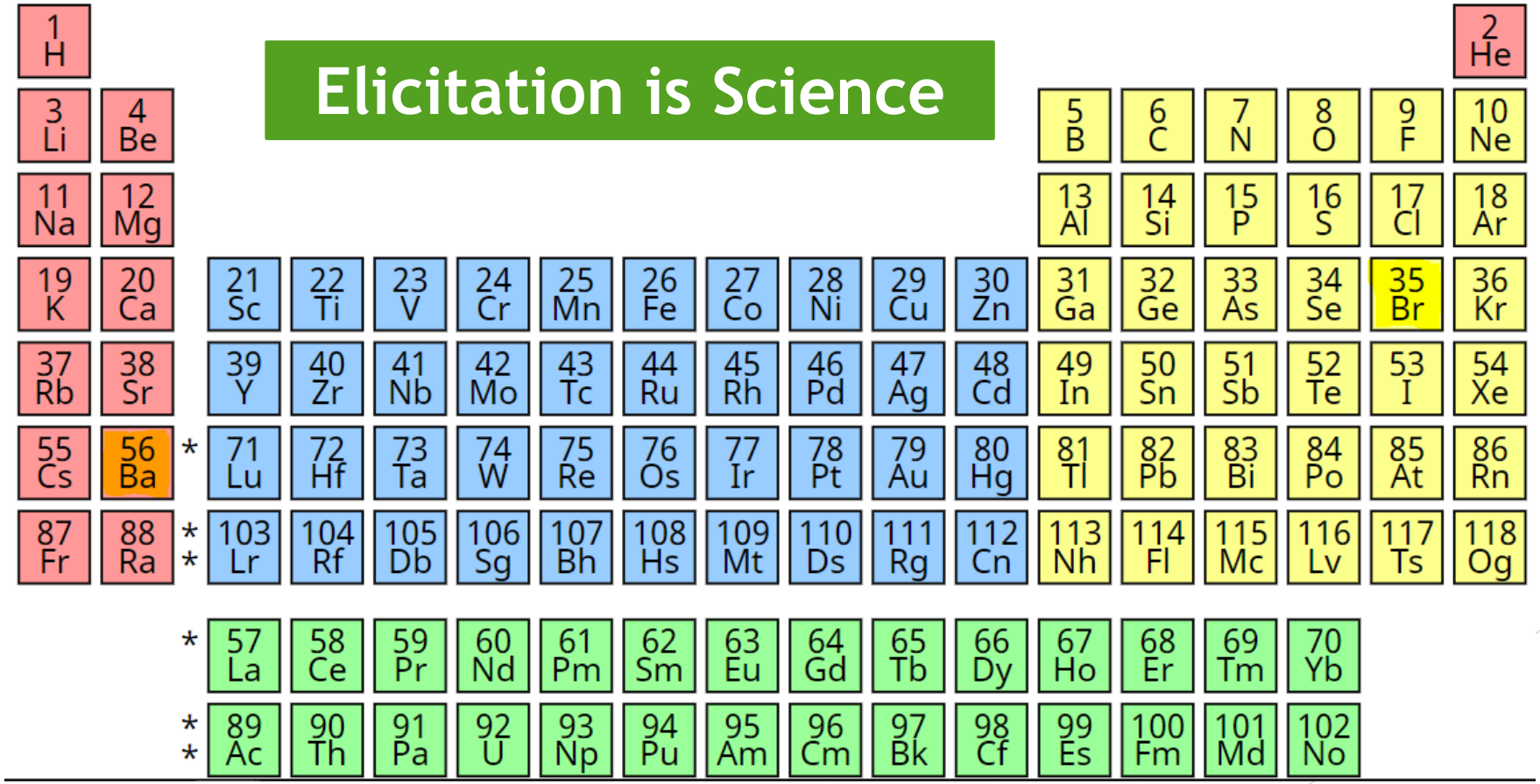
Solving the Right Problem

An Elicitation Workshop

Angela Weller

Elicitation is Science



Ground to Cover Today

- Stakeholder engagement
- 3 Rights ensure no Left turns
  Right conversations w/ **Right people** to solve the **Right Problems**
- Planning – The Plan
- Audience/Stakeholders – Who matters – Cost of a meeting
- WHY - Interview – Right questions on Why
- Dev Team Collaboration tips

- Questions:
  - Examples of struggles
  - Analyze Requirement elicitation & collaboration
  - Tools & Techniques BABOK

