

# Requirements Workshop Work Breakdown Structure

Reference Introduction to Part II in  
*Requirements by Collaboration* by Ellen Gottesdiener, Addison-Wesley, 2002.

## Phase 1: Plan

### **Stage 1: Define Workshop Purpose and Participants Tangible Deliverables: Workshop Purpose Statement**

#### **Tasks**

1. Gather information from initial contact.
2. Identify workshop and project sponsor.
3. Assemble a planning team.
4. Gather information from sponsors.
5. Characterize project.
6. Identify potential participants, recorder, and observers.
7. Draft initial purpose statement.
8. Gather information from participants and planning team.
9. Identify recorder.
10. Identify observers and on-call subject matter experts.
11. Conduct participant interviews.
12. Identify workshop time constraints.
13. Select requirements navigation strategy.
14. Decide whether multiple workshops are needed.
15. Refine the workshop purpose statement.
16. Schedule workshop participants.

### **Stage 2: Define Workshop Principles, Products, Place, Process Tangible Deliverables: Workshop Agenda**

#### **Tasks**

1. Define decision rule and decision rule process.
2. Draft generic and special principles (ground rules).
3. Identify tangible and intangible workshop deliverables.
4. Identify level of detail needed for all workshop products.
5. Identify workshop inputs (draft models, documentation, pre-work, templates, and workshop aids such as instructions and samples).
6. Delineate doneness tests for deliverables.
7. Design workshop process: opener, activities, and closer.
8. Identify and schedule workshop place.
9. Arrange for workshop refreshments.
10. Schedule sponsor for kick-off and show-and-tell.
11. Draft workshop agenda.

**Stage 3: Prepare Workshop Inputs**  
**Tangible Deliverables: Workshop Inputs**

**Tasks**

1. Create draft models of workshop input materials.
2. Design workshop pre-work materials and instructions.
3. Acquire or collect templates, workshops, and modeling guidelines.
4. Identify system and user documentation needed.
5. Review draft workshop agenda with sponsor and participants.
6. Prepare workshop pre-work materials.
7. Revise draft agenda.
8. Create visual tools such as posters.
9. Acquire materials and tools for the workshop room.
10. Select final workshop evaluation form.
11. Arrange for workshop repository.

**Stage 4: Orient Participants**  
**Tangible Deliverables: Final Workshop Agenda**

**Tasks**

1. Assess the need for an orientation meeting.
2. Schedule orientation.
3. Prepare for and conduct orientation.
4. Adjust workshop agenda if necessary.
5. Prepare and distribute final workshop agenda.

**Phase 2: Conduct: Do**

**Stage 1: Prepare Workshop Room**  
**Tangible Deliverables: Workshop Room Ready to Go**

**Tasks**

1. Arrange tables and chairs.
2. Hang posters.
3. Prepare walls.
4. Ensure that refreshments are available.
5. Test equipment.
6. Make workshop tools accessible (markers, cards, sticky notes).
7. Greet participants.

**Stage 2: Open Workshop**  
**Tangible Deliverables: none**

### **Tasks**

1. Conduct sponsor kickoff.
2. Review purpose, principles (test decision rule process), and products.
3. Explain process roles (facilitator and recorder).
4. Review agenda.
5. Obtain pre-work materials from participants.
6. Conduct opener activity.

### **Stage 3: Conduct Workshop** **Tangible Deliverables: Requirements Models**

### **Tasks**

1. Facilitate workshop.
2. Adjust workshop process to deliver products.
3. Maintain workshop parking lot or issues list.
4. Record workshop content.
5. Conduct interim workshop evaluations.
6. Prepare for show-and-tell.

### **Stage 4: Close Workshop** **Tangible Deliverables:** **Assigned Issues and Dates, Documented List of Next Steps, Completed** **Workshop Evaluation Forms or Poster**

### **Tasks**

1. Conduct show-and-tell.
2. Review workshop products list against actual deliverables.
3. Review and assign remaining issues.
4. Define and assign post-workshop actions.
5. Complete workshop evaluation.

### **Phase 3: Assess: Check**

### **Stage 1: Review Evaluations** **Tangible Deliverables: Summary of Evaluations**

### **Tasks**

1. Read workshop evaluations and debriefing documentation from the session.
2. Conduct self-assessment.
3. Deliver copy of evaluations to workshop sponsor and planning team.
4. Debrief immediate learning point with sponsor and planning team.

### **Stage 2: Complete Post-Workshop Assignments**

**Tangible Deliverables: Completed Parking Lot or Issues Documentation,  
Completed Actions and Associated Documentation**

**Tasks**

1. Research issues.
2. Document issues to all participants.
3. Close issues and communicate issue resolutions.
4. Conduct action steps.
5. Document action steps.
6. Close actions and communicate actions.
7. Close outstanding requirements models per issues and actions.

**Stage 3: Publish and Review Workshop Documentation  
Tangible Deliverables: Edited Workshop Documentation**

**Tasks**

1. Generate or post documentation from workshop.
2. Distribute workshop documentation.
3. Edit and annotate workshop documentation.
4. Update documentation.
5. Redistribute final copy of documentation.

**Phase 4: Improve Facilitation Process: Act**

**Stage 1: Plan Next Steps and Workshops  
Tangible Deliverables: Project Action Plan, Next Workshop Schedule**

**Tasks**

1. Define next steps for using workshop deliverables in project activities.
2. Assess need for additional workshop or adjustment to existing workshop plan.
3. Schedule workshop(s) as warranted.
4. Begin planning process (Phase 1).

**Stage 2: Assess Business Value  
Tangible Deliverables: Cost-Benefit Analysis**

**Tasks**

1. Analyze and estimate workshop costs (person time, project lapse time, actual funds).
2. Estimate costs for non-workshop alternatives.
3. Interview sponsors, stakeholders, and participants as needed.
4. Estimate benefits and value.
5. Prepare and present cost-benefit analysis.

6. Prepare and distribute post-workshop evaluation (four to eight weeks later).
7. Read and summarize evaluations.
8. Conduct self-assessment.
9. Summarize workshop data (before, during, after).
10. Determine improvement opportunities: goals, questions, metrics.
11. Determine data to capture.
12. Draft changes in process, aids, templates, or methodology.
13. Obtain feedback on proposed changes.
14. Implement changes.

**Stage 3: Adjust Facilitation Process**  
**Tangible Deliverables: Documented Changes**

**Tasks**

1. Draft changes to process, documentation, tools.
2. Approve changes.
3. Communicate changes.
4. Implement changes.
5. Monitor metrics against goals.