

THE IN-HOUSE TRAINING COMPANY

Creating effective specifications

Overview

High quality specifications are of paramount importance in achieving the right technical performance and value for money. This long-established training programme has been developed to help those involved in producing specifications to create high quality documents in an organised and effective way. It provides a sound foundation for those new to the topic whilst at the same time offering new insights to those with more experience.

The programme emphasises the need for a clear definition of requirements combined with the ability to communicate those requirements effectively to third parties. A structured method of preparing specifications is provided, and a range of practical techniques is presented, to enable participants to put the principles into practice. The commercial and contractual role of specifications is also addressed.

Learning objectives

The objectives of the workshop are to:

- Provide a clear understanding of the role and purpose of specifications
- Present a framework for organising and producing specifications
- Define the key steps involved in creating effective specifications
- Demonstrate methods for assisting in defining requirements
- Provide tools and techniques for scoping and structuring specifications
- Show the role of specifications in managing variations and changes to scope
- Present methods to assist the writing and editing of specifications
- Review how specifications should be issued and controlled

Who should attend?

The workshop is designed for approximately 12-15 participants who are, or will be, involved in writing or contributing to the preparation and management of specifications.

Format

A thoroughly practical two-day course involving exercises, three case studies, formal tutorials and trainer-facilitated discussions. The tutorials cover the key principles and practical methods for writing specifications while the case study sessions illustrate how the principles can be applied. The programme is highly participative and sessions may be adapted accordingly.

Special features

To facilitate the knowledge transfer and performance improvement process, we recommend that the programme sponsor both introduce the course and be present for the final session.

Expert trainer

John is a highly qualified (BSc, MSc, CEng, MIMechE, MAPM, AMInstP) independent consultant specialising in project and change management. He established his consultancy practice in 1990, following 20 years of industrial management experience, and now offers a wide range of management training and team development programmes. He also provides facilitation and consultancy services to help clients with specific projects or to assist them with staff and management development programmes.

Before setting up his consultancy and training business, John was a senior manager with Ilford Limited, a leading manufacturer of specialist photographic products. Having starting as a development engineer, he progressed through technical and team leadership roles and was appointed Manager of Engineering Development in 1980. In this role he was directly involved in a major company restructuring programme whilst managing a diverse portfolio of multi-disciplinary engineering projects. His project management role subsequently grew to include a range of business projects, including manufacturing improvement programmes and new product introductions. John was also involved in co-ordinating international technology transfer activities and in strategic business development studies within the Ilford Group.

John's project management experience includes the design and installation of new manufacturing equipment, the development of new products, the improvement of manufacturing procedures, the relocation of offices and staff and organisation restructuring. John has also co-ordinated international project teams and carried out assignments in support of strategic business development programmes.

Prior to joining Ilford Limited, John trained in the automotive industry and gained an honours degree in Applied Physics. He went on to conduct post-graduate research in cryogenics at Oxford University for which he was awarded an MSc in Engineering Science. John is a member of the Institution of Mechanical Engineers, The Institute of Physics and The Association of Project Management.

John's client base includes leading organisations in Engineering, Manufacturing, Construction, Defence, IS/IT and Education. He is an associate with Loughborough Business School and is a senior consultant and course director with a number of well-known training organisations. Whilst his work is centred in the UK, he frequently works internationally in Europe, the Middle East and Asia.

A highly experienced, popular and professional trainer, John's courses are always much appreciated by the participants, as the following comments show:

'I really liked the practical exercises'

'There was certainly a lot to think about'

'John's experience was excellent'

'The group was encouraged to interact very well'

'A very useful course'

'A very worthwhile, productive and enjoyable two days'

Workshop outline

DAY ONE

1 Introduction

- Review of course objectives
- Review of participants' needs and objectives

2 Creating effective specifications

- The role of specifications in communicating requirements
- The costs, benefits and qualities of effective specifications
- Understanding the differences between verbal and written communication
- The five key steps of 'POWER' writing: prepare-organise-write-edit-release
- Exercise: qualities of an effective specification

3 Step 1: Preparing to write – defining readership and purpose; the specification and the contract

- Designing the specifications required; applying BS 7373
- Defining the purpose, readership and title of each document
- Effective procedures for writing, issuing and controlling specifications
- The roles and responsibilities of the key players
- Understanding contracts; the contractual role of the specification
- Integrating and balancing the technical and commercial requirements
- Writing specifications to achieve the appropriate contract risk strategy
- Deciding how to specify: when to use functional and technical specifications
- The role of specifications in managing variations and changes to scope

4 Case study 1

- Teams review a typical project scenario and identify the implications for the specification
- Feedback and discussion

5 Step 2: Organising the specification content

- Defining the need and establishing user requirements
- Deciding what issues the specification should cover
- Scoping techniques: scope maps, check lists, structured brainstorming
- Clarifying priorities: separating needs and desires
- Dealing with requirements that are difficult to quantify
- Useful techniques: cost benefit analysis, QFD, Pareto analysis

6 Case study 2

- Teams apply the scoping techniques to develop the outline contents for a specification
- Feedback and discussion

DAY TWO

7 Step 2: Organising the specification content (cont)

- Deciding what goes where; typical contents and layout for a specification
- The three main segments: introductory, key and supporting
- Creating and using model forms: the sections and sub-sections
- Detailed contents of each sub-section
- Tools and techniques for outlining and structuring specifications

8 Case study 3

- Teams develop the detailed specification contents using a model form
- Feedback and discussion

9 Step 3: Writing the specification

- The challenges of written communication
- Identifying and understanding the readers needs
- Choosing and using the right words; dealing with jargon
- Problem words; will, shall, must, etc; building a glossary
- Using sentence structure and punctuation to best effect
- Understanding the impact of style, format and appearance
- Avoiding common causes of ambiguity
- Being concise and ensuring clarity
- Choosing and using graphics to best effect
- Exercises and examples

10 Step 4: Editing the specification

- Why editing is difficult; how to develop a personal editing strategy
- Key areas to review: structure, content, accuracy, clarity, style and grammar
- Editing tools and techniques

11 Step 5: Releasing and controlling the specification

- Key requirements for document issue and control
- Final formatting and publication issues; document approval
- Requirements management: managing revisions and changes

12 Course review and action planning

- What actions should be implemented to improve specifications?
- Conclusion

Any questions?

Please just give us a call on 01582 463463 – we're here to help!

Or visit www.theinhousetrainingcompany.com