Transform How You Gather Business Application Requirements

Empower Your Team with a Guided Process for Facilitating Requirements Workshops
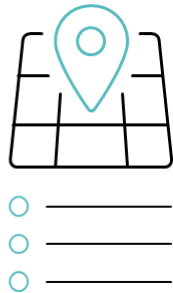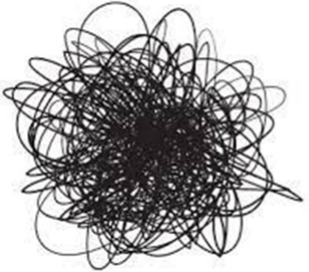
APPRISING

Friday,
24 March 2023

12:00pm NZDT

Online
Microsoft Teams

From an unstructured mess of **written** and **spoken** information
to a clear **visual** backlog of **user stories**,
that **everyone understands**.

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- 15+ years Microsoft Dynamics 365 / Power Platform consulting experience

- Specialisation: Power Platform adoption, governance & design

- Design thinking & Design Sprint certified, IDEO U teaching team

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When facilitating requirements workshops...
Is this you or your team? 👇

1. Don't know what questions to ask.

2. Difficult to keep conversations on track.

3. Key people are missing from the workshop.

4. Everyone has a different understanding.

5. Not eliciting the right information.

6. Time consuming documentation that is not understood

Poll

What would it mean to you if you could overcome these challenges?

Preparation

Discovery & Planning

Solution Mapping Framework

Expert Interviews

User Journey

Process Map

Backlog

Outputs

Solution Blueprint

Expert Interviews

Let's find out more from the people who are experts.

Introduction

The aim of expert interviews is to capture the challenges a group has before diving into more detail.

This is a structured discussion where we **listen to our Experts** and collect all the challenges that come up during the interview.

The facilitator asks questions to **1 person at a time**, for 5mins.

Everyone else takes notes.

Once an 1:1 interview is finished we move onto the next person.

Taking Notes

We capture our thoughts as questions in the '**How Might We**' format. The HMW format helps us define our biggest challenge **without prescribing a solution**.

- 'How' assumes that there are solutions out there, so it provides confidence.
- 'Might' suggests that the group can put ideas out there that might work or might not - either way it is ok.
- 'We' suggests the group is going to do it together and build on each other's ideas.

Example

Example:

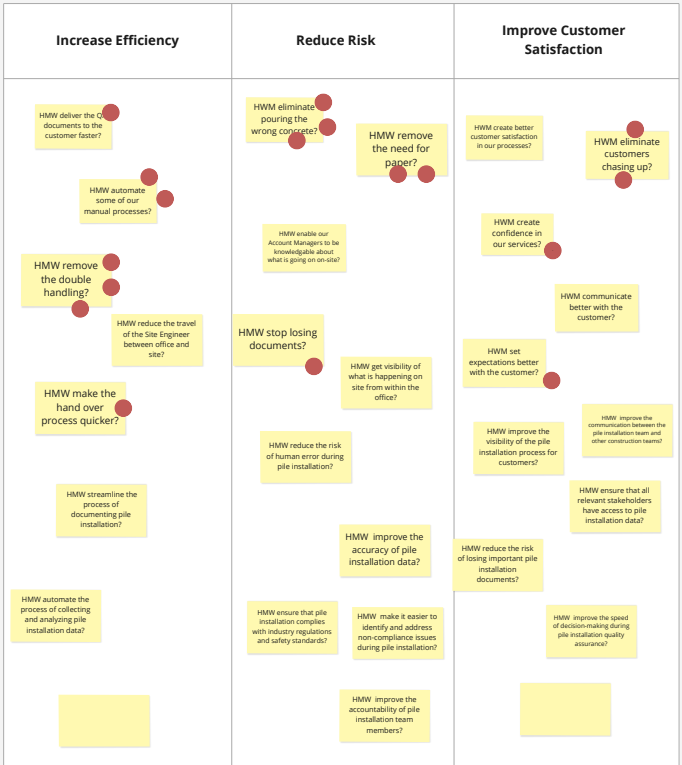| Customers complain that we are often late with our deliverables | → | HMW ensure that we deliver what we say we will in a timely manner? |

Find your individual workspace to create your HMWs 👇 Listen to the interview and collect the problems on sticky notes.

