

RealPlay[®] Open Source Tool



Requirements Roadmap Instructions



This open source tool is a component of the broader award winning Vested/Vested Outsourcing[®] research developed in conjunction with the University of Tennessee. *RealPlay*[®] was created by University of Tennessee's faculty member Kate Vitasek to interactively help those taking the Vested[®] courseware gain a deeper understanding of the material that is presented. *RealPlay* takes role-playing to the next level. Instead of merely being assigned roles and a potential problem or situation to work through, *RealPlay* has course attendees bring in their own problems and situations into the classroom. This allows course attendees to take the material they have just covered and immediately apply it to their personal situations and gain a deeper, more complete understanding of the material. Instead of just theories about how Vested could be used in their company to build a better relationship, *RealPlay* allows individuals to bring back concrete materials that show how the Vested methodology can benefit their relationship.

The objective of Requirements Roadmap is to help you build stakeholder consensus around your Desired Outcomes and to help you create a “Roadmap” that will clearly define and measure each of the Desired Outcomes.



Organizations adopting Vested for larger or more complex agreements will find it helpful to engage a Vested Center of Excellence to facilitate the development of your Requirements Roadmap. A typical Requirements Roadmap facilitated workshop includes a cross-functional group of stakeholders and typically takes two days to complete.

Step 1: Review Your Shared Vision



Your Desired Outcomes should support your Shared Vision. For example, a Telecommunications company and their network maintenance service provider developed the following Shared Vision.

***We excel at servicing our customer's connected world
with passionate people and smart solutions.***



Teams often find it helpful to post a very large printout or a flipchart of the Shared Vision at the front of the room as an easy memory jogger.



If you do not have Shared Vision, stop and co-create one

Step 2: Brainstorm One-Word “Outcomes”



A good way to start this exercise is to review the one-word adjectives that reflect what you want to accomplish through your partnership.



You can use a tool such as Wordle (available free at <http://www.wordle.net/>) to create an image such as the one at right to provoke thoughts by the Team.





Step 3: Create short phrases

Create five short phrases to describe the future state of a successful partnership



Look to your Shared Vision Statement for guidance. The Shared Vision Statement outlines what the organizations want, and is based on the objectives or drivers for the relationship. It is what each party wants to accomplish, and defines what success looks like.

For example, a large team (divided into four smaller groups each asked to list their Top 5) came up with a list of 20. Once duplicates were eliminated, the following remained:

<ul style="list-style-type: none"> • Market leader • Provide amazing customer experience (ACE) • Operational Excellence/Efficiency • High Quality measured by KPIs • Value 	<ul style="list-style-type: none"> • Lower TCO • Higher Profitable • Better ROI • Valuing Share • Innovation – Products • Innovation – Services • Passionate people
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Step 4: Document your High-Level Desired Outcomes

Looks for ways to streamline your Desired Outcomes into five or less.



In many cases, items can be combined because they are similar or removed (because they are duplicates) with the sub-bullets being objectives and/or metrics that will be included later.

CASE STUDY

Network Management Example

Many times there are themes, and some initial ideas will perhaps become objectives or measures

Second Draft

- Provide amazing customer experience (ACE)
- Market leader
- Operational Excellence
- High Quality measured by KPIs
- Value
- Lower TCO
- Higher Profitable
- Better ROI
- Valuing Share
- Innovation – Products
- Innovation – Services
- Passionate people

Third Draft

- Provide amazing customer experience (ACE)
- Be the market leader in Operational Excellence
 - Quality
 - KPIs
- Create economic value through inspiring partnerships
 - TCO
 - Profitable
 - ROI
 - Value Share
- Innovate to bring smart solutions
 - Products
 - Services
- Be the Employer of Choice
 - Passionate people



1.
2.
3.
4.
5.

Step 5: Review Your High-Level Desired Outcomes

As a single group, review the high-level Desired Outcomes you created for weaknesses.