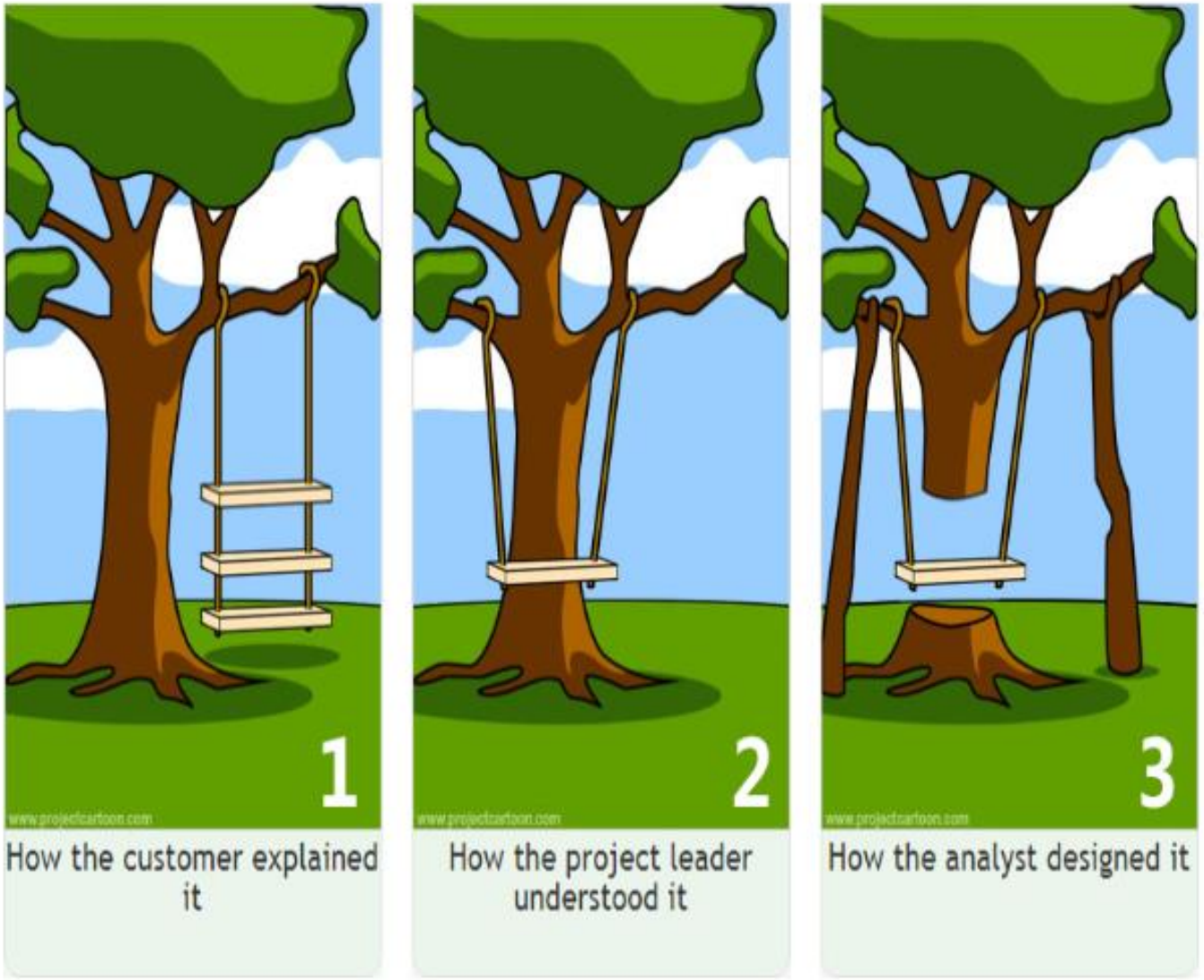
  - Agile Teaser – User stories

Communication: The Big "C"

1. When a **customer** describes what s/he wants,
    1. tends to be true that s/he **always overstates it.**
2. The PO product owner gathers the customer's requirement and summaries it.
3. Engineers follow PO's summary and make it work.
    1. Well, to some extent...
4. Then programmers will write it.
    1. However, when you test it, it is NOT workable.
5. Finally, we have a product, so the sales can start their job by exaggerating its features.
6. When you want to check the document,
    1. it is always nowhere to be found.
7. What the operations build is simply a rope.
    1. Gosh, I don't know what to say.
8. Customers are billed for extraordinary experiences.
9. The way Helpdesk solves problems is just simple and "radical".
10. Voila! It turns out what the customer truly wants is just a **simple tire swing**.

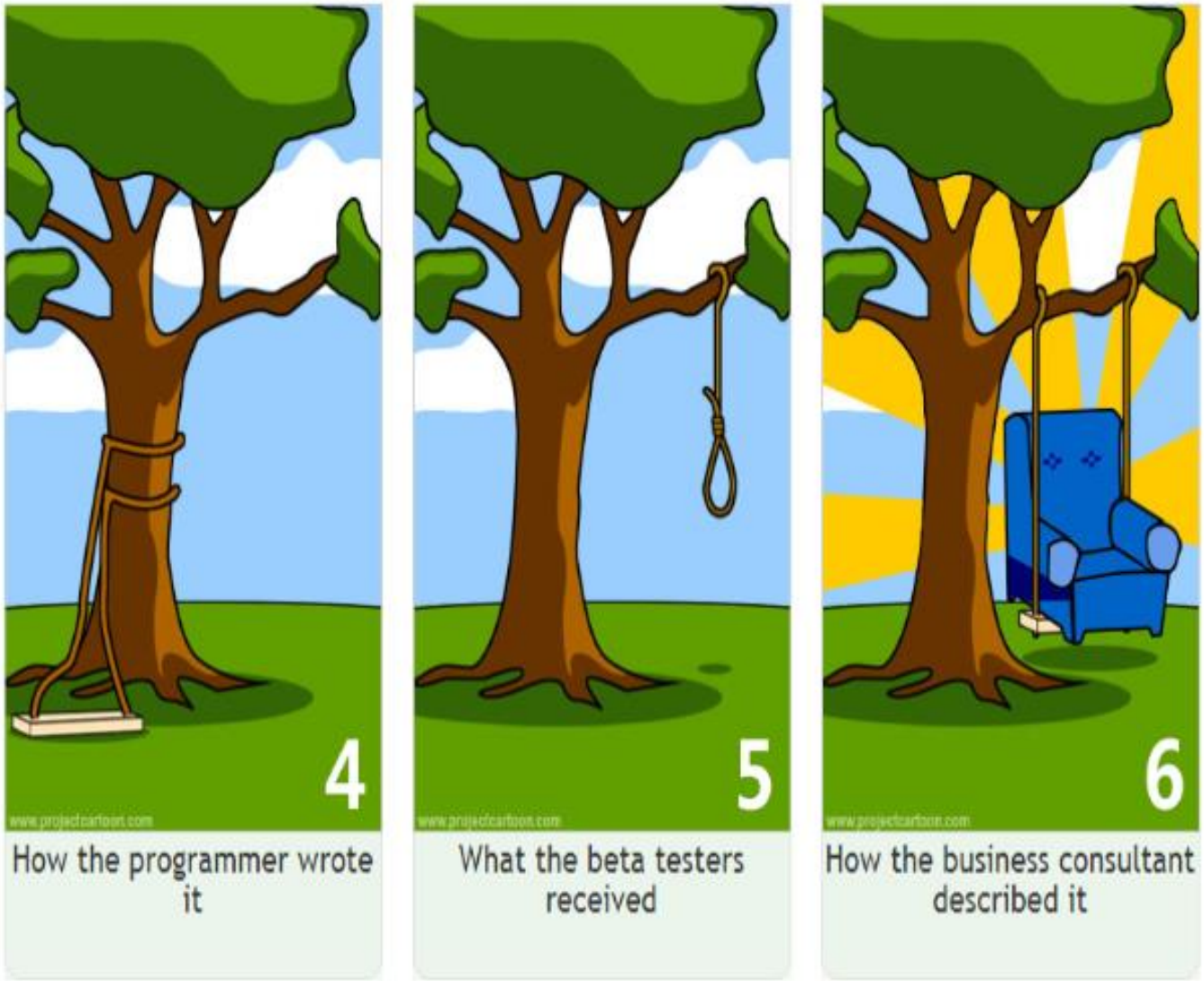
https://pmac-agpc.ca/project-management-tree-swing-story

