

Elicit the stakeholders

Business Analysis

Analysis Skills : 3

Elicitation is the main task of the BA. It allows to collect all the information necessary to the realization of a project. Nevertheless, a good knowledge of the environment in which one finds oneself will facilitate the work.

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Introduction

Information hunting requires good collaboration with the various stakeholders that were listed during the planning process using the **RACI** role tool. Stakeholder elicitation is present throughout the project, during planning, during needs analysis, during requirements writing, until project validation.

The EC (Elicitation and communication)

The **EC** is the section about retrieving information from stakeholders as seen by the **BABOK**.

It allows us to be able to understand, analyze, prioritize the needs of the company and its employees.

A **PDF** attached to this publication, in the form of a data stream, summarizes all the tasks, their descriptions, tools, stakeholders involved, as well as mnemonic techniques. It has been produced for educational purposes.

Good elicitation practices

To understand the needs of a business, it's not enough to ask users. You're going to have to investigate and diagnose. It often happens in an interview where opinions differ and not everything is absolute truth. To be well prepared to interview the different parties, a bit of preparation is required.

- Start by investigating the problem on your own.
- Prepare your questions with your investigation and personal opinion in mind.
- Don't take for granted what people tell you, the truth is elsewhere, the words are embellished.
- Note what seems consistent. A little gumption never hurt anyone.
- Don't just gather information, analyze it. That takes skill and intelligence.

Ask the right questions

What?

Try asking questions that begin with "**What ?**" allows you to assess the situation and get the big picture.

- What is the problem you are trying to solve ?
- What is the opportunity you are trying to take advantage of ?
- What is the impact on the future if nothing is done ?
- What do you think is the purpose of the project ?
- What do you think you will gain from changing the existing ?
- What is the current profit margin ? Do you think that by changing the process, the margin will be better ?

Who?

Try asking questions that start with "**Who ?**" helps to know which people are involved or to understand a process. It also helps to expand the list of contributors to interview.

- Who is involved ?
- Who uses this information ?
- Who will create the necessary information ?

Why?

Try asking questions starting with "**Why ?**" allows us to know the reason behind the query.

- Why is the company pursuing this opportunity over another ?
- Why did the company decide to choose this software over other options.
- Why is this a problem for the company, in your opinion ?
- Why do you want to replace the ERP? And why now ?
- Why is the ROI only 2% over 10 years for this project ?
- Why are the employees with the highest intellectual potential being fired ?
- Why does the company stubbornly refuse to adapt to the times ?

Where ?

Try asking questions that start with "**Where ?**" allows for the source of the data.

- Where does the data come from ?
- At what point does the inefficiency of the process begin ?
- At what time do process inefficiencies begin ?
- Where are the collaborators located ?

When ?

Try asking questions starting with "**When ?**" helps control the time aspect and priority of a process.

- When did the problem first appear ?
- When did you first experience the problem ?
- When do you encounter this problem ? Only at a certain time or all the time ?
- When do you perform this task ?
- When does the process start ?

How ?

Try to ask questions beginning with "**How ?**" helps define the process of performing a process.

- How this issue affects the way you work ?
- How these changes will affect your industry ?

Some tricky answers and how to respond

- "**Because we've always done it this way**", can be countered with the question "**Why do you do it this way ?**" or "**Who was the first to do it this way ?**" or "**Didn't anyone consider changing the process ?**"
- A "**unanswered question**" can be perceived as uncomfortable. Asking the question "**What are the reasons behind this way of doing things ?**" helps remove the ambiguity of being personally involved.

Choose an approach

There are several elicitation techniques. The face-to-face interview is not the only tool, and fortunately so. These include :

- The existing documentation.
- Observation of a collaborator. By the way observation can be passive or active. Trying it yourself always puts people at ease.
- The interview and questions. An interview can be done in a small group.
- The **"surveys"**, reserved for the large group.
- The **"workshop"**, a technique used to bring people together and get them to participate on a topic defined in advance
- The **"brainstorming"**, on the contrary, allows anyone to express themselves without a scope.
- The **"focus group"** allows like the **"workshop"**, to work on a very specific topic with a small number of people.
- The interface analysis concerns especially the technical collaborators.
- The prototype allows the collaborators to have a vision of what we approach.
- The **"reverse engineering"** allows to master the other side of the picture. For example, to know the formula for an **"Excel"** spreadsheet.
- Competitive analysis allows you to take a look at competing products and be able to debate them.

Elicitation techniques

- Analyze the company as if you were at a job interview.
- Get to know the work environment, the different business areas, the subsidiaries.
- Read the process documentation. A company that has no paper processes is a company whose processes are very simple to understand.
- Are there statistics ?
- Check that the documentation is up to date. Outdated documentation can show that the company does not have much interest in an area of activity or that employees know by habit a knowledge that is passed on orally.
- Consult the company newspaper is a source of information not negligible.
- The website can also be a source of information and statistics. It can give information about the staff and services offered.
- Analyze the screens, software and processes.
- Understanding the business rules can give information about costs, delivery charges.

- Getting to grips with the IT architecture, network plans is a good source of information to anticipate processes.

Taking ownership of a profession you don't know

It's always attractive and exciting to be able to learn a profession you don't know. However, you will never be an expert in the eyes of those to whom this is just the bread and butter. Stay humble and don't try to be the one who knows, it's counterproductive!

- Observe as much as possible during a visit, for example.
- Analyze the processes and try to point out the shortcomings. If a process seems wrong, look into it further.
- Measure the time of a process to get consequential information on statistics or to use it as leverage for comparison.
- Try to identify work constraints.
- Try to do an employee's job (with his or her consent, of course).
- Observe the processes at different times of the day.
- Observe the tools, the security in place.
- Finally, observe the outcome.

Preparing for an interview

- Think about the objective.
- Prepare your questions.
- Get to know the collaborator by asking colleagues.
- Summarizing the objective at the beginning of the interview helps make the atmosphere casual.
- Always paraphrase answers by having them confirmed to you.
- Keep your questions short.
- Take notes during the interview, electronically. This will save you time when writing your deliverables.

The workshop

The Workshop is certainly the most widely used approach aside from face-to-face elicitation.

- It is used to develop quality requirements.
- Sessions are often intensive.
- Requirements are synergistically formulated with several people. This saves an enormous amount of time when checking and validating them.
- Note down all ideas, even those that will not be retained.
- Think about reframing the discussion if the conversation strays from the original goal.
- Think about giving everyone a voice, that everyone can share their knowledge and experiences.
- Try to find a solution to every point in the debate.
- If there is any work that needs to be provided by any of the participants, consider putting a time limit on it.

> The workshop is not a conference. People participate, it's pro-active ! You share your experiences and knowledge.

Conclusion

Every situation has its own set of questions. No one becomes a good elicitor overnight. You can put your best foot forward by preparing these questions in advance, in view of the situation and your own investigation. Let your improvisation run wild. Don't be tied to your question sheet. And remember, **practicing makes you a blacksmith !**