

# Elicitation Notes

## General Techniques

- Interviews
  - Understand the advantages and limitations of interviews.
  - Plan interview questions
    - Interview questions <https://drive.google.com/file/d/19ID5U0d59raojtf8LijQTbM3l8kUNyyP/view>
  - Plan recording answers
    - Record meeting if online
    - note taker (bring someone along to take notes)
    - Could use the phone to record
  - Follow best practices
    - Utilize - The Quest for Excellent Requirements Sample Interview Agendas
    - (Doc link here) <http://www.google.com/urlq=http%3A%2F%2Frequirementsquest.com%2Fdownload%2Finterview-agenda-template%2F%3Fwpdmdl%3D2978&sa=D&sntz=1&usg=AFQjCNE4jflOk7zyqb1VqRZlZmTIHlODAw>
- Scenarios
  - Allow software engineers to provide a framework with
    - “what if” and “how is this done” type of questions
    - Example: use case descriptions
- Prototypes
  - Acts similar to scenarios but are valuable for clarifying ambiguous requirements.
  - Techniques:
    - various levels, like paper mockups and beta-test versions.
  - low-fidelity is good to prevent “anchoring”
- Facilitated meeting
  - group individuals to refine ideas
  - can reveal conflicting requirements early
  - be sure that everyone gets to talk and avoid some groups deterring others.
- Observation
  - shadow different users to understand business processes that are subtle and complex for actors to describe.
- User Stories
  - “As a <role>, I want <goal/desire> so that <benefit>.”
  - Can be created by users themselves.
  - Before implementation, an acceptance procedure must be written by the customers to determine whether the goals of the user stories have been fulfilled.

## Examples of Stakeholders

- Users:
  - People who will use the software that involves different roles and requirements.
- Customers:
  - People paying for the creation of the software and represent the software’s target market.
- Market analyst:
  - Establish market needs
  - act as a proxy for customer/user
- Regulators:
  - Oversees of a business or industry like OSHA.
    - Complies with the requirements of the regulatory authorities.
- Software engineers:
  - So they know what to make
  - How they can make it
  - What they can and can’t do
  - Tradeoffs among requirements should be identified. (constraints have a major impact on project cost or delivery because they either fit well or poorly depending on the skill set of engineers).

## Identifying stakeholders

- Ask known stakeholders for other possible stakeholders: “Who else could be impacted?”
- Org. Chart
- Observation
- Follow the money
- Why questions
- Anyone who supports the system.
- Suppliers
- Trainers
- Operators

## Sources

- Goals
  - Should come from my business analysis.
  - Provides motivation for the software or business concern/critical success factor.
  - hopefully follows SMART standards.
- Domain knowledge.
  - SE needs to have knowledge of business or industry.
  - This can be done with research or get in contact with someone who is knowledgeable of the business.
  - Relationships between concepts within the application domain should be identified.
- Stakeholders
  - SE needs to identify multiple viewpoints from different stakeholders to avoid conflict of stakeholder needs.
  - See examples above
  - Stakeholders cannot be the only source.
- Business rules
  - A statement that defines or constrains some behavior of the business itself.
  - What policies must the product conform to?
- The operational environment
  - Are requirements that are derived from the environment that they are used in.
  - Such as timing constraints, servers, capacity, and possible location.
  - Host systems/user systems {cost of internet}
- The organizational environment
  - The software should support the business process and not force unplanned changes on the business processes.
  - Such as change of device type, OS change, longer load times, and confusing interface.

## User Characteristics

User Characteristics page - [User Characteristics](#)

## Elicitation Summary

- Eliciting user stories from stakeholders was facilitated by my sponsor Edward as he was able to reach out to currently identified stakeholders and new stakeholders who in the past have interacted with Boomi's legal department with a description of the system idea and how it would benefit their current interactions with the legal department with their current role. Sadly, it was a long process as most of these stakeholders were in Austin, Texas, and affected by the severe weather conditions hindering the process. Due to current conditions, we were able to get in touch with a handful of stakeholders but the elicitation of user stories will continue.

