



Focal Point Workshop

“Introduction to Focal Point”

Hands-on Exercises – Part 2

June 1, 2009

I. Introduction

This document contains hands-on exercises to be used during the Focal Point Workshop. Hands-on steps to be performed are presented in this format:

A – 1 This is the format of steps to be performed.

Screen shots of Focal Point are also provided, with call-outs that mirror the steps to be performed while guiding you to the appropriate area of the application. The screen shots may not appear exactly as your live image, but are intended as a guide in navigating the application.

You will also find paragraphs labeled “Notes” that help you interpret what you are seeing in Focal Point.

II. Workshop Hands-on Exercises

These exercises assume that you are performing them using the Focal Point Workshop workspace provided to you.

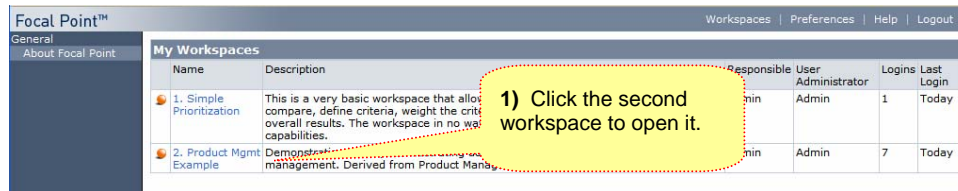
For these exercises, one of our demonstration workspaces has been configured to give workshop participants “read-only” access to various views that might be of use to a product management organization. The workspace is not intended to represent a production environment, it does not adhere to any specific product development process, and does not expose all the features and capabilities of Focal Point.

Participants should work with their Account Manager to learn about capabilities of Focal Point that are outside the scope of this Workshop.

EXERCISE A: Market Prioritization of Requirements

Objective: To illustrate how a global product development company might rank the importance of requirements to their various markets, giving more weight to the more desirable markets.

A - 1. Login in and click the workspace named: “ 2. Product Mgmt Example”.



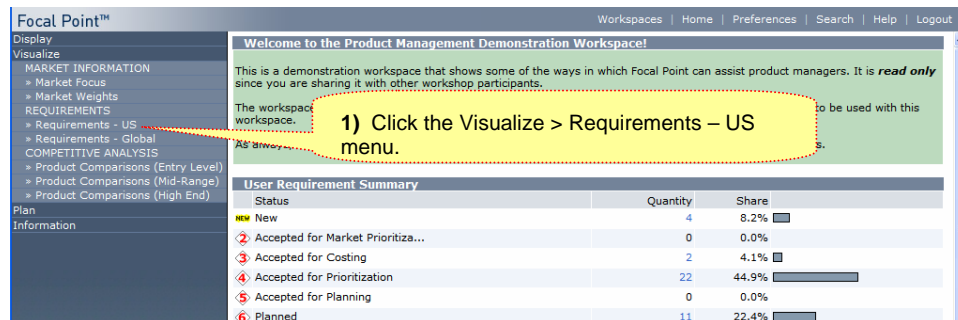
Screenshot 1 – Opening the Workspace

Notes: Referring to Screenshot 2, notice that in this workspace your home page, or “dashboard,” is different from what you may have seen before. Again, this is configurable for each user and role, and here you are just seeing some simple examples.

In the home page view called “User Requirement Summary,” notice the more detailed process that is defined – again highly configurable to match your process, whether you are managing requirements, a single product or project, or a portfolio of products or projects.

In the view called “Release Budgetary Summary,” you see the concept of planning and scheduling product releases, allocating requirements to them and rolling up the costs of the allocated requirements.