Participant

Participant

Participant

Participant

Participant

Participant

Participant

Participant

Organise

Great job on collecting so many HMWs! 👋

We'll now transfer all our HMW post-it's from our individual workspaces on this wall. Put the HMW's under the right category, this helps getting an overview more easily.

⏱ **5 min**

Raise above competition by	**Reduce** for our customers:	**Eliminate** for our customers:	**Create** for our customers:

Voting

Now let's narrow this whole board filled with sticky notes to the most vital challenges we want to focus on in this workshop.

"Which challenges are the most important ones, *for the people that we serve*, to solve?"

⏱ **5 min**

Participant ●● / ●●
Participant ●● / ●●
Participant ●● / ●●
Participant ●● / ●●
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Participant ●● / ●●
Participant ●● / ●●
Participant ●● / ●●

Expert Interviews - Example

Increase Efficiency

HMW deliver the QA documents to the customer faster?

HMW automate some of our manual processes?

HMW remove the double handling?

HMW reduce the travel of the Site Engineer between office and site?

HMW make the hand over process quicker?

HMW streamline the process of documenting pile installation?

HMW automate the process of collecting and analyzing pile installation data?

Reduce Risk

HWM eliminate pouring the wrong concrete?

HMW remove the need for paper?

HWM enable our Account Managers to be knowledgable about what is going on on-site?

HMW stop losing documents?

HMW get visibility of what is happening on site from within the office?

HMW reduce the risk of human error during pile installation?

HMW improve the accuracy of pile installation data?

HMW ensure that pile installation complies with industry regulations and safety standards?

HMW make it easier to identify and address non-compliance issues during pile installation?

HMW improve the accountability of pile installation team members?

Improve Customer Satisfaction

HWM create better customer satisfaction in our processes?

HWM eliminate customers chasing up?

HWM create confidence in our services?

HWM communicate better with the customer?

HWM set expectations better with the customer?

HMW improve the communication between the pile installation team and other construction teams?

HMW improve the visibility of the pile installation process for customers?

HMW ensure that all relevant stakeholders have access to pile installation data?

HMW reduce the risk of losing important pile installation documents?

HMW improve the speed of decision-making during pile installation quality assurance?

<<Journey Name>>

Visualise the user's journey through the process you want to improve. Use this template to get a high level understanding of the user's current experience, their pain points and explore potential opportunities to make the experience better.

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Persona:

Phases
High level steps required to complete the process

| Phase 1 | Phase 2 | Phase 3 | Phase 4 |

Actions
Activities the the user performs

Interacting with
Systems, tools or people the user is interacting with

Thinking/ Feeling
What is the user thinking or feeling? Positive or negative?

Pain Points
Problems that the user faces

Opportunities
Potential improvements to the process to give a better experience
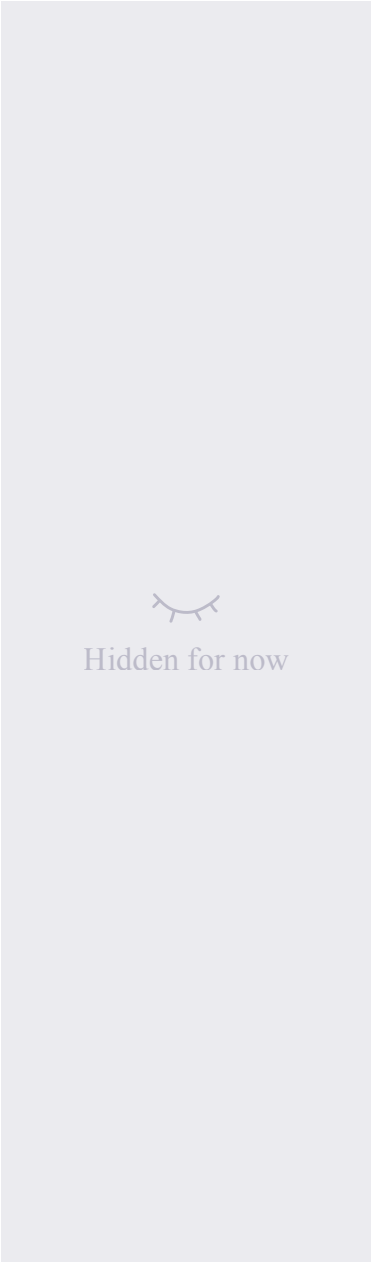
Hidden for now

Prioritise

Nice one, we now have a lot of opportunities! 👏

Let's narrow down the most important

Consider Impact vs Effort

When you make your decision, also consider the effort to implement, and the impact it might have. Focus on what you would consider high **impact**!

