

## Preparing for a Workshop

### What needs to be identified:

The 6 “P”s are essential to define for a successful workshop.

**Purpose:** a brief description for the reason the workshop is being held.

### The 6 “P”s

#### **Participants:**

- **Sponsor:** Legitimizes the workshop and ensures the right participants attend. Kicks-off the workshop and attends the end-of workshop “show-and-tell”. If she or he is a content expert and/or a decision maker, they attend.
- **Content Participants:** Business subject matter experts (SMEs, representative users, key stakeholders, product managers, etc.) and delivery/engineering team members with the knowledge needed to create the workshop deliverables.
- **Recorder:** Person(s) creating real-time documentation for use during and after the workshop. The recorder can be developer, tester, coach, scrum master, project lead, or facilitator-in-training. A recorder should *not* be a content participant.
- **Facilitator:** Neutral servant of the group who helps plan, design, and facilitate the event.
- **Observers:** Person(s) who need or want to learn about the workshop content or process, not a participant.
- **Planning Team:** A subset of content participants who collaborate with the facilitator to plan the workshop. They help define workshop’s scope and purpose, determine who needs to be in the workshop, what the deliverables and inputs will be, and act as “on call” aides during the workshop. There should be at least three people on the planning team, including the facilitator. A balanced planning team includes representative from the business and engineering. Strive for no more than four, total.

**Principles:** Working agreements (e.g., ground rules) for the workshop. Includes *decision making rules* so the content participants can efficiently reach closure on the deliverables and decisions.

**Products:** *Very specific deliverables* including how each will be represented, what their format will be, their level of precision, and completion criteria for each deliverable. Includes product-related deliverables, dependent on the type of workshop (e.g., vision statement, product box, product roadmap features, MMFs, in/out scope table, context diagram, user stories, nonfunctional requirements etc.). Products also include planning and team process deliverables (e.g., release schedule, team communications, risks and risk mitigation actions, metrics).

Input products are essential to jump-start and accelerate the workshop. Inputs can include items such as a draft vision statement or image, glossary of key domain terms, workflows, personas, context diagram, list of domains, stories in the backlog, etc. Inputs can also include templates for workshops activities. The planning team (see next page) is instrumental in preparing these inputs. Workshop participants often need to review these inputs prior to the workshop to mentally prepare for the workshop.

**Place:** Logistics and timing.

**Process:** Agenda that identifies the flow of activities, timing, tools and materials.

**What does the customer (e.g., “uber” product owner /champion) need to do?**

The customer, eg., “uber product owner or product champion, collaborates with the planning team to:

1. Prepare and share the product *vision* (unless that is a workshop deliverable). She or he often also shares goals, objectives, market drivers and competitive landscape (for commercial products), strategic alignment needs, and timelines.
2. Identify what decisions will be made in the workshop, and help identify how to “decide how to decide”.
3. Identify participants for the workshop(s) – including those who will also serve on the planning team. Why? Because the planning team plays a vital role *prior* to the workshop (see below).
4. Create an invitation to workshop participants, along with an approach to communicate with them their workshop roles and responsibilities.
5. Ensure participants are committed to completing pre-work (*if any*) and post-work.
6. Identify who will be responsible for making decisions about the workshops deliverables.

**What does the Planning Team do?**

The planning team works with the EBG facilitator to identify the “**P**”s on the prior page. They:

1. Decide the optimum deliverables needed to achieve the workshop purpose.
2. Agree on the format for each deliverable so it is useful and useable for the consumers of the workshop’s deliverables.
3. Assemble or create draft workshop inputs.
4. Work with your EBG facilitator(s) to:
  - Establish a common language for workshop deliverables (e.g., product roadmap and requirements such as features, MMFs, stories, story map, quality attributes, etc.).
  - Iteratively develop and review the workshop inputs
  - Draft working agreements about decision-making
  - Identify workshops roles and communications
  - Determine mechanisms for conducting ongoing retrospectives (debriefs) to pause, learn and adjust the planning processes.
5. Help marshal the internal resources needed to get the right participants.
6. Arrange logistics.

*Note:* the planning team participants will need *twice* the time commitment as the rest of the participants

**What can I read to get more information?**

- Please visit EBG’s web site to learn more about facilitated [workshops](#) and [workshops for agile](#) teams. Visit our publications section for numerous [articles on workshops](#) and on [agile analysis and requirements practices](#).
- Ellen Gottesdiener’s book, [Requirements by Collaboration: Workshops for Defining Needs](#) is a good source of detailed information workshop planning, design and facilitation.
- Ellen’s second book, [The Software Requirements Memory Jogger](#) describes essential requirements good practices and many of the requirements representations (models) delivered in workshops.
- Ellen is collaborating with [Mary Gorman](#), EBG’s Director of Quality & Delivery on a [book on agile product needs](#)