Tue, Feb 16, 3:00 PM

Hey Ed for this week I need help eliciting stakeholders needs for our system and make user stories out of these needs.

User stories template:

"As a <role>, I want <goal/desire> so that <benefit>"

I was wondering if there is any way you could help me contact colleagues/ people who regularly contact the legal department (users)/ or in general stakeholders.

Tue, Feb 16, 6:05 PM

I'd be happy to reach out to some stakeholders and pass on their stories along those lines. That work? If so, approx how many folks do you need to hear from?

Thu, Feb 18, 4:00 PM

Update: had some timing issues tracking folks down for stories that week, as our team is head quartered in Austin, which had major issues with black-outs cause of the winter storms. I'll keep pushing and get you something soon.

Awesome thanks for the update. Let me know if there is anyway I can help

Hi William. We actually had our annual Sales Kick Off event these last weeks (held virtually this year) so it gave me a good opportunity to reach out to stake holders in various departments at Boomi that interact with the legal department. That said, folks were extremely busy with the event, and others were without power and playing catch up, as the company is headquartered in Austin, where they had blackouts and other issues all week based on the snow storms. In any case, I've gotten some good feedback and expect more this week. By this Thursday, I'll have some first hand "short stories" or blurbs from a handful of stakeholders on how/when they come to legal for answers to the type of questions we'd expect to see in the discussed bot.

Good to hear hopefully everyone is doing better now. Additionally, I was wondering if you could come up with a user story your self. Think of any functionality that you would want from the bot.

- **Dell Tech:** As a sales team member within Dell Technologies, we often make software and hardware sales to large enterprises, and certain Boomi branded products are combined with the Dell Technology products on one order form, for ease of customer review and to expedite the sale process. We need to work with the Boomi legal department in those instances to make certain the needed Boomi legal terms and conditions are in place, on the order form. It would be helpful to have certain of the information readily available in a self-help tool, both so that I can get quick access to the answers, but also so that I don't feel like I'm bothering the Boomi legal team.
- **Accounts Receivable:** I've worked in the finance department in Boomi for seven years, and as part of my role, I oversee collections from customers who fail to pay their bills as they become due. After an account is more than 90 days past due, we need information from the Boomi legal department in order to send the customer a notice of material breach and/or to send the customer account to a third-party collections lawyer. I know the Boomi legal team is a busy group, and they are more focused on closing deals to bring in new revenue as opposed to chasing down customers that refuse to pay for services. To the extent they could make the information we need available through a software tool we could access and navigate on our own, that would create a ton of efficiencies.
- **Finance:** The Boomi finance team is called on the approved negotiated terms and conditions in customer contracts that relate to the payment of amounts due, including requests to make monthly payments, request to pay bills other than 30-days after receipt of invoice, requests for refund rights, etc. We coordinate with the Boomi legal team to determine how those negotiated terms find their way into the final contract. We are a pretty tech-savvy group of finance experts, so we always welcome new technologies in finding ways to speed up processes and avoid human error. The Q&A "bot" sounds like it could be quite helpful in interacting with the legal leaders.
- **Sales Engineering:** As a Sales Engineer, my role is to make sure customers understand how our products work, which security protocols we have in place to protect their personal data that we process as part of our primary Boomi products and services, and to approve changes to legal documents that pertain to our data privacy and security protocols. I could see some real value in having quick access to information that we otherwise need to obtain from a lawyer, in person.
- **Account Executive:** My role as an account executive (AE) at Boomi allows me to be the primary point of contact for the customer. I essentially "own" the customer account, from making the initial pitch to working with the customer on what products and services work best for their use case, and where applicable, in escalating issues to the Boomi legal leadership team when customers have questions that are outside of my area of expertise (like the terms and conditions of our contracts!). Any tool to get me information more quickly would be beneficial, both to me and to the legal team, so that they could focus on more substantive and critical issues the company faces.