A well-defined Desired Outcome is:

- **Linked to your Shared Vision**
- **Clearly stated**
- **Often boundary spanning – and not something that the Service Provider can accomplish on their own**
- **Most often measurable, even if measuring it is somewhat vague**
- **Linked to achieving your strategic objective**
- **Not a task-oriented SLA (Service Level Agreement) measuring an activity or an “output” as typically found in a conventional buyer-supplier agreement**



It is helpful to have either a hard copy print-out of this tool, or access to a soft copy. At a minimum consider printing a hard copy of this page.

We suggest the criteria at right as starting points – free free to add additional criteria

Evaluate each Desired Outcome, and place a ✓ in the column where a weakness is perceived

Your High-Level Desired Outcomes

		Vague / easy to misinterpret	Focus is on How, not What	Not measurable			
1							
2							
3							
4							
5							



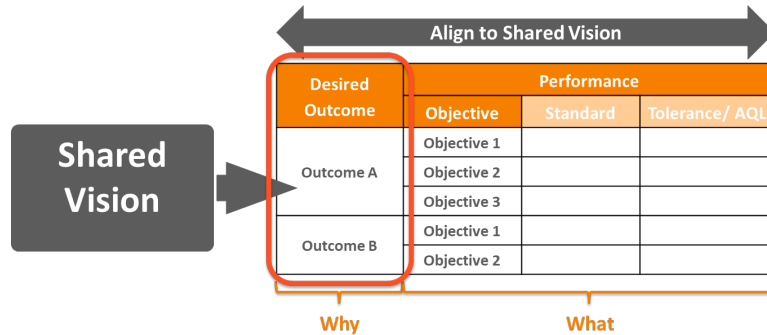
Step 6: Refine your Desired Outcomes



Break into groups of 4-6 people – each group chooses one High-Level Desired Outcome

Take a hard look at your draft Desired Outcomes based on the weaknesses identified by the team, and these questions:

- Do your Desired Outcomes support your strategic direction?
- Do your Desired Outcomes emphasize your strategic direction regarding:
 - Cost?
 - Schedule?
 - Performance?
 - Customer satisfaction?
 - Other?



Each group should refine / redraft / reword the assigned Desired Outcome to address the weaknesses. Use the Fist-To-Five technique to achieve consensus in your small group. Remember, the Desired Outcome should describe the future state of a successful partnership. Record your revised statement on a flip chart to be presented to the team.



Look to your Shared Vision Statement for guidance. The Shared Vision Statement outlines what the organizations want, and is based on the objectives or drivers for the relationship. It is what each party wants to accomplish, and defines what success looks like.

Step 7: Present to Full Team

Post your flipcharts at the front of the room, and ask the team to review each against these questions:

1. Are the statements clear and understandable? (Note: later you will provide a drill down including more tangible objectives and measures)
2. If each of these Desired Outcomes were achieved:
 - A. Would the sum reflect success for the buying organization?
 - B. Would the Shared Vision be fulfilled?
 - C. Or, is something missing?



If the answers to A and B are “yes”, and C is “no”, move on to Step 8. If the answer to C is yes, loop back to Step 6 and determine if a new Desired Outcome is needed, or if a revision to one of the existing Desired Outcomes is more appropriate.



Determining your Desired Outcomes before proceeding to the rest of your Agreement is essential, because they are:

- ***Critical to driving transformation in a Vested Agreement***
- ***The focal point for the Vested Agreement***
- ***The primary message communicated by both parties to key stakeholders***

Step 8: Document your Desired Outcomes



Step 9: Divide and Conquer

Divide the team into cross-functional groups of 4-6 people with Buyer and Service Provider represented in each group



Each group then selects one Desired Outcome to work on in Step 10. If you have more Desired Outcomes than teams, the first team finished can then select another Desired Outcome, and repeat the process. Continue until all Desired Outcomes have been processed thru Step 10.

Step 10: Expand each Desired Outcome into a few Objective statements.



Note: You may find that some of the initial Desired Outcomes you identified actually become Objectives that fall under a broader Desired Outcome.

Use the following criteria to evaluate your Objective statements

- Objectives should be clearly stated
- Objectives should support the Desired Outcome
- Objectives should be measurable, even though you may not have the data to measure the objective at this time. In some cases, a measurable Objective can be measured as a “yes/no” rather than by a number.

