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1 Requirements

During the requirements stage we will compile, clarify and document your business requirements into precise and specific Functional Requirements. Requirement gathering is a challenging and time-consuming task and will require a lot of input from your team and Subject Matter Experts. At the conclusion of this stage, you will have a Functional Specification document, which we will use to build your system.

It can be difficult to predict ahead of time just how long it will take and how much effort will be required. In some projects, the requirements phase can take 60% of the total project length.

Step		
S SCOPE	Onboarding and Initial Planning	Negotiation of contract, initial meetings to prepare you for project commencement.
	Kick-Off Meeting	The two teams meet for the first time. We will take you through the process, the draft project charter and our understanding of the scope.
	Project Charter (Document)	The 'rules of engagement' where the initial scope and project management rules are agreed.
I INTERVIEW	High-Level Requirements	We will prepare an initial draft of the requirements based on the initial scope, all available business documentation and findings from the kick-off meetings.
	Wireframe	We will create an interactive wireframe to share with you. The Wireframe will provide you with a good understanding of how the finished system will present to users, but it will not have any functionality at this stage.
M MASTERMIND	Requirements Consolidation and Clarification	We will now workshop with your Business Analyst to fill any gaps in our initial High-Level Requirements.
	Functional Specification	Now we will build a comprehensive requirements document, that covers all aspects of the system to be built.

2 Steps

2.1 Onboarding

At this stage we will establish a contractual relationship and handle administrative activities needed for vendor signup and invoicing.

We recommend a contract for any project of a value greater than \$30,000 AUD.

This stage will substantially occur before the start of the project, coordinated by your Project Manager, the eBMS General Manager and eBMS Project Manager.

2.1.1 Client Project Manager Onboarding Checklist

As the client Project Manager, it is recommended that you:

- Read and understand the proposal;
- Read and understand **Field Guide S1 - SIMPLE - Project Introduction** and this document;
- Co-author a draft Project Charter with your counterpart (the eBMS Project Manager) – Making sure that your Sponsor is satisfied with everything;
- Establish with your counterpart any risks for the project;
- Establish with your counterpart any documentation or reporting requirements that have not been laid out in the proposal or eBMS documentation (note that additional effort will bring additional cost);
- Assign (or have assigned) personnel to the key positions in the project (Project Manager, Business Analyst, Key Users).

It is mandatory that you:

- Ensure there is a signed contract with eBMS (or signed proposal for a low value project)
- Provide eBMS with a Purchase Order number and any Vendor sign-up forms required by your organisation
- Establish a payment schedule commensurate with the anticipated cost and effort to eBMS across the length of the project

2.2 Initial Planning

At this stage we will build an initial Project Plan. This is a 'DRAFT' only and will be finalised on approval of the Functional Specifications document. Until this time, we will endeavour to keep it accurate and to meet your time constraints.

Delays during the lifecycle of a project can occur. They may be at the request of eBMS but more frequently are at the client's request. **Any delay will affect the project timeline and will probably affect the expected solution delivery date.** The periods of eBMS activity generally cannot be shortened as we try to deliver quickly and only allow the time that we actually need. Remember that our staff are often booked to work with more than one client, so unexpected delays may cause longer delays as we need to rebook resources.

You will find that some activities often take longer than expected, especially time needed to gather and confirm requirements on the client side and the time taken to review and provide feedback. If there are delays caused by the client affecting the progress of the project, eBMS will invoice for work already completed.

An updated project plan will be provided in the event of a delay. We will always seek to be transparent and upfront regarding the impact of delays on the project plan. We will always do our best to achieve the best result for you.

As the client Project Manager, you will need to -

- Book in your team members, and inform them of project timelines and what is expected of them;
- Share scheduled leaves if relevant.

2.3 Kick-Off Meeting

This meeting will be the first of many meetings between eBMS and your Project Team. Where we can, we like to make our clients our friends. In this meeting we will keep things light-hearted so as to build a positive and optimistic atmosphere from the start.