- Ed McCarthy, Legal Counsel, Dell Technologies. My primary job is to advise the company leadership in order to avoid bad legal risks. As part of that, I'm tasked with negotiating Master Service Agreements and Cloud-based "as a service" deals with customers primarily in North America, but also globally. I served as the primary Legal escalation point for revenue deals and manage internal negotiation positions as to operational and risk issues presented in the contracts. I collaborate with Sales, Operations, Finance, Legal, Tax, Insurance, Privacy, and IT Security groups to ensure that agreements meet Company policies and protect the Company's interests. The job requires that we lawyers provide time-sensitive support to Account Management teams on Sales transactions while balancing business needs and risks. Recognizing risks and providing creative solutions to resolve issues is a key part of daily work. The chief goal is to convey complex and legally complicated information to Business Leaders in a concise and professional manner. Because Dell Boomi Inc is the fastest growing subsidiary of Dell Technologies and a rapidly growing supplier of the best cloud integration platform on the market, my team handles a substantial volume of sales, inbound and outbound licenses, compliance matters, any disputes, all legal issues pertinent to a worldwide cloud services business. Having the type of software that provides stakeholders with reliable answers to questions that would otherwise need to come from a lawyer – and take time away from more time-sensitive and critical issues – could create some efficiencies and make a meaningful impact on the company.

User Story Notes - [User Stories](#)

## Mockup

Process for mockup -

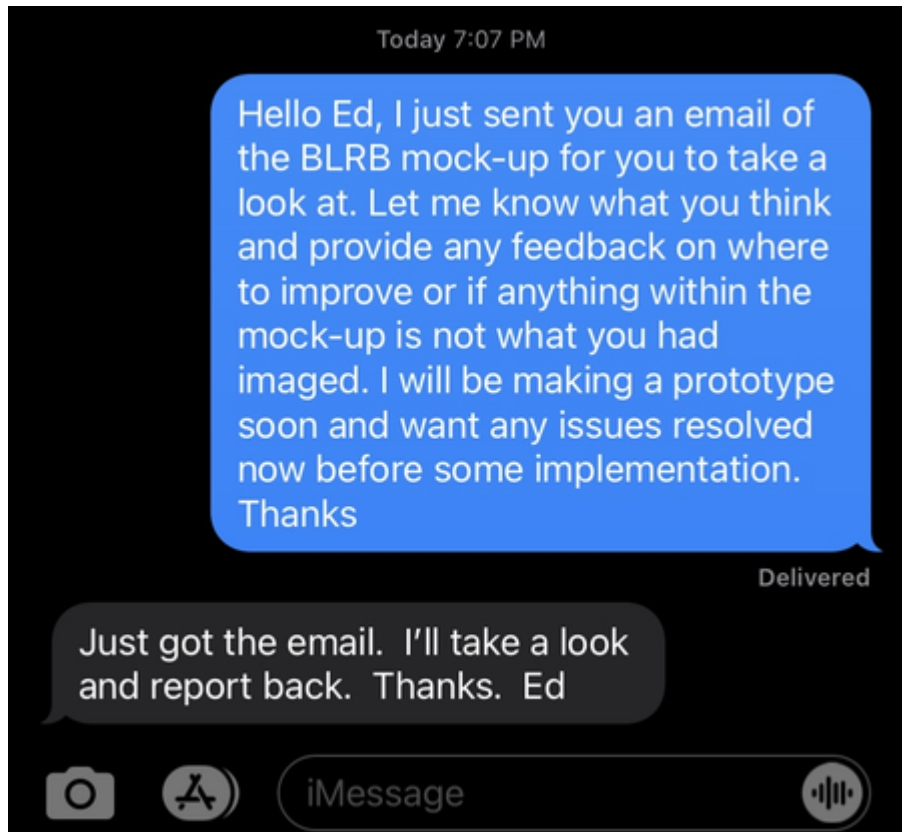
After taking a look at some of the mockup software provided by Vanzelow:

- Adobe XD, Figma, Balsamiq Mockups, or Mockplus
- IDEs/ IDE integrations: Scene Builder, Android Studio, Visual Studio

I decided to go with Adobe XD. Once in Adobe XD website, I clicked Start for free which instantly began downloading Creative Cloud. Once the creative cloud was installed I chose Adobe XD and began working on my mockup with the help of some youtube videos to get a better understanding of the capabilities of Adobe XD.

