

Specifying Report Requirements

Good reports deliver business value. They give decision makers the information they need to take fast, effective action and save time, effort and money.

There are three attributes to defining effective reports: Action, Stakeholder, Information:

Action: A decision or task used to manage or operate the business. A Stakeholder takes Action using Information. Actions are measurable, no matter what they are called ("objectives", "goals", etc.). "Be informed" is not measurable. "Describe [situation] to executives" and "Satisfy regulators" are.

Stakeholder: Someone, often a manager, who will take Action based on Information. Reports are created because the Stakeholder needs to make a decision or understand a problem. If you could automate the action it's usually part of a process, not a report.

Information: Data, aggregated and presented in a way that answers a question. Describe only the necessary data and formulae, the way the data should be structured into groups or summaries, and the best way to deliver the data.

When Eliciting High Level Reporting Requirements

Ask, in the following order:

1. "In the context of this project, what decision or task is important to running your business?" OR "What business questions do you need answered?"
2. "Which Stakeholder takes that Action?" OR "Who needs the answer to this question?"
3. "What Information does this Stakeholder need to know how to Act?" OR "What information do you need to know to answer that question?"
4. How is the information viewed?" (This is the dimension – by week, by branch, by department, etc.)

Focus on the essential Information needed to guide the Action. It's easy to start enumerating data elements and screen layouts when you're looking for "web-based" "email" or "loudspeaker" (based on the Action and the Stakeholder).

When Defining High Level Reporting Requirements:

Fill in the attributes, starting with the most important reports, for example, reports with Actions that are critical decisions, or that have many Stakeholders using the same Information to support different Actions.

When Documenting Detailed Reporting Requirements:

Describe the Information, Stakeholders and Actions in enough detail for a report designer to start building mock-ups. At this stage you'll define delivery schedules and data sources and page layouts. Your last step is the traditional starting point for defining reports.