Setting up your project for success

Seminar 3: Requirements and Change

Welcome

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Agenda

Speakers

Chris Wingham: Nichols, Project and Programme Management advisor

- Chartered Engineer with experience leading capital investment and business change initiatives across whole lifecycle
- Values ranging from £5k to £100M plus
- Former Army Engineering Officer and 10 years delivering major Programmes for TfL

Simon Bevis: Nichols, Project and Programme Management advisor

- Chartered Civil Engineer
- Experience in the design, set up, delivery and assurance of capital projects and programmes
- Public and private clients across urban regeneration, infrastructure (rail and roads), international development, defence and education sectors
- Small to mega projects- project values from £60k to £98bn

1. Introduction (5)

2. Requirements Management (25)

3. Breakout Discussion (15)

4. Benefits Management (10)
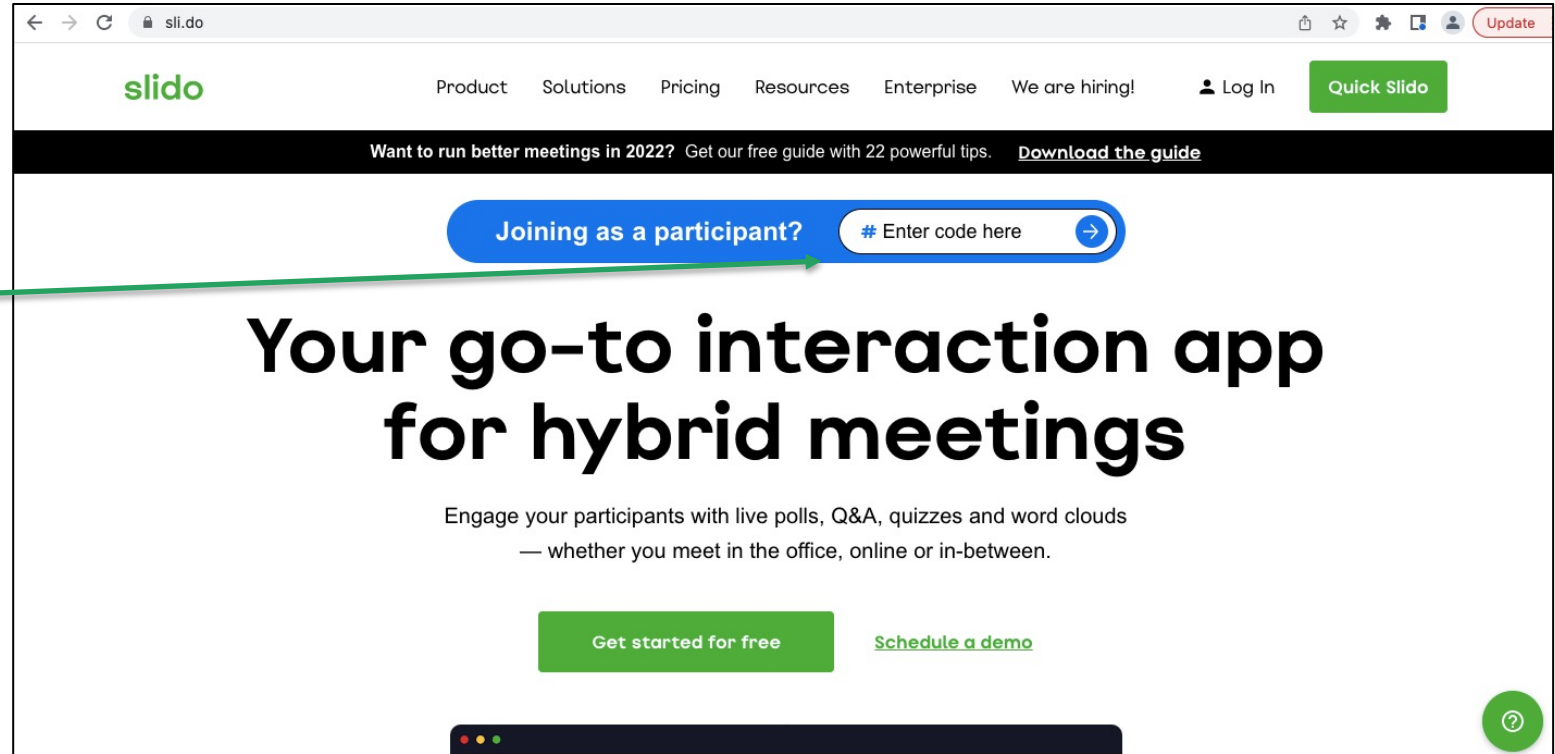
6. Change Management (15)

7. Breakout Discussion (15)

8. Wrap Up (5)

