software designer? What font size is permissible? How complex may the menu structure become? If necessary requirements which have been specified with words are additionally described through graphic models.

When documenting requirements professionals aim to avoid any misunderstandings. Important terms are defined in a glossary. This way the project manager and the sponsor will have a common understanding of central issues. “Many project managers arrange their requirements in order of priority”, elaborates Egon Hren, “They indicate which requirements are vital and therefore indispensable, which requirements should be included if at all possible and which ones would simply be nice to have.”

Step Three: Check and re-check requirements

Walk in the client’s shoes and engage your critical thinking – this recommendation sums up the best approach to requirements engineering. Professionals check the catalogue of requirements for clarity and inner logic. Do all the requirements add up to one coherent picture? Do they fit with the objectives of the project? Any contradictions must be cleared up. Sometimes defining binding requirements leads to conflict between departments. These conflicts need to be analysed and resolved. Otherwise the requirements catalogue might prove inconsistent and the project will be built on an unstable foundation.

Step Four: Manage requirements

Some projects work with hundreds of requirements. Losing overview can happen fast. This is why project managers need to manage their requirements in a systemic way. Specialised IT tools are available to support them. Professionals list each requirement with the following information: What kind of requirement is this? What department does it originate from? Who in the project team will implement this requirement through which technical modules? And lastly: How do these modules relate to other modules? What are the interdependencies?

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“Keeping track of and documenting requirements in this detailed manner comes in very handy later on,” explains Egon Hren. If it comes to disagreements the project manager can provide detailed information on how the requirement was established and how it is being realised. Such documentation also facilitates changes later in the process. Many sponsors change their requirements as the project unfolds. In such cases project managers need to respond quickly and integrate the changes. “The project manager who has an overview of all the project requirements and knows who in his team is working on which requirement will be at a clear advantage”, closes Egon Hren.

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