A - 2. Click the Visualize > Requirements – US menu. (note that you can grab the right edge of the menu bar and expand it as needed)



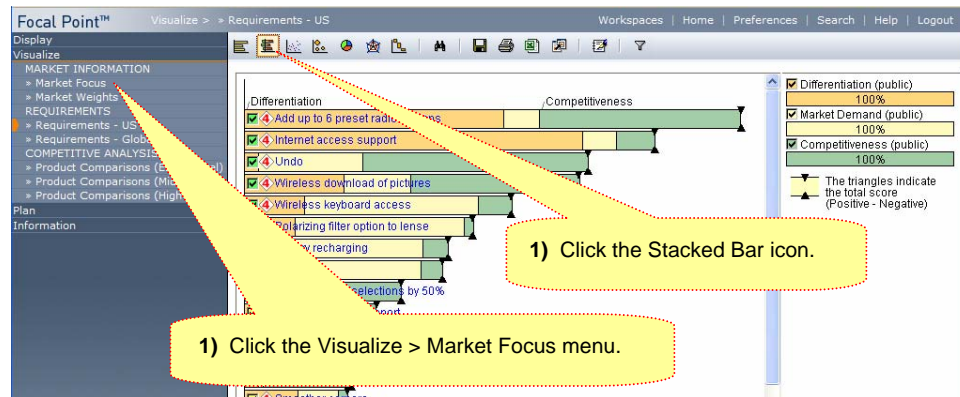
Screenshot 2 - Role-based Home Page for this Workspace

A - 3. Select the Stacked Bar chart on the toolbar.

Notes: Referring to Screenshot 3, imagine the Marketing Managers in the United States ranking a set of requirements based on the criteria of Differentiation, Market Demand and Competitiveness. Remember, the criteria are defined based on what is important to your organization, and this can be done on any type of data – not just requirements.

Assume that a similar exercise has been completed by the Marketing Managers in all targeted markets. For simplicity, we have not included all those views here.

A - 4. Click the Visualize > Market Focus menu.

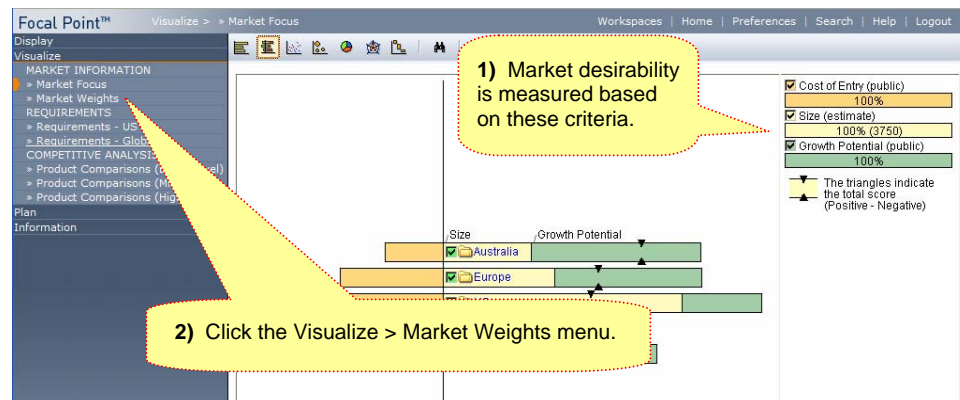


Screenshot 3 - Requirements Prioritization - US Market

Notes: Referring to Screenshot 4, this is an example of how Corporate Management might rank which markets should be pursued most vigorously. This results in “weights” to be applied to the rolled up requirement rankings from each group responsible for the various markets

Looking at the criteria, you will notice that “Size” is an “estimate” criteria, meaning that it is pulling quantitative data from the database – presumably that was gathered through market analysis. The others were voted on using pair-wise comparisons that you are now familiar with, providing qualitative, or subjective, judgments.

A - 5. Click the Visualize > Market Weights menu.