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Slido

Requirements and Change

A personal experience of requirements
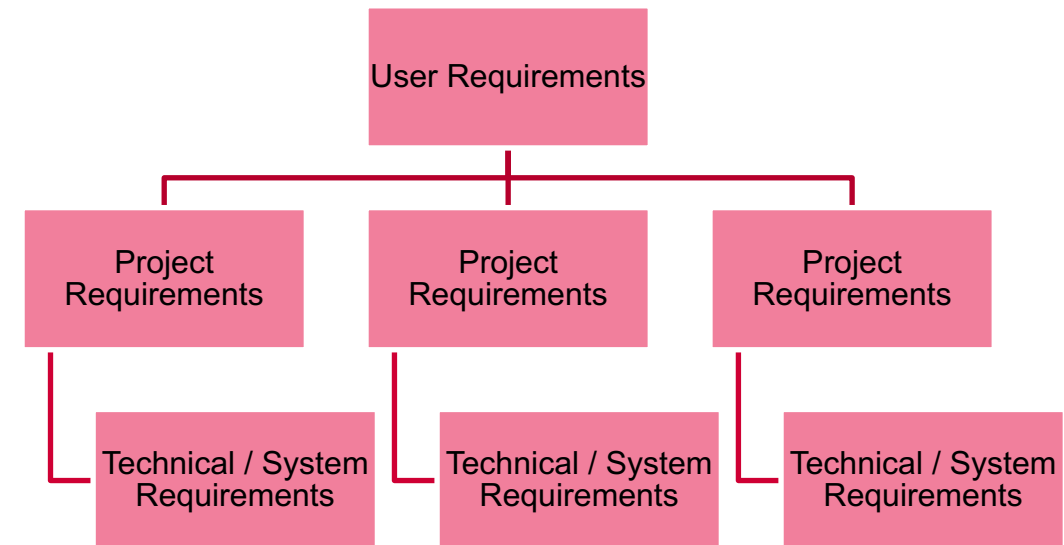
Introduction

Definition

- The process of capturing, assessing and justifying stakeholders' wants and needs (APM Definition)

Why are they important?

- Determine the outputs, outcomes and benefits
- Help project teams and supply chain understand what they need to deliver
- Demonstrates how a project will deliver on its vision
- Without good requirements, projects may fail in the eyes of stakeholders as not delivering in line with their expectations

Considerations

- What is the nature of your Programmes / Projects? What will your requirements hierarchy look like?
- Does your organizational design align with your requirements?

User Requirements

Project Requirements

Project Requirements

Project Requirements

Technical / System Requirements

Technical / System Requirements

Technical / System Requirements

Slido Q: How much prior experience do your team have in the area of requirements management?

