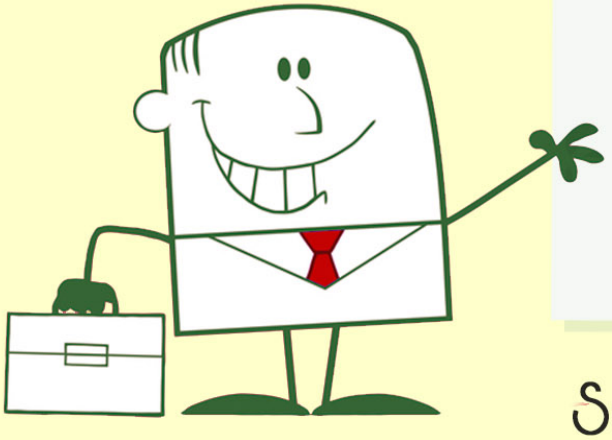
BUSINESS ANALYST LEARNINGS

A BEGINNER'S GUIDE TO REQUIREMENTS ELICITATION

What To Do During The Event



How to apply the power of planning and visualization to elicitation events

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Dedication

To my parents, Florence and Solomon, who have always been there for me.

Preface

I wrote this eBook specifically for business analysts (BAs), consultants, project managers, and any professional planning to hold a requirements elicitation event.

The ideas in this eBook can be applied to planning:

- Presentations
- Vendor demonstrations
- User acceptance test (UAT) sessions
- Group meetings
- Elicitation events like workshops, group interviews, focus groups, and brainstorming sessions.

While there are no guaranteed approaches to facilitating successful elicitation events, the tips in this book will significantly increase your chances of achieving the objectives of your event. If you know, understand, and can visualize what to do during the course of your elicitation event, there will be fewer surprises to contend with on the day of your event.

This eBook will make you question how you run your elicitation events.

This is the second in a series of titles and it focuses on what to do during your elicitation event so that you can plan for it effectively. The third title will cover what to do after an elicitation event.

1. Facilitate

The entire success of a ship's voyage lies on the captain's shoulders and how well the passengers and crew are managed. Passengers get on the ship, knowing where they want to go but not how to navigate the ship to its destination. This is where the captain comes in. The captain understands how to navigate through the storms that may come, knows the route to take, and ensures everyone on board is comfortable throughout the journey. This is what a facilitator is expected to do during the elicitation event—help stakeholders resolve issues that crop up and go through the agenda to achieve the objectives of the event thereby guiding stakeholders to their desired outcome.

While a cruise ship captain is responsible for his vessel, the passengers, and the crew, an event facilitator is responsible for the outcome of the requirements elicitation event. Still, there are many similarities between a ship captain and an event facilitator:

1. A ship captain uses navigational aids to determine the speed and location of the ship in order to pilot it and avoid hazards. In the same vein, a facilitator uses aids (an agenda, whiteboards, etc.) to steer the event in the desired direction while avoiding hazards (conflicts and clashes between stakeholders).
2. A ship captain ensures that maritime protocols and regulations are followed. In the same vein, a facilitator sets ground rules which participants are expected to follow.
3. In the same way a captain is responsible for the safety and comfort of passengers and crew members, a facilitator is also responsible for ensuring participants are comfortable and safe in an environment where their ideas and contributions will be respected.

While there are definite similarities between the two roles, there are also fundamental differences between a ship captain and an event facilitator. While the captain is the final authority on decisions, the facilitator's role is to ease the decision-making process and assist stakeholders in arriving at decisions.

Facilitation is crucial to both virtual and physical events and to preparing key business analysis deliverables; it is the process through which requirements are elicited. Effective facilitation can help stakeholders define their requirements and discover any other requirements they may have.

Facilitation skills are particularly important to Business Analysts (BAs) since they are often required to facilitate requirements elicitation events like workshops, focus groups and brainstorming sessions, to name a few.

