TOTAL SYSTEMS EDUCATION, LTD.

TSE022

DATA GATHERING
and
REQUIREMENTS ELICITATION WORKSHOP

Endorsed Education Provider

COURSE DESCRIPTION:

For a project to be effective and produce *quality* results, we must focus on the true needs of the business and objectives of the Client /User. To determine these, it is necessary to gather information form a variety of stakeholders and subject matter experts, and to locate and use documentation and other sources of information

This two-day workshop covers techniques for gathering information about project requirements, assumptions and constraints and communicating it to project stakeholders. These skills essential for Business Analysts, Systems Analysts, Developers, Liaisons, Project Managers and Project Team Members. The techniques covered include interviewing, requirements workshops (including JAD or Joint Application Design), document analysis, observation and questionnaires. By bridging the communications gap the production of *quality* products, on time, within budget, and without surprises, can become a reality!

Participants involved with PMI®, The Project Management Institute's Project Management Professional – PMP program, are awarded 14 PDUs or "Contact hours". Our Global R.E.P. number is 1270. For Business Analysts, we are also an EEP, Endorsed Education Provider of the IIBA™.

Upon completion of this module of training, the participants will be able to:

- Produce a Requirements Elicitation Plan for a project
- Plan and conduct one and two member interviews, under differing conditions and atmospheres;
- Develop questionnaires and surveys
- Conduct effective observation or job shadowing
- Plan and conduct JAD sessions and Requirements Elicitation Workshops
- Perform document analysis effectively
- Establish rapport with Users, Business Partners and related Stakeholders;
- Document information gathered, and plan follow-up action.

This is a true workshop! It includes lecture, reading, presentations of sample problems, case study simulations, role-play, and a variety of additional class exercises. Handout, checklists, tested-questions, and other materials are provided to participants for on-the-job use *(Upon in-house client request, internal SDLC materials, elicitation and "JAD" Session procedures will be included.)*

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COURSE OUTLINE:

I. Introduction and Overview

A. Course Objectives
B. The Need for a Formal Data Gathering Methodology
C. The IIBA™ and Impact of the BABOK
D. Roles and Data Gathering Responsibilities
   1. IT Personnel
   2. Liaisons and Business Analysts
   3. Customers / Users
E. Customer Service Requirements

II. The Interactive Interview
(Attempting 2-way Communication)

A. The Goals of the Interview
   1. IS Information Gathering
   2. The Iterative Process of Defining Needs and Objectives
   3. Negotiating Agreements (Creating a Win/Win Situation)
B. The Types of Questions and Techniques
   1. Closed and Open-Ended Questions
   2. Self-Assessing Questions
   3. Tested Questions
   4. Redundant and Threatening Questions
   5. The Broad Brush Approach
   6. Rephrasing/Restating Technique
   7. Hypothesis Technique
   8. Projective (Prototype) Method
C. The Art of Creative Listening
   1. How to do it (Listen)!
   2. When to interrupt (and *When not to*!)
   3. Using the Interruption effectively *(When the phone rings)*
   4. Body language (and using it)

III. Tools for the Interview

A. Creating the Unambiguous Question
   1. Formulating Objectives of the Meeting
   2. Developing Topics
   3. Testing the Questions and Topics
      a. complexity test
      b. jargon test
      c. verbal test
      d. stress test
      e. ambiguity test
      f. peer review test

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COURSE OUTLINE (Con't.):

III. Tools for the Interview (Con't.)

B. Using the Projective (PROTOTYPE) Technique
1. The Objective
2. Creating the Document / Screen
3. Administering the Sample
4. Evaluating the Results (*retry*)
5. *When* the Technique should be used

C. Tested Questions – from the In-house SDLC
1. Preparation and Use
2. Evaluation
3. Follow-up Questions for more Detail

IV. Creating the Interview Plan

A. Scoping the Interview
B. Reviewing Existing Information
C. Creating the Interview Questionnaire
1. Writing and Testing the Questions and when to just use topics
2. Mixing Question Type and Technique
3. Sequence the Questions (Flow)

D. Using a Feedback Checklist
E. Preparing the Material and Equipment List
F. The Dry Run
1. When necessary
2. Level of Formality
3. When to restart

V. Conducting the Interview

A. Establishing the Control Environment
1. Creating the proper climate
2. Timing
3. Setting the pace
4. Who does the Opening?
5. The Interruption

B. Changing the Interview Plan
1. Thinking on your feet (or *seat*)
2. Don't waste *anybody's* time
3. Rescheduling the interview

C. The Hypothesis Method
D. Win/Win Negotiations
E. How to Use the Feedback Checklist
F. The Bridging Close
1. Setting the stage for follow-up

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COURSE OUTLINE (Con't.)

VI. Interview Concerns

A. Number of Participants at the Interview
   1. Is someone in charge?
   2. A scribe or a partner?
   3. Individual or a Team
   4. Don't intimidate the User with a crowd
B. Preconceptions of the Client/User and IS
C. The Use of Jargon
   1. A major complaint
   2. IS and Business terminology
   3. Using Humor
      (If done wrong, may not be a laughing matter)
D. Loss of Control
   1. Lacking precision
   2. Anxiety? Good!
   3. Over Control (Not letting anyone else speak)
   4. Under Control (Too much digression)
E. Recording the Interview
   1. Tape Recorders *will be hazardous to rapport!*
   2. Note taking - How to do it well.

VII. Joint Meetings – aka JAD Sessions

A. The Steps of the JAD Sessions
   1. Define the Project
   2. Research
   3. Preparation
   4. The JAD Itself
   5. Closure
B. Objectives for Facilitation
   1. Establish Success Criteria
   2. Establish Goals
   3. Establish Participants
C. Preparation – by Session Role
   1. The different Types of Meetings
   2. Contact Attendees
   3. Learning about Participants
D. The Set-up
   1. Location
   2. Time
   3. Privacy
   4. Layout
   5. Responsibilities

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COURSE OUTLINE (Cont'd.)

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VII. Joint Meetings – aka JAD Sessions (Continued)

D. Agenda
   1. Establishing
   2. Sending it out
   3. Getting Feedback
E. Running the Meeting (as Facilitator)
   1. The Beginning
   2. The Body
   3. The Conclusion
   4. Minutes
F. The Role of the Facilitator
   1. Getting Correct People
   2. Communication
   3. Establish Metrics
   4. Negotiate
   5. The Survival Guide
G. Other Roles
   1. Responsibilities to the Project
   2. Responsibilities to the Group
   3. Expectations
H. The Close
   1. Conclusion
   2. Measurement Criteria
   3. Survey on Effectiveness
   4. Evaluate Criteria
   5. Lessoned Learn
   6. Building Lessoned into the Next Meeting
   7. When to End

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COURSE OUTLINE (Cont'd.)

VIII. Additional Data Gathering Techniques

A. What they are,
How to do them
When to use them
B. Observation
1. Process vs. Information
2. Success factors
3. Risks
4. The Process
C. Written Questionnaires
(and *Why most fail*)
1. Making it work
D. Content Analysis - Documentation Review
(Great starting point, if something exists!)
1. What to look for
2. Pitfalls and Dangers
E. Exercises and Samples of Each

IX. Conclusion

A. Review Major Topics
B. Job-Aids for Use
C. Participants Critique the Class

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