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Golden Thread: Requirements, Outputs, Outcomes and Benefits

Towns Objectives

Create

Programme / Project Vision

Is detailed by

Cycleway user requirement: A new cycleway connecting x and y able to accommodate both bicycles and pedestrians

User Requirements

Help define

Business Case

Which addresses

Programme requirements

That defines the means to address

Cycleway project requirement:
- *The cycleway shall be a minimum of x meters wide throughout.*
- *The cycleway shall be designed in accordance with Sustrans design guidance*

Project requirements

Delivered through

Projects

That manage

Projects Execution

Which meets

Organisational Performance

That result in

Cycleway project benefits: Provision of a safer, greener and more sustainable mode of active travel within Colchester

Benefits

That realises

Transition to BaU

Which allow

Outcomes

Which generate

Cycleway project outcomes:
- *Reduction in road traffic flow*
- *Reduction in CO_2 equiv. by x*
- *Automatic count of cyclists and pedestrians of x per day*

New Capabilities

That deliver

Project Outputs

That deliver

Cycleway project outputs: 2.5km of new cycleway

Project Goals

Slido Q: Where in this process are your projects?

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Requirements management through the lifecycle

Full RIBA Plan of Work

- 0 Strategic Definition
- 1 Preparation & Brief
- 2 Concept Design
- 3 Developed Design
- 4 Technical Design
- 5 Construction
- 6 Handover & Close Out
- 7 In Use

Revisit pillars at major transition points / as change occurs

Requirements management arrangements should evolve as:

1. More information becomes available

2. Understanding of requirements improves

3. Project team and processes develop

4. Project progresses through lifecycle

Developing, agreeing and prioritising requirements [1]

Inputs into Requirements Management:

- Mature business case
- Any contracts containing requirements
- Assumptions register
- Risk register
- PID
- Management Plans – risk, benefits, quality etc.
- Applicable standards

Develop:

- Engage with stakeholders
- Gather requirements – workshops ('day in the life of'), interviews, questionnaires etc.
- Develop requirements early to underpin business case
- Lessons from other similar projects

Agree and prioritise:

- Analysis and prioritisation - look for gaps, conflicts and overlaps; analyse to determine priority (MoSCoW)
- Specifications and validation – write requirement specifications; validate with stakeholders (verification workshops)

Slido Q: For your project(s), what are your biggest concerns regarding agreeing and prioritising requirements?

Developing, agreeing and prioritising requirements [2]

Risks

- Stakeholder mapping and analysis not complete
- Missing requirements
- End user / maintainer not consulted
- Unrealistic stakeholder expectations
- Requirements not clearly defined, documented and maintained
- Requirements not frozen as early as possible
- Governance framework not established in time to manage development and control change

Some wider considerations:

- Are any project requirements dependant on any other projects' requirements?
- Is there a clear understanding of constraints, risks and assumptions?
- Are there mandatory requirements? i.e. legislative, regulatory?
- Do the requirements take a whole-life perspective?
- Do your projects have any environmental sustainability requirements i.e. Net-zero or carbon negative aspirations?