Vote

It's time to place our votes!

Take the dots with your name and place them on the opportunities that will have the most impact and move us towards our desired outcomes.

3 min

Decide

Once all the dot votes are placed, the decider needs to choose the opportunities that should be included in the MVP, by placing a decider dot.

The decider can place as many decider dots as they like.

3 min

High | Low effort, high impact ⭐ | High effort, high impact 🤔

IMPACT | Low effort, low impact 🥱 | High effort, low impact 👎

Low | Low | High

EFFORT

Pile Installation Checklist

Visualise the user's journey through the process you want to improve. Use this template to get a high level understanding of the user's current experience, their pain points and explore potential opportunities to make the experience better.

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Persona: Site engineer

Phases
High level steps required to complete the process

| Create checklist | Complete checklist | Create documents | Review documents |

Actions
Activities the the user performs

Create checklist	Complete checklist	Create documents	Review documents
Design piles / Create install checklist / Get design reviewed by Design Manager	Hand over meeting with Site Crew / Hand over paper checklist / Review checklist completion / Collect & check concrete dockets / Work through installation issues / Document issues	Return checklist to the office / Return supporting documents to the office / Scan all paper documents / Compile documents into a single PDF	Send to Design Manager to review / Send approved document to customer / Receive counter signed document from customer

Interacting with
Systems, tools or people the user is interacting with

Create checklist	Complete checklist	Create documents	Review documents
Email / Excel / Design documents / Design Manager / Printer / In the office	Truck / Site Crew / Paper checklist / On site / Concrete dockets / Pen & paper	Truck / Scanner / Paper documents / In the office / PDF software	Email / Design Manager / Customer / In the office / PDF

Thinking/ Feeling
What is the user thinking or feeling? Positive or negative?

Pain Points
Problems that the user faces

Create checklist	Complete checklist	Create documents	Review documents
Time consuming to generate checklist / Duplicate copies of checklist once printed / Not sure which checklist is the most up to date version / Not always clear if the review is complete / Back & forth via email for review changes	Concrete dockets get lost / Manual capture of concrete docket information / Paper checklist gets lost / Paper gets wet & dirty / No real time information on progress or issues if not on site / Manual review of checklist can lead to mistakes / Manual check of concrete strength can lead to costly mistakes	Can take weeks to get checklist back to office / Time consuming to compile into single document / Double handling and input of information / Documents must be hand delivered to office / Scanning is slow / Easy to compile docs in wrong order	Unhappy clients with slow service / Manual review process, physical documents / Have to follow up with customer / Documents do not always get signed / Lots of following up

Opportunities
Potential improvements to the process to give a better experience

Create checklist	Complete checklist	Create documents	Review documents
App to hold checklist info in once place / Auto-generate checklist / Cloud based app, accessible from mobile device / Automated checklist approval process / Ensure approval before checklist handover to site crew	Scan concrete docket / AI to read concrete strength from docket / Cloud based app accessible from office / Digital check list hand over / Automated check list validation / Issue notifications to Design Manager	Automate document consolidation / Cloud based app accessible from office / Automated updates notifications to client based on progress	Automate approvals process / Digital signatures / Automated notifications and follow up

Process Map

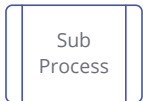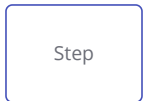## Let's use the opportunities identified and look toward the future...

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Let's draw a visual representation of the future state process.

This enables stakeholders and the project team to quickly get on the same page.

