

## Facilitation Techniques Workshop

### Course Summary

#### Description

Strong elicitation skills are a 'must have' for anyone charged with defining requirements for their project. Success is dependent on a mixture of technical skills (i.e. knowing which technique to use and how to use it) and interpersonal skills (i.e. building relationships, listening, and gaining consensus). Whether you plan to meet with your stakeholders in one-on-one sessions, in a facilitated session, or remotely, you will need to know how to select and implement techniques to accurately and efficiently identify the needs of your client.

In this highly interactive 2-day course, you will learn how to enhance and refine your elicitation skills. Industry best practices are explained and then augmented with professional tips and methods. Working in small groups, you will practice new techniques and discuss strategies that your organization should be using to better define stakeholder needs. A case study driven workshop comprises more than half the course and provides a real-world example, templates, and job aids to reference once you are back on the job. If you are struggling with missing requirements, lack of stakeholder involvement, out of control scope, you'll want to consider this workshop!

#### Objectives

By the end of this course, students will be able to:

- Apply best practices to resolve common problems encountered in requirements elicitation
- Establish and communicate the scope for eliciting requirements on a project
- Identify, analyze and manage stakeholders during the elicitation process
- Determine the appropriate mix of elicitation techniques to utilize on a project
- Plan and conduct an interview to elicit requirements
- Plan and conduct several different types of facilitated sessions

#### Topics

- Describe the planning, techniques, and partnerships that are vital to the success of requirements elicitation
- Identify and differentiate between the different types of requirements that need to be elicited
- Describe the importance of documenting business objectives and project scope before eliciting requirements
- Utilize a context diagram to scope the requirements
- Utilize a process, techniques, and templates for stakeholder identification and analysis
- Apply industry best practices to common issues with Stakeholders during requirements elicitation
- Plan and conduct a good Interview and a facilitated session
- Introduce standards in process modeling
- Plan and develop a prototype to elicit requirements

#### Audience

This course is a must-have for the Business Analyst, Business Systems Analyst, Systems Analyst, and Requirements Engineer. The Business Sponsor and the Project Manager who are actively involved with specifying requirements for their project will also benefit from this workshop.

#### Prerequisites

General knowledge of the requirements process. Essential Skills for the Business Analyst course would provide this information.

#### Duration

Two days

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### Course Outline

#### I. Course Introduction

#### II. Fundamentals of Requirements Elicitation

- A. Challenges of requirements elicitation
- B. Planning, techniques, and partnerships that are vital to the success of eliciting
- C. Best practices approach to requirements elicitation
- D. Defining types of requirements that need to be elicited

#### III. Understanding the Project Objectives and Scope

- A. Importance of documenting business objectives and scope prior to gathering requirements
- B. Starting with the Project Charter and other Enterprise Analysis artifacts
- C. Using a context diagram to scope the requirements
- D. Communicating scope to your stakeholders (process, techniques, templates)

#### IV. Identifying and Analyzing Your Stakeholders

- A. Importance of stakeholders and stakeholder analysis
- B. Identifying and analyzing stakeholders (process, techniques, and templates)
- C. Best practices to resolve common issues with stakeholders during elicitation
- D. Building a stakeholder elicitation plan

#### V. Interviewing Techniques

- A. Planning and conducting a good interview
- B. Active listening techniques
- C. When to use other related techniques - Focus Groups, Questionnaires and Surveys

#### VI. Facilitation Techniques

- A. Identifying and practicing skills associated with conducting a requirements workshop
- B. Defining the role of the facilitator
- C. Introducing common techniques used within a requirements workshop (brainstorming, business process modeling, use cases, prototyping)
- D. Planning and conducting a facilitated session with brainstorming

#### VII. Process Modeling

- A. Introducing process modeling
- B. How to use a facilitated session to encourage process modeling (process, techniques, examples)
- C. Process modeling notations (UML Activity Diagrams. Note: BPMN notation can be substituted)
- D. When to use other techniques that support process modeling (Observation, Job Shadowing, Task Analysis)

#### VIII. Prototyping

- A. Value of exploratory prototyping
- B. Defining types of exploratory prototypes
- C. Planning and developing an exploratory prototype to elicit requirements
- D. Understanding and avoiding common pitfalls with prototyping

#### IX. Document Analysis, Interface analysis, and Reverse Engineering

- A. Understanding the role of document analysis in requirements gathering
- B. Introducing interface analysis and reverse engineering and discussing their applicability

#### X. Course Summary