Shared Vision

Align to Shared Vision			
Desired Outcome	Performance		
	Objective	Standard	Tolerance/ AQL
Outcome A	Objective 1		
	Objective 2		
	Objective 3		
Outcome B	Objective 1		
	Objective 2		
Why		What	



If you have identified metrics associated with your Objectives, use the Requirements Roadmap template to capture your notes in the “Standard” and “Tolerance” columns of your template

Once you are happy with your Desired Outcomes and Objectives, adjust the statements, if necessary, to assure that they are quantitative and in support of overall strategic direction.

Record your work on a flip chart or white board for presentation to the entire Deal Architect team.

Step 11: Create a consensus view

Each group should present the Objectives for the Desired Outcome on which they worked. The Deal Architect team should evaluate and critique the work, and the facilitator should make notes of the comments. Then, break back into small groups to repeat Step 10 to address those comments.



Pay particular attention to overlapping Objectives. We often find the same or similar Objective attached to more than one Desired Outcome. In some cases, you may find it useful to combine two Desired Outcomes into a single Outcome in order to more clearly break it down into Objectives.



We have found it useful to have a different team work on each Desired Outcome during the repeat of Step 10.



Repeat Steps 10 and 11 as necessary to achieve complete consensus of the Deal Architect team. Use the Fist-To-Five technique to judge consensus.



Do not move forward without complete consensus – your Statement of Objectives is critical to your Agreement – it drives everything else

Step 12: Transfer the information to your Requirements Roadmap

When you have complete consensus, update your Requirements Roadmap template with your Desired Outcomes and Objectives.

Step 13: Review your current metrics



- Review your current metrics – the metrics you are using to measure performance in your existing agreement or for the work you plan to outsource – and note the following:
 - What metrics are part of Service Provider SLAs or internal department measures?
 - What metrics are part of a supplier scorecard?
 - What metrics are used in operational reviews?
 - What metrics are used in quarterly business reviews?
 - Can you identify the top five critical metrics from your list?

Step 14: Divide and Conquer

Divide the team into cross-functional groups of 4-6 people with Buyer and Service Provider represented in each group



Each group then selects one Desired Outcome to work on in Step 15. If you have more Desired Outcomes than teams, the first team finished can then select another Desired Outcome, and repeat the process. Continue until all Desired Outcomes have been processed thru Step 15.



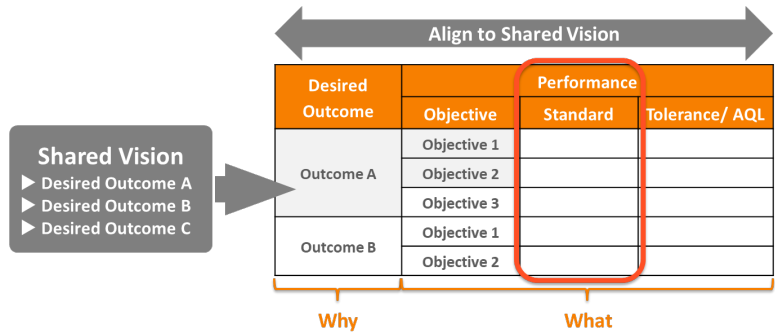
Step 15: Select a Standard for each Objective



Think of it this way... how will we know when we have successfully achieved an Objective?

Use the following criteria to evaluate your Standard:

- Use metrics that are quantifiable and measurable
- Ensure that Stakeholders, including end customers, will value the outcome if success is achieved against a specific metric



This requires that each performance Standard be:

- Defined
- Measurable

This also requires that data can be gathered to support it, that the Standard is jointly agreed to, and it must avoid 'gaming' and confusion.



Reference your current measures, especially those flagged as used in scorecards and reviews in Step 13 – but assure that they meet the criteria above.

Choose the target Standard carefully; in most cases, the higher the Standard, the higher the cost to achieve it. Make sure the level specified is needed to assure fulfillment of the Objective and attain the Desired Outcome

Record your work on a flip chart or white board for presentation to the entire Deal Architect team, and for quick reference in the chart below.

Desired Outcome	Objective	Standard



Step 16: Create a consensus view

Each group should present their Standards for the Desired Outcome & Objectives on which they worked. The Deal Architect team should evaluate and critique the work, and the facilitator should make notes of the comments. Then, break back into small groups to repeat Step 15 to address those comments.



