



SKYLINE

Making Meetings Meaningful

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NEW IIBA Chapter Meeting November 18th, 2020

Solutions Consulting

- Discovery Services
- Product Setup
- Better Requirements Training and Coaching
- Business Analysis
 - Coaching and Mentoring
 - Maturity Assessments
 - Staff Aug Opportunities
- Agile Enablement Services



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About Kurt

- **Joined Team Skyline in October 2010.**
- **Started career as a Software Developer**
- **Transitioned to Business Analysis in 2014**
- **Professional Scrum Product Owner certified**
- **Professional Scrum Master, Level 2, certified**
- **Certified Business Analyst Professional (CBAP)**
- **Have been described as an “Energizer Bunny”**
- **Not a fan of monotone, boring presentations**

“Seeing the blockers is easy. Finding the path through takes diligence, determination, and grit.”



Roadmap



Learning Objectives

Keys to Preparation



Understand how successful preparation can set the stage for more efficient collaboration

Driving Engagement



Drive better engagement from team members, stakeholders, executives, etc.

Closing the Loop



Ensure action items are carried out as planned / expected.





Ineffective Meetings





Have you ever...

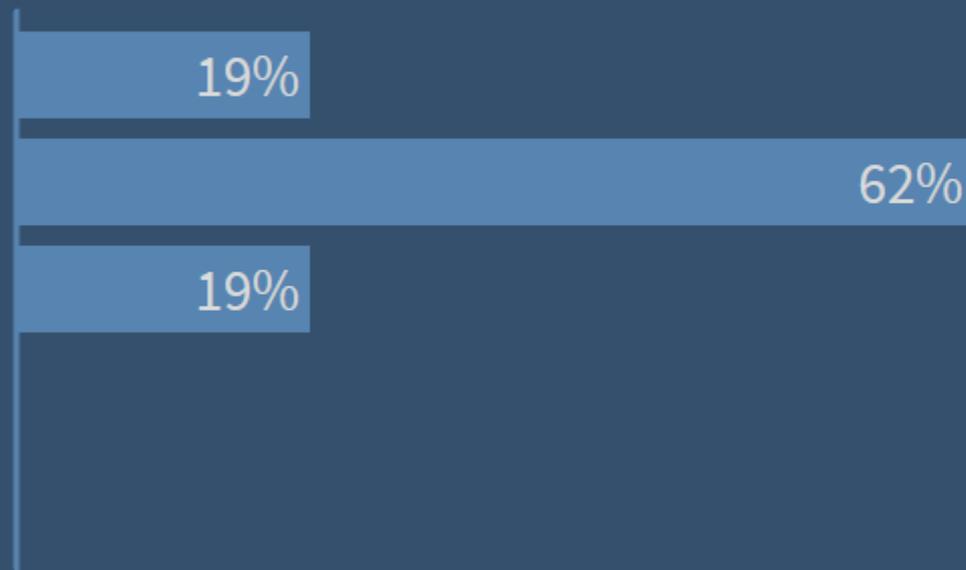
- Looked at your calendar to find a poorly named meeting that you're invited to? No details in the event, no attachments, vague messaging?
- Entered a meeting which doesn't start until 5 to 10 minutes late?
- Heard the leader / organizer start a meeting with a statement like "Eh, which meeting is this one again?"
- Unsure where the conversation started, unsure where the conversation is at, and even less sure where it's going when someone asks you "What's your thoughts?"



When poll is active, respond at PolleEv.com/kurtwondra339

Text **KURTWONDRA339** to **22333** once to join

When was the last time you were in an ineffective meeting?



Source:

<https://www.pollevanywhere.com/multiple-choice-polls/ub0OpWWpMYf9uPC>

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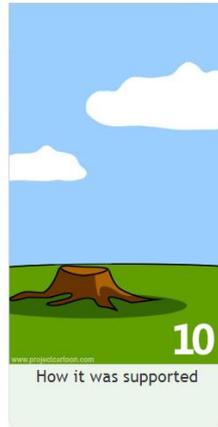
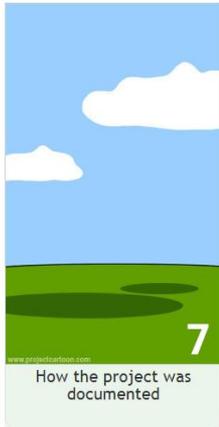
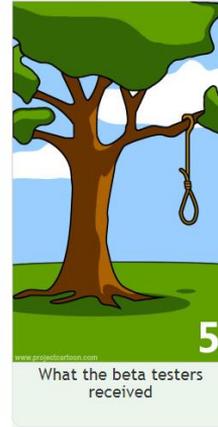
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Themes

