

Facilitation Toolkit for Business Analysis

Collaborative/JAD Approach to Requirements Gathering

Description

3 Sessions

The Facilitation class for business analysis and business requirements gathering is designed to provide the BA with a toolkit of techniques, agendas, scripts and templates for conducting business analysis and requirements gathering sessions. The class focus is to:

- Discuss the roles/responsibilities and skills needed to be a successful facilitator
- Demonstrate techniques for consensus building and decision making
- Teach how to use Joint Application Development (JAD) techniques for requirements gathering
- Provide exercises for planning and conducting facilitated sessions for business analysis
- Present techniques for controlling group dynamics and difficult participants

The objectives of the seminar are to:

- Provide practical exercises for: planning and building agendas for decision making, business analysis and business requirements sessions; questioning techniques; consensus building and facilitation tips and techniques
- Give each class participant the opportunity to facilitate specific agenda for different types of business analysis and business requirements gathering modeling techniques

Seminar Content

Session 1

Introduction

- Agenda, ground rules, materials and student introductions

Overview

- What is a facilitator?
- What is the role of a facilitator?
- What are the skills, qualities and traits needed to conduct an effective meeting?
- What are the facilitation rules?

Facilitation skills

- Active Listening
- Questioning
- Neutrality
- Observation skills
 - Reading and interpreting body language

- Responding to observed body language
- Appropriate response styles
- How to handle difficult people
 - Motivation of difficult people
 - Types of problem people- characteristics and what to do
- Presentation skills
- Group Dynamics
 - Phases of group dynamics
 - Leadership styles
 - Managing conflict
 - Reasons for conflict
 - Types of interventions
 - Meeting problems (tips of what to do when things go wrong)
 - Meeting set up and ground rules

Facilitator's Tool Kit

- Facilitation techniques
 - Brainstorming
 - Storyboarding
 - Interviewing
 - Kit reviews
 - Teleconferencing tips and techniques
 - Consensus building techniques
 - Decision making techniques
- Ice Breakers and Team Building Exercises

Building an agenda

- Steps for planning an agenda
- Exercise- Planning a meeting approach
- Preparation for Short Meeting Facilitation Exercise

Session 2

Exercise- Short Meeting Facilitation using a specific technique demonstrated in class

Requirements Meeting Management

- JAD Methodology
 - Preparation (checklists)
 - Workshop (set up, basic communication techniques, ground rules)
 - Follow-up (checklists)
- Business Analysis and Business Requirements Gathering Meeting Roles and Responsibilities
 - Business Sponsor
 - Project Manager
 - Facilitator
 - Business SMEs
 - Business & Technical Experts

- Key components of a successful meeting

Discovery Modeling Techniques for Scoping Business Needs

- Business Process Improvement Techniques and Agendas
 - Business Process Flows- “as is” and “to be”
 - Exercise- Facilitating the high level “to be” business process flow using storyboarding
 - Process Mapping for Gap Analysis
 - Exercise- Facilitating focus groups for gap analysis using storyboarding

Session 3

Discovery Modeling Techniques for Business Requirements Sessions

- Software Development Techniques and Agendas for Scoping Sessions
 - Context Diagram
 - Use Case Diagram
 - Exercise- Facilitating using the context and use case diagram
- Software Development Techniques and Agendas for Requirements Gathering Sessions
 - Activity Diagrams with swimlanes
 - Exercise- Facilitating focus groups using the activity diagram with swimlanes using storyboarding
 - Business Use Cases
 - Exercise- Facilitating focus groups using the business use cases for requirements gathering

Wrap up

Who Should Attend?

Those who will find this of value are: Solutions Leads, Requirements Leads, JAD Facilitators, Business Analysts, Technical Leads, Technical Analysts, Project Managers, SMEs, Requirements Analysts, Business Systems Analysts, Architects, Developers and Designers.

Materials

Each class participant receives a Seminar Handbook with sample agendas and scripts for conducting interactive BA/TA scoping, requirements definition sessions and technical requirements/design focus groups using the techniques taught in class. A Process Description, JAD Procedures Guide, templates and checklists are also provided.