Communication: The Big "C"



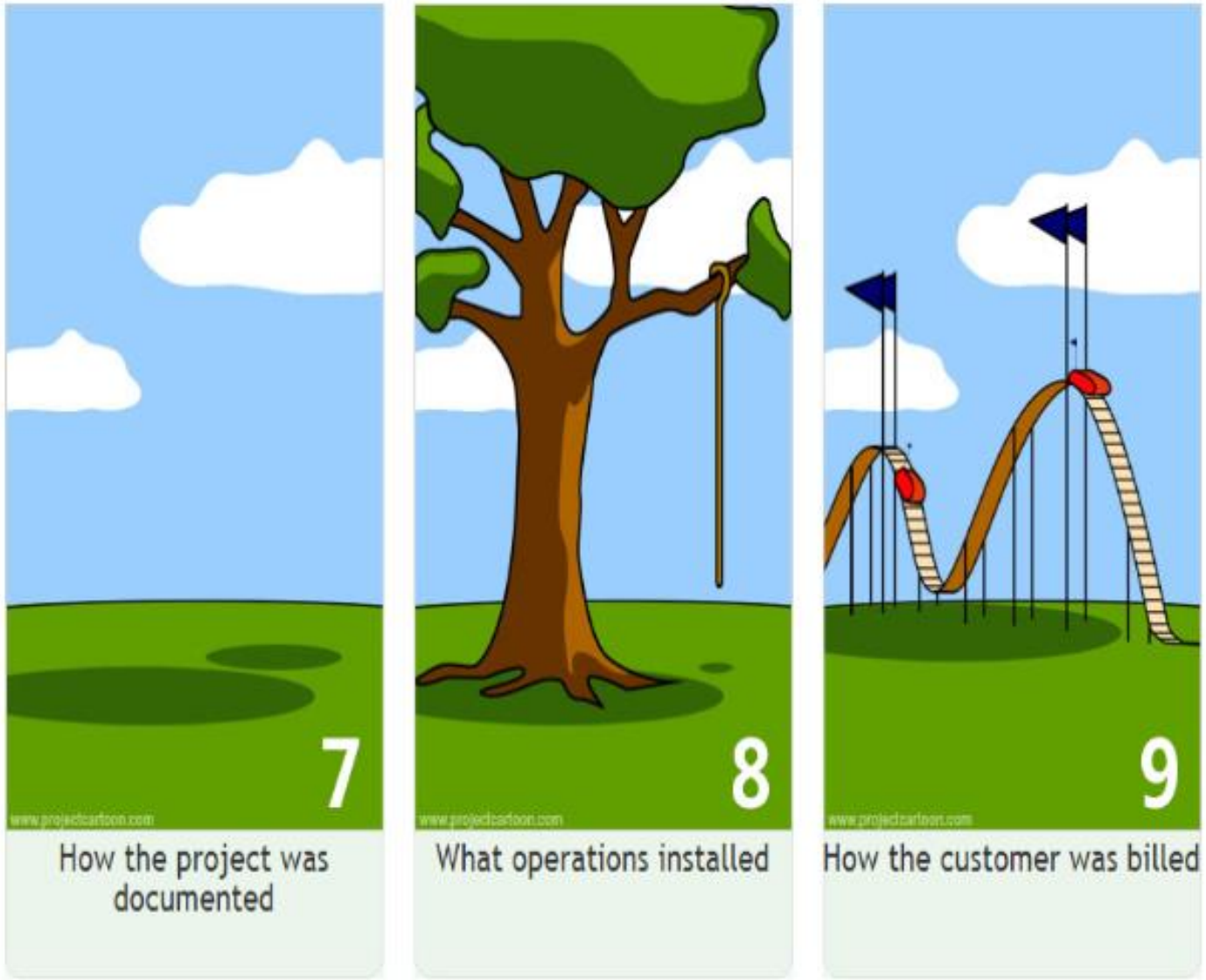
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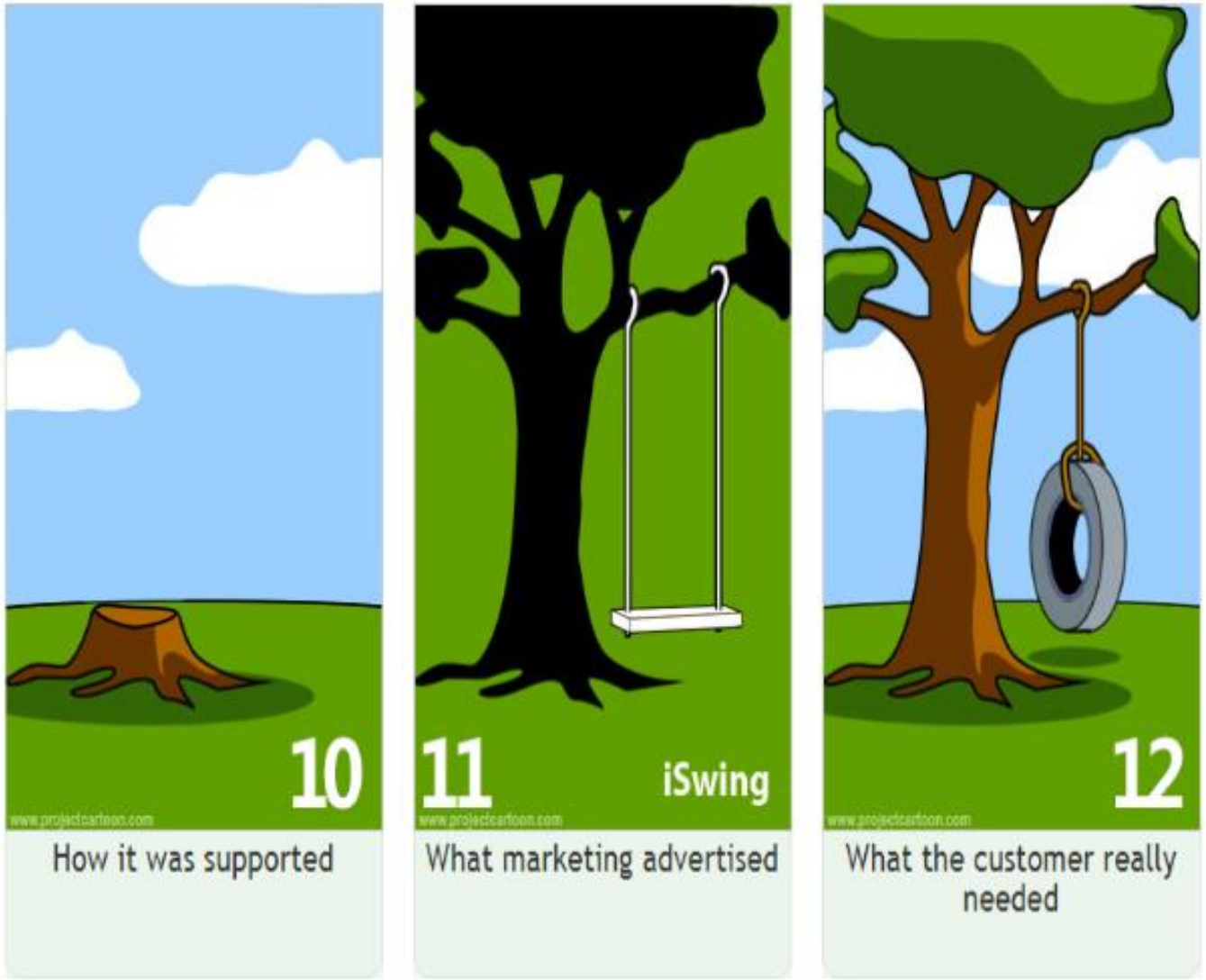
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Communication: The Big "C"



