

## Reducing the time to market for Project Deliverables using facilitated requirements meetings

It's a dilemma as common as it is frustrating: If meetings are the best way to develop requirements that affect multiple departments in an organization, why aren't they more productive? What causes well-intentioned participants to get bogged down and start over every time they meet? Why can't they act faster and more effectively as a group?

Those questions, and others, were vexing a large Chicago area firm faced with a strategy-critical IT-driven business capability – and a very short timeframe in which to act. Although the company had the right IT development processes and methodologies in place, management realized that the requirements development time seemed to take longer than it should. The company called upon NueVista Group and its IT Leadership Practice Director, David De Witt, a certified business analyst, to assist with shortening the time required to elicit, document, and gain acceptance of the business requirements for the mission critical capability.

The company's Project Management Office had said that the inability to get complete requirements on a timely basis was due to several factors they could identify: not having the "right" people in the "right" meetings; inconsistent meeting attendance by participants; long and frequent meetings that ended without decisions about the next steps; and having last minute participants question requirements or attempt to reverse the group's direction.

As it turns out, the company has an effective IT development methodology in place. But the barrier to completion was the unstructured way that the business participants were included in the process. Meetings were not as effectively planned, executed, and managed as they could be because of the transient participation. More importantly, the roles and responsibilities of the various participants and stakeholders in the business areas and in IT were unclearly defined for the requirements development process. "They had the right IT development methodology," De Witt said, "but they didn't have the tactical know-how to execute the requirements development steps effectively with the business and IT stakeholders."

"The key issue," he says, "was how to help the company drastically compress the time it took to elicit the information needed, analyze it, and gain business agreement that requirements were correctly stated in the

documentation. In doing so, it's essential that the company arrive at sound, carefully evaluated and thoroughly developed business requirements that support all of its business objectives."

A common contributor to the drawn out timeframe that seems to envelop these important tasks, he believes, is "the fact that the SME's have full time responsibilities outside of their project commitments and do not always have the necessary time required for their requirements gathering duties." De Witt adds.

As a result, little attention, if any, is given corporate-wide to the composition of the group that will define and then agree upon the requirements for the new capability. The project manager might ask "who *should* attend?" but most often no one asks "why *that person should* attend?"

That's the critical first step, according to De Witt. "We asked management to select individuals whose specific business processes would be affected by changes made by the IT side of the organization."

Building the cross-functional team of the "right" participants is a crucial management task. Once the key players are identified by senior management, their superiors are approached. "We explain that participating in this process must be a high priority that will require the employee's time," De Witt says. If the boss agrees, each designated employee is asked to commit to the task. If the employee can't or won't make the commitment, his or her boss is asked to recommend a qualified replacement. "This mutual accountability makes their participation part of their job," De Witt explains. "Participation after this point is not optional."

*Client Comment:*

*"The key changes NueVista implemented that improved the process significantly, was eliciting senior management to identify the proper resources not for the entire project, but for the AS-IS/TO-BE process specifically. Once those resources were identified, communicating to those resources their specific role in the process, and the effort it would take, then building a strawman with those subject matter experts up front, greatly reduced the overall timeline to complete these documents. Simple concepts like adding the observer role and communicating that role to participants, made the workshops run much smoother!"*

"We must have the commitment of every person identified as essential to the task. Each of them had to agree to be prepared, to attend the meeting or meetings, and to participate. Second, we had to carefully structure our meetings to complete the task by the very real deadline. Third, we had to have robust communications throughout the process to handle the normal changes in a business environment."

De Witt recommended that the company thoroughly prepare each participant for the requirements meetings. Each attendee was assigned pre-work, including background reading.

An important element in the pre-meeting work is distribution of an agenda and a “straw man” document, De Witt explains. The “straw man” is a preliminary description of the current understanding and is prepared by the Project Leader. Participants are asked to attend the meeting ready to discuss their views of the document – agree or disagree, accept or reject, endorse or oppose. Each attendee was called prior to the meeting to confirm attendance and to verify that the pre-work and reading had been done -- or to encourage the participant to complete the pre-work and reading *prior* to the meeting.

