



Facilitating a Requirements Workshop

Onsite or Virtual

The art of bringing people together, face-to-face or remotely, to elicit requirements, make decisions, and gain consensus on solutions is a critical success factor for teams. This course teaches facilitation techniques that can be used for structured requirement workshops and facilitating a small informal group to a decision. This course goes beyond traditional facilitation training by focusing on facilitation techniques specific to gaining a shared understanding of requirements in person or with remote participants.

Students will spend 60% of class time participating in interactive, real-world business case studies and performing each key role in at least one session. Each student will have the opportunity to practice facilitating multiple requirements sessions in a "safe" environment with personalized feedback.

The workshops in this course require students to plan the requirements workshop, develop the correct questions to ask the group, and facilitate the group to a consensus on the requirements using one of the learned techniques. This course supports and expands on the techniques in the BABOK and ICAgile's Agile Value Management track.

Learning Objectives

- Facilitate using proven techniques for eliciting detailed business, functional and non-functional requirements.
- Identify when and how to use each technique.
- Develop confidence and a skill set to conduct requirements workshops, whether face-to-face or with remote participants
- Actively practice learned skills and techniques.
- Use a requirements planning session template.
- Prepare the participants for the requirements session.
- Perform each facilitation role through role playing each session.
- Conduct the session to stay focused on the core requirement that was planned as a deliverable.
- Select which facilitation technique to use for each core requirement being gathered.
- Complete checklists for managing and conducting the session.
- Facilitate a requirements workshop including remote participants (if desired).

Intended Audience

This course is designed for experienced, knowledgeable business analysts involved with requirements elicitation and analysis. Students are expected to understand the purpose of business and functional requirements.

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Prerequisites

We recommend that students first attend our *Essential Skills for Business Analysis* class or have experience in project scope definition, eliciting requirements from subject matter experts, and understanding how business requirements fit into the entire systems development effort.

Learning Topics

Topic	Time
Introduction	1.5 hours
<ul style="list-style-type: none">• Define requirements facilitation• Define participant roles• Learn guidelines for requirements facilitators• Explore techniques for facilitating across distance	
Student Workshop	2.5 hours
<ul style="list-style-type: none">• Conduct a mini-requirements workshop. (May include remote participants if desired.)• Practice techniques used for requirements workshops	
Session Feasibility	2 hours
<ul style="list-style-type: none">• Determine when requirements workshops are appropriate:• Review the core requirements components and discuss how they are best gathered• Learn when <i>not</i> to use requirements workshops• Student Workshop: Practice determining session need using real-world scenarios.• Learn facilitation techniques:<ul style="list-style-type: none">○ Brainstorming○ Consensus building○ Visualizing<ul style="list-style-type: none">▪ Flowcharting▪ Storyboarding	
Student Workshop	5 hours
<ul style="list-style-type: none">• Lead a session to teach and utilize various facilitation techniques as assigned by the instructor (May include remote participants if desired.)• Conduct individual sessions• Observe and give feedback for each session	
Planning and Preparing for a Facilitated Session	2 hours
<ul style="list-style-type: none">• Plan the session:• Prepare for a session:<ul style="list-style-type: none">○ Outline the goals and requirements deliverables.○ Select session participants and determine if pre-session interviews are appropriate.• Student Workshop: Utilize the Session Plan Summary Template, Session Plan Template, and Session Agenda Template to plan and prepare for a facilitated session.	
Conducting the Session	1 hour
<ul style="list-style-type: none">• Learn the stages of group development/productivity	

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<ul style="list-style-type: none"> • Facilitate decision making – work toward consensus • Conduct the session: <ul style="list-style-type: none"> ○ Utilize a checklist for managing the session ○ Set session rules and manage the session <ul style="list-style-type: none"> ▪ Encourage participation ▪ Manage group focus ▪ Learn reactive techniques to use during the session ○ Create a follow-up action plan • Follow up on the session: <ul style="list-style-type: none"> ○ Produce the final requirements document ○ Share session feedback ○ Determine the next steps to finalize the requirements 	
Student Workshop	6.5 hours
<ul style="list-style-type: none"> • Conduct a requirements workshop using the plans developed in the prior student workshop. (May include remote participants if desired.) • Produce a requirements deliverable using one or more of the facilitation techniques learned in class. • Personal feedback will be provided to drive skill development. 	
Course Summary	.5 hours
<ul style="list-style-type: none"> • Bringing it all together • Develop an Action Plan with next steps on the student’s current project 	
Appendix – Job Aids	
<ul style="list-style-type: none"> • Common Challenges for Virtual Meetings • Applying Elicitation Techniques in a Virtual World • Engaging Participants • Keeping Groups Focused • Ice Breaker/Energizer Tips 	



This class is a part of the **B2T Training Business Analyst Certification Program**. For more information on the program, please see our [Certification](#) page.