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| ***Objective: The objective of Requirements Roadmap Template is to help you build stakeholder consensus around your Desired Outcomes and to help you create a “Roadmap” that will clearly define and measure each of the Desired Outcomes.***  ***Tip! Organizations adopting Vested for larger or more complex agreements may find it useful to engage a*** [***Vested Center of Excellence***](http://www.vestedway.com/vested-centers-of-excellence-coaching-and-consulting/) ***to help facilitate the development of your Requirements Roadmap. A typical Requirements Roadmap facilitated workshop includes a cross-functional group of stakeholders and takes two days to complete.*** |

*“Using the Requirements Roadmap was great. After we completed that tool, I used it more than anything else when writing the contract. I can’t tell you how many times I referred to it when we were writing the contract, because it really is the heart of the contract.”*

- Darrin Browder, Vested Certified Deal Architect, Strategist and Supplier Relationship Manager - Dell, Inc.,

Getting your requirements right is essential for any business agreement. A Vested Agreement uses the ***Requirements Roadmap Template*** to help business partners clearly define requirements. A well-defined Desired Outcome:

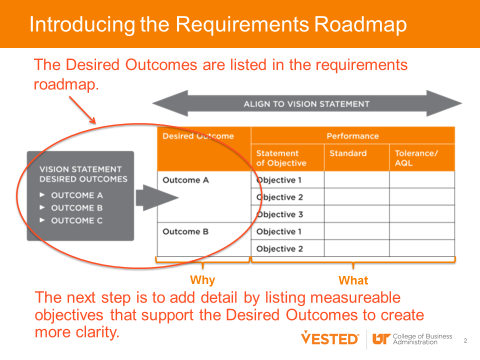
* Is linked to your Shared Vision
* Is clearly stated
* Is often boundary spanning – and not something that the service provider can accomplish on their own
* Is most often measurable, even if measuring it is somewhat vague (see Green and Clean from module 5 of the online courseware or chapter 7 from [*The Vested Outsourcing Manual*](http://www.vestedway.com/books/))
* Is linked to achieving your strategic objective
* Is not a task oriented SLA (Service Level Agreement) found measuring an activity or an “output” as typically found in conventional buyer-supplier agreements

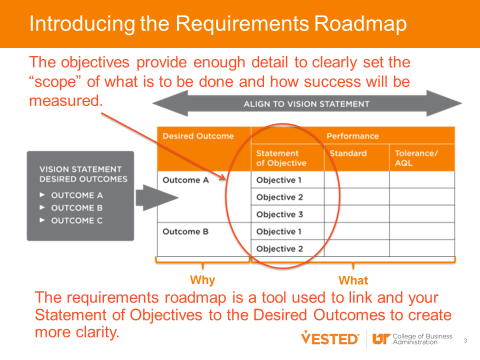
Defining your Desired Outcomes is a JOINT exercise with key stakeholders present and is best if done in a face-to-face setting, allowing direct dialog.

***Tip! This exercise is well-suited to be conducted in a larger “facilitated workshop” environment with the goal to allow as many people as possible to have input and gain buy-in about what the parties intend to accomplish going forward. Many find that combining this exercise with the Shared Vision exercise from the Module 4 of the*** [***Creating a Vested Agreement***](http://www.vestedway.com/online-courseware/) ***online course a valuable use of key stakeholders time. If you have an existing supplier, the partner should be part of this exercise. If you are creating a Requirements Roadmap as part of a Vested Request for Partner process, your short list of selected service providers should be invited to participate in the workshop.***

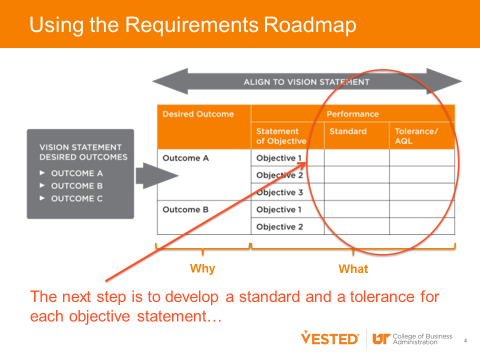
As you complete the ***Requirements Roadmap Template*** – you will work from left to right, first completing the Desired Outcomes and the Statement of Objectives (SOO) columns.

***Step 1: Complete the Desired Outcomes and SOO Columns of the Requirements Roadmap Template***

Start by “brainstorming” potential Desired Outcomes; there should be no limits.