With the creation of the Mockup, I provided my sponsor with the current idea I have with the BLRB software (He's yet to provide feedback but this will be updated once there is). Additionally, any upcoming meetings with stakeholders will be facilitated by presenting a visual representation of the BLRB to ensure that they are satisfied and stay within scope.

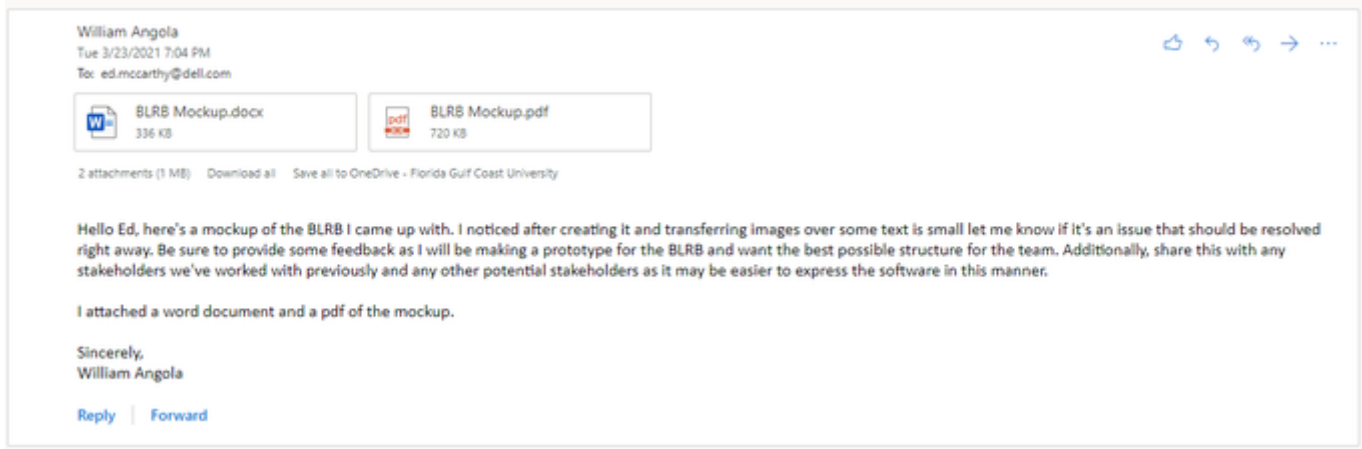
Notifying ED of Mockup -



Email reiterating mockup information -

BLRB Mockup


2



Update needed for Prototype 3/27/2021 - Add a disclaimer that says "The information provided on this website does not, and is not intended to, constitute legal advice; instead, all information, content, and materials available on this site are for general informational purposes only." Potentially add third-party links related to other products involved with Dell Boomi to depict their legal information correctly.