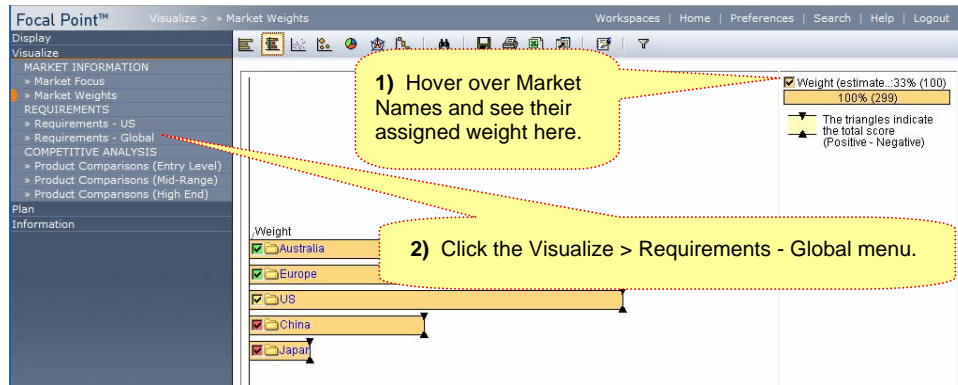


Screenshot 4 - Visualize Desirability of Markets

Notes: Referring to Screenshot 5, notice that this is just a summary view of the prior chart, without looking at the breakdown of the criteria involved. Compare the relative positioning of the aggregate score indicators (black triangles) in the two charts.

If you hover over any of the market names, you will see its assigned weight appear next to the criteria name. In this example, we see that Australia is weighted at 33%.

A - 6. Click the Visualize > Requirements – Global menu.

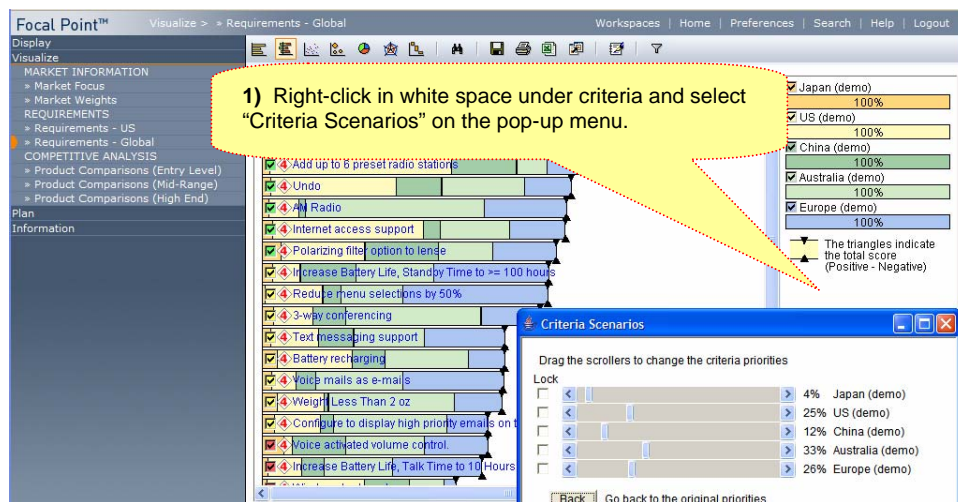


Screenshot 5 - Weighting Based on Desirability

A - 7. Referring to Screenshot 6, click the stacked bar chart if needed.

A - 8. Right click in the white space under the criteria and select criteria scenarios from the pop-up menu.

Notes: In Screenshot 6, notice that the weights assigned to the markets are the same as in Screenshot 5. This shows how your criteria can be weighted using another set of criteria through Focal Point’s prioritization capability.

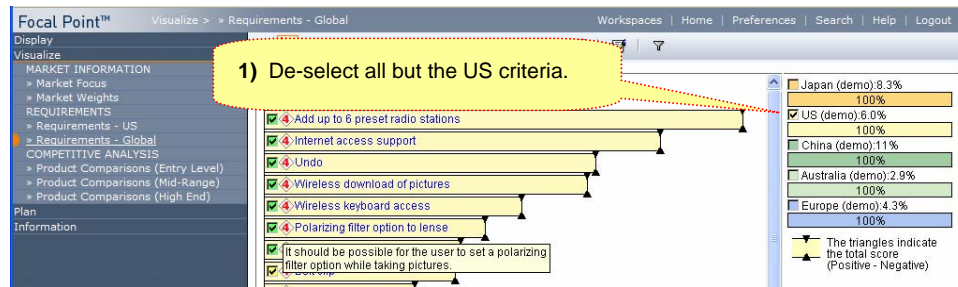


Screenshot 6 - Summary View with Market Weights

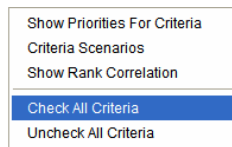
A - 9. Close the Criteria Scenario window and in the Criteria frame, deselect all but the US.