* Develop a consensus view by consolidating and agreeing on a limited number of Desired Outcomes (typically 3 – 5, but definitely no more than 7)
* Take a look at your Desired Outcomes based on these questions
  + Do your Desired Outcomes support your strategic direction?
  + Do your Desired Outcomes emphasize your strategic direction with regards to:
    - Cost?
    - Schedule?
    - Performance?
    - Customer satisfaction?
    - Other?
* Expand each Desired Outcome into a few objective statements. ***Note: often many of the initial Desired Outcomes you identified become Objectives that fall under a broader Desired Outcome.*** 
  + Objectives should be clearly stated
  + Objectives should support the Desired Outcome
  + Objectives should be measurable, even though you may not have the data to measure the objective at this time. A measurable objective can be measured as a “yes/no” and not by a number.
* If you have identified metrics associated with your Objectives, go ahead and fill those in under “Standard” and “Tolerance.”
* Once you are happy with your Desired Outcomes and Objectives, adjust the statements, if necessary, to assure that they are quantitative and in support of overall strategic direction.

***Step 2: Complete the Standard and Tolerance Columns of the Requirements Roadmap Template***

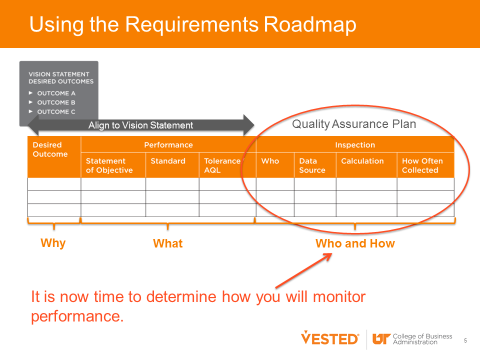
It is critical to know how you will measure your Desired Outcomes. Metrics will be used by both organizations to measure progress against the Desired Outcomes. This will involve:

* Agreeing on and documenting a standard or the targeted level of performance that you jointly agree is acceptable. A standard is the targeted level of quality or performance that stakeholders would generally consider normal or acceptable.
* Agreeing on and documenting any tolerance. A tolerance is the amount by which performance can be different from the standard before it is no longer acceptable. For example, in a supply chain agreement the standard might be a 99% fill rate and the tolerance might be 97% to 99.7% (achieving below 97% impacts customer satisfaction and achieving more than 99.7% is an indicator of holding too much inventory).

Once you have updated the Requirements Roadmap Template, ask the following questions:

* Have you established performance standards and tolerances for each SOO? If you still have work to do, have you included a placeholder in the requirements roadmap?
* Can you clearly link the standard back to the Desired Outcome?
* Have you determined which of the objectives and associated performance standards the service provider is accountable for and which the company is responsible for? ***Note: in many cases metrics are boundary-spanning. This is appropriate.***
* Is the standard clear? Are the tolerances clear and fair?
* Do you have too many or too few measures?

***Step 3: Complete the Quality Assurance Plan Columns of the Requirements Roadmap Template***

The Quality Assurance Plan portion of the Requirements Roadmap ensures agreement on how you will monitor success. Each performance statement includes four things:

* *Who is responsible for the data related to the metric?* Listthe department responsible.
* *What is source of the data?* Be specific so that it is clear what data is used and where it is located.
* *How is the metric calculated?* Clearly document the formula used to calculate the metric. If the metric relies on other reported metrics, take the time to validate and document these calculations.
* *How often is the data collected?* Clearly establish how frequently the data is collected and the metric calculated and when is it reported and reviewed.

Once you have updated the ***Requirements Roadmap Template*** ask the following questions:

* Have you clearly documented the quality assurance plan for each objective statement?
* Are all parties in agreement?
* Is the frequency of collection and reporting sufficient to manage performance?

***Tip! Don’t forget to review your Stakeholder Analysis and Communications Plan to see which stakeholders should review and have buy-in. If you have not worked with key stakeholders to complete this exercise, they will likely need to be debriefed and provided an opportunity to give their feedback.***

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| **Desired**  **Outcome** | **Performance** | | | **Incentive** | **Inspection** | | | |
| **Statement of Objective** | **Standard** | **Tolerance/**  **AQL** | **Who** | **Data Source** | **Calculation** | **How Often Collected** |
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