Seilevel Whitepaper

How to Prepare for Requirements Sessions with Your Users

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requirements defined

There is general agreement in the software industry that talking to end users to gather requirements is critical to the success of the project. However, a common issue is that users are particularly busy. For example, if an organization decides to add features to a call center application, talking to the call center representatives is critical, but it's also costly to pull them away from taking calls. In addition, requirements analysts are extremely busy and may have to limit how much time they spend with any one user.

A common issue in gathering requirements is leaving a stakeholder meeting where you missed major requirements because the "next question" to ask did not occur to you at the time. It is unreasonable to think that this will never happen. The reality of requirements efforts is that they are iterative. In addition, there is quite a bit of critical analysis that must take place, and that analysis cannot always happen immediately in a meeting environment.

Whatever the reason, there is certainly a need to get the most out of time spent with the users. So how do you best prepare for meetings with your end users?

1. Organize Your Time

Requirements analysts should realize that the requirements life cycle can be time intensive, including time to analyze, edit, review, and update. The key is to maximize the value from everyone's time.

One suggestion is to make sure that requirements sessions are well planned, inviting the minimal group of people necessary to get value out of the meeting. The burden of extra time spent should be on the requirements analyst, not the users who are being taken away from their primary jobs. Prepare an agenda and appropriate artifacts prior to the sessions in order to keep the meeting focused on making valuable progress.

In dealing with any super-users who are unable to commit much time, it is important to zero in on specifically what information they must provide. Then allow these users to suggest alternative users to meet with to provide additional information, ensuring them you will allow them to review what the alternative users provided.

2. Prepare Your Models In Advance

Another suggestion is to prepare draft requirements models in advance of the meeting. The reality is that good requirements analysts do in fact know quite a bit about the business processes and requirements. There is a misconception that they should remain unbiased; however, these individuals become experts in the systems they are capturing requirements for and that expertise should be utilized to its full advantage.

As an example, if you are going to cover a topic with a user about how he or she does a task, then you can try to come up with the obvious use cases in advance. You can then take it one step further and actually try to write the header information and normal course for the use cases. Similarly, you may find it valuable to draft state diagrams, where you capture the states and transitions that are obvious and highlight the unknown ones for completion in the meeting. Virtually all requirements models can be pre-drafted if you know a little bit about the business.

In doing these models ahead of time, you will find yourself jotting down lots of questions in the margins, like "What really happens at this step?" or "Should they do X instead of Y?". Even if you throw away the draft model because it was all wrong (which rarely happens), there is still a value from the time investment because you came up with a list of detailed questions. Essentially this is a brainstorming tool for you.

Starting from a blank slate can seem like a daunting task, so once you have draft models, in the meetings with users, you can use these models to work from. Similarly to the authoring experience, reviewing the models will spur questions in the reader's mind. Therefore they make an excellent tool with which to facilitate a user meeting.

3. Prepare Your Elicitation Questions in Advance

One of the key steps to take prior to a stakeholder meeting is to prepare a list of questions to be asked during the meeting. These questions might be created based upon past experiences or recent meetings with the user. If the analysts know the users, the organization, or the types of issues they face, that knowledge should lead to obvious questions. If the analyst has met with the user already, new questions should be created based upon those original meetings, lessons learned and new issues identified. Also, if drafted models exist, those most certainly should prompt questions.

There are some stock questions that you can use as a guide to requirements gathering sessions. Keep in mind, though, each project will need its own unique questions, and some of these questions are likely not appropriate.

How to Identify Actors for Software Requirements

Here are some suggested questions to ask to identify the actors of the system.

- Who uses the system?
- Who installs the system?
- Who trains people to use the system?
- Who fixes the system?
- Who starts up the system, who shuts it down?
- Who maintains the system?
- Who creates, updates, deletes information in the system?
- What other systems interface with the system?
- Who gets information from this system?
- Who provides information to the system?
- Does anything happen automatically at a predetermined time?

How to Identify Use Cases

The following suggested questions can be used to identify the list of use cases or system functionality.

- What functions will the actor want from the system?
- Does the system store information?
- Do the actors need to create, update, or delete information?
- Does the system need to notify an actor about changes in an internal state?
- Are there any external events the system must know about?
- What is the actor's overall job?
- What problems has the actor had in the past?
- What steps are manual today?

How to Identify Alternative Courses

In order to identify alternative courses or exception paths, these questions should be asked at every step of a use case main course.

- Is there some other action that can be chosen?
- If X does not happen, then what should happen?
- What if the actor cancels an operation (e.g., closes a window)?
- What if the actor provides incomplete information?
- What might go wrong at this step?
- What if part of the system goes down or is unavailable?
- Are there any events (or interrupts) that might occur at any time during the use case?

4. Sit with Your Users

If your users are extremely busy, and the project involves changes to or replacement of an existing solution, then turn the challenge into an advantage. Sit beside the users while they perform their job tasks. Typically this is a good way to elicit requirements because users cannot always articulate their needs if they are used to completing tasks without thinking about them. This technique will require follow-up meetings with the users after, but then those meetings can be prepared for as above, with intelligent questions based on the observations, thereby shortening the time that users are away from their work.

There are many ways in which requirements analysts can intelligently prepare for requirements sessions with users. Typically a mix of the above suggestions will work well on any project. These tips will help the analyst and users get the most value out of the available time.

About Seilevel

Founded in Austin in 2000, Seilevel is a professional services firm that creates requirements for Fortune 1000 customers. The Seilevel mission is simple: redefine the way companies create software requirements. Today, only a small percent of IT projects succeed; the primary reasons for project failure are poorly defined or missed requirements. Leading companies turn to us to define their requirements because of a proven approach to software requirement definition that saves development dollars and maximizes resources. Seilevel gets the requirements right, so our clients get their software right.

About the author

Joy Beatty has deep knowledge of all aspects of the software development life cycle, particularly with online and offline sales applications, pricing applications and ecommerce solutions. She has been instrumental in developing a strong methodology at Seilevel for use case development and requirements gathering. For more information, visit us at www.seilevel.com