

Writing a Requirements Document and Implementation Plan

There is an old saying that “failing to plan is planning to fail”. No one wants to fail which is why taking time to understand your requirements and ultimately your implementation plan will help your organization root out any issues that will need to be addressed and guide you to the best solution. It will also minimize any course corrections or costs associated with finding hidden issues in the project that were not budgeted for. And most important, it gives you the ability to clearly communicate the impact of rolling out your project to donors, board, staff, and clients, etc. allowing the organization to acquire better adoption and/or support for funding.

Before you start a project, you should be able to answer these four questions:

- What problem are we solving or what is the business need?
- Is technology the solution? If yes, then which technology – what are you looking for and what is the scope of the solution?
- How does the proposed project advance our overall mission?
- Is the investment in solving the issue worth the cost, or in other words, what is the return on investment or ROI of doing the project?

If the answers to these questions lead you to affirm that your organization has a project that will advance your operations or service delivery the next step is to gather requirements for the system you want to implement.

Creating a requirements document defines the purpose of the project and puts the project in context with overall strategy and operations. Spending time identifying features that are helpful to those who will use the system will give you better data input for planning a successful technology project. Requirements should be driven by the needs of end users of the project. Including end users in the requirements gathering process is important as they will often think of things you have not even

imagined. By engaging all stakeholders in the process of identifying the requirements of the system, you will have taken an important step toward managing a successful process and implementation of a new technology system.

The elements that should be addressed by a systems requirement document include:

- Why the system is needed - context of the system
- Description of system properties or requirements and any constraints.
 - Define how this project might relate to other parts of the system infrastructure.
- What the system should do and how should it work.
- User, system, interface and access requirements.
- Task timelines and who is responsible to determine the bandwidth/resources needed to accomplish the project.
- Why each requirement is needed - a rationale for implementing at this time.
- Priority of requirements, in case project needs to be phased in or paid for with multiple funding sources.

Once the system requirements have been identified the organization can then start the process of selecting the technology tool or other solution that meets those requirements. The requirements will also help an organization identify the right consultant, if needed, to assist with implementing the project and guide that relationship including working together on planning for the project and its costs.

The next step is producing an implementation plan that describes the finished project using the product or solution chosen. This includes a play by play of how the organization expects to successfully cross that finish line. Each piece of the project is detailed and scheduled for time and cost.

The size or scope of an implementation plan will depend on the project itself. Web design or databases have more to consider than say a hardware implementation. But all projects can benefit from planning, knowing the milestones you want to meet and when, and who is responsible. Even a one page statement of scope, goals, risks, and potential cost does wonders to align a team of people around what needs to be accomplished. Some of the common things an implementation plan should address are:

- Description of the product chosen or the development platform

- Include all assumptions and dependencies that went into decision like hosting environment, security, any infrastructure constraints such as internet connectivity, development platforms, ease of use, etc.
- Any application customization and tools that will be used to complete the project.
 - Make sure all project components are addressed including interface with end users, configuration of system, protocols, ports, etc.
- How the system fits with other infrastructure pieces (like Wi-Fi) or how it may need to communicate with other technologies (i.e. donor database may need to send data to a finance database securely; or audio-visual equipment may need to meet a standard for viewing/sound quality on internet, etc.).
- How the technology will be accessed or distributed. Are there any barriers to access that need to be addressed?
- Lay out the phases of the project including timelines to accomplish each part of the project that shows who will be doing the work and any check ins on project progress to make sure schedule and budget have not gone off track.
 - Include staffing of project and schedule of deliverables
 - Include consultants, when applicable, as well as staff responsible for their work and meeting deadlines.
 - Make sure staff will have time on top of regular duties to perform and meet deadlines.
 - Quality Assurance, release and launch plans should also be included if needed.
- Project Budget that shows costs for the technology as well as any additional development or implementation costs such as consulting with a breakout for each phase if a larger project.
- The type of reports or other outputs expected from the system and a data migration plan, if needed.
- A sustainability plan that considers the lifecycle of the technology.
- A plan for any policy or operational changes the technology might lead to and any documentation or training that end users will need to successfully roll out the technology.
- Any communication planning, if necessary, to drive adoption or use that will be needed to successfully roll out this new technology.

- Plan for evaluation of project and how it will be measured for success.

The more money you intend to spend, the more risks there are and the more time you should invest in figuring out what a successful project will look like. Through planning and communication, your organization will be ready to adopt the new technology and the project will have immediate impact. Because a successful implementation of a technology project that aligns with the organization's mission is when money has been well spent.