Tips & Advice when Choosing a Requirements Management Tool

Why Cathay Pacific Airways Chose iServer

WP0078 | May 2013

Arnold Aranez

Arnold Aranez is a leader and specialist in IT Business Analysis and Digital Strategy. Arnold is experienced in telecommunications, banking, eCommerce, advertising and marketing and airline enterprise systems.

Leyton Brownlie

Leyton Brownlie is an experienced Enterprise and Solution Architect and Application/Technology lead with strategic and operational experience in architecture, requirements & design, implementation and support of business applications and technology including project and team management.

Leyton is a trusted advisor and an experienced consultant who is a leader in the field of Enterprise and Solution Architecture governance, capability, modeling and repository management.

My name is Arnold Aranez and I am the Business Process Improvement Practice Lead for SMS Management & Technology based in Hong Kong. SMS are a strategic IT partner of Cathay Pacific Airways.

I'm always interested in hearing how technology decisions are made, especially around business analysis tools like a requirements management tool.

A few weeks ago, I caught up with Leyton Brownlie, Architecture/BPM Practice Manager for Cathay Pacific Airways (CPA), to discuss why CPA chose iServer as their requirements management and business process management tool.

I thought it would be great to share this discussion and believe it's a very relevant topic for many organizations maturing in their management of requirements. This is especially true when graduating from an unstructured and randomly organized set of requirements documents to a requirements tool that would provide benefits such as:

- Reduction in time to generate requirements

- Reduction in time to market new or updated products

- Improve quality and consistency of requirements

- Reduction in costs

- Increased levels of customer satisfaction

Access our **free**, extensive library at
www.orbussoftware.com/downloads

Why the need to store requirements?

The key reasons for using a repository tool to store requirements is:

1. To enable reuse

2. To perform impact analysis/traceability

3. To enable alignment and compliance to standards (whether internal IT or industry frameworks & methods) and

4. To enable requirements integration to other tools (i.e. testing)

By using a single repository/library, requirements and their definitions, types (business, functional, non functional), priorities (must have, should have, etc) and other key components of IT requirements and solution design (i.e. project objectives, business process, application components, integration, etc) can be located in a central location (a knowledge base) for both the duration of all phases of a project lifecycle and importantly long after a project has closed and is transitioned to business as usual.

How did you search for a requirements tool? Did you use past experience or online recommendations?

Our focus when searching for a requirements tool was to make a selection prioritizing the best fit for Cathay Pacific. This was certainly based on the success and ease of use that we had experienced with existing repository tools. It was also important for us to select a tool that had strong alignment to our project delivery lifecycle and the industry standards we have aligned to (i.e. BABOK, BPMN 2).

Which tools did you shortlist and why?

Back in 2010, Cathay Pacific performed a full market scan/RFx in order to assess the product/vendor offering in IT repository tools. Whilst our initial focus was a tool for Enterprise and Solution Architecture, our assessment also considered whether the selected tool could cover business process modeling and requirements management. This market scan covered 8 of the major vendors/products and was quickly shortlisted to 3 for brief demonstrations and prototyping.

After assessment, Cathay Pacific selected the full product suite of iServer, developed by Orbus Software, because it

1. Met our key specific requirements

2. Functional fit

3. Alignment to principles/standards and

4. Cost

What were the main reasons for selecting iServer over the rest?

The main reasons for the selection of Orbus Software's iServer as the repository tool at Cathay Pacific for business process, requirements and solution design include:

- Use of familiar MS Office and Visio ensured minimal user resistance and strong understanding of the user interface from the team.

- Support for Office documents meant BABOK, BPMN 2, TOGAF 9 deliverables could be managed in the same central environment.

- Flexibility of the system allowed Cathay Pacific to quickly customize the system to implement only the aspects of BABOK, BPMN 2, TOGAF 9 which were useful and to extend as necessary (i.e. our framework/metamodel).

- Production of extremely high quality deliverables which were visually appealing to stakeholders, an essential requirement due to the need to 'sell' the benefits of IT to the business.

- Dependency analysis and traceability ensured the team could interrogate the process, requirements and or design to answer key business questions such as requirements traceability, process decomposition, which applications are affected by particular project(s).

The low-risk, low-cost combination also factored heavily in the decision-making process, especially as many team members had concerns about the ease of adoption of tools within the team, based on less-than favourable previous experiences with more complex and costly solutions.

How long did it take to implement and what were the major challenges?

The initial implementation and deployment of Orbus Software's iServer took only a few weeks. With the extended use of iServer for business process and requirements management, it took less than a week to deploy the iServer Business Process Analysis (BPA) module and configure the structure and use of the tool to our needs and standards.

How would you improve iServer?

To improve iServer, Cathay Pacific works very closely with Orbus Software to help drive enhancements and new functionality. Current improvement suggestions include more advanced query capabilities, a more integrated and flexible publishing and reporting capability, a content merging capability and standard out-of-the-box HP Quality Centre integration.

I would also look for a more formal and regular customer advisory board for iServer users to share lessons learnt and good practices as well as to help drive the development of iServer's product range and capabilities.

Do you have any advice for people looking to implement iServer or any other Requirement Management tool?

Whether using a repository tool for business analysis and requirements (business process, business, functional and non-functional requirements, use case), for architecture (Enterprise Architecture, Solution Architecture & design, infrastructure design), development design (functional specification, technical specification) or in context of programmes, projects or business as usual activities, the following 10 tips are recommended:

1. Adopt industry standards – use product accelerators BPMN 2, eTOM, TOGAF (with or without ArchiMate)

2. Define framework/structure and deliverable templates - this drives your metamodel/tool configuration, ensures alignment/reuse (i.e. EA to SA, BPM to BA, etc), establish EA content (i.e. app inventory, business functions/services, logical architecture) and requirements methodology and structure.

3. Finalize deployment/configuration before training – custom training based on your design and use of tool rather than standard out-of-the box training or user guides.

4. **Single repository/tool** – make a single repository work, don't purchase more than one tool for requirements/process/design, manage the constraints rather than tackling the complexity and administration overhead of multiple repositories/library or very complex tool alternatives.

5. **Documentation and modeling standards** – document your use of the tool and modeling standards you want to enforce - tool design can help.

6. **Define content ownership** – identify roles, ensure content ownership, maintain completeness.

7. **Embed into practice & delivery lifecycle** – through governance, checklists, KRA's.

8. **Drive vendor** – for regular enhancements and product improvements.

9. **Identify functional/technical ownership** – identify owner (typically 1x FTE) with influence across all IT functions (BA/BPM, Arch, Dev, PMO).

10. **Purchase enterprise license, plan for growth** – perpetual or annual subscription, unlimited client (cover current team plus contract augmentation), unlimited Portal (read-only).

Conclusion

I believe the list of tips that Leyton has described is very thorough. I especially agree with points number 1 and 2 in terms of aligning the use of your tool with an industry standard and framework – in fact I would even go further and suggest that the organization must be aware and trained in the standard and framework before the tool is implemented.

Other tips that I would provide from my own personal experience are:

- Treat the implementation of the requirements tool as a project – have tasks, resources to do those tasks, timelines and governance etc

- Seek an executive champion (relates to number 9)

- Look for a tool that integrates with your current project and testing tools if possible

- Remember, it's a tool and a means to an end, not the end itself

A huge thank you to Leyton for providing us with these invaluable insights into how Cathay Pacific chose iServer and of course for providing a list of tips for others who are currently considering or implementing a new requirements management tool in their company.

orbus
software