

Requirements Elicitation Techniques

需求获取技术

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CONTENTS



Methods: Interviews, surveys, prototyping, ethnography.

01 方法：访谈、调查、原型制作、民族志。



Tools: JIRA, DOORS, collaborative platforms.

02 工具：JIRA、DOORS、协作平台。



Role-Play: Elicit requirements from a "difficult client."

03 角色扮演：从“难缠的客户”那里引出要求。

Elicitation Techniques & Tools

- **Interviews:** Structured or unstructured conversations with stakeholders to gather detailed insights. Best for deep, qualitative understanding.
- **Surveys/Questionnaires:** Scalable method to gather quantitative data and opinions from a large group. Efficient for validating assumptions.
- **Prototyping:** Creating a visual or interactive model (low-fidelity sketches to high-fidelity simulations) to quickly gather feedback and refine requirements.
- **Ethnography/Observation:** Studying users in their natural environment to understand unarticulated needs, workflows, and context.

引发技巧与工具

- **访谈:** 与利益相关者进行结构化或非结构化的对话，以获取详细见解。最适合深入、定性理解。
- **调查/问卷:** 一种可扩展的方法，用于从大群体收集定量数据和意见。高效验证假设。
- **原型制作:** 创建可视化或交互式模型（从低保真草图到高保真模拟），以快速收集反馈并完善需求。
- **民族志/观察:** 研究用户在其自然环境中，以理解未被表达的需求、工作流程和背景。

Tools [工具]

□ **JIRA**: Agile project management tool often used for user story capture, backlog grooming, and tracking requirements evolution.

□ **DOORS (IBM)**: Formal requirements management tool for traceability, version control, and handling complex, compliance-heavy projects.

□ **Collaborative Platforms**: (e.g., Miro, Mural, Confluence, Microsoft Teams). Facilitate real-time brainstorming, workshops, and documentation sharing.

JIRA: 敏捷项目管理工具，常用于用户故事捕捉、待办事项整理和需求演变跟踪。

DOORS (IBM) : 用于可追溯性、版本控制及复杂合规性项目处理的正式需求管理工具。

协作平台: (例如 Miro、Mural、Confluence、Microsoft Teams)。促进实时头脑风暴、研讨会和文档共享。

课程考核及成绩评定

1. JIRA (by Atlassian)

- JIRA offers a robust free plan for up to 10 users, which is perfect for small teams or classroom demonstrations. It includes core features like Scrum and Kanban boards, backlogs, and basic reporting.
- **Atlassian Academic License:** Through their Academic License program, students and educators can get free one-year licenses for JIRA Software with virtually all premium features for up to 50 users. This is the best way for a structured class.
- **Demo:** You can sign up for the free plan or academic license and create a sample project with:
 - A product backlog (list of user stories/epics).
 - A Scrum or Kanban board showing stories moving from "To Do" to "Done."
 - Sprint planning and reporting views.

2. DOORS (by IBM)

DOORS Next is a high-end, enterprise-grade tool with significant cost.

Educational Demos/Licenses? Possible, but requires initiative.

IBM has deep academic partnerships. The best path is to contact IBM's academic team or a sales representative directly and explain you are an educator seeking a temporary license or a live webinar demonstration for instructional purposes. They often provide time-limited trial licenses or can arrange a sales engineer to give a guided demo to your class.

Alternative for Class: Given its complexity and cost, many instructors use screenshots, video walkthroughs (available on YouTube and IBM's site), or demonstrate with a simplified analog/whiteboard exercise to teach the concepts of formal requirements tracing.

3. Collaborative Platforms

3-1. Miro / Mural:

- Both offer excellent free plans with unlimited "boards" for a limited number of editors (e.g., Miro: 3 editable boards). Perfect for a live, in-class brainstorming session.
- Very generous. Both offer free upgraded educational plans for students and teachers.
- Miro's Education Plan: Provides unlimited boards and many advanced features.
- Mural's Education Plan: Similar offering.
- Demo: Create a board beforehand with frames for:
 - Personas: Sticky notes for user attributes.
 - User Journey Map: A timeline to map steps.
 - Brainstorming Area: For features.
 - Dot Voting: Use the voting feature to prioritize. Invite students to the board as "editors" or "commenters" during class.

3-2. Confluence (by Atlassian):

- Free for up to 10 users.
- Covered under the same Atlassian Academic License as JIRA. It integrates seamlessly with JIRA.
- Demo: Show how to create a "Product Requirements" space, link pages to JIRA issues, and use collaborative editing.

3-3. Microsoft Teams:

- ❑ The free version includes core collaboration features.
- ❑ Extremely common. Many institutions already have Microsoft 365 Education licenses (which include Teams) for free for students and staff.
- ❑ **Demo:** Create a "Project" team, show channels for different topics, and demo the integration document collaboration, Whiteboard, and Planner (for basic task tracking).

Demonstrate how a project team uses Microsoft Teams for communication, collaboration, and task tracking.

Prerequisites:

Microsoft 365 Education account (free for schools)

Microsoft Teams installed

Pre-prepared assets:

A simple Word document (e.g., "Project Charter - QuickMeal App.docx")

A basic PowerPoint slide (e.g., "Initial Mockups.pptx")

A list of 3-4 sample tasks

Part 1: Setting Up the Project Team

"First, let's create our project team for a QuickMeal food delivery app project."

1. Open Microsoft Teams
2. Click on the "Teams" icon in the left sidebar
3. Click "Join or create a team" (bottom of teams list)
4. Select "Create a team"
5. Choose Team Type
6. Select "Class" or "PLC" (Professional Learning Community) for educational context
7. Name Your Team
8. Team name: QuickMeal App Project
9. Description: Development team for the new food delivery application
10. Privacy: Private (only added members can join)
11. Add Members

Part 2: Organizing with Channels

"Now let's organize our work into different channels. Think of channels as dedicated rooms for different topics."

1. Default Channels

- Point out the "**General**" channel (created automatically)
- "*General is for announcements and broad discussions.*"

2. Create Topic-Specific Channels

- Click "**More options**" (...) next to team name → "**Add channel**"
- Create these channels:
 - **Channel 1:** requirements (for requirements discussions)
 - **Channel 2:** design-reviews (for UI/UX feedback)
 - **Channel 3:** sprint-1 (for current sprint work)
 - **Channel 4:** stakeholder-updates (for client communication)

Part 2: Organizing with Channels (contd...)

3. Channel Features Demonstration

- In the requirements channel:
 - Show the **Posts** tab (for discussions)
 - Show the **Files** tab (shared storage)
 - Show the "+" to add tabs (we'll use this later)

Role Play Activity for Requirements Elicitation