From: Ellen Gottesdiener
To: ellen@ebgconsulting.com;
Subject: [Success with Requirements] Being There: Observations on Observation; Spring Sale on Self-Paced eLearning; Newest IIBA-Approved Course, and other Resources
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ebg CONSULTING Ellen Gottesdiener, Publisher

Forward to a Colleague

Helping your business and technical teams get product requirements right so your projects start smart and deliver the right product at the right time

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Success with Requirements

Forward to a Colleague

Welcome to our Newsletter!

Hi, ellen -

Welcome to issue #4, Volume 2 of EBG's eNewsletter, *Success with Requirements*.

When was the last time you visited your users to learn what they go through to get their work done? This can lead to a profound understanding of requirements, provide context for your analysis, and build rapport. Consider the combination of techniques you use to elicit requirements. Is observation in the mix? In this month's eNewsletter, I share my observations on observation.

I hope you'll find it useful, and, as always, welcome your comments and suggestions for upcoming *Success with Requirements* topics.

~ ellen

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Being There: Observations on Observation

I've worked with many project teams on a wide variety of products. In all cases, effectively eliciting requirements is a challenge. One team was building software to be used during clinical trials by nurses and research investigators. Another team was replacing a global manufacturer's inventory management application to be used in large warehouses for tracking and releasing invoices. Still another was creating kiosks for the public to use in buying theater tickets, stamps, and discount grocery and gas coupons.

As you may know, I'm a big advocate of requirements workshops as an elicitation method, having written a book on the topic. However, I also recognize that multiple elicitation techniques are often warranted. One of my favorites is ***being there* -- observation**.

Observation means going to the users' environment, watching what they do, taking notes, and periodically asking clarifying questions about **what they're doing and why**. This technique works whether you're replacing or enhancing existing products, and even when you're prototyping products that are new to the marketplace.
Related elicitation techniques include contextual inquiry, field observation, shadowing, ethnography, and soft systems analysis.

Note: A step beyond observation in understanding users' work is to actually *do* the work, often referred to as "apprenticing." (Sometimes this isn't feasible -- for example, if you're building software to be used by surgeons, emergency responders, or financial traders.)

Here are some ways to **maximize the benefits** you get from observation.

Think Ahead

Prepare a list of activities you want to observe and questions you want answered. Review existing documentation such as user manuals, standards, guidelines, competitive information, systems documentation, or screen shots of any existing system.

Some questions you might consider asking during the observation are:

- How do you decide which tasks to do in which order?
- What interruptions typically occur while you're working?
- What's the most useful object in your work environment?
- What's the easiest thing for you to do?
- What's the most difficult thing for you to do?
- What one thing would you *not* want changed about how you do a particular task?

Include "meta process" questions from time to time. These are questions about the task itself. For example:

- Why did you start with that activity?
- Did that help you get the tasks done?
- What are some of the issues in your mind right now?
- What made you decide to do that?
- Does this task typically take you this long?

Plan to observe people who share the same roles but have **different experience levels** -- novices, experts, and those in between. You will

learn about different quality attribute needs (e.g., performance, usability) from users who have varying amounts of experience. An experienced claims adjudicator, for example, needs less navigational help, whereas a novice might need prompting and help.

At the Job Site

Look for job aids. Are users accessing training manuals, checklists, handwritten notes with shortcuts, or other resources? If not, ask your users what non-software tools they have, and why they don't use them. Also ask them what kinds of aids would really help them perform their tasks. This can surface **tacit requirement**s as well as give you clues about the usability of documentation.

Does the work seem to flow very smoothly? Do users comment about correcting their own work as they go? You might hear comments such as, **"I didn't mean to do that"** or "Actually I think I do this first." Ask them if they actually more often do it the other way.

Watch out for the "Hawthorne Effect," whereby users behave differently while performing their job because they know they are being observed. To test your assumptions about changes in behavior due to observation, you might ask whether your presence is changing the way they go about the tasks.

Take notes, and summarize them soon afterward. This will help you remember your observations. Ask permission to share your notes with the persons you observe, and request that they check the notes for missing information. Also, ask them if you can share summary descriptions or models, and be sure to thank them!

Mix it Up

Combine observation with other elicitation techniques (e.g., prototypes, facilitated workshops, documentation study). In numerous projects I've been involved with, our team discovered that observation -- preceding our requirements workshops -- was helpful for analysts, testers, and developers. It led them to ask **even better questions** and flesh out model details during our workshops.

Observation is a powerful technique to help you understand product requirements. Being fully present, watching your customers deal with their tasks in their work space, and **seeing their struggles and challenges help you appreciate your customers' needs** and build rapport. Sometimes, *being there* is a good thing to do.

~ ellen

References

Gottesdiener, Ellen. *The Software Requirements Memory Jogger: A Pocket Guide to Help Software and Business Teams Develop and Manage Requirements*, GOAL/QPC, 2005. Pages 84-86 provides a short summary of observation as an elicitation technique (what is it, why do it, what does it do, and steps and tips for how to do it).

Spring Sale and Special Offer on Self-paced eLearning

We'd like you to know we are offering a spring sale on our self-paced

eLearning training Foundation for Requirements Development and Management.

This 8-course curriculum teaches essentials of requirements development and management, and features tips, downloads, scenarios, quick checks to test your learning, and more. This course is IIBA-endorsed and is intergrated with The *Software Requirements Memory Jogger* (which is included with the training). Read more here.

We are offering "Success with Requirements" eNewsletter subscribers an additional 10% discount, use code: **FRSWR04** when you register here.

Newest IIBA-Approved Course: Agile Requirements

Our instructor-led training course *Agile Requirements: Collaborating to Define and Confirm Needs* was just approved as an endorsed education course with the IIBA (EBG Consulting is a charter Endorsed Education Provider).

This training builds skills in the agile method of developing requirements, the basis for delivering business value to customers on agile projects. Our clients often combine this training with our *Agile Jump-Start* coaching service.

Upcoming Events

1. Mary Gorman us delivering two full-day tutorials and a presentation at Business Analyst World/Project Summit, Philadelphia, PA (April 28-May 1, 2008).

2. Paul Reed will be delivering a full-day tutorial and a presentation at ProjectWorld/World Congress for Business Analysts, San Diego, CA (June 24-27). "Success with Requirements" eNewsletters can get a discount when you register using discount code SPKRM2010PR.

Resources of Interest

Each month we provide a few resources we think are worthwhile. The resources below are related to this month's topic on observation.

We welcome your comments and suggestions for future issues!

- Read how anthropologists use their skills with deep observation in the corporate world in Kate Kane's article, "Anthropologists Go Native in the Corporate Village."

- In this booklet for Peace Corp volunteers, a succinct training lesson is provided on observation in the first 10 pages (it also provides ideas for interviewing and facilitation).

- This paper documents a research project on meta-observation as a way to learn on IT projects -- learning by watching the observation, finding among other things that this type of experience can promote deep learning.

- Skilled facilitators are first astute observers. In our facilitated

workshops training, we emphasize this skill and use a simulation including observer roles. Why? Because as facilitators, we should challenge ourselves to not only observe the group we serve, but also *our own self as we facilitate*. This helps us stay attuned to our own behavior and when we may not be congruent (i.e., when our thinking and our behavior are out-of-wack).

- One tool I've learned from Roger Schwarz and his Skilled Facilitator approach is to use a left-column case which you "unpack" a difficult situation to become a better observer as a facilitator. An overview to the left-column, described both in Roger's book and the Fifth Disciple Fieldbook, gets you to conduct meta-observation of yourself - and is a powerful way to learn metaobservation.

Archive Issues

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