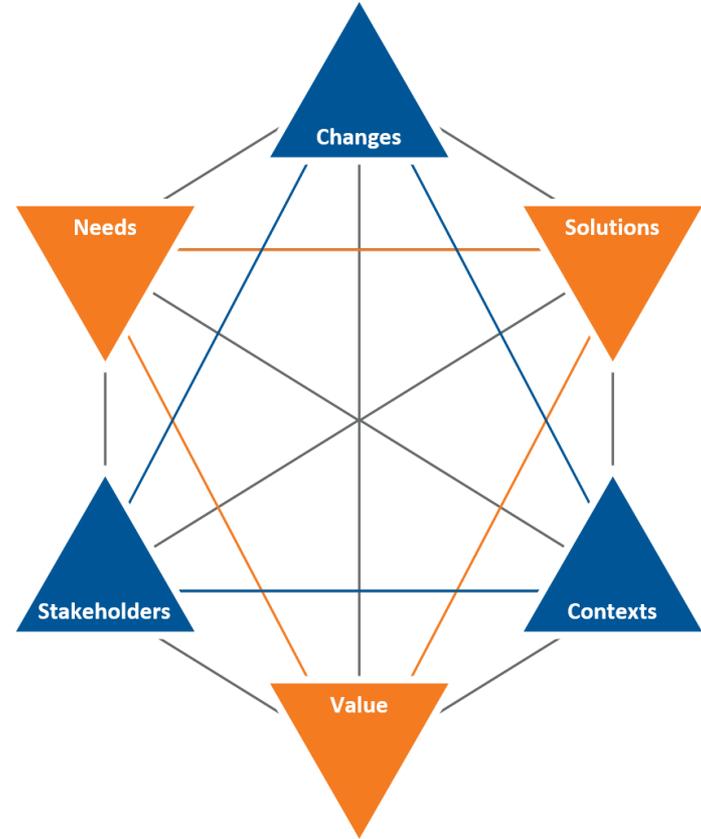


Understand the Need



Core Concept Model

- **Need:** A problem or opportunity to be addressed
- **Context:** The circumstances that influence, are influenced by, and provide understanding of the change
- **Solution:** A specific way of satisfying one or more needs
- **Change:** The act of transformation in response to a need
- **Stakeholder:** A group or individual with a relationship to the change, the need, or the solution
- **Value:** The worth, importance, or usefulness of something to a stakeholder within a context



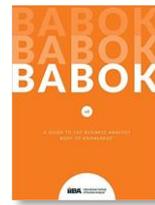
Be the Maestro





Keys to Preparation

Tools at Our Disposal

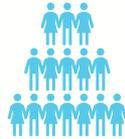


3.1 Plan Business Analysis Approach



- Planning approach
- Formality and level of details of BA deliverables
- BA Activities
- Timing of BA work
- Complexity and risk
- Acceptance

3.2 Plan Stakeholder Engagement



- Perform stakeholder analysis
 - Roles
 - Attitudes
 - Decision making authority
 - Level of power or influence
- Define Stakeholder Collaboration
- Stakeholder communication needs

3.3. Plan Business Analysis Governance



- Decision making
- Change control process
- Plan prioritization approach
- Plan for approvals

