# Information Gathering for Business Analysis

## Techniques for Remote and Hybrid Teams

## Course Overview

The world has changed! It is increasingly difficult for Business Analysts to gather information using the tried and tested approach of face-to-face interviews. Even when organisations adopt a hybrid approach to work, it’s not easy to get everyone in the office at the same time to conduct workshops. The solution for many, has been to “muddle” through poorly planned remote sessions lacking staff engagement and failing to be inclusive.

This two-day course is a much-needed solution. It offers a toolkit of techniques based on a facilitation framework that prompts staff to consider six key aspects of remote and hybrid sessions. The framework allows them to:

* clearly define the objectives of a session;
* plan the structure and timing of a session;
* ensure participants collaborate effectively during a session;
* anticipate how participant’s informal relationships might help or hinder a session;
* ensure all participant’s feel included and engaged in the session; and
* continuously assess the mood of individuals and the session as a whole.

The application of the framework is guided by a generic information gathering workflow and concrete examples of workflows for remote and hybrid sessions, face-to-face interviews and workshops.

The course adopts a “learn by doing approach”, with plenty of hands-on activities that demonstrate the practical application of the facilitation framework and the information gathering work flows discussed during the course.

Based on the Mural&REG [[1]](#footnote-21) visual collaboration platform, the course emphasises a “digital first” approach to information gathering that addresses the challenges of remote and hybrid work.

At the end of the course, staff will have improved their ability to plan and facilitate sessions, bringing a more confident and professional approach to information gathering.

## Course Features

* Based on a facilitation framework that identifies the six key aspect of remote and hybrid sessions
* Describes a generic information gathering work flows with concrete examples of typical session workflows
* Includes many hands-on activities based on the Mural&REG visual collaboration platform
* Describes why a digital first approach to hybrid sessions works best
* Includes a set of “take away” session planners

## Participant Benefits

* Gain an understanding of how to apply the facilitation framework and information gathering workflows
* Develop the skills required to plan and facilitate remote, face-to-face and hybrid information gathering sessions
* Builds confidence conducting information gathering sessions

## Who Should Attend

* Agile teams, Product Owners, Business Analysts, Systems Analysts, Requirements Engineers and Requirements Analysts who need to elicit information from stakeholders in order to understand their needs
* Users, User Representatives and Stakeholders who need to participate in information gathering sessions
* Software Engineers, Software Developers, Test Engineers, Test Analysts, Quality Assurance Staff, and Solution Architects who want enhance their careers with the knowledge and skills necessary to plan and conduct remote and hybrid information gathering sessions
* Scrum Masters, Consultants, Project Managers, Project Sponsors, Program Managers, Software Development Managers and Test Managers who who want to gain an understanding of information gathering in remote and hybrid

## Course Duration

* Available as a 2-day virtual course, a face-to-face, instructor-led course, or as a hybrid face-to-face and remote course

## Course Agenda

### Introduction

### Introduction to Information Gathering

* What is information?
* How to represent information in information gathering sessions?
* Why do Business Analysts need to gather information?
* Sources of information
* How can information be gathered?
* The Information Gathering Workflow
* The Facilitation Framework

### Objective and Mood

* Objective - describing the purpose of the session
  + Purpose
  + Information gathered
  + Analysis performed
  + Feedback provided
  + How will the information is used
* Mood- describes the mood of the session
  + How to assessing the mood of a session
  + Checking participant engagement
  + Avoiding the ‘meeting’ mindset

### Structure and Collaboration

* Structure
  + People - identifying who will participate in the session
  + Locations - considering the location of the participants
    - Co-located
    - Split location
    - Remote
    - Hybrid remote and co-located
  + Time - deciding on the timing of the session
  + Face-to-Face sessions - identifying the venue and equipment used in face-to-face sessions
  + Remote sessions - identifying the platforms and software tools used in remote sessions
* Collaboration
  + Participation - defining how the participants will participate in the session
    - Synchronous
    - Asynchronous
  + Medium - considering how participants will communicate
  + Activities - planning how the participants will collaborate
    - What are collaborative games?
    - Brain writing
    - Affinity analysis
    - Dot voting
  + Elicitation - deciding how information will be elicited from the participants
    - The Listening Triangle
    - Asking questions
    - Opening and closing questions
    - Exploring and hypothetical questions
    - Facilitating questions
  + Recording - deciding how information will be recorded during the session
    - Mind mapping
    - Advantages and disadvantages of mind mapping
    - Mind mapping tools
  + Facilitation - planning how the session will be facilitated
    - Eliciting
      * Asking and listening
      * Paraphrasing and confirming
      * Talking vs. listening
    - Understanding group dynamics
      * Staying on purpose
      * Resolving conflict
    - Summary of facilitation
  + Templates - developing the templates that will be used to elicit and record information
    - Mind mapping templates
    - Visual canvas templates
      * Business Model Canvas
      * Requirements Discovery Canvas
      * Canvas-based software tools

### Relationships and Personalities

* Relationships - considering a participant’s informal relationships (social network)
  + The influence of informal relationships on a session
  + The influence of sub-groups, alliances and power-blocks
  + Cultural Influences
* Personalities - considering the characteristics that influence a participant ’s thinking, motivation and behaviour
  + Ensuring session are inclusive
  + Managing the tendency towards introversion and extroversion
  + The importance of psychological safety

### Information Gathering Workflows

* Planning Information Gathering Sessions
  + Defining the objective
  + Deciding what’s possible
  + Working with time constraints
* Planning and conducting
  + Remote sessions
  + Face-to-face workshops
  + Hybrid sessions
  + Face-to-face and remote interviews
  + Surveys
  + Prototyping sessions

### Review and Conclusion

1. The Mural name and logo are registered trademarks of Tactivos, Inc. d/b/a Mural in the United States and other countries. [↑](#footnote-ref-21)