They are the same, validating that the Global chart is a roll-up of the rankings by the various markets.

A - 10. Right-click in the white space under the criteria and select the menu option to “Check All Criteria”



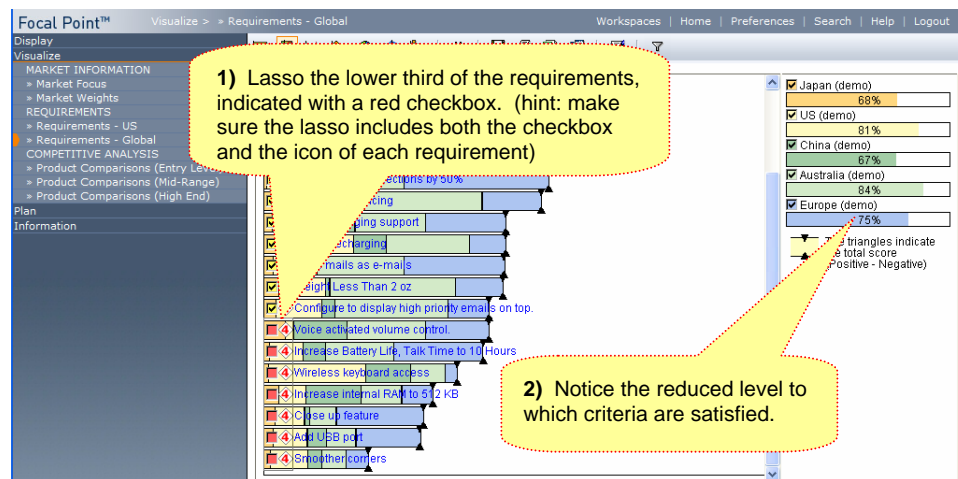
Screenshot 7 - Validating Roll-up of Market Rankings



Screenshot 8 - Pop-up Menu for Criteria

A - 11. Referring to Screenshot 9, scroll to the bottom of the chart and use your mouse to “lasso” the lower third of the requirements – those with a RED checkbox.

Notes: With items deselected in Screenshot 9, you can see to what degree the remaining checked items satisfy the criteria. In this case we see that Australia still gets most of what they want while China gets the least. This should not be too surprising as we remember from the Market Weights view that Australia was weighted most heavily.



Screenshot 9 - De-selecting Lower Third of Requirements

EXERCISE B: Competitive & Gap Analysis

Objective: To illustrate how Focal Point can aid in competitive analysis to not only help drive product direction, but that of marketing as well.

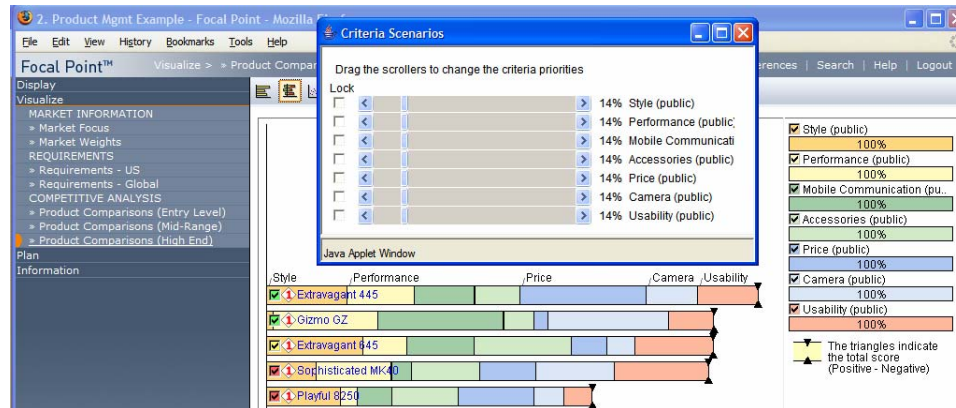
B - 1. Click the Visualize > Product Comparisons (High End) menu. Selet the Stacked Bar-chart Icon.