Slido Q: For your project(s), do you have environmental sustainability requirements? If so then please summarise in a few words.
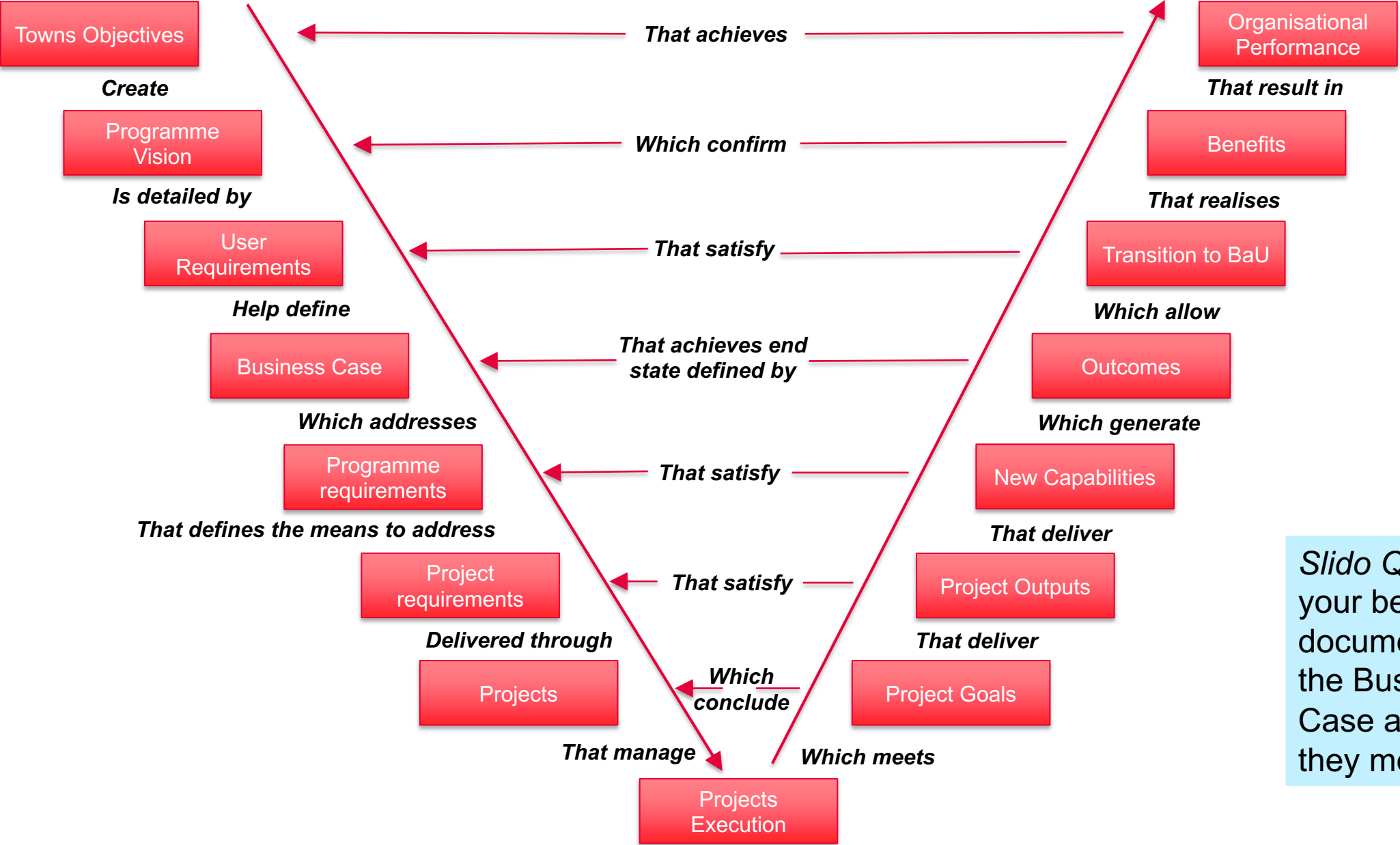
Breakout discussion
(15 mins)

Feedback
(5 mins)

Breakout Discussion

Consider the following in groups:

- How will you gather, prioritise and agree requirements? Is it clear who will be responsible for this process?

- How will you deal with conflict between stakeholders in agreeing requirements (or changes to them)?

Alignment of objectives, requirements and benefits

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Towns Objectives

That achieves →

Organisational Performance

Create

That result in

Programme Vision

Which confirm →

Benefits

Is detailed by

That realises

User Requirements

That satisfy →

Transition to BaU

Help define

Which allow

Business Case

That achieves end state defined by →

Outcomes

Which addresses

Which generate

Programme requirements

That satisfy →

New Capabilities

That defines the means to address

That deliver

Project requirements

That satisfy →

Project Outputs

Delivered through

That deliver

Projects

Which conclude →

Project Goals

That manage

Which meets

Projects Execution

Slido Q: Are all of your benefits documented in the Business Case and are they measurable?

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Benefits Management

Considerations:

- M&E guidance now issued to Towns (reporting on outputs and outcomes)
- Benefits come from incorporating outcomes into BaU
- Benefits Management – identify, measure, monitor and manage throughout Programme (matrix, mapping)
- Robust process required to ensure success
- Objective measures defined?
- When will your benefits be realised?
- Resource allocated / planned? Who is accountable?
- Communicate benefits progressively to stakeholders
- Consistent approach across Programme
- Benefits realisation plan / management plan
- How regularly will you review your benefits?