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Elicitation Conducting Methods

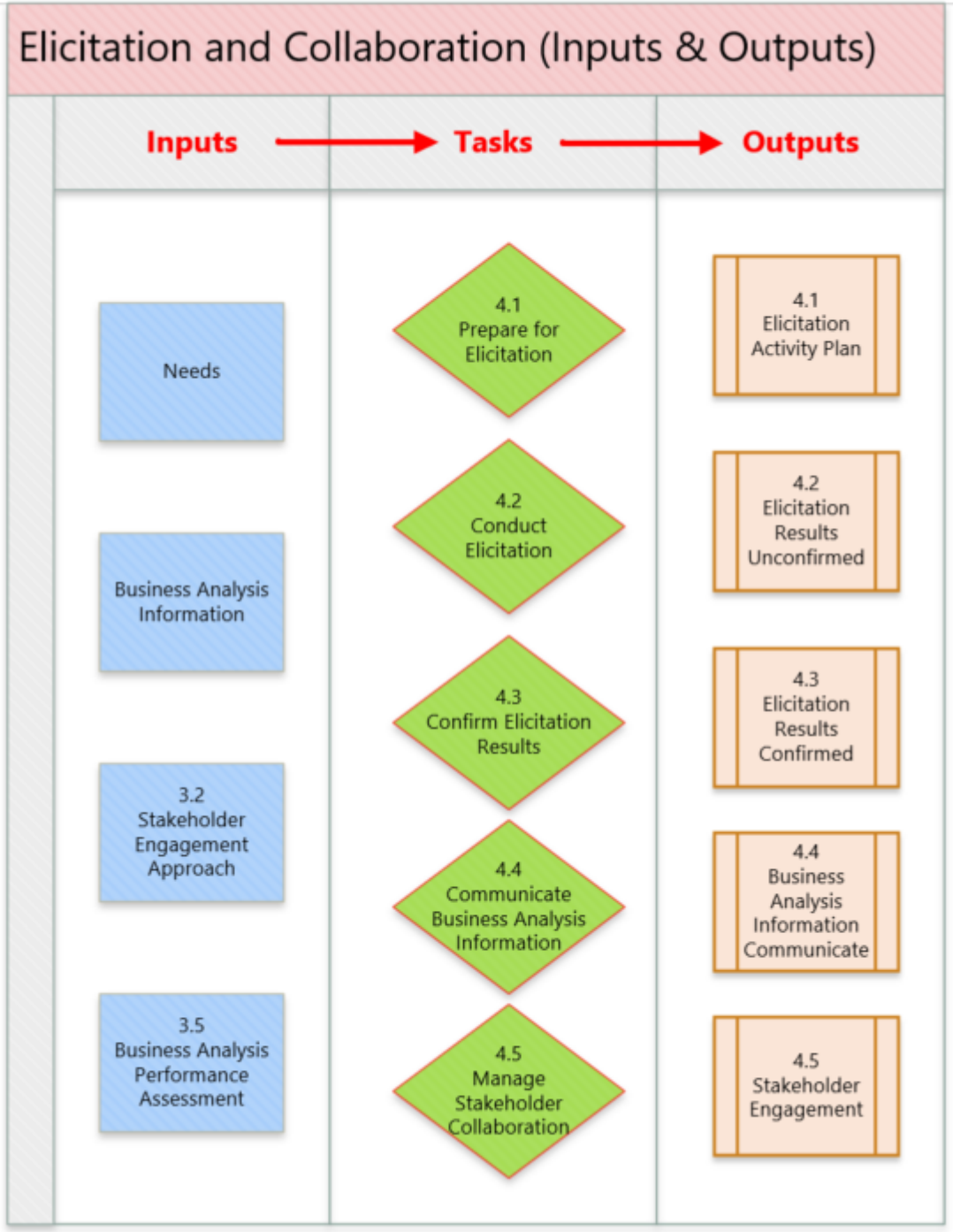
- Collaborative
  - directly interacting with stakeholders
- Research
  - discovering and studying information from materials or sources.
- Experiments
  - identify information through controlled tests.