B - 2. Right-click in the white space under the criteria and select the “Criteria Scenarios” menu.

Notes: In Screenshot 10, notice that all the criteria have equal weights, though these could have been weighted as we saw before based on further market analysis.

B - 3. Click on one of the sliders in the Criteria Scenarios pop-up and move it to the right.

Notes: As you move the sliders, you will see how the aggregate score of our high-end product (the Gizmo GZ) varies compared to the competition. If the Gizmo GZ score moves to the right relative to the competition, that is a strength that should be emphasized in our marketing message. If the score moves to the left relative to the competition, it is a perceived weakness and perhaps needs to be addressed in our next model or release.



Screenshot 10 - Assess Strengths and Weaknesses

B - 4. Experiment with adjusting the weight of each individual criteria, while the rest remain constant. This will reveal all the strengths and weaknesses of the Gizmo GZ.

B - 5. When done, click the Visualize menu to collapse it.

EXERCISE C: Release Planning

Objective: To introduce the concept of planning that allows you to optimize schedule, resource use and value.

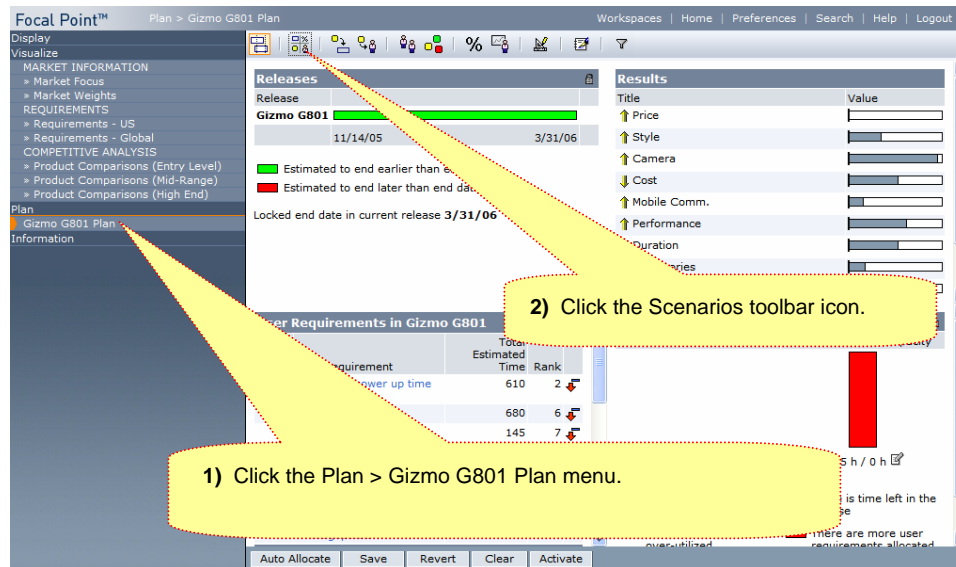
C - 1. Click the Plan > Gizmo G801 Plan menu and click the Scenarios toolbar icon.

Notes: Referring to Screenshot 11, the upper left frame shows the target schedule and it is currently locked. This means that if we allocated further requirements to this release, our resources might become overloaded¹. While this view only shows one release being planned, it could be configured to allow us to plan multiple releases at a time, experimenting with various mixes of requirements.

The lower left frame has all the requirements ready to be planned. Scroll down in that frame to see they are broken into those allocated to the active release and those not allocated. The icons to the far right of this frame allow you to add and remove requirements relative to the release.

The upper right frame shows the qualities we desire to affect as we plan our release. You might recognize these as the same criteria we saw in the competitive analysis exercise, and it makes sense that we would be addressing them in our planning.

The lower right frame shows resource loading, though resources were not configured in this example workspace. Using these views, you can plan your release such that you optimize the schedule, your resource loading, and the value to be delivered by the release.