Remember that the scope of the project is already agreed at this point, so it is important that the client Project Manager and eBMS restrain from any input which has the potential to change the agreed scope. Allowing free-form discussion on 'what we could do' can lead to false expectations, cost blowouts and disappointment.

As the client Project Manager, you should:

- Confirm dates for this meeting with your eBMS Project Manager;
- Book your team members and Project Sponsor into this meeting;
- Provide the list of attendees to your eBMS Project Manager;
- Arrange a venue with internet access and a screen/projector;
- Co-author an Agenda for this meeting with the eBMS Project Manager and distribute it to all attendees.

On the day of the event, we will:

- Take you through our Kick-off slides and explain the process;
- Walk through the initial proposal and scope;
- Clarify the initial requirements as needed;
- Cover any other topics agreed in the agenda.

Please take the kick-off slides to heart, as they reflect some hard-learned lessons.

Following the meeting:

- eBMS will provide you with an email address to include in all communications. This will ensure that all eBMS project team members are advised;
- Collaboratively we will finalise the Project Charter and submit it for approval;
- The eBMS Business Analyst will make contact with your Business Analyst to do as much preparatory work as possible before the High-Level Requirements Workshop.

2.4 High Level Requirements

During this phase we will conduct a workshop with your team and compile a High-Level Requirements Document.

2.4.1 Preparing for the Workshop

Your team should meet and compile the knowledge you already have about your business requirements.

You should:

- Decide what you want to get out of your system;
- Decide who should be in the workshop from your side – (try and keep this at around 6 or less);
- Discuss what documentation would be useful to give eBMS;
- Read this guide together to understand the process;
- Decide when and where would be suitable for the Workshop.

Once this is done, provide your materials to the eBMS Project Manager to disseminate.

It is important that your team do this preparatory work to establish between yourselves what your business requirements are, as eBMS is not able to create them for you – they are unique and internal to your organisation, and if we try to invent them no one will use the system. Our role is to incorporate your already agreed upon processes and procedures into a Nimblex Solution.

Note that the materials shared at this stage don't need to be final. All the materials provided will be processed by the eBMS Business Analyst in preparation for the Agenda of the workshop.

2.4.2 On the Day of the Workshop

During the requirements gathering workshop the eBMS Business Analyst will be collating and clarifying your requirements. You may need to take some questions on notice, but please be prompt in following up as this is often a cause of delays.

Our team will endeavour to combine your inputs into a consistent High-Level Requirements document.



This process can be a challenge, as we are combining a lot of complex information and concepts, turning them into clear business rules that can be built into a system.

High level goals for this Workshop:

1. Step through all the workflows required to meet your requirements;
2. Discuss all of your known needs:
 - a. Each type of approval required e.g. DocuSign, In-system approval or out of system approval;
 - b. Reporting;
 - c. Email Alerts and Notifications;
 - d. Types of integration required including specific system name and touch points;
 - e. Any other requirements that don't fit neatly into the above.
3. Capture all Action Items and assign an owner to each.

Tips to make both parties life easier:

1. Try avoiding using too many acronyms or share them prior to the workshop;
2. Refer to people by their role rather than their name for system functions;
3. Avoid long debates on a single topic or data fields.

2.4.3 High Level Requirements Document

Your eBMS Business Analyst will use the outcomes of the Workshop and prepare a 'High-Level Requirements' document. In addition to system functions the HLR will include a definition of the hosting environment, integrations, data migration needed and training needs.

2.4.4 Handover

eBMS will present and discuss the draft HLR document to you during an HLR document hand-over meeting. This can be in-person or online. The meeting will present an opportunity to attain a common understanding between you and eBMS. Changes will be made where needed, based on your feedback during the meeting. eBMS' Technical Lead will also be involved in this meeting, as it's critical that they too have a complete understanding.

eBMS will do its best, but it can often be a challenge to take the expectations in your head and convert them into actionable requirements. It's quite possible for us to initially miss some detail, or that you might forget to mention something to us. Unless everything is documented and agreed upon, we cannot correctly build your solution. With that in mind, please read the HLR document in detail. Let us know what elements you think we got wrong – or even if you are not sure. Please also feel completely free to come back to us with questions and comments to ensure that we meet your expectations.