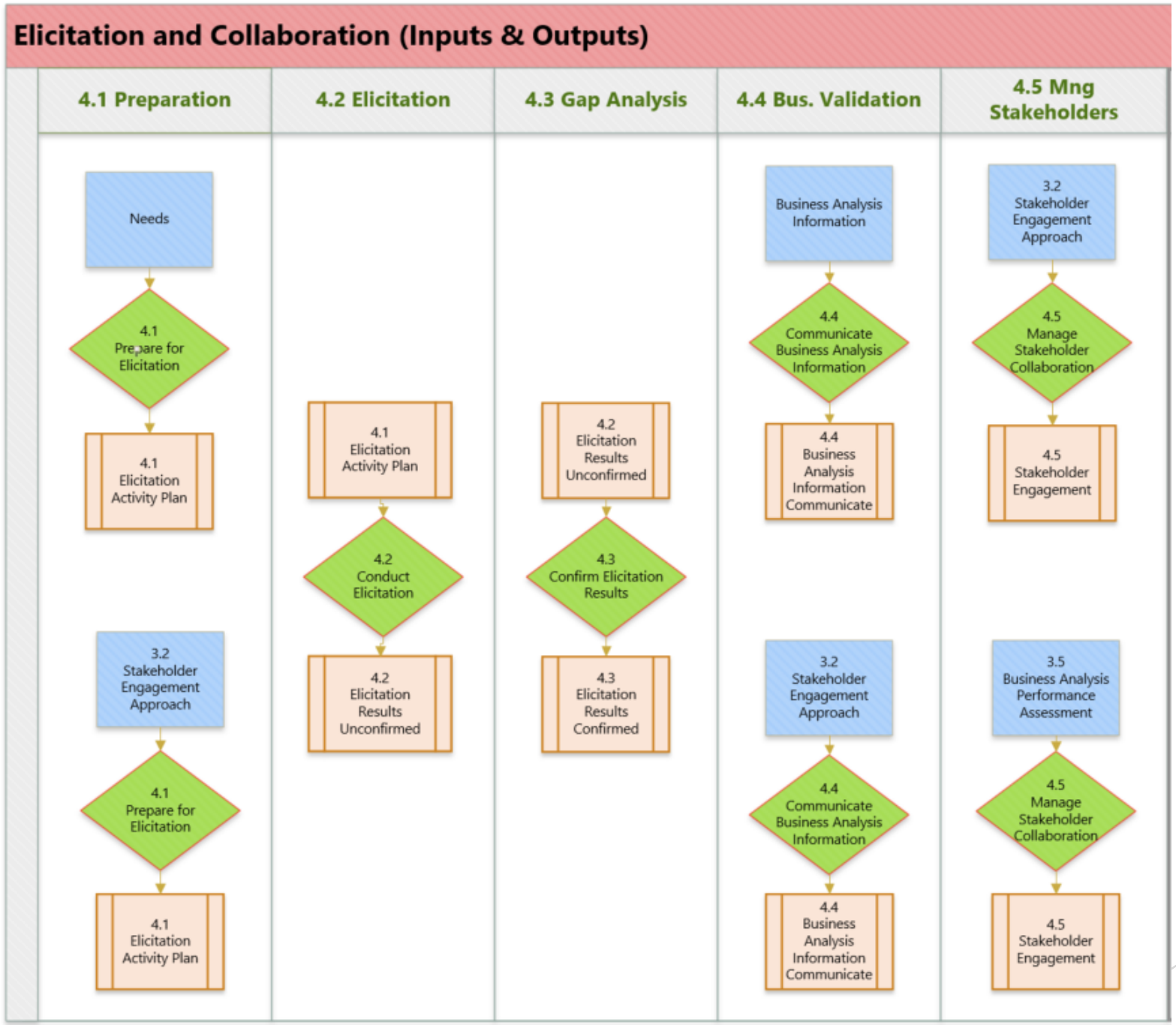
Business Analysis Core Concept Model



Elicitation & Collaboration & BACCM

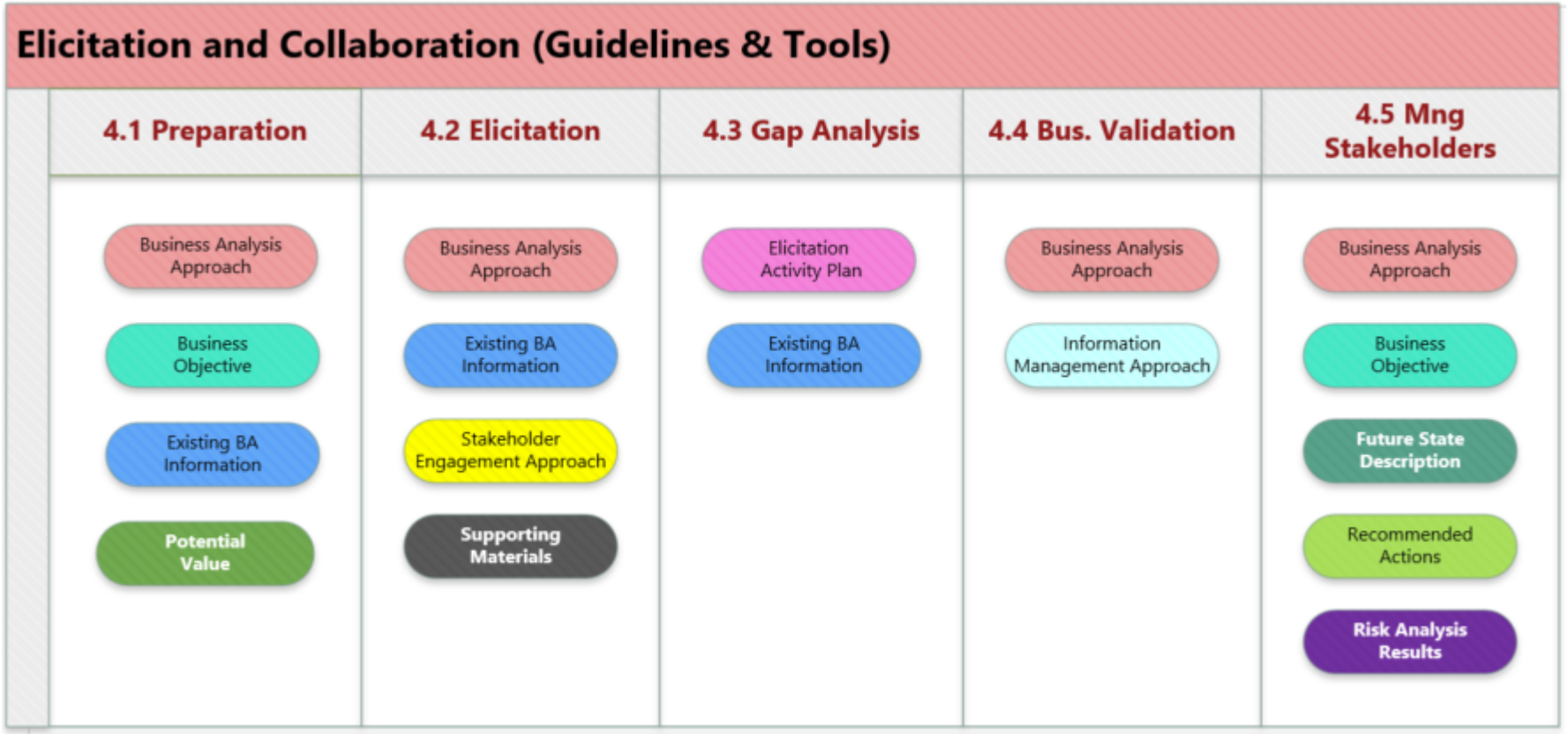
Change	Using appropriate techniques to identify change characteristics and stakeholder concerns
Need	Eliciting needs Confirming needs Communicating needs
Solution	Eliciting Solution Confirming Solution Communicating Solution
Stakeholder	Managing stakeholder collaboration
Value	Assessing value through elicitation; Confirming and communicating value
Context	Identifying impact of context on change


Elicitation and Collaboration (Inputs & Outputs)
Inputs
Tasks
Outputs
Needs
Business Analysis Information
3.2 Stakeholder Engagement Approach
3.5 Business Analysis Performance Assessment
4.1 Prepare for Elicitation
4.2 Conduct Elicitation
4.3 Confirm Elicitation Results
4.4 Communicate Business Analysis Information
4.5 Manage Stakeholder Collaboration
4.1 Elicitation Activity Plan
4.2 Elicitation Results Unconfirmed
4.3 Elicitation Results Confirmed
4.4 Business Analysis Information Communicate
4.5 Stakeholder Engagement



Inputs & Outputs

Guidelines & Tools



CHANGE Adoption

- Change is Hard
- Change is Scary/Fear
- Change is Moving the Cheese

- Why would and individual not disclose details that are instrumental in success?
  - Fear of Job Loss
  - Over-worked
  - It works ok today
  - Forgot
  - Misunderstood your goal or intent

Create a Real Connection

Physical Connection:

- Dress appropriately
- Smile
- Make eye contact
- Mirroring technique – People like to feel connected

Emotional Connection

- Know that we are all human - Life is hard, Life is good
- Be Yourself
- Listen with your Heart
- Be Open – Feel free to break the ice – Be real
- Be Inquisitive – People love talking about themselves
- Dig Deeper – Ask for clarifications
- Do NOT make Assumptions
- Be present & focus on the conversation & body messages they sned
- Be Generous – Helpful when possible
  - Feel Felt Found

Dale Carnegie...
“Remember that a person's name is to that person, the sweetest and most important sound in any language”.