3.4 Plan Business Analysis Information Management

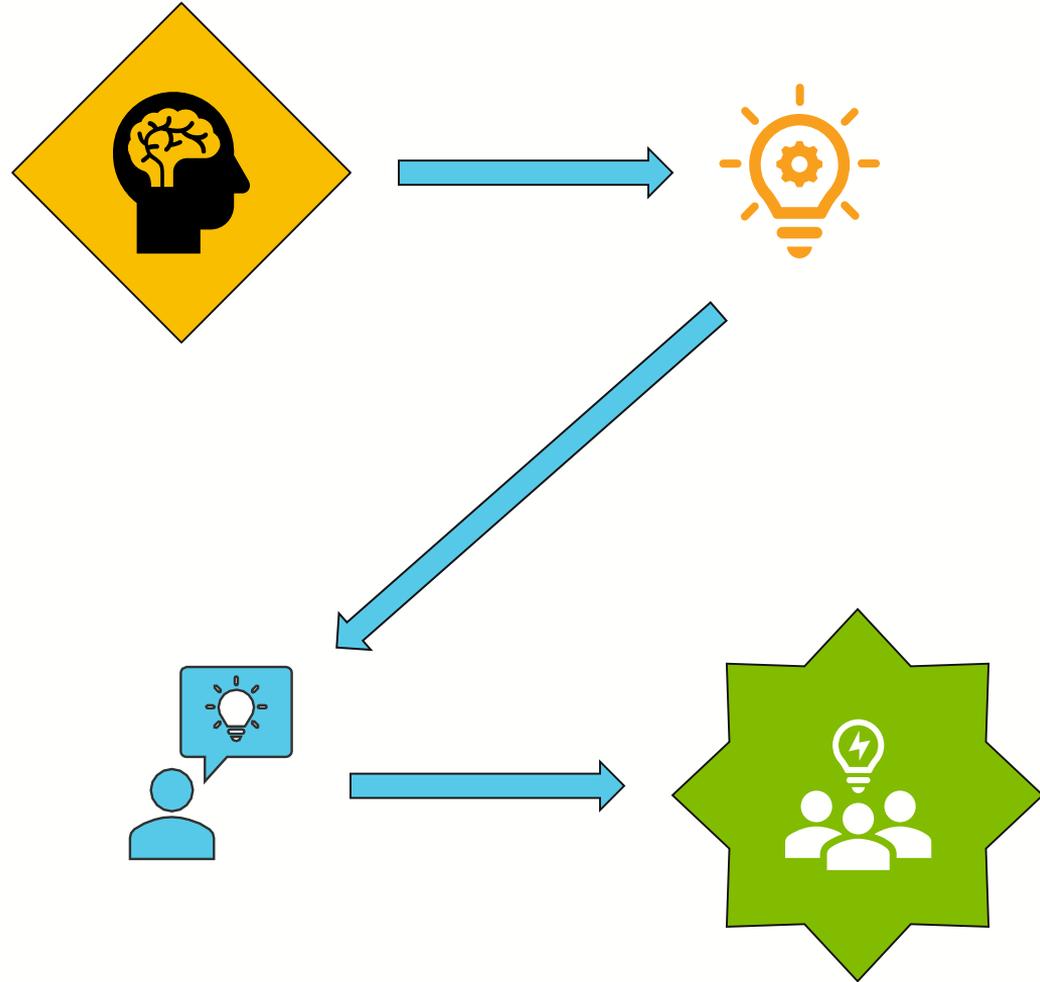


- Organization of BA Information
- Level of abstraction
- Plan traceability approach
- Plan for requirements reuse
- Storage and access
- Requirements attributes

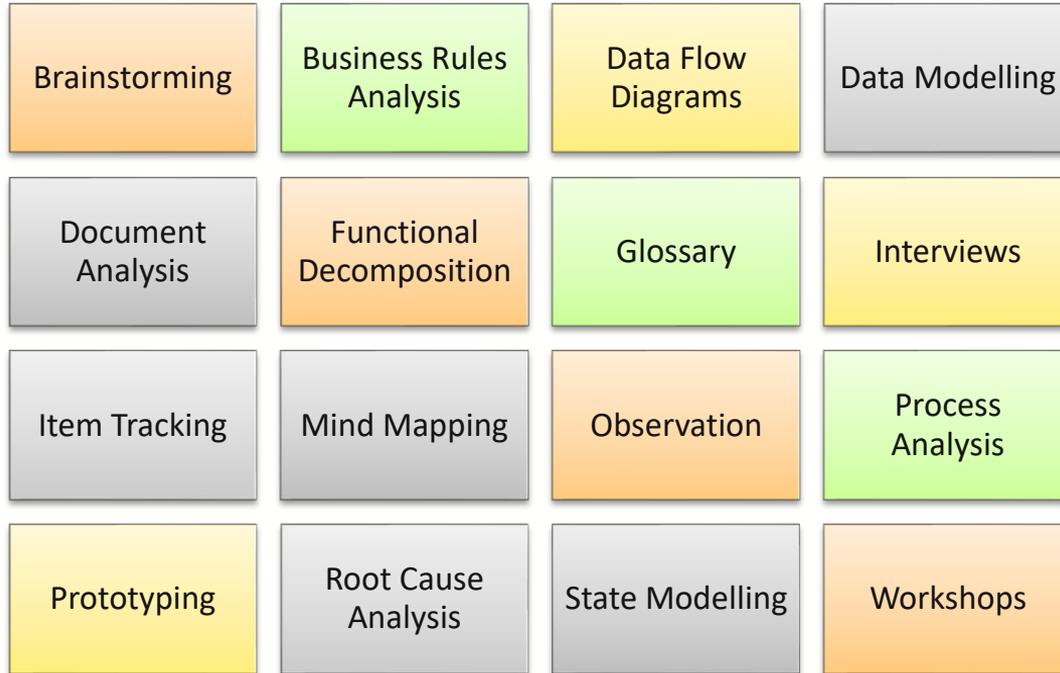
What's the impact?

