From: Ellen Gottesdiener
To: ellen@ebgconsulting.com;
Subject: [Success with Requirements] Savvy Shopping for COTS Software, Upcoming Webinar, and other Resources
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ebg CONSULTING Ellen Gottesdiener, Publisher

Forward to a Colleague

Helping your business and technical teams get product requirements right so your projects start smart and deliver the right product at the right time

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Success with Requirements

Forward to a Colleague

Welcome to our Newsletter!

Hi, [fname] -

Welcome to issue #9, Volume 2 of EBG's eNewsletter, *Success with Requirements*.

How do you tackle requirements for off-the-shelf (COTS) software? How do you make smart choices to ensure a good fit? What questions should your ask? How should you represent the requirements?

Many of our clients employ a default strategy of "buy before build", that is, explore COTS solution options *before* attempting a custom development project. This month, requirements guru and EBG Consulting Sr. Associate Mary Gorman shares good practices to use when shopping for COTS solutions. I hope you find it informative!

Please email me with suggestions for upcoming *Success with Requirements* topics.

~ ellen

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Savvy Shopping for COTS Software

When you're shopping for commercial off-the-shelf (COTS) software, you can run afoul of the **law of unintended consequences**: buying too little or too much, buying something that doesn't work with the stuff you already have, or spending more than you meant to. Faced with a multitude of software products, what's a time-pressured, distracted shopper to do? The key is to **ask the right questions**.

Making a list, checking it twice

The first step is to identify the need, pain, or opportunity that motivates your COTS shopping. You need to understand your business goals and objectives and clearly define the scope of the effort.

Here are specific questions you should ask.

- **What?** Uncover **key function**s by asking what organizational functions you might want to automate. Then draw a **relationship map**, with directed lines representing the flow of information and products among the functions.
- **Who?** Who comes in contact with the functions? Add the external **customers** to the relationship map along with flows. Who can serve as an **adviser** on subjects such as regulations and business rules? Who will be a **provider** of software and integration services? Be sure to include them.
- **What features** will be included? What are the definitions of terms you use? It's not too early to capture the organization's vernacular (i.e., do you refer to your targets as customers, clients, or members?) in a **glossary**. Depict key terms in a conceptual **data model** to show their relationships at a high level.
- **How?** You ask this question to understand the major business processes in scope. A **process map** (also called a **swimlane diagram**) shows the sequence of processes across the various functions. This model can include the flows to and from external customers, providers, and systems that you identified on the relationship map.
- **When?** This question is to elicit **events** that trigger the business processes shown in your process map - that is, when something happens in your organization. One answer might be to define the **states** of a key term. For example, an invoice's states might be "pending shipment," "delivered," "paid," and "canceled." States verify the processes on your process map and can **reveal missing processes**. Also, don't forget about temporally initiated events (such as issuing paychecks on the same day each month).

Your COTS shopping list should be based on the "to be" views of your requirements. In contrast, your "as is" business models will help when you implement your COTS application by identifying how users need to adapt to the new software.

All in the details

User requirements models provide details for the shopping list and are essential for analyzing the gap between your needs and the COTS solutions.

To clarify the system's environment, ask, "What?" and draw a **context diagram** to show the actors' interactions with the COTS solution. Use your conceptual data model to capture additional details, such as essential data attributes. This model represents the data requirements that the COTS software must support.

To elicit events and states of significant data entities, ask, "When?" You need to know which specific events the COTS product must respond to, including responses that involve interfacing systems. This activity will **uncover data you may have missed** as well as potential business

rules.

Model the answers to the "how" question by using **stories** or **scenarios** that describe specific instances through the events.

Ask, "Why?" to learn the **rules, regulations, or legislation** that must be enforced in the selected product.
Don't forget your nonfunctional requirements:

- **Quality attributes** such as performance, reliability, security, interoperability, and usability
- **Design and implementation constraints** such as your database management system (DBMS), browsers, operating system, and other aspects of your technical architecture
- **External interface specifications** (human-computer, report, system-to-system, hardware-to-system)

You need to **prioritize** all the requirements from both the business and the technical perspective.

Shop till you ...

Use your shopping list to identify and evaluate candidate packages. Have vendors execute your scenarios in demos to show how their COTS product will deliver your high-priority features, data, and rules. Remember to **grade the candidates** on user as well as nonfunctional requirements.

