

## Overview: Planning and Requirements

This section describes how to gather business requirements and create a project management plan. It includes identification, verification, review, validation, and approval by all involved parties. This process is performed primarily by the Project Manager with assistance from the project team and the technical Leads.

### Planning and Requirements: Inputs and Outputs

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| <b><u>Entry Criteria:</u></b> <ul style="list-style-type: none"><li>• Approved charter</li><li>• Approved Initiation Phase</li></ul>  | <b><u>Inputs:</u></b> <ul style="list-style-type: none"><li>• High-Level Business Requirements</li><li>• Approved Project Charter</li></ul> | <b><u>Participants:</u></b> <ul style="list-style-type: none"><li>• Project Manager</li><li>• BA</li><li>• QA</li><li>• Subject Matter Experts</li><li>• Sponsor / Representative</li><li>• Security (If applicable)</li></ul> |
| <b><u>Process Steps:</u></b> <ol style="list-style-type: none"><li>1. Project Manager facilitates the kick-off meeting</li><li>2. Project Manager initiates the requirements-gathering workshops and /or work sessions.</li><li>3. BA completes the list the requirements</li><li>4. Project Manager and BA analyze the requirements with appropriate parties.</li><li>5. Project Manager and BA verify and evaluate the requirements with Sponsor/Representative</li><li>6. Project Manager and BA Prioritize the requirements with Sponsor/Representative</li><li>7. Project Manager Creates the Project Management Plan to include:<ol style="list-style-type: none"><li>a. Team Responsibility and Accountability (RACI)</li><li>b. Staffing Management Plan</li><li>c. High-Level project schedule (include procurement tasks, if applicable)</li><li>d. High-Level Risk &amp; Issue log.</li><li>e. Updated Budget plan</li><li>f. Communication plan</li></ol></li><li>8. Project Manager or BA Creates Use Case</li><li>9. Project Manager and QA Create Test Strategy</li><li>10. Project Manager or QA prepares testing tool (setting-up the requirements)</li><li>11. Project Manager obtains Sponsor sign-off, in writing, on the final requirements.</li><li>12. Project Manager addresses changes (if applicable) via the change management process</li><li>13. Project Manager and QA update Test Strategy (If applicable)</li><li>14. Project Manager or BA Creates Traceability Matrix</li><li>15. Project Manager uploads documents to the collaboration space.</li></ol> |   |  |

**Outputs:**

- Detailed Business Requirements
- Test Strategy
- Traceability Matrix
- Use Case (High-Level)
- Communication Plan
- Staffing Management Plan
- Updated RACI
- Updated Budget Plan
- Updated Project Schedule
- Updated Risk & Issue log
- Updated Project Charter (if needed)
- Change Request Form, if needed

**Exit Criteria:**

- Approved Detailed Business Requirements document