Some Programme-level challenges:

- Reliance on customers and users – feedback / behaviour
- Benefits not in a form that is easy to measure
- Time between project outputs and benefits realisation – changes may impact
- Business cases can overstate benefits in order to gain approval
- Outputs do not align to requirements – re-examine
- Implications of changes to requirements against BC – continually assess and manage

Slido Q: Who will be accountable for managing benefits across your projects?

Managing Change

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Definition:

- The process through which all requests to change the baseline of a project or programme are identified, evaluated and approved, rejected or deferred.

Why is it important?

- Enables Sponsor / Stakeholders to understand implications on forecasted outcomes and influence decisions

- To ensure that all parties are clear on time, cost and scope being delivered to

- Early recognition and management of issues that could be influenced for the good (cheaper, quicker, more efficient)
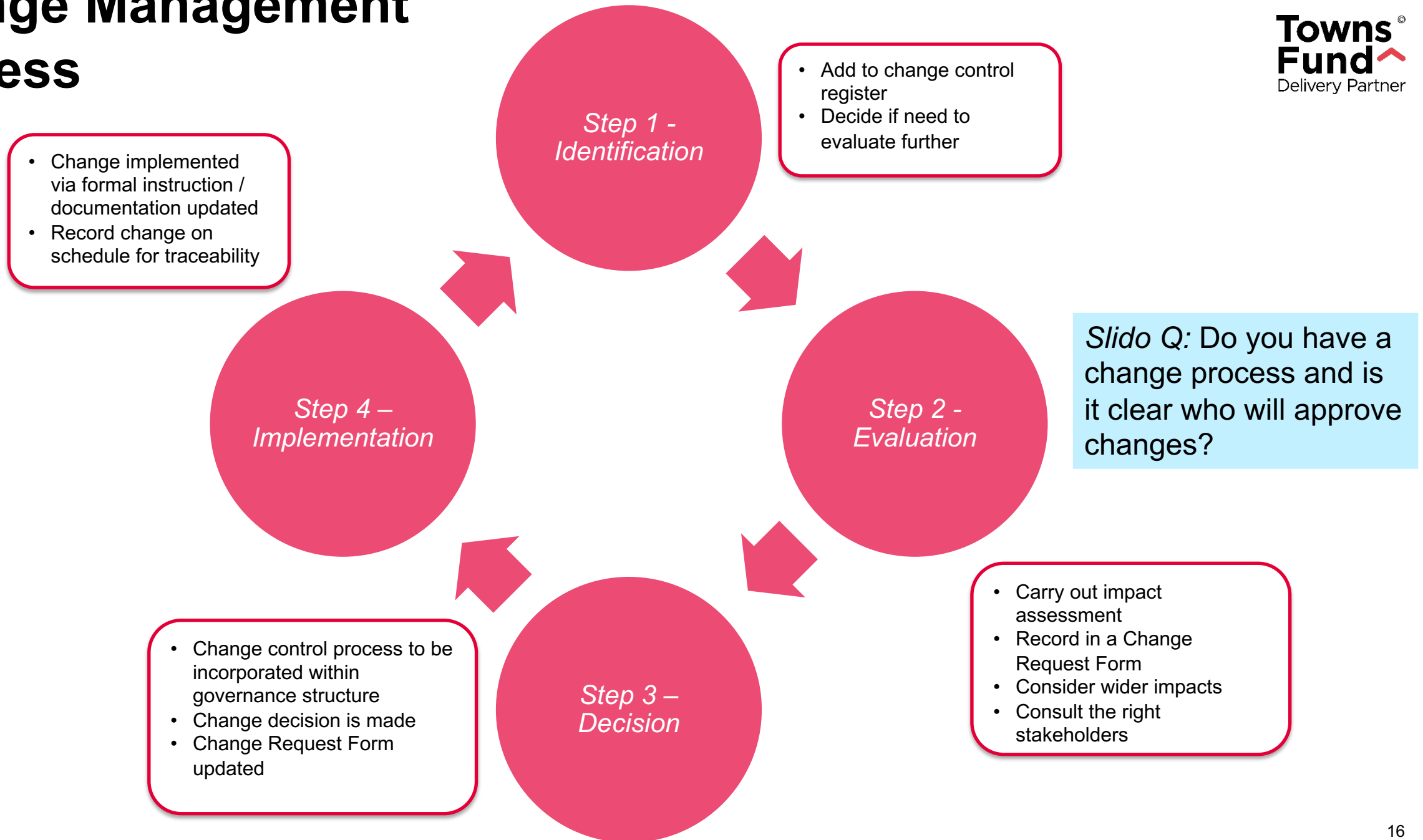
- To maintain control of the project