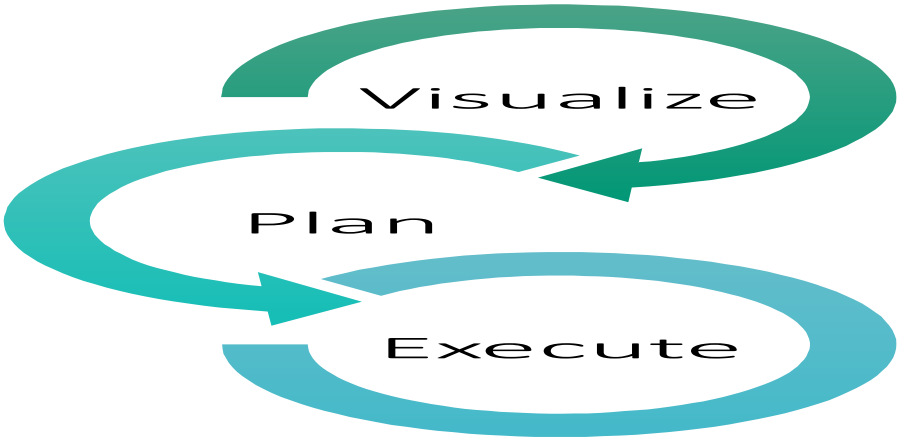
1.1 The Role of Facilitation in Business Analysis

According to the Guide to the Business Analysis Body of Knowledge (BABOK Guide), the term *facilitation* means being skilled at supervising discussions within a group with the objective of ensuring participants articulate their views while recognizing and appreciating the differing opinions of others.

This definition emphasizes a form of collaborative interaction where opinions are aired within a conducive setting. *Conducive* here implies the absence of judgment or any limiting factor that may prevent participants from airing their views.

Facilitation skills are indispensable to holding successful elicitation events. Most of the activities you will be involved in fall under the term *facilitation*. If you can visualize how the day's events will pan out, planning ahead for your responses to both expected and seemingly unexpected events, you will have fewer surprises and be better able to respond to whatever happens on that day.

Here is a three-prong approach you can apply to your elicitation event:



Visualization can help you identify the details of your plan (what to do during the event) and then execute it. Facilitating an elicitation event requires skill, experience, planning, and a sufficient level of domain knowledge. This eBook will discuss what you need to know for successful event facilitation.

1.2 What Does Facilitation Entail?

In a nutshell, facilitation requires a business analyst to carry out the activities indicated in the diagram below:

A good facilitator knows when, how, why to question, listen, visualize, engage, empathize, manage issues, and round up discussions to arrive at an accurate representation of requirements. Here's an introduction to each of these key activities:

1. Question

Questioning is essential to drawing feedback from participants. Feedback can produce superior insight, helping to achieve the objectives of the event. A facilitator that knows how and when to question can make the difference between a successful event and a failed one.

2. Listen

As a facilitator, your role is to listen to participants and ensure they are heard while encouraging them to express their views. This is key to meeting the objectives of the event and guiding all stakeholders to a place of mutual understanding. Listening requires being objective and not rushing to interrupt.

3. Visualize

The use of visuals can increase the level of engagement experienced during elicitation sessions. Visuals trigger questions, summarize concepts and reduce ambiguity.

4. Engage

A facilitator ensures that participants are engaged. The tools, techniques, and methods you employ during elicitation should be tailored to encourage active participation and discussion of ideas. Participants who are engaged are better placed to contribute their opinions and ideas. You'll need to get things moving and keep up the energy levels of

participants and their momentum throughout the event.

5. Empathize

As a facilitator, you must learn how to put yourself in the shoes of stakeholders so that you understand how they feel. Watch out for their body language and address concerns as they rear their heads.

6. Manage Issues & Conflicts

Issues and conflicts that do not contribute directly to achieving the objectives of the elicitation event may crop up and need to be actively managed to avoid derailing the session. Good facilitators know how to keep discussions on track. As a facilitator, you should be neutral on issues and not take sides. The facilitator should not own the topic or make decisions regarding what is being said, but should be in a position to advise participants and assist them in arriving at a shared understanding of the problem or opportunity with minimal conflict.

7. Round Up

How you end the requirements elicitation event can be just as important as how you begin. Rounding up involves bringing it all together to ensure that participants go away with the right message.

Facilitation is not a task designed solely for business analysts and can be performed by any professional in charge of achieving the objectives of an event or project. Project managers, QA specialists, and software engineers are some examples of professionals that may get involved in events facilitation.

Facilitation is not about the facilitator, and should be centered on the participants—the primary focus of the event. At the end of the event, participants should feel like they have learned something valuable, that they have been heard and that the opinions they have aired are valued. Just as important is the need for the business analyst to achieve the objectives of the event.

This eBook is a compilation of tips that can be applied to facilitate workshops, focus groups, interviews, and practically any event that involves interacting with a group of stakeholders to elicit information. The rest of this eBook will touch on each of the key activities that will ensure a successful elicitation event.

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