

The logo for Clearworks, featuring the word "clearworks" in a white, lowercase, sans-serif font. The "c" is lowercase, and the "w" has a distinctive shape with a loop. The logo is positioned in the bottom left corner of a large orange rectangular area.

clearworks



Requirements Gathering and Documentation

A Comprehensive Approach to Using Voice of the Customer

WHO WE ARE

We help companies connect with customers to create and deliver clear and compelling products, services, and messaging. We help to define the right products and also talk about them in a way that makes sense. And we deliver actionable plans to bring the new idea to life



REQUIREMENTS OVERVIEW

3

- Gather Requirements
 - From customers, employees, partners and other stakeholders
 - Globally
- Document Requirements
 - Use and easy to use/understand template
 - Be comprehensive and detailed
- Requirements Types
 - Requirements geared towards either in-house or outsourced development
 - Requirements for internal business systems that support the innovation, product management and product marketing functions (e.g. CRM, Idea Management, Content Management, etc.)
 - Requirements for new products
 - Requirements for new services

REQUIREMENTS GATHERING APPROACH

4

- Review background documentation
- Create a draft Requirements outline
- Conduct a series of in-person working sessions and calls with key stakeholders, users, and the cross functional team
 - Use these sessions to gather requirements input; i.e. get the team's thoughts organized and on paper
 - Conducted interview style
 - For internal business systems, shadow employees to document experience working with process and tools
- For new products and services, conduct research with the target customer
 - Interviews, focus groups, user experience/prototype testing
- Conduct a process mapping exercise with the team to map the process and the user/customer experience
 - Use process flow to determine requirements to support the ideal experience

REQUIREMENTS DOCUMENTATION APPROACH

5

- Use an easy to read/understand template
 - Create a document that facilitates conversation and understanding between the business/product team and the technical teams
 - Keep user scenarios simple and easy for the technology team to relate to
 - Provide detailed requirements that are actionable
- Use a hybrid MRD (market requirements)/PRD (product/system requirements) approach
 - Allow for enough strategy, market and customer data to put the requirements in context
 - Include the “what” not the “how”
- Allow for review sessions with the stakeholders and cross functional team to ensure requirements were interpreted correctly

REQUIREMENTS GATHERING

Internal Systems

6

Some examples include:

CRM Requirements

- Gathered global requirements from stakeholders using interviews, user shadowing and process mapping sessions
- Documented requirements for new global CRM system
- Used requirements to lead vendor selection efforts

Service Management Tool

- Documented requirements for service management tool using cross functional team process mapping to identify systems required to support the new service
- Identified and evaluated pool of service management tool vendors against requirements

Idea Management Tool

- Conducted cross functional process mapping to document the innovation process and system requirements, from idea generation and collection through concept development and screening to pilot planning and launch
- Identified requirements for a new idea management tool

REQUIREMENTS GATHERING

New Products/Series

7

Some examples include:

Mobile Advertising Platform

- Helped Startup team decide on requirements for new platform
- Conducted cross functional workshops and team interviews
- Leveraged inputs from partners and customers

Enterprise Code Search Tool

- Documented requirements for new enterprise code search product
- Conducted Customer Summit with key customer targets to test/validate and gather requirements
- Worked hand-in-hand with engineering team to ensure product and technology were in sync

New Services Business

- Developed requirements for a new suite of services for a technology product company
- Gathered and wrote requirements for 5 new services
- Used process mapping/customer experience mapping to design the new services
- Used requirements to develop tools and templates to support the launch of the new services

BENEFIT OF THE CLEARWORKS APPROACH

- Documentation that bridges the gap between business and technology
- Cross functional workshops ensure buy-in and capturing of all good requirements
- Customer research and input ensures voice of the customer
- Little resource required from your internal teams

CLIENT TESTIMONIALS

“Clearworks developed comprehensive product requirements for our new mobile services offering. They picked up on the technology quickly, were able to drill down to great detail, and incorporated the much needed user perspective. Our engineers got just what they need to get started on development.”

John Finch, VP of Product Management, Zoove

"The Clearworks team did an amazing job understanding a complex engineering project, running our customer focus group, and turning that into a usable product requirements document. I have mentioned to several people that it is incredible your level of understanding of our product with such limited exposure."

Dean Pfitzenreuter , Software Architect, Krugle

"Clearworks is what every engineering team needs -- the voice of the customer brought into the product development process."

Dave Loftesness, President and CEO, Blue Mug

At Clearworks we help our clients connect with their customers to create clear and compelling products, services and messages. We get what it takes to bring a product or service idea to life and how to create an actionable plan to get there. We understand what you need to know and how you're going to use that information to make decisions. Let us bring clarity to your products and services.

customers. connections. clarity.

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Thank You.



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