Why do changes occur?

- New customer requirements
- Change in legislation or standards
- Interface misalignment
- Incomplete project information
- Unexpected discoveries
- Change to budget, schedule or scope

Other considerations

- Unauthorised change – needs to be assessed retrospectively
- Change freezes sometimes necessary to avoid negative impact to project outputs
- Understand change trends

Change Management Process

Step 1 - Identification

- Add to change control register
- Decide if need to evaluate further

Step 2 - Evaluation

- Carry out impact assessment
- Record in a Change Request Form
- Consider wider impacts
- Consult the right stakeholders

Step 3 – Decision

- Change control process to be incorporated within governance structure
- Change decision is made
- Change Request Form updated

Step 4 – Implementation

- Change implemented via formal instruction / documentation updated
- Record change on schedule for traceability

Slido Q: Do you have a change process and is it clear who will approve changes?

Breakout discussion
(15 mins)

Feedback
(5 mins)

Breakout Discussion

Consider the following in groups:

- How will you manage benefits and what challenges do you anticipate in your Towns?
- What process will you use to manage change and what challenges do you anticipate aligning this with your governance arrangements?

Final thoughts on success

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Some common problems

The requirements are poorly articulated or conflicting, so the purpose of the project and/or what it needs to deliver is confusing

There is no clear process, nor defined responsibilities, for prioritising requirements and deciding which of those should be incorporated into the project

It is not clear how the deliverables align or contribute to the expected benefits, leading to a risk that the benefits will not be fully realised by the project

The project requirements, business case and design indicate a lack of future thinking and insufficient focus on the experience of the end user

There is conflict or tension between the participating organisations as the project is not fully aligned with their relevant individual objectives

The technical requirements have advanced more quickly than the development of the target operating model

Some keys to success

Proactive and ongoing stakeholder engagement

Focus on getting them right in the early stages of project planning. Will be repaid many times over during project delivery

The sponsor and asset manager engage upfront to determine how the asset will be transitioned into operation

Requirements are clear and unambiguous

Benefits are owned and actively championed by empowered sponsors who regularly engage with the project team and other key stakeholders

There is alignment between requirements and the expected benefits, and a common understanding of the interdependencies within the project, and with other projects

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Next week: drop in clinic

Requirements and Change

Format for drop-in clinics

- One hour open session for you to discuss seminar related questions with us and your peers

- The focus for the clinic next week is **Requirements and change**

- Please send in specific areas or questions you'd like to bring to the clinic by midday on the Tuesday before the Thursday drop-in

Slido Q: What have you found most useful today? Is there anything specific you would like covered at the Drop-In Clinic?

How can we help?

You and your team

- Helping you to identify the team and capabilities you'll need to deliver

- Providing capability development, coaching, and mentoring for project/programme management and sponsorship

Contact us

- Simon.Bevis@Nichols.uk.com

- Christopher.Wingham@Nichols.uk.com

Your preparations

- Providing you with a project and programme management viewpoint when developing your business cases in particular the Management Case

- Supporting your preparation for successful project initiation and project delivery using the questions above

- Considering if you have the right sponsor, project management and commercial skills in the right quantity to deliver

End