1. Initial Customer Contact

The initial customer contact can occur through several different formats (email, telephone call, personal appointment). Some of these formats do allow the requirements analyst to gather the complete picture of the customer’s request; however, even through the most disconnected medium of an email exchange, the requirements analyst should attempt to gather the following information:

1. A statement of problem in clear, non-technology specific language.
   Ex. We need to track additional information on applicants.
   Ex. We would like to automate the processing of vacation/sick/holiday hours taken.
2. A statement of the driving force behind this request. Why now?
   Ex. The government has mandated a change to the financial aid packaging
   Ex. Our (the client’s) customers are asking for the ability to do this function themselves.
3. A statement of the time frame for the request.
4. A statement of the reach/impact of the request.
   Ex. The solution will need to get information from the Registrar so we can verify that the student has enough credits to qualify for the Scholarships
   Ex. The solution will be entirely housed within the Housing department; all of the information is self-contained and does not directly interface outside of Housing. Only billing charges (assessed through a manual process by a staff member) will be transmitted to other departments.
5. The following questions should also be answered during the communication (often the answers to these questions will allow the requirements analyst to triage the request into the development process):
   a. Is this request for a new system or an additional feature to be added to the current system?
   b. Is this a new requirement/how is the customer currently handling this problem?
   c. Is there support for this request from within the department?
   d. Is there administrative support for this request?
   e. Is there an expert in this process in the department? At the University?
   f. Is there someone within the department able to act as project advocate/primary customer?

Most of these statements should be considered preliminary statements. Neither the customer nor the requirements analyst should feel committed to the answers to these questions. They will be used to help generate the question lists for the guided interview portions of the requirements gathering. The more complete this initial contact, the more in depth the requirements analyst can delve during the guided interviews, and the more accurately the analyst can triage the request.

Simple Project Exception

The exception to this rule is when the requirements analyst has triaged the request into the simplified Consulting/Development methodology and therefore does not need to proceed to a full guided interview. If the request meets the requirements of the simplified Consulting/Development methodology, then the requirements analyst can proceed with further requirements gathering in a more informal process and proceed with development independently.