Elicitation Plan Considerations

- **5 W's & HOW**
  - Who
  - What
  - Where
  - When
  - Why
  - How
- **5 WHY's**
  - Why
  - Why
  - Why
  - Why
  - Why
- **Be real**
- **KISS** (Keep It Simple Silly)
- Your Deliverable (JIRA, BRD)
- Begin with End in Mind
- System or Process Demo's
- Current State Process Mapped
- Future State Process Mapped
- System Gaps between current & future
- Identify Manual Processes & why
- Vision of Tool Documented
- Mission Document detailing Goal of project
- Persona – Identify who the user is & what a day in the life would be for them
- Sign OFF - stakeholders
- Due Date
- Listen for: We have always done it that way. – WHY?

Elicitation Plan

Who (Actors)	• Stakeholders (directly & indirectly impacted) • Champion (Controls $$$) • Other systems' Interactions • Source of Truth Input • Source of Truth Output
What (Triggers)	• What is the goal • What is the problem & causes pain • What is the value • What are steps (Pre & Post) • What are the gaps
Where	Where is the impact? Systems, Teams, People
When	Deadline: How soon needs implemented • $ Risk Regulations penalties • Cross team impact scheduling
Why	Why, Why, Why, Why, Why? • Naturally, do Not insult by asking exact same question. • But, dig deeper - Reword to find the real problem
How	• How do they envision the solution working? • What would success look like to the stakeholder? • How answer is: "If they had a paint brush, how would they paint the solution?" • No promises since we need to consider what is also best for the tool's sustainability

Know Your Audience

- Tailor your discussions to the audience you are speaking to
- What do they feel
- Really listen
- Why Do they care?
- Personality type?

Worker Bee

- Worker Bee Cares about:
  - Value
  - Project Efficiencies
  - Workload
  - # of Clicks
  - Intuitive Tool
  - Cross Business Team Impact

CEO/Leaders

- CEO Cares about:
  - Value
  - Speed to market
  - Competition
  - Liabilities to firm
  - Risks
  - Team impact
  - Budget - Hours to build
  - Contracts

Dev Team

- Dev Team Cares about:
  - Tool - Current State
  - Effort to Build
  - Tool Sustainability & Flexibility
  - Build complexity
  - Solving the Business Ask
  - Quality testing
  - Cross system Impact
  - Cross Dev Team impact

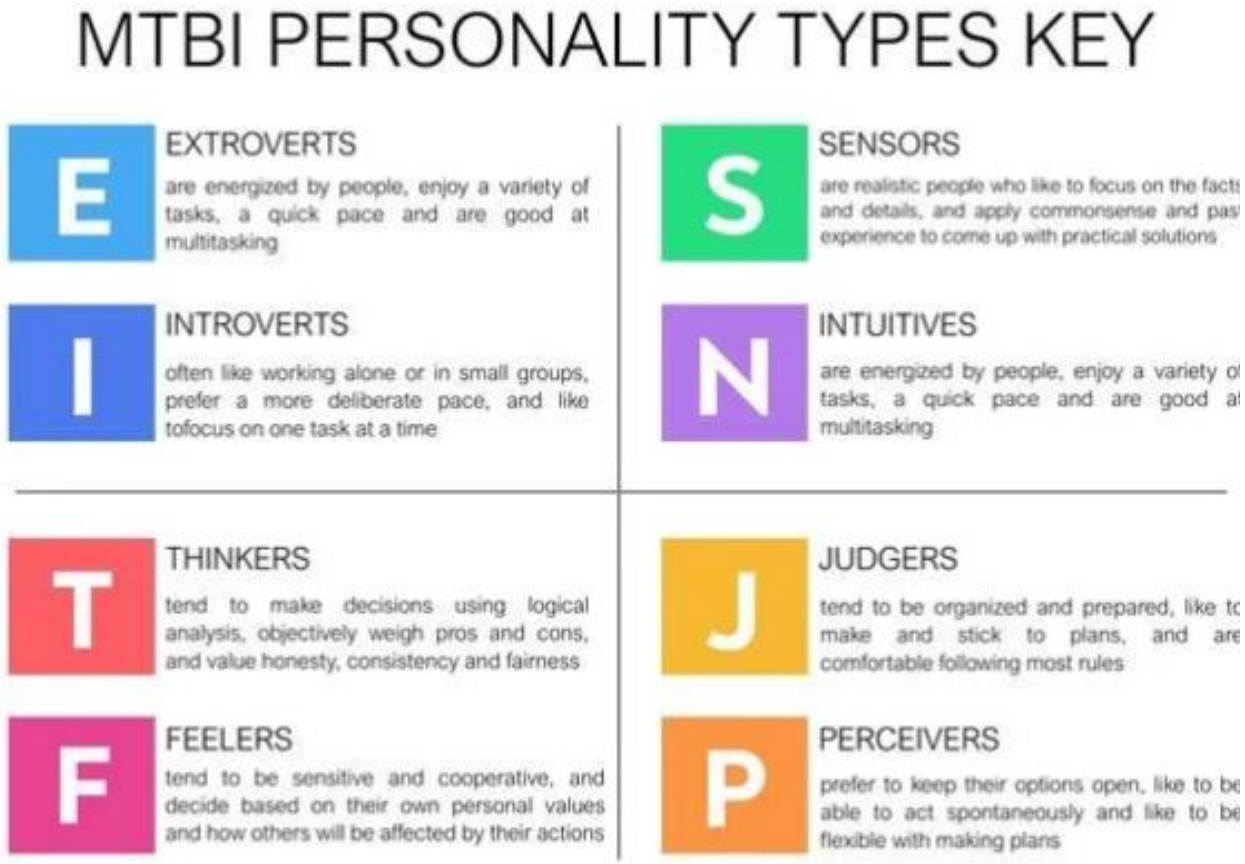
Feel Felt Found – Difficult Stakeholder

- I Know How You Feel…
- I Felt the Same Way…
- Here is What I Have Found…

- When dealing with difficult stakeholders
- My goal is to get stakeholder to discuss hesitations, liabilities & to assist with tool adoption. Basically, **what gives them pause or is pain points.**

- Training tip: Ask the questions to drive understanding – Read the room
- Record demos or meetings when elicitation to reference later
  - Be sure to disclose

Myers-Briggs





Know Your Audience

How Do They Think?