We have found it useful to have a different team work on each Desired Outcome during the repeat of Step 15.



Repeat Steps 15 and 16 as necessary to achieve complete consensus of the Deal Architect team. Use the Fist-To-Five technique to judge consensus.

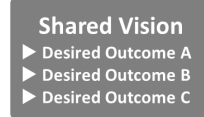


Do not move forward without complete consensus – your performance Standards are critical to the success of your relationship

Step 17: Establish Tolerances



This portion of the Workshop can be done by the group as a whole, or by doing breakout sessions as laid out in Step 14. Either way, consensus is required to move forward.



Desired Outcome	Performance		
	Objective	Standard	Tolerance/ AQL
Outcome A	Objective 1		
	Objective 2		
	Objective 3		
Outcome B	Objective 1		
	Objective 2		

Why What

For each Objective and Standard, select your Tolerance or Acceptable Quality Level (AQL). This can be expressed as a range, as plus / minus, or a minimum accepted level (AQL). The examples provided in the courseware are listed below for quick reference:

- Temperature – Target 73° with tolerance of 68°-75° (or +2 / -5)
- Fill Rate – Target 97% with tolerance of 95%-99%
- Turnaround time – Target 4 hours with an AQL up to 8 hours (+4 hours)

Choose your levels carefully – assure that they are needed to achieve the Desired Outcome

Record your work on a flip chart or white board for presentation to the entire Deal Architect team, and for quick reference in the chart on the next page.



Desired Outcome	Objective	Standard	Tolerance / AQL

Step 18: Transfer the information to your Requirements Roadmap

When you have complete consensus, update your **Requirements Roadmap Template** with your Desired Outcomes and Objectives. Review the results against the following:

- Have you established performance Standards and Tolerances for each Objective? If you still have work to do, have you included a placeholder in the Requirements Roadmap?
- Can you clearly link the Standard back to the Desired Outcome?
- Have you determined which of the Objectives and associated performance Standards the service provider is accountable for and which the company is responsible for?
 - Note: in many cases metrics are boundary-spanning. This is appropriate.
- Is the Standard clear? Are the Tolerances clear and fair?
- Do you have too many or too few metrics? This will be further addressed in Topics 4 & 5.

Step 19: Document the Quality Assurance Plan



In this exercise, you will update the **Requirements Roadmap Template** by completing the last four columns of the Requirements Roadmap. This includes:

- *Who is responsible for the data related to the metric?* List the department responsible
- *What is source of the data?* Be specific so that it is clear what data is used and where it is located.

Shared Vision ▶ Desired Outcome A ▶ Desired Outcome B ▶ Desired Outcome C							
Align to Shared Vision							
Desired Outcome	Performance			Inspection			
	Objective	Standard	Tolerance/AQL	Who	Data Source	Calculation	How Often Collected
Outcome A	Objective 1						
	Objective 2						
	Objective 3						
Outcome B	Objective 1						
	Objective 2						
Why		What		Who and How			

Open Source Requirements Roadmap Instructions



- *How is the metric calculated?* Clearly document the actual mathematical formula used to calculate the metric and clearly specifying the elements to be used in the calculation. If the metric relies on other reported metrics, take the time to validate and document these calculations.
- *How often is the data collected?* Clearly establish how frequently the data is collected and the metric calculated and when is it reported and reviewed



We recommend you record your work directly into your Requirements Roadmap Template. This allows everyone to see the entire row of information, and verify that the responsibilities, etc. are appropriate.

Step 20: Review your Quality Assurance Plan



Review the completed QA Plan portion of your Requirements Roadmap and ask the following questions:

- Have you clearly documented the Quality Assurance Plan for each Objective?
- Are all parties in agreement?
- Is the frequency of collection and reporting sufficient to manage performance?



Don't forget to review your Stakeholder Analysis and Communications Plan to see which stakeholders should review and have buy-in. If you have not worked with key stakeholders to complete this exercise, they will likely need to be debriefed and provided an opportunity to give their feedback.

Open Source Requirements Roadmap Instructions



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