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Organizing Effective Requirements Workshops: Before, During & After

For complex projects involving multiple stakeholders, a workshop is one of the quickest and most cost-effective ways of eliciting requirements. It's however, not the easiest of techniques because of the diversity of stakeholders involved and their often-conflicting interests. A requirements workshop should be carefully planned and managed to derive the expected benefits.

One of the unique benefits of a requirements workshop is that it allows the Business Analyst resolve conflicting business requirements, conduct stakeholder analysis and achieve instant requirements validation all in one go. According to BABOK V2, a workshop is particularly essential to:

- Discovering requirements
- Refining requirements
- Prioritizing requirements and
- Scoping requirements

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Are you planning a requirements workshop for your project? Here's a list of things to consider before, during and after the workshop:

BEFORE THE WORKSHOP

Do your homework – If it's a new project you're trying to organize a workshop for, the first thing you need to do is gather as much background information on the project as possible. If you're the workshop facilitator, you'll need to have sufficient insight on the project/business area to engage actively with the stakeholders and ask the relevant questions.

Plan, plan, plan – One of the most essential things to do is to draw up a plan for your workshop. This involves identifying all the activities you need to complete before the day of the workshop. A mini-project plan or checklist will help you keep track of your progress and ensure that all your preparation activities are completed on time. Part of good planning is determining how interactive you want the requirements workshop to be which will in turn, determine the type of tasks and materials you prepare for the participants.

Where does it all end? Begin with the end in mind - The objectives of your workshop must be clearly identified and articulated. Your objectives will determine the scope of the questions and discussions participants will engage in. Ask yourself: *What outputs do you expect to have after the workshop?* Once your objectives are defined, ensure that all participants know exactly what these objectives are so that they are guided by them. The objectives should also serve as the basis for drawing up your workshop agenda

What's in an agenda? - An agenda represents a list of all the main topics or issues that will be covered during the workshop. I usually send the agenda before the workshop so that all the stakeholders are clear on what to expect. While preparing the agenda, consider the different learning styles, so that each stakeholder is sure to take something away. Participants may be *visual, tactile or auditory learners*.

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Timing matters - The time of day you choose to hold the workshop is just as important as the duration of the workshop. People tend to be more attentive in the early hours of the morning than the early afternoon. In addition, avoid organising workshops immediately before or after mealtimes. Workshops should also not be scheduled to hold for too long so that participants do not lose concentration and enthusiasm. Instead of scheduling a workshop for an entire day, consider spreading it over 2 or 3 days.

Get the right stakeholder mix – A necessary pre-requisite to hosting a successful workshop is having all your stakeholders mapped out. The mix of stakeholders you invite has a direct impact on whether you achieve your workshop objectives or not.

Pick stakeholders with clout, that is, include Subject Matter Experts who are well versed in the specific matters your workshop will address. Select stakeholders from different backgrounds so you can benefit from multiple perspectives.

Also, select stakeholders wisely so that the needs of all the system users are equally represented. Beware of assembling large groups of stakeholders; consensus may become difficult to achieve.

The Environment matters too – Select a venue and make sure it's suited to the number of participants you're expecting. If the venue is outside your office environment, it should have all the supporting materials you need: whiteboards, flip chart, markers and so on.

Ensure your stakeholders are prepared – Give stakeholders enough notice so that they can prepare. Also, send them sufficient information before the day so that they can read the materials and prepare to contribute.

DURING THE WORKSHOP

Be an Early Bird – Arrive at the venue early enough so that you can prepare and set up all your supporting materials. Remember Murphy's Law.

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Remember that Tense Stakeholders Don't Contribute – Your first objective should be to get everyone to relax. I like Adrian Reed's post on leaving ranks at the door during workshop sessions. As a Business Analyst cum Workshop facilitator, you should create an environment where stakeholders are not inhibited in any way. You can reduce tension by *acknowledging comments from participants*; *assisting introverted participants* by encouraging them to speak out; and *desisting from evaluating people's opinions*. Listen, empathize and engage.

Stick to the plan – Be guided by the objectives of your workshop. Ensure that the objectives are clearly written out for stakeholders to see so that only discussions along these lines are considered.

Use Visual Aids - Use diagrams, mockups or wireframes to present your initial understanding of requirements. Such tools can help to kick-start productive dialogue among stakeholders and clarify ambiguous requirements.

Use the Parking Lot – I like the idea of the parking lot because it allows the Business Analyst/Facilitator defer contentious or off-topic issues temporarily. These issues can be "parked" for a later time.

Use Complementary BA techniques – Workshops can be extremely effective and more interactive when combined with techniques like Affinity Diagrams and 5 Whys.

Employ a Scribe – A workshop usually requires a scribe. Having a scribe to take down the minutes of the workshop can prove to be extremely useful, practical and time-saving. This will take the additional task of documenting off the BA or facilitator.

Resolve Issues - The workshop is a great platform for identifying conflicting requirements. Table areas of ambiguity and conflicting priorities for discussion to clarify stakeholder requirements.

AFTER THE WORKSHOP

Requirements Elicitation Technique

Use Case Diagram

Root Cause Analysis

How to design questionnaires

State transition diagram

Organogram

Pareto analysis and decision-making

Problem tracking technique

Document Analysis

Role and Permissions Matrix

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1. Adrian Reed

Document, Communicate and Validate – The results of the workshop may serve as the basis for preparing the requirements package for subsequent validation with stakeholders

Follow-up - Any action items identified during the workshop session should be tracked until completion.

Don't forget to say thank you – You may need these stakeholders again.

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