Tips to Scheduling a Meeting:

- Audience – Think about the cost of the meeting & add the right people.
  - $50 per hour X 15 user = $750 meeting
- Subject: Attendance *Required – Discussion on process flow of XYZ
- Always include an agenda & Phone in Number
- You book the time so you control the meeting
- Ask the lead to provide a list of recommended attendees
  - & who is a *Required attendee
- Take minutes - assign someone to do this: (Rotate responsibility each week)
- Include:
  - Topic > Problem Summary > Discussion Details > Take aways w/ Assignment > Due Date

Tips to Scheduling a Meeting:

- Pressing - Emails: If I need a response or have a pressing due date
  - Subject: Response Needed by 9/16/2022 – Then topic of email
  - Mark as urgent
  - Put read recipient response on (use this wisely)

Tools & Techniques

- Brainstorming
- Solutioning Workshops
- Data Mining
- Document Analysis
- Interviews
- Mind Mapping
- Risk Analysis and Management
- Stakeholder List
- Org Chart Mapping
- Personas
- Record sessions for better note taking (always disclose up front)

RESOURCES

- https://www.iiba.org/
- https://www.16personalities.com/free-personality-test
- https://pmac-agpc.ca/project-management-tree-swing-story

Business Process Mapping Tool

- Tools:
  - Whiteboard or Blank wall
  - Stickies
  - Sharpies/Pens
  - The right people/stakeholders across the Org or customers

- Call to Action: Have each stakeholder create stickies that detail what their steps of the process are & why they do it.
  - It has always been done that way.
  - But WHY???

Soft Skills Matter

Thank You!

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Type	Details	Example
Project	The system that we are building	Ex: XZY Trading Platform, CRM, SharePoint
EPIC	All features related to the Product/Project we are building (Bucket of work)	Ex: forms, reports, workflows, layout, UI
User Story:	User's problem detailed out What do we need to tackle?	As a, (Who/Role) I Want, (What/Goal) So That, (Problem/Reason) URL: Link Biz Rules & Req Details: Dependencies: Mockup **Acceptance Criteria** **Scenario 1** If, Then OR Given (Beginning state of the scenario), When (Action), Then (Testable outcome) Pre-Conditions: Pre steps to identify the ask Post Conditions: down stream impact
Technical Story:	Technology updates to system	The Need: Why:
Bug:	Software that Broke (Broken & needs fixed)	As Is: Problem To Be: Goal Criticality Impact Acceptance Criteria
Spike:	Need Developer to Research limitations & scope of system before we can discuss possible solutions	1 Point Research Why & How Identify Dependencies: Expected deliverables are clearly described so BA can book a design session or write Story
Task	Breakout the Dev tasks Calls out steps identified during Planning	Dev Note: If … Then…

Requirement Gathering – User Story Template

Focus Areas:

Current Sprint: Address any req. gaps the Scrum team encounters during sprint.

Next Few Planned Sprints: Completing requirement for user stories planned to build in our next two planned sprints

Backlog: Collecting user story requirements slated for future sprints based of PO's priority.

- Problem Statement
- Why (what value will this add to business)
- Links/Mock-up/wireframe
- Business process/Business Rules
  (If this happens then what outcome is expected)

ACCEPTANCE CRITERIA	Testable, clarifies what done will do. Should have at least 1 Usually several (+ & -) Gherkin: Given, When, Then Biz Rules: If, Then	**Scenario 1 (Detail)** Pre-Conditions Given When Then Post Conditions **Scenario 2 (Detail)** Pre-Conditions Given When Then Post Conditions

Product Backlog Initiative/Item

PBI #:	Fibinanchi Points:
Title:	

User Story
AS A: (Role)
I WANT: (Goal)
SO THAT: (Why)

Acceptance Criteria *(Testable)*
Scenario 1: *(Overview)*
If:
Then:
Given:
When:
Then:
Pre Conditions:
Post Conditions:
Scenario 2: *(Overview)*
If, Then or Given, When, Then
Pre Conditions & Post Conditions:
Scenario 3: *(Overview)*
If, Then or Given, When, Then
Pre Conditions & Post Conditions:

Priority:	Due Date:

User Story Overview

Description:
Problem: That needs solved
Goal: How will it help business make $

Biz Rules:
If then's
How should the UI react for business

Links
Images

Dev Notes:
QA Notes:

Additional details:
Cross team impact
Successor stories or predecessor stories

ACCEPTANCE CRITERIA (+ & -)
AC1) High level call out of testing needs
AC2) High level call out of testing needs
AC3) Negative Path

Example of an Agile User Story

- **Subject: Board of Directors Webpage Update**
- URL: http://www.centraliowaiiba.org/chapter/board-members
- **As a** CIC IIBA website User
  I want to have the 'About Us' Board of Directors page updated
  So that there is an email link to each board member.
  And display the term date range for each position
- **Issue:** Not able to find emails to contact our IIBA CIC board members very easily.
- **Req Details:**
  Title: Director of Volunteerism & Outreach
  Name: Angela Weller
  Term: 2017 - 2018
  Email: volunteerismandoutreach@centraliowaiiba.org

  Complete similar details for each board member
- See mockup attachment
- **ACCEPTANCE CRITERIA**
  Scenario 1 - Layout
  Given a user clicks on our about us tab
  When the user views the board members
  Then user will be able to see all emails & terms

  Scenario 2 - Interaction
  Given a user clicks on our about us tab
  When the user clicks on the email link or any board member
  Then email template is created and user can send an email without typing the email.