2.4.5 Sign-Off

Once you are happy and confident that the document is a good representation of your high-level requirements, then please sign-off on this document.

2.5 Infrastructure and Integration Planning

At this stage we should have a good understanding of what infrastructure and integration support is required.

We will organise a meeting between the following to discuss and plan:

- eBMS Business Analyst
- eBMS Technical Lead
- eBMS Integration Engineer
- Client Business Analyst
- Client Project Manager
- Client IT Representative

Please make sure to have any information relevant to this planning shared amongst the attendees before the meeting, as this can be a huge time saver.

Please refer to **Field Guide I1 – Infrastructure and Integration** for more information

2.6 Wireframe

2.6.1 Creating the Wireframe

We will at this time build a wireframe of how we envision your finished system will look. This will often commence while we are still reviewing and completing the HLR document.

Wireframing is a great tool to communicate how we will interpret your requirements into a solution but can be completed much faster than actual solution building. This allows us an opportunity to quickly iterate on the final design before we build.

It is a great opportunity for all parties to clarify their mutual understanding of how the solution should function and is a very important step towards successful delivery. We will probably contact you during this process, to seek additional information or to seek your advice when picking between design options.

2.6.2 Presentation of the Wireframe

Once completed, we will share with you the wireframe in a screen-share or physical meeting. You may take the wireframe away to review, and then consolidate all your stakeholders' feedback to provide to us. If necessary we can book a meeting to talk through your feedback.

We will update the wireframe based on your feedback and share it for your review again. This process may repeat a few times, but we will halt the process when the returns become too small, as this can be picked up at later stages.

Please consolidate all your stakeholders' feedback at each round to minimise the number of rounds required. Typically, your Business Analyst will be the main contact for the back and forth during this stage.

Once the wireframe design is agreed, we can move on to the next stage.

2.7 Account Manager Checkpoint

Your eBMS Account Manager will schedule a one-on-one meeting with you at several points throughout the project. The objective of these 'Checkpoint' meetings are to provide an opportunity for you and eBMS to assess the health of the project, and to raise any concerns that you might have.

Note that the Account Manager is there to listen and consult and will often not be able to provide solutions to all of your concerns on the spot. They will take note of any concerns and bring them back to the team to find a resolution.



Later in the documentation, we will not copy this content, but you will instead see this icon. Please refer here for the checklist.

Goals of the meeting:

- Clarify yours and our expectations;
- Address any concerns you might have.

With the above in mind, please consider the following questions prior to your Checkpoint meeting:

- Are project activities clear and unambiguous so far?
- Will all levels of stakeholders understand what you, your team and eBMS have completed?
- Have relevant users and stakeholders contributed to this stage?
- Is your team functioning effectively?
- Is the eBMS team functioning effectively?
- How does your Sponsor view the progress thus far?
- Are the commitments made and contained in the Project Charter document being actioned?
- Is the delivery up to this point still reflecting the Project Purpose and Vision?;
- Are you and eBMS still on track to achieve the Project Objectives?
- Are the risks and issues raised so far being addressed effectively?
- What are the additional risks that have arisen and what risks have gone away?

Your Account Manager looks forward to discussing your answers to the above questions.

2.8 Functional Specification

During this phase we will conduct at least one workshop and develop a Functional Specification document that lays out all of the functions that will be included in your completed system.

Functional Specification Document (FS): This is a formal document developed by eBMS to describe exactly 'what your solution will do'. This document once signed will be used to evaluate feedback throughout the process and to assess the implementation for success.

2.8.1 Before the Workshop

Now eBMS will use the knowledge gained through the High-Level Requirements and Wireframe stages, as a stimulus to develop a full system Functional Specification (**in line with your Project Scope**). The first step in this process is to conduct one or more Functional Specification Workshops.

At this point the eBMS Project Manager will contact you to book a time and location for your Functional Requirements Workshop.