Then when you implement the selected COTS package, use your list to **structure your project plan**, placing early emphasis on interfaces with other systems. Your requirements models, especially the scenarios and business rules, are the basis for preparing **test cases**. Study your "as is" and "to be" process flows to identify where and how users' work will change. This analysis will help you make plans for easing the **inevitable challenges** that users face with new software.

Your Turn

Do you have experience to share about shopping for COTS software? What works for you? What doesn't? I'd love to hear from you. Write me at mary@ebgconsulting.com.

Further Reading

Gorman, Mary. "*Events to the Rescue*," StickyMinds Original, October 2006.
Gorman, Mary. "*Ready, Fire, Aim: How Timely Interface Analysis Reduces Risk in Software Projects*," StickyMinds Original, November 2007.
Gottesdiener, Ellen. "*Good Practices for Developing User Requirements*," Crosstalk, March 2008.

Author's note: This article was adapted from a column published in June, 2008 on Stickymind.com.

October 2nd Webinar on Business Rules and Data Requirements

Join EBG Consulting Senior Associate Mary Gorman for a webinar on business rules and data requirements on Thursday, October 2nd at 2:00 EST. Here is the info again. I hope you will attend!

Title: "Business Rules and Data Requirements: Pulling in Tandem for Success"

Date: Tuesday, October 2nd 2:00 PM - 3:00 PM EDT

Brief description: Requirements expert and mentor Mary Gorman

explores ways to effectively elicit and analyze business rules and data to help you deliver a balanced set of requirements.

Practitioners will learn the value of going beyond process requirements (often detailed in use cases or stories) to explore functional requirements specified in business rules and data requirements. Gain an appreciation of how analyzing data and rules, in tandem, improve the completeness and quality of your customer needs.

What you will learn by attending:

- How process requirements trace to data and business rules
- Appropriate timing for modeling data and business rules
- What skills are needed to model data and business rules
- The risks of single-dimension requirements

Webinar sponsor: IIR USA, host of the November Project World & World Congress for Business Analysts Conference in Orlando. Both Mary Gorman and Ellen Gottesdiener will be presenting at this event.

How do I register?: Go to https://www1.gotomeeting.com/register/561652152 and use priority code **EBGIIR2**.

Upcoming Events

1. Mary Gorman will present a free webinar entitled *"Business Rules and Data Requirements: Pulling in Tandem for Success"* (see above).

2. Paul Reed will be presenting tutorials and classes at Project Summit/Business Analysts World in San Francisco, the week of October 13th.

3. Ellen Gottesdiener and Mary Gorman will be presenting tutorials and classes at Software Development Best Practices in Boston the week of October 27th.

4. Ellen and Mary will be presenting tutorials and classes at Project Summit/Business Analysts World in Boston the week of October 27th.
5. Ellen will be presenting several tutorials and classes at Agile Development Practices in Orlando, the week of November 10th.

6. Mary will be presenting tutorials and classes at Project Summit/Business Analysts World in Chicago, the week of November 10th.

7. Ellen and Mary will be presenting tutorials and classes at Project World/World Congress for Business Analysts in Orlando the week of November 17th. We are pleased to pass along to you and your colleagues a 20% discount to join us at the event. Your special discount code is **SPKRM2020EG** when registering.

Resources of Interest

Each month we provide a few resources we think are worthwhile. The resources below are related to this month's topic on COTS and requirements.

- The Software Engineering Institute (SEI) has developed an Evolutionary Process for Integrating COTS-based systems (EPIC), a methodology for acquiring, engineering, and managing COTS systems. You can read an overview of EPIC on the SEI site.

- Soren Lauesen describes research on COTS selection when the software solution needs to integrate with other products.

- The Software Technology Support Center's Journal, *Crosstalk*,

features an in-depth article by David Cook: *Issues to Consider When Acquiring COTS.*

Media Page with Webinars and Podcasts

Last month we launched our new Media page to offer you a growing list of podcasts and webinars for your listening and viewing. Examples of media include:

- Webinar on how to capture performance requirements (Paul Reed)
- Webinar on adapting requirements practices (Ellen Gottesdiener)
- Podcast on a variety of requirements topics (collaboration, the IIBA, and more) (Ellen Gottesdiener)

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For your *Success with Requirements* eNewsletter subscriber discount (10%) on our 8-course self-paced eLearning training curriculum, *Foundation for Requirements Development and Management* use code: **FRSWR04** when you register here.

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