DESIGN PHASE – THE DEVIL IS IN THE DETAIL!

The old adage of the devil is in the detail is most certainly the case for any project and the Design stage is where we get into the detail to draw out exact requirements and agree a solution.

It is rare to find clients with identical requirements, simply because our clients are individual, unique businesses operating slightly differently, even when using the same systems.   Therefore in order for us to ensure that we deliver a solution that fits your particular needs, it's important to spend the time understanding and interpreting your requirements.

It's important to note that this is a 2-way process, combining our extensive knowledge of what can be done with the systems and your deep knowledge of your business to come up with an optimal solution together. Don't be afraid to challenge us if you think we haven't understood something correctly or feel as though we are going down the wrong path.

In some cases the requirements will not always be clear; perhaps you need to solve an issue or there is a general desire to improve a process. In cases like this we can help you draw out requirements by advising you on best practice business processes, what is possible and what solution we think would best fit your business.

Often there are several possible solutions. We can work with you to demonstrate the pros and cons of each possible solution, and support you to determine the best option for your business. Obviously one of the main factors to consider is budget. If you have a budget in mind we always recommend sharing that with us so we can take that into account and ensure we design an appropriate solution. Of course it may not always be possible to achieve your requirements within a limited budget, so in order to keep costs to a minimum we recommend:

- You internally workshop requirements and document them. We have a Business Requirements Document (BRD) template that you can use if you do not have one of your own.
- You involve all key stakeholders in Design stage.
- You respond to any queries we have as quickly as possible, so that our consultants don't have to re-visit previous work if there has been a delay
- Thoroughly review the proposed solution in the FRD or SDD – see below.
- Be aware of any assumptions we have made and challenge them if they are not correct.
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- Keep your data clean and up to date – we commonly find that unexpected issues arise during UAT due to data issues, or unexpected data. Equally so, ensure that all possible data combinations are captured during the Design stage.

For all projects, large or small we follow a similar process during the Design phase:
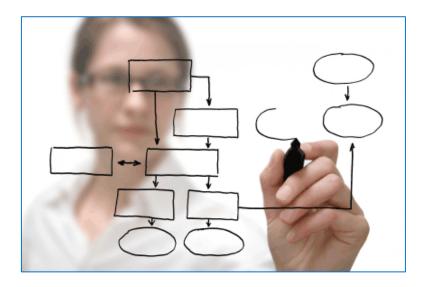
Task	Small Project – e.g. custom report	Large project e.g. system or module implementation	Detail
Estimate of effort	Quote	Statement of Works (SOW)	We base this on a high level understanding of basic requirements, in order to help you decide whether to proceed or not. Sometimes it's necessary to delve into further detail at this stage to come up with a more accurate quote. However, at this stage it is still only an estimate.
Client acceptance of Estimate	Approval of Quote	Execution/signing of SOW	Your approval to proceed
Detailed understanding of Requirements	Requirements discussion – this can involve back and forth communications to clarify any points/issues as we work through designing a solution	Immersion workshops We take you through each module and best practice usage to establish how to configure the system balancing meeting your unique requirements with utilising as much vanilla, standard, out of the box functionality as possible.	We strongly recommend that the right people are involved in this stage: a) who understand the requirements and all associated business processes and b) who can make key decisions on behalf of the business.
Solution Design	Functional Requirements Document (FRD): • what we are going to build • any assumptions we have made • what you should test • confirmation of our estimated effort – this may change from the original quote once we get into the detail • although it covers technical details we aim for this to be easily interpreted by a non technical user	Solution Design Document (SDD): covers how your module/system will be configured	As part of the Solution Design we will re-confirm our estimate of effort. We try to be as accurate as possible but occasionally there can be unforeseen issues with environment, code, date etc. that can impact the level of effort required. Once the FRD/SDD is approved we do track spend against budget and try to flag any potential issues as early as possible.
Client Review of Proposed Solution	This is your opportunity to ensure that we have captured and correctly interpreted all requirements. Once the FRD/SDD is approved, any changes are subject to a Change Request and almost certainly additional effort/cost. Therefore it is essential to take the time to review the FRD/SDD thoroughly. Don't assume that it is correct – we can interpret discussions quite differently from you. We recommend that your Subject Matter Expert for all business processes impacted by the change, review the FRD/SDD to ensure all angles are covered. We are not suggesting onerous change management approval for all changes but we do find it is		

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	quite common for one user to design a change without necessarily understanding the impact on other business processes/users. So it is worth considering up front who should be involved in approval. Remember it is always more cost effective to address issues at this stage whilst it is fresh in everyone's minds rather than during User Acceptance Testing, when our consultants need to come back and revisit their work, often some weeks/months later.		
Approval of Solution	Approval of FRD	Approval of SDD	Acceptance of the proposed solution and approval to commence build. Any changes that arise after this will be subject to a Change Request.

- **Written by Claire Graham, Loci Solutions – Project Manager, April 2017**

If you would like to learn more about our suite of services and products can revitalise your real estate IT set-up, please click here.

Alternatively, you can call directly on +612 9251 3877 or email us at info@locisolutions.com.