Elicitation And Collaboration

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Purpose:

This document outlines the approach, tasks, and techniques for requirements elicitation and stakeholder collaboration within the ADPA – Advanced Document Processing & Automation Framework project. It is aligned with BABOK v3 standards and tailored to the enterprise automation, integration, and compliance context of ADPA.

1. Introduction

1.1 Purpose and Scope

The purpose of this Elicitation & Collaboration document is to define a structured approach for gathering, clarifying, and validating business, technical, and compliance requirements for ADPA. It ensures all stakeholder needs are captured and that the resulting requirements support the delivery of a modular, standards-compliant enterprise automation framework.

1.2 Key Stakeholders

- **Project Sponsor:** Product Owner/Steering Committee
- **Project Manager:** Sarah Johnson
- **Business Analyst:** Mike Chen
- **Technical Lead:** David Wilson
- **QA Manager:** Lisa Brown
- **Security and Compliance Officer** (for regulatory alignment)
- **Enterprise Integration Leads:** SharePoint, Confluence, Adobe, API, and AI Provider SMEs
- **End Users:** Enterprise project managers, analysts, and technical staff

2. Elicitation Preparation

2.1 Stakeholder and Source Identification

- Compile a comprehensive stakeholder register covering all functional areas (project management, document automation, data management, compliance, IT security).
- Identify external dependencies: AI providers (OpenAI, Google, GitHub Copilot, Ollama), integration partners (Atlassian, Microsoft), and compliance/legal advisors.

2.2 Elicitation Technique Selection

Based on project complexity and stakeholder landscape, the following techniques will be used:

- **Workshops:** Cross-functional sessions for requirements alignment and prioritization.
- **Interviews:** Targeted sessions with SMEs for technical, security, and compliance requirements.
- **Surveys/Questionnaires:** To gather input from distributed user groups.
- **Document Analysis:** Review of existing standards (BABOK, PMBOK, DMBOK), prior documentation, and regulatory materials.
- **Prototyping/Demo Sessions:** Showcasing CLI, API, and web interface features for early feedback.

2.3 Preparation Activities

- Develop workshop/interview agendas and question sets tailored to integration, security, AI, and compliance topics.
- Prepare supporting materials, including process diagrams, sample documents, and workflow maps.
- Set up logistics: schedule sessions, ensure remote access, and distribute materials in advance.

3. Conduct Elicitation

3.1 Execution of Elicitation Activities

- **Workshops:** Facilitate multi-stakeholder workshops focusing on key capabilities (document generation, workflow automation, compliance reporting, integration scenarios).
- **Interviews:** One-on-one or small group discussions to deep-dive on technical architecture, AI orchestration, and regulatory requirements.
- **Surveys:** Distribute and analyze targeted surveys for broader user input on usability and integration preferences.
- **Prototyping:** Live demonstrations of CLI, REST API, and admin interface; gather immediate feedback.

3.2 Documentation of Elicitation Results

- Record all workshop/interview outcomes, capturing decisions, requirements, pain points, and constraints.
- Document each elicited requirement with clear traceability to source and rationale.
- Use ADPA's document generator to produce interim and final elicitation outputs in standardized formats.

4. Confirm Elicitation Results

4.1 Validation with Stakeholders

- Circulate documented requirements and elicitation summaries for stakeholder review and sign-off.
- Conduct follow-up sessions to clarify ambiguities, resolve conflicts, and ensure shared understanding.

4.2 Addressing Gaps and Ambiguities

- Perform gap analysis against BABOK, PMBOK, and DMBOK coverage to identify missing or ambiguous requirements.
- Update requirements artifacts based on stakeholder feedback and further analysis.

5. Collaboration & Communication

5.1 Ongoing Stakeholder Engagement

- Establish regular cadence for status updates, review meetings, and ad-hoc collaboration (e.g., bi-weekly standups, monthly steering reviews).
- Maintain open channels for stakeholder input via Confluence, SharePoint, and version control (GitHub Enterprise).

5.2 Communication Methods and Frequency

- **Email Updates:** Weekly summaries of progress and key decisions.
- **Confluence/SharePoint:** Centralized documentation repository; real-time updates and feedback.
- **Workshops/Meetings:** As per project plan (see Project Timeline).
- **Issue Tracker/Discussions:** GitHub Issues/Discussions for requirement clarifications and tracking.

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6. Revision History

Date	Author	Change Summary
2024-06-15	Mike Chen	Initial draft based on BABOK v3 and ADPA context
2024-06-18	Sarah Johnson	Incorporated stakeholder feedback and compliance updates
2024-06-19	David Wilson	Technical integration sections enhanced

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Note: This document is a living artifact and will be updated as additional requirements are elicited and collaboration activities evolve. All updates are version-controlled and published in the central documentation hub.

References:

- BABOK v3, PMBOK 7th Edition, DMBOK 2.0
- ADPA Project README
- Sample Business Requirements Document