*Client Comment:*

*“While this new process requires more planning time for the project managers, yet reduces significantly the amount of time project team members need to sit in meetings. Not only did this new process greatly reduce the time it took to complete these process maps, they were much more complete.”*

Each requirements meeting is conducted according to clearly articulated procedures:

1. A planned agenda is followed, the meeting has specific objectives to meet, and ground rules govern the discussion. The facilitator provides the structure needed to insure that all participants are heard and that the meeting’s objectives are understood by all.
2. The meetings are typically kicked off with a statement from the business leader who is sponsoring the project. This ensures that all understand what the business objectives are for the new capability.
3. All participants must attend and must be prepared for the meeting.
4. Only participants may speak. Participants include business subject matter experts, business managers, IT project managers, and others relevant to developing the requirements for the project.
5. Some who attend the meeting are Observers. Observers are not allowed to participate generally, but can be given an opportunity to ask clarifying questions at the conclusion of a discussion. Since the project task was the development of requirements, there were no IT developer participants in the requirements elicitation; they were included as observers. When the focus shifts from requirements to design, IT developers will need to be participants.
6. The facilitator can re-direct the discussion if it goes “off agenda.” The facilitator can also strengthen the discussion by asking clarifying questions or by summarizing the discussion to insure uniform understanding or agreement.
7. The facilitator puts off-subject comments in the “parking lot,” a list of comments compiled during the meeting that, while important, are not immediately relevant to the agenda items under discussion.

8. One person (not one of the designated attendees) attends the meeting to function as a recorder. This note taker, who is conversant with the processes being discussed, is utilized to keep an accurate and detailed account of all discussion.
9. Before the meeting is adjourned, every item in the parking lot is assigned to a person in the meeting for investigation or resolution with a specific due date.

The selection of participating employees, communication with their superiors, preparation of the “straw man” document, and pre-meeting contact with attendees was handled by the project manager or other members of the company’s management team. De Witt directed the process of planning the agendas and served as facilitator at the requirements meetings. “An effective facilitator,” he says, “really can’t be a member of management or of the project team. My responsibilities were to design the agenda, keep us on track, to enforce our ground rules and to encourage a very free-flowing, but focused conversation. The facilitator needs to be a third-party, objective resource who isn’t or can’t be swayed by personal or hierarchical considerations and who has no vested interest in the outcome.”

Following the conclusion of each requirements meeting, the note taker sends a detailed recapitulation to all participants – in preparation for any subsequent meetings, development of deliverables, or to get feedback about the meeting itself. The notes document serves two purposes, De Witt says. “First, it’s an accurate statement of the meeting’s discussion. Second, it ensures feedback– those reading must accept the report or challenge it. That saves time later because there is an accepted view of the discussion.

“At this point, it’s altogether possible that a multiple meetings will be necessary to reach a consensus on the requirements document. That’s perfectly acceptable,” De Witt says. “But, there will be fewer and more effective meetings due to the adoption of this disciplined, facilitated process.”

Subsequent meetings followed a similar trajectory: Enlist committed personnel; complete all pre-work prior to meeting; adhere to a rigid agenda; and follow the same procedural rules. Using a prepared requirements draft, the meeting was tightly focused on “*what*” to change – not “*how*” to design and build change.

“Don’t expect the straw man to sail through,” De Witt advises. “It’s not unusual to have several drafts circulated before the meeting,” he says. “My rule of thumb is to do as many as you have to and as few as you can.”

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“Requirements meetings often lose focus,” De Witt says, “when someone from the business area or from IT wants to talk about technical design or what to program or how to code. That’s not the purpose of requirements development. We’re working to understand *what* in the firm’s current business and systems processes will change, based on the requirements. We are not at the point of *how* they will change. ”

The level of detail is key to a successful requirements document.

Get too deep and the old symptoms re-appear: lack of productivity; getting bogged down and having to start over at every meeting; repetitive meetings with no results; meeting frequently and having the group’s decisions overruled or its directions changed. Don’t go deep enough and the group’s work lacks cohesion and scope – and invites repetition because the problem has not been solved.

“Our goal was to help the client build a practical, disciplined approach to managing the different stakeholders during the requirements development process,” De Witt says, “that would enable their people to use their time much more effectively. We were told that what we were able to help them accomplish in four meetings over a matter of weeks was more than they were getting done in several months. They tell us they’re not only getting their requirements documents completed faster -- but they’re making better, too!”

*Client Comment:*

*“The facilitation techniques NueVista taught us; such as writing the exception processes on a visible area in the room really helped us speed the process along. Previously we would keep referring to those items, but once we began writing them down where they were visible to the entire group, it stopped being revisited because people felt comfortable they would be addressed separately.”*