It provides a tool for clearly communicating how things will work in the future and roles that each user plays in that future state.
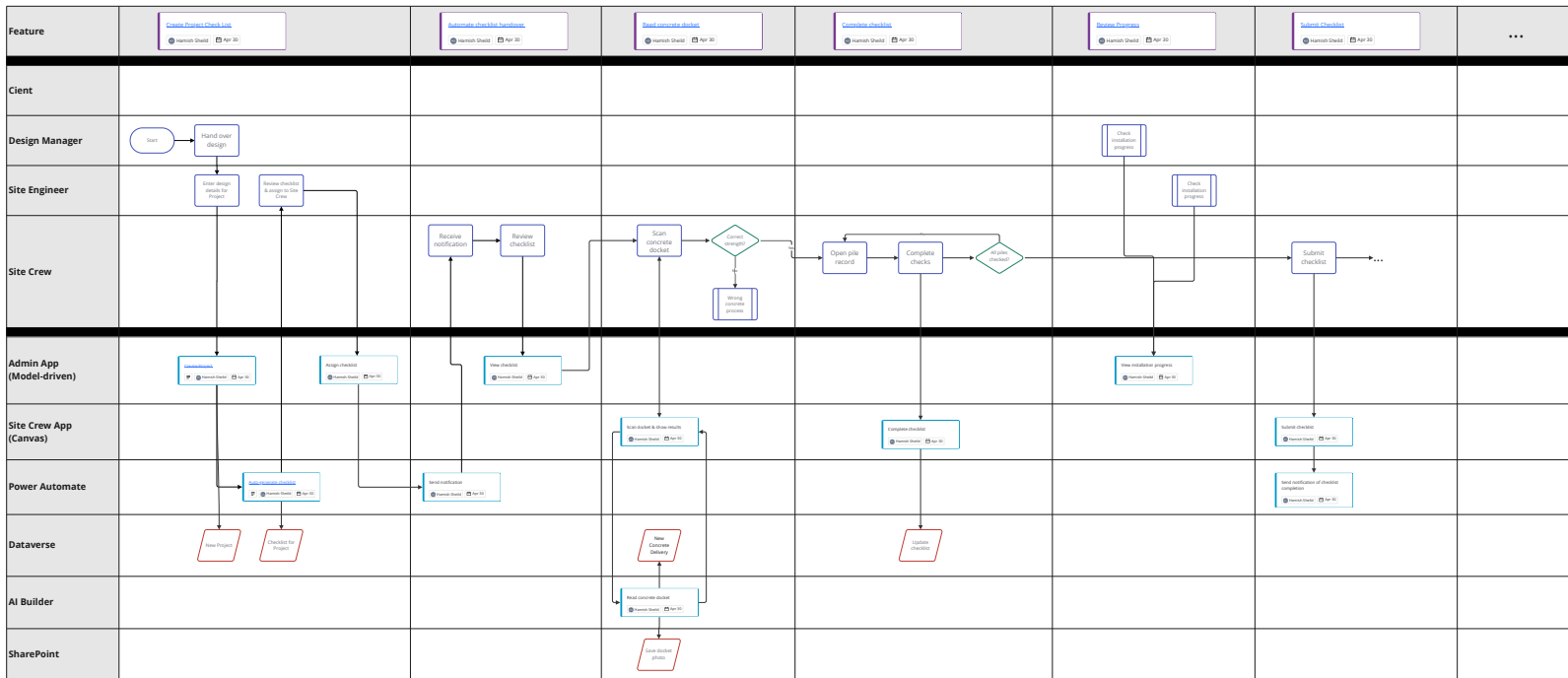
Diagram Shapes

Start / Stop

Step

Decision

Data

Sub Process

Feature			
		Scan concrete dockets	
Persona 1			
Persona 2			
Persona 3			
System			

Pile Installation Check List
Hamish Shield — Apr 30

Feature

| Create Project Check List | Automate checklist handover | Read concrete docket | Complete checklist | Review Progress | Submit Checklist | ... |
| Hamish Shield · Apr 30 | Hamish Shield · Apr 30 | Hamish Shield · Apr 30 | Hamish Shield · Apr 30 | Hamish Shield · Apr 30 | Hamish Shield · Apr 30 | |

Cient

Design Manager
- Start
- Hand over design
- Check installation progress

Site Engineer
- Enter design details for Project
- Review checklist & assign to Site Crew
- Check installation progress

Site Crew
- Receive notification
- Review checklist
- Scan concrete docket
- Correct strength? → Wrong concrete process
- Open pile record
- Complete checks
- All piles checked?
- Submit checklist → ...