Updated Interactive prototype: <https://xd.adobe.com/view/74bc2c47-5df2-4af7-9668-8cd46339977b-21ef/>

Login page



BLRB

Create Account

## Login


Username

Password

Login

New employee? [Create Account](#)

Create Account page



BLRB

## Create Account

First Name

Last Name

Email

Password

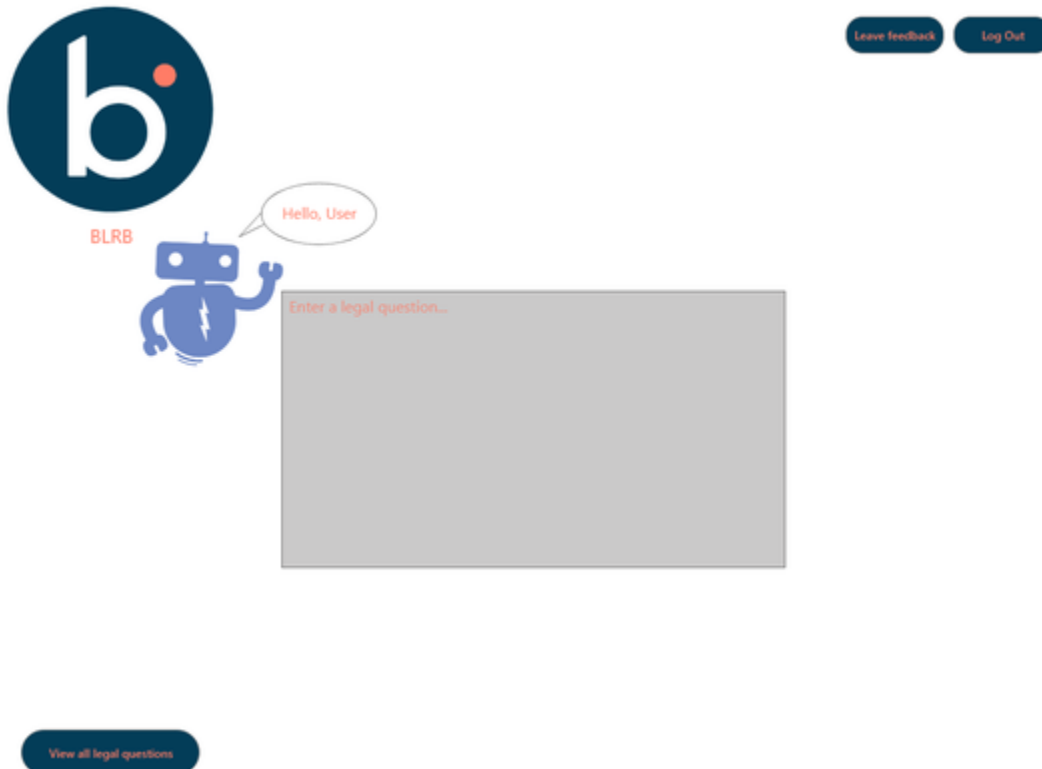
Password must be at least 8 characters long and at least one (special character, upper case, and lower case)

Boomi ID

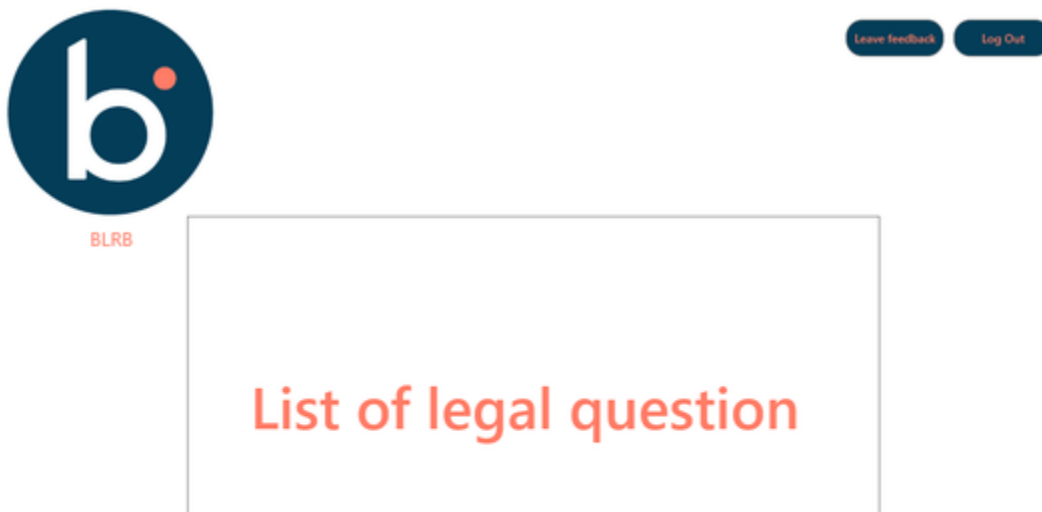
☐ I understand that BLRB is for Boomi Personnel Only.

