

## Requirements Facilitation Workshop

### Course Summary

#### Description

If information technology projects are to be successful, they have to be built on a strong base of business and user requirements, and though engaging business representatives and customers in useful dialogues about project deliverables sounds easy. It is anything but.

In today's fast-paced business environment, managing effective dialogues with users and business representatives can be challenged by:

- The complexity of today's systems
- The competing demands on the time of both users and PM/BA/SAs
- Competing requirements
- The fear of changes in business processes and systems
- The lack of skills among PM/BA/SAs
- The conflict between systems as they are intended to operate and informal work-arounds and processes
- The inability of users to articulate requirements
- The unwillingness of users to sign-off on requirements

Because of these and other challenges, it is critical that BA/SAs for information technology projects have the ability to facilitate useful and cost-effective dialogues with business users. They have to create trust with the user and ask solid, open-ended questions. They have to draw out requirements, eliminate assumptions, and develop consensus among business stakeholders at the user level and above. Meeting those challenges requires both skill and the confidence to meet them head-on.

Building those skills and confidence is the purpose of this workshop. It will engage participants in a learning experience designed to introduce them to critical skills of facilitation including:

- Working with customers to set and prioritize requirements
- Identifying and eliminating assumptions
- Preparing for the customer dialogue
- Creating a good opening statement
- Designing good, open-ended questions
- Identifying customer interests, separating their real needs from the positions they take and managing conflict
- Getting past emotional responses and engaging in rapid and effective dialogues with customers and stakeholders to identify the problems that need to be solved
- Thriving in a tough, demanding workplace and recovering from adversity

Participants in the workshop will be engaged in exercises designed to increase their understanding of concepts and help them apply those concepts to their work environment. At the close of the workshop, participants will be provided with checklists for the application of concepts explored in the workshop.

#### Objectives

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

- Increase the ability of BA/SAs to engage in effective dialogues with business customers
- Increase the quality of requirements gathered by BA/SAs
- Improve user satisfaction with requirements dialogues
- Help participants master the skills necessary for managing requirements dialogues
- Build participant confidence in their ability to manage difficult dialogues and elicit solid requirements
- Engage participants in interactive exercises designed to build their capabilities and confidence

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### Course Summary (cont'd)

#### Topics

- Introduction to the workshop
- The challenges of managing the requirements dialogue
- Preparing for customer interviews
- Group dynamics and participant motivations
- Clarifying customer and stakeholder demands and building effective conversations with them
- Application of the concepts
- Workshop wrap-up

#### Prerequisites

There are no prerequisites for this course.

#### Duration

Two days

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### Course Outline

#### **I. Introduction to the workshop**

- A. In this module, we will detail the course objectives and schedule and identify participant interests and concerns

#### **II. The challenges of managing the requirements dialogue**

- A. In this module, we'll examine the challenges of managing the requirements dialogue and engage participants in an exercise designed to let them explore the challenges they face. That exercise will also help us create a vocabulary that will help us later in the workshop.

#### **III. Preparing for customer interviews**

- A. In this module, we'll describe the processes for preparing for the customer interview. We'll describe techniques for identifying those stakeholders to interview, crafting the interview agenda, the role of the meeting charter, getting the participants focused on the meeting, and designing questions. We'll examine strategies for managing the anxiety that comes with facilitation. We'll describe the types of meetings and the various roles of the facilitator, roles that need to be balanced in customer interviews. We'll engage in exercises to reinforce concepts.

#### **IV. Group dynamics and participant motivations**

- A. In this module, we'll examine group dynamics and the various, potential motivations of stakeholders. We'll discuss ways to overcome resistance and build consensus. We'll also identify unproductive participants and strategies for dealing with them and ways to encourage participation by all attendees. We'll describe the use of reframing as a means of confirming understanding.

#### **V. Clarifying customer and stakeholder demands and building effective conversations with them**

- A. In this module, we'll examine the art and science of managing the customer dialogue. We'll identify the difference between positions and interests in order to change the conversations we have with our customers and stakeholders. We'll identify ways to build rational dialogues with them so that we can quickly and effectively separate their real needs from the noise that usually accompanies customer demands. We'll also identify ways to manage conflict and increase participant comfort with conflict.

#### **VI. Application of the concepts**

- A. In this module, participants will be engaged in an extensive exercise to apply what they've learned to a case study designed to replicate their work environments.

#### **VII. Workshop wrap-up**

- A. In this module, we'll make concluding comments, answer remaining questions, and evaluate the workshop.