- Consider the question “So What?”
- Focus on why the need exists?
- Stay focused on the outcomes, not the outputs

If you don't understand enough about the need to thoroughly articulate it back to your stakeholders, then you aren't ready to effectively collaborate with them.



Start Exploring



Start Exploring

- Gather the facts, wherever I can find them
- Conduct many interviews
- Ask for direct observation / interaction
- Understand the intersections of the people involved, the processes being carried out, and the technologies utilized along the way

Key Questions:

- Where did the need originate?
- Who could be impacted?
- What threats stand in our way?
- What's the potential impact?

Which techniques have you used (albeit effectively or ineffectively)? (Pick 3)



Prepare Your Peers

- Schedule a time & place for collaboration
 - Audio & video needs
 - Access to collaboration tools
- Define & Document:
 - The need
 - The goal of the discussion
 - The expectations of participants
- Share only enough to whet their appetite
 - Pique their interest
 - Don't lead the witness



Documentation Assets



Tips & Tricks



Ways to Prepare Others

Prepare Your Peers

Date: Wednesday, November 11th | 8:30-9:30AM | Fast Feet Conf Room

Good Morning,

In several recent studies we've found that our latest pair of running shoes has a profound impact on non-runners, specifically individuals with chronic foot pain, back pain, and headaches. We've never marketed our products to general consumers before but given these results we should consider expanding our target audience. The goal of this discussion is to determine whether or not we'll recommend this market expansion opportunity to the board.

Frank → Please come prepared to share the analytical findings from these studies proving their positive impacts.

Marcus → We'll want to understand how this shift could impact our brand image. Will this help or hurt our existing brand with the runner's audience?

Toni → In your prior experience you had developed campaigns to broader audiences than our typical customers. What concepts would we need to consider in a scenario like this?

Date: Friday, November 13th | 3:30-4:30PM | Badger Conf Room

Good Afternoon,

Over the last few weeks we've seen a sharp increase in the number of issues reported with our order entry system. This has led to some orders needing to be keyed in multiple times and has increased the wait time for our customers calling in due to the added manual processing which is now occurring. The goal of this discussion is to formulate options to address these issues and to improve the system's stability. We'll need help from each of you in the following ways:

- Steve → We'll look to you for an overview of recent tickets and any trends they seem to be presenting.
- Nancy → We've heard that this has occurred in the past. Can you help us understand what approach was taken then?
- Phillip → Given your backend knowledge of our systems, we'll look to you to identify any undesired consequences which could result from our proposed solutions.



Driving Engagement



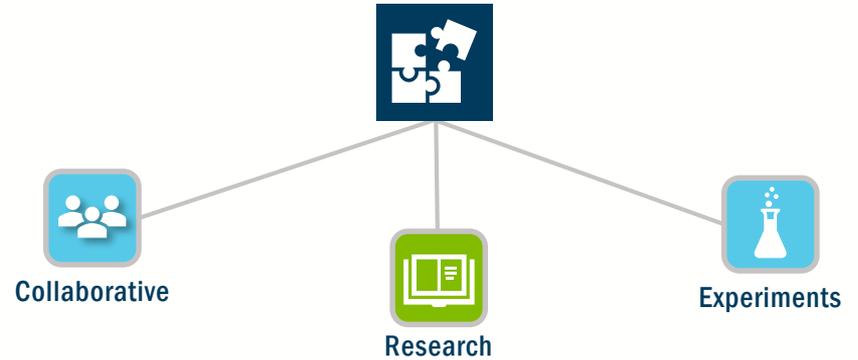
Conduct Elicitation

You've already prepped for a meeting which will be conducive of effective decision making. Now it's time to see it come to fruition...