[Create Account](#)

Home/bot page



View questions page





go back

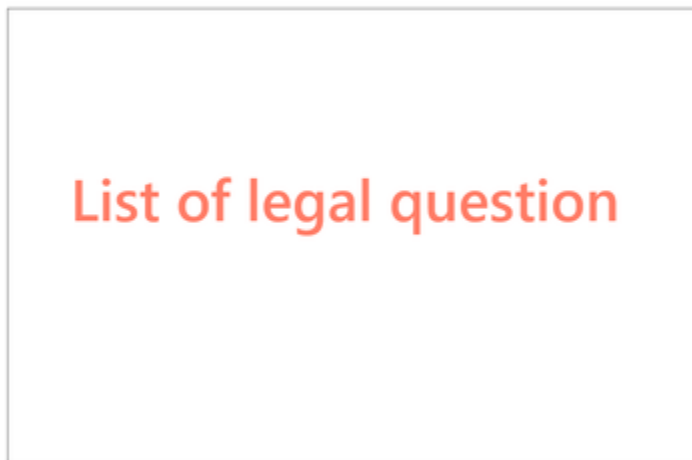
Counsel question view page



BLRB

Leave feedback

Log Out



List of legal question

Edit questions

go back

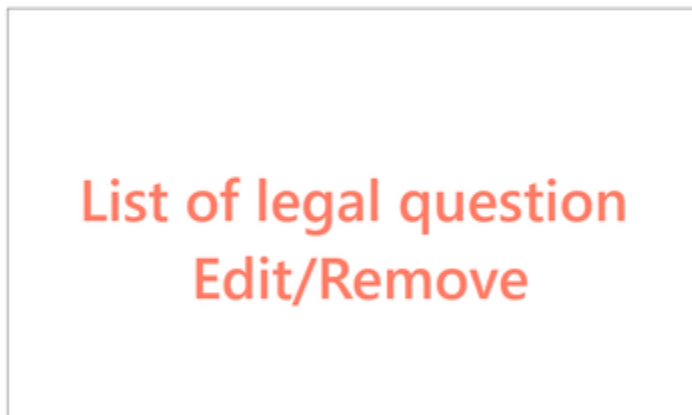
Edit mode page



BLRB

Leave feedback

Log Out



List of legal question  
Edit/Remove



[go back](#)[Submit changes](#)

System design constraints:

- Passwords must have (at least one special character, at least one upper case letter, and at least one lower case letter) and at least 8 characters long.
- BLRB must be written using Java, Python, or C++.
- BLRB will only be used by Boomi personnel.
- The system can only go down for maintenance between (Undecided time frame).
- BLRB answers will be made by the legal department and not by developers due to expertise.
- BLRB's interface will be built using SceneBuilder (subject to change).
- The correction of answers provided by BLRB is to be handled by the legal department.
- Only legal counsels can create/update/remove legal questions.
- From the Boomi website: When a user registers and activates an account, Boomi generates a private/public x509 key. We store the public certificate and the private key in our secure data center.
- From the Boomi website: Global Data Protection Regulations (GDPR) came into effect in 2018, and applies to companies that are NOT established in the EU if they process the personal data of EU-based individuals for the purpose of.
- Dell Boomi's Commitment to Data Protection and GDPR Compliance information can be found here: <https://boomi.com/wp-content/uploads/boomi-gdpr-compliance-statement-june-2018.pdf>