Screenshot 11 - Planning View

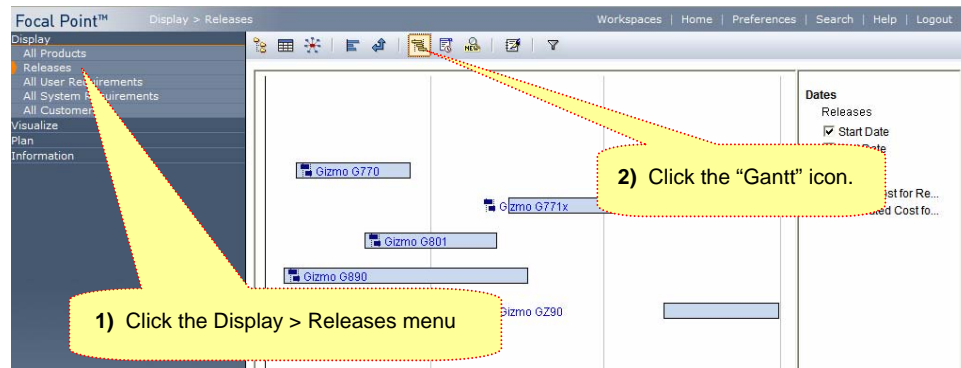
¹ There are no defined resources in this evaluation workspace, so the resource allocation portion of this view will not be accurate.

C - 2. Click the Display > Releases menu

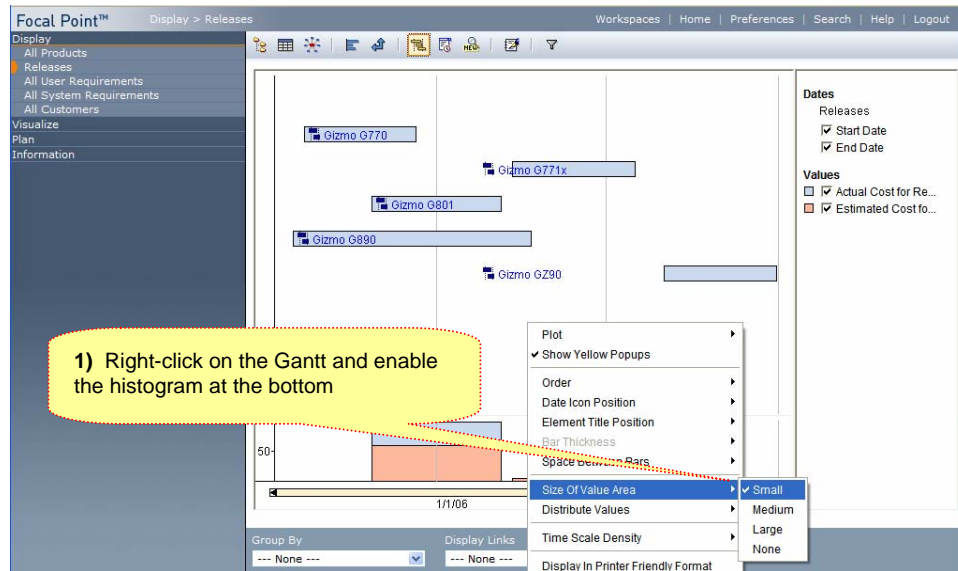
C - 3. Click the Gantt icon at the top of the frame.

Notes: Here we see a traditional Gantt view of all our releases. If you do not see the histogram at the bottom of the view, right click on the chart and set the “Size of Value Area” as seen in Screenshot 13. Notice that you can click the “Edit” button in the right frame, then drag the schedule items left or right and see how the histogram is affected.

In this example, the demo data is incomplete, but in practice the histogram could show any type of resource, such as man hours, cost, time for lab or test equipment, manufacturing equipment, etc.