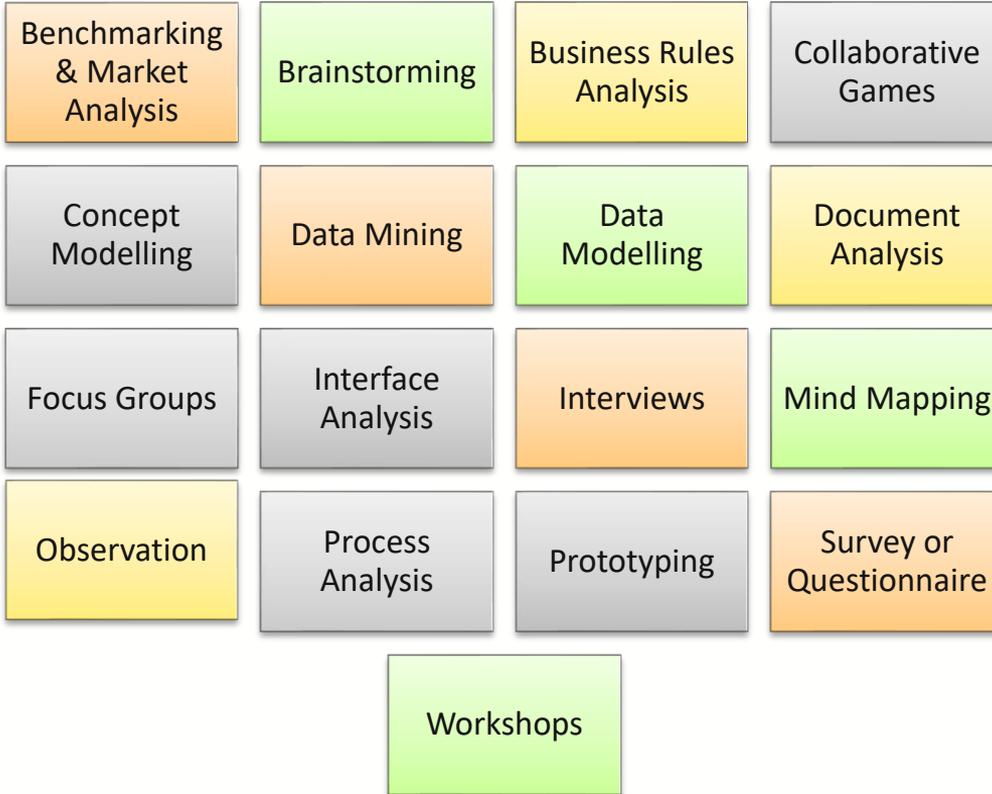
Per the BABoK "The purpose of Conduct Elicitation is to draw out, explore, and identify information relevant to the change."

- Take control from the start
- Guide the elicitation
- Utilize a variety of techniques
- Capture its results
- Make use of a "Parking Lot" when conversations go awry

Types of Elicitation



Techniques for Elicitation



Extract information any way you can

- Learn from the knowledge of those involved
- Hunt down and find information not readily known
- Consider the value of experimentation

Key Considerations:

- How do the stakeholders visualize this information?
- What techniques have we used in the past?

Which of these techniques have you used?

Which of these techniques would you recommend to others?

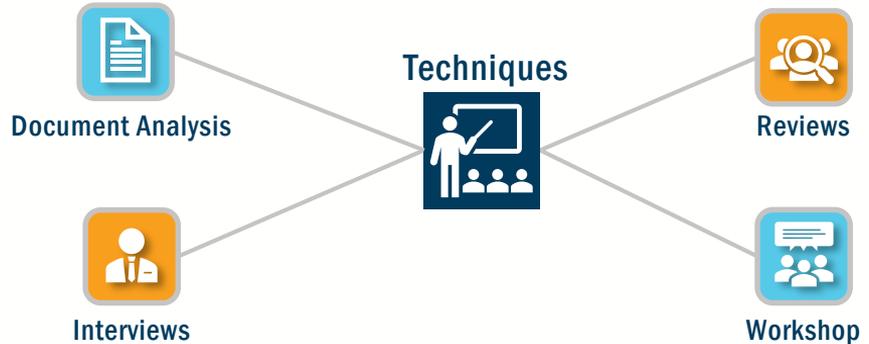
Which techniques would you like to try more often? (Pick 3)