For your workshop, you should:

- Book a room with a projector or screen for the time;
- Invite up to approximately 6 attendees;
- Provide your list of attendees to the eBMS Project Manager.

2.8.2 On the Day

The following eBMS Team members will attend:

- Business Analyst;
- Technical Lead;
- (Optional) Project Manager;
- (Optional) Account Manager.

We will follow these rules, and find it beneficial if your staff have read them ahead of time:

- One person speaks at a time;
- No speeches;
- Challenge the idea not the person;
- Listen to each other;
- There are no 'stupid questions';
- Be punctual;
- Let's focus less on mobile phones and more on the workshop.

The style of the workshop will be investigative in nature. We will ask questions until we are 100% sure we are understanding one another. This may at times seem like we are asking something obvious or something we already know the answer to, please bear with us as correct communication of complex topics is difficult – it is much better to be 'too sure' than 'not sure'.

If there is an internal disagreement about something, take a note of it and move on – then inform us of the outcome later. There is little benefit for the whole group to be diverted into a long discussion and there is only a limited amount of time available for the session. We cannot make the decision for you, so do please be sure to follow up with the resolution.

It is not eBMS' expectation to receive all the answers on the spot, as in many cases team members will need to go away and consult to determine the answer.

As Client Project Manager, please assist to:

- Document who is responsible in your team for delegated and outstanding tasks;
- Ensure all tasks are fully understood by the responsible members of your team ;
- Confirm during the meeting the desired deadline for completing each task.

2.8.3 The Document

The eBMS Business Analyst will often start to draft the Functional Specification during the wireframing stage. After the workshop, eBMS Business Analyst will start finalising the Functional Specification.

Note that **now that some of your project team members will start to understand the extent of the possibilities that Nimblex offers**. Experience has shown that this can turn into new ideas, changes and process flow extensions. These new ideas can have an impact on the Project Scope. Any out of scope items will not be documented into the Functional Specification before the additional scope items are approved or traded with other in-scope items.

Project Scope: This is concise, clear and is documented in the project proposal. Anyone reading the scope should have an excellent understanding of what the project consists of. The project scope also includes details of what is **not** included in the project.

The delivery of the Functional Specification is an **extremely important milestone** and must be approved by the client before eBMS starts to build a solution. This prevents rework and disputes about scope in **Stage 2 (Field Guide S3 - SIMPLE - The Build (Stage 2))** of the project.

Once the Functional Specification document has been formally approved, then eBMS will provide a revised project timeline.

2.8.4 Change Management

Changes or additions outside of the approved Functional Specification document will be assessed by eBMS and may incur additional costs over and above the original proposal.

We are happy to discuss any additions or changes but are not bound to add them into the specification. We might suggest that these changes or additions are included in a separate follow-up project. Scope creep is very closely monitored by us as it has cost implications for both the client and eBMS. Additions and/or changes during the Iteration stage will require additional time for eBMS to implement the changes and this extra time will be costed accordingly to the client.

Once you have approved the Functional Requirements document eBMS will commence the solution build. From this point forward, we will have to govern any changes through a Change Management Process. This process is explained in **Field Guide S3 - SIMPLE - The Build (Stage 2)** which focuses on the configuration and creation of your solution.

eBMS will keep the Functional Specifications updated during the production phase of your solution. This will ensure that the document accurately reflects the specifications of your solution by the end of this project. This will help us to manage your Warranty issues, Change Requests and Support post implementation.

2.9 Test Planning

Generally, eBMS will not be heavily involved in planning the client component of testing. We recommend you take the time now to plan out test cases against the Functional Specification.

Remember that eBMS is building against the Functional Specification, so it's important that your test cases are linked back to that document, as the document reference will be required if a bug report is being lodged.

3 Read More

The next guide in this sequence is S2 - SIMPLE Requirements (Stage 1).

Document	Title	Content
S3	SIMPLE The Build (Stage 2)	Explains the configuration of your system.
S4	SIMPLE Launch (Stage 3)	Explains UAT, Training and Release to Production.



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