"Oh No, You Gave Me What I Asked For!"

Part 2: Using Consulting Skills to Uncover Expectations

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Industry Article

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As presented in Part 1 of this article, project professionals realize that projects fail when customer requirements are not clearly defined and customer expectations are not met. Project managers and business analysts face a number of challenges to developing the kind of usable products that customers expect.

Part 1 mentioned 5 pitfalls to uncovering expectations: 1) the Time Trap, 2) Stated Requirements Don't Meet Expectations, 3) Ineffective Questioning, 4) Using the Wrong Techniques and 5) Accepting Solutions Presented by the Business. This article continues the discussion by addressing how these common pitfalls can be addressed by using a consulting approach and focuses on consultative questioning.

Using Consulting Skills to Overcome Requirements Pitfalls

Overcoming the many pitfalls described in Part 1 of this series requires a consultative approach. Why is that? Being a consultant to the business helps ensure that expectations are met. The background of a situation is assessed by understanding the business problem, analyzing the current state, understanding the limitations, and gathering supporting statistics detailing the exact impact of the current situation. The project professional is then in an excellent position to recommend a solution that will solve the business problem at hand. Effective consultants have learned that the key the key to success includes:

1) Asking questions to uncover problems and synthesizing the responses
2) Analyzing those problems
3) Advising clients by recommending solutions.

This article explores step 1 and focuses on consultative questioning. Part 3 of this series will conclude with steps 2 and 3 of the process, and will focus on analysis and recommendations.

Step 1) Asking Question that Uncover Problems and Synthesizing the Responses

Asking the Right Questions

Asking the right requirements questions can be challenging, because we need the right context for asking good questions. Being a consultant requires asking questions to obtain the right perspective, before trying to understand the details of the end product. Once we have the context, we can then move on to questions related to our product.

A few good consultative questions to ask, regardless of the product or service of the project, always include the business context with such questions as:

1. What business problems are being solved with the project?
2. What opportunities is the organization taking advantage of?
3. What are the external threats that this project addresses?
4. How does the project take advantage of the organization's strengths or compensate for its weaknesses?

5. What is the product description and project vision?
6. How does this project link to the organization's strategic direction?
7. How will this product be perceived in this organization?

A few good questions for understanding the project context can include such things as:

1. How much are you willing to spend on this project?
2. What is the priority of this project in relation to the other projects in this portfolio/program/organization/division?
3. What are your time constraints and what causes them?
4. What risks do you see with this project?
5. Who/who else should we talk to?
6. Who are the subject matter experts and what experience do they have?
7. If you had to choose among time and cost, scope, and quality which is the most important to you? Least?

Some good questions for learning high-level product requirements includes such things as:

1. To what extent will this new product cause business process to change? Which ones will change and in what way?
2. What do people need to know in order to use this product?
3. How will internal and external customers use the product
4. How will the product be sold? Maintained? Supported?
5. What impacts to other areas are you aware of?
6. How stable are the product requirements?
7. Tell me about the best/worst product feature you've encountered? Easiest/hardest product to use that you've had to use?

Tip: avoid questions related to detailed features and functions until the business, project, and product context are clearly understood and documented.

Synthesizing Responses

Synthesizing responses uses active listening skills to take a great deal of disparate information and organize it in a way that is useful to the appropriate stakeholders. It starts with active listening, which involves ensuring that what is said by the speaker is actually heard correctly and completely by the listener. The listener needs to ask clarifying questions and paraphrase what is thought be heard. Asking good and relevant questions builds confidence by the speaker that there are no assumptions or misconceptions on the part of the listener.

To effectively synthesize information, critical thinking skills are needed along with the ability to:

- Process large amounts of information. Similar past experience can be useful, but care should be taken to avoid making assumptions based on past project experiences.
- Organize, discriminate, and discern disparate pieces of information, putting them together in concise and useful ways.
- Distinguish between what's important from what is not, and discarding the unimportant. Experience is invaluable in making this determination. Analysis tools can also be extremely helpful. For example, Pareto analysis is a helpful technique for determining the major factors causing a business problem. It uncovers the critical 20% of causes that lead to 80% of the results.

Traceability and Creating Structure from Chaos

A useful tool in synthesizing a large amount of information is the traceability matrix, which is a table for recording requirements. The structure of this table is hierarchical, so that high-level requirements can be documented in the beginning of the project and details can be added as more is learned. In addition, requirements attributes, such as a unique identifier, textual description, requirements source, rationale, priority and many more can help categorize requirements as they surface.

Although there are many techniques for creating structure from chaos, traceability provides the most effective way to organize large amounts of disparate pieces of information, ultimately helping to ensure that every requirement adds value, that what was approved is actually implemented, and that changes are controlled. It does so by providing a structure that allows requirements to be linked to business and project objectives, business problems, and deliverables. Traceability also helps ensure that the product can be built, tested and verified after implementation. Finally, logical groupings of the table help manage changes more easily.

Tip: Use traceability to help ensure that each requirement is linked with project deliverables, project objectives, business problems, and business objectives, preventing rogue requirements from sneaking into the project.

Summary

Uncovering expectations takes time and requires the art of consultative questioning. In this article, we focused on tips for effective questioning. We presented several ideas and examples of asking the right questions, regardless of the product or service of the project. We stressed the importance of synthesizing the information obtained to make it relevant. We also showed how a traceability matrix can be a useful tool for synthesizing sizable amounts of information like requirements. Part 3 of this series will conclude with the remaining steps of the consulting process, and will focus on analysis and recommendations.

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Watermark Learning helps improve project success with outstanding project management and business analysis training and mentoring. We foster results through our unique blend of industry best practices, a practical approach, and an engaging delivery. We convey retainable real-world skills, to motivate and enhance staff performance, adding up to enduring results.

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