Screenshot 12 - Gantt View of Release

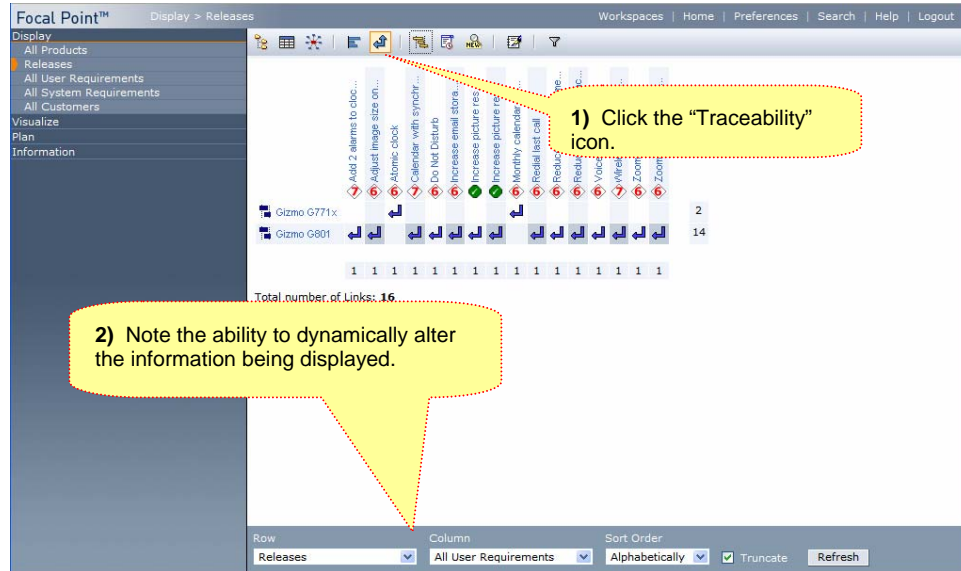


Screenshot 13 - Enabling the Histogram

C - 4. Click the Traceability Matrix icon at the top of the frame.

C - 5. In Screenshot 14, notice how the pull-downs at the bottom allow you to alter the data being displayed.

Notes: In this view, you will notice that one release has many requirements allocated to it while the other has only two. This could, for example, represent a full release and a patch release, respectively.



Screenshot 14 - Traceability Matrix

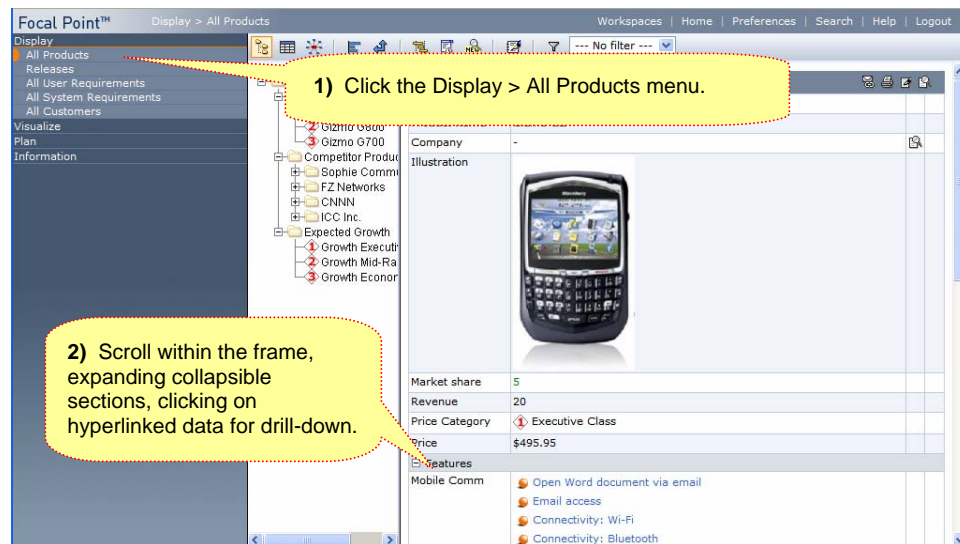
EXERCISE D: Additional Data & Concepts

Objective: To illustrate some of the other types of information and relationships that can be managed within Focal Point.

D - 1. Click the Display > All Products menu.

D - 2. Scroll down in the right hand frame, expanding the collapsible sections.

Notes: This is just an example of some of the types of information that might be pertinent to product management. Scroll down in the right frame to see links to features, user requirements and other information. As always, notice how you can click any hyperlinked data to drill down into more information. Look at the tree structure and note in this single view we have access to product information on both our products, and that of our competitors – again, completely configurable based on your needs.



Screenshot 15 - Displaying Product Information

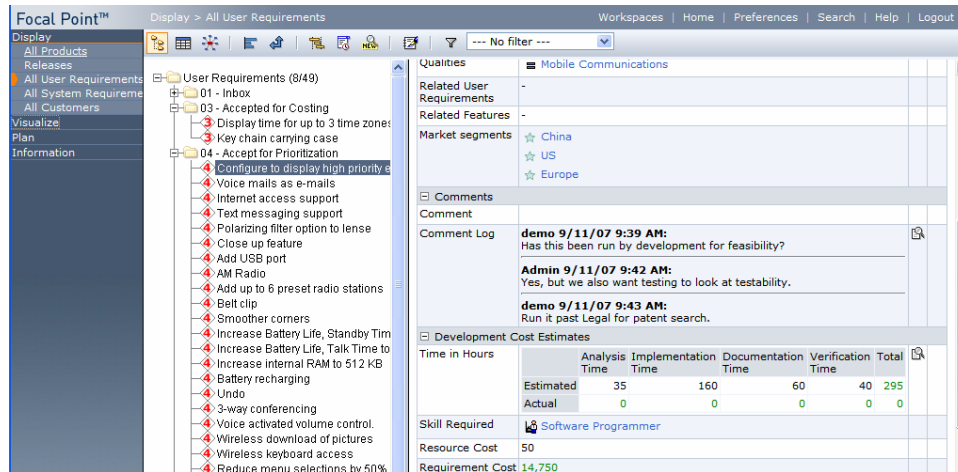
D - 3. Click the Display > All User Requirements menu.

D - 4. In the tree structure as shown in Screenshot 16, expand the “Accepted for Prioritization” folder and select one of the requirements.

D - 5. In the right frame, scroll down to see the information in the planning and testing sections.

Notes: This shows how Focal Point can support your entire development lifecycle, from initial ideation, through planning, development and testing. Notice how user requirements can be decomposed into more detailed system level requirements. If needed, these could be further decomposed or categorized into hardware, software requirements, etc.

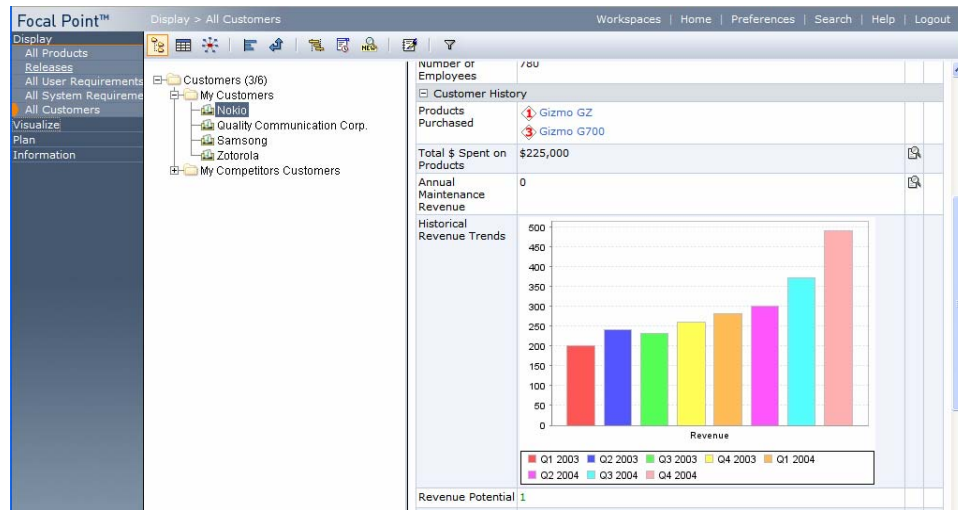
This view also shows calculations relative to development time that can be used elsewhere in planning and analysis.



Screenshot 16 - User Requirements Across the Lifecycle

D - 6. Click the Display > All Customers menu.

D - 7. Scroll down in the right frame to observe some of the types of information you might collect regarding your customers, which could then be used for analysis.



Screenshot 17 - Capturing Customer Information and Metrics

D - 8. Feel free to explore all the various menus and views, but when you are done, remember to LOGOUT!