

Needs Analysis Checklist

Users

Since people will judge the success of the project, identifying those people is the best place to start. If there are only a few users you can address each one individually. If there are many users you will need to group them and address their needs group by group. Consider grouping by function, experience level, location, computer affinity etc.

Business Objectives

For each group or individual above:

What business change will the system help to bring about? Ask yourself three questions:

- ◆ What questions should the system answer?
 - ◆ What decisions will it help to make?
 - ◆ What will be different as a result of the system?
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Metrics (measures)

What are the indicators, line items or variables that will be used to make the decisions and answer the questions? This might be the P&L or balance sheet, key performance indicators, or other measures used in the mathematical business model.

Output

Reports

Since a single format or layout may be used for many iterations (e.g. the "sales report" by product and region) consider describing report formats based on row, column and page dimensions. Number each exhibit because names tend to change over time, or mean different things to different people.

Report Inventory						
Exhibit #	User/Owner	Report Name	Column dim/s or members	Row dim/s or members	Page dim/s or members	Comments
1						
2						
3						
4						

Screens

Exports

Note: Consider creating a "Dimension Summary" exhibit

Input

Describe each feed or input source as follows:

Physical source

Data file format

Frequency

How often is the data generated? e.g. a file is exported once per week.

Periodicity

What is the time dimension granularity, e.g. daily, weekly, monthly data.

Shape (dimensionality)

e.g. Data is g/l data (measures) by month, division, product and budget version.

Approx. number of records (or other rough indication of size)

Notes:

1. if there are multiple feeds from similar sources, how consistent are they? For example, if you have 10 similar spreadsheets to load, are they 100% consistent in format? If not, what are the differences?

2. Consider producing a "Source File Analysis" Exhibit

Transformations

Normalization calcs

Essbase db calcs

Report calcs

Other Internal

External summarization

External joins (qualification)

Other external

Procedures

User procedures

Ad-hoc Analysis

Regular Reporting

Loading data

Calculating

Outline Maintenance

Annual Updates

Admin procedures

Outline Maintenance

Annual Updates

Backup

Load

Security

Other

Hardware/software environment

Client systems

Web environment

Server/s

Network

Software versions

Upgrade plans