Admin App (Model-driven)
- Create project
- Assign checklist
- View checklist
- View installation progress

Site Crew App (Canvas)
- Scan docket & show results
  - Hamish Shield · Apr 30
- Complete checklist
  - Hamish Shield · Apr 30
- Submit checklist
  - Hamish Shield · Apr 30

Power Automate
- Auto generate checklist
  - Hamish Shield · Apr 30
- Send notification
  - Hamish Shield · Apr 30
- Send notification of checklist completion
  - Hamish Shield · Apr 30

Dataverse
- New Project
- Checklist for Project
- New Concrete Delivery
- Update checklist

AI Builder
- Read concrete docket
  - Hamish Shield · Apr 30

SharePoint
- Save docket photo

Backlog

It's time to document the details

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Let's make our future processes actionable by building up a backlog of user stories that we can design & build from.

We are going to tag our diagrams with Epics, Features or User Stories so that we have a clear visual representation of our backlog and how the development activities relate to the processes.

Structure the Backlog

First, let's define what your Epics and Features will be. A good rule of thumb is...

Epic = a business process

Feature = an opportunity (or group of opportunities) from the business process

📄 Use your favourite backlog management tool (we use Azure DevOps) to write up the Epics and Features.

Identify & Document User Stories

Similar to the Epics and Features we are now going to tag areas of the business process diagram with User Stories.

A good rule of thumb is...

User Story = a single step from the system swimlanes of the business process diagram.

📄 Go back to your backlog management tool and write up the user stories.

Map the Backlog Items

Option 1: Manual Sync

For each Epic, Feature & User Story that you documented, copy the cards below 👇, give them a title and paste them onto the process diagrams they align with.

Epic Title

Feature Title

User Story Title
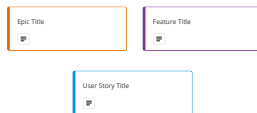
Ctrl + C to copy

Ctrl + V to paste

**Option 2: Automated Sync Integration with Azure DevOps**

Your cards will magically appear below 👇. Copy the cards and paste them onto the process diagrams they align with.

Note: This integration is not part of this template. See Azure Cards + Miro | Team Collaboration Apps Marketplace for more info
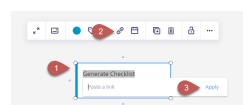
Optional: Link the map to the User Stories

Add links to your backlog items to each of your User Story tags on the map. This enables the project team & stakeholders to better collaborate on the requirements and drill into the details.

e.g. Copy the link of the User Story from the backlog
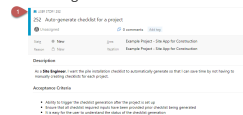
Add the link to the card on this whiteboard

Feedback

Solution Mapping Framework

"Wanted to let your know I used your requirements framework in Mural for the A&D I am running at the moment, and this morning it was **GOLD**. Within 5 minutes we went from "yes the process works the same way every time for all branches" to discovering that's not the case. "

"I would say overall, change in solution building at this company is evolving much quicker than I originally anticipated and because of your course, I'm able to navigate us to **higher efficiencies**!"

"I used your Expert Interviews workshop format for the first time on Monday and I've got another one today. Total **game changer**, Hamish. We've a third Expert Interviews session and then I'll be drafting a User Journey Map for feedback before we create and estimate a User Story Map to support the business case."

"...the client recently signed off on the Solution Design - which is always a great feeling! The **best thing** about it was **using your framework** to help achieve this design - So kudos to you mate on providing me with new tools I can carry on for the next project."

"This is a **game changer** for us."

"I've been using elements from your posts / blogs / videos on day to day on the project with **great success**, I hope they [my team] can adopt the same."

"Looking back at the Catalyst program and DBA I totally agree that the 'Defining business Applications Program' is more practical and easier to digest. Not only that, I was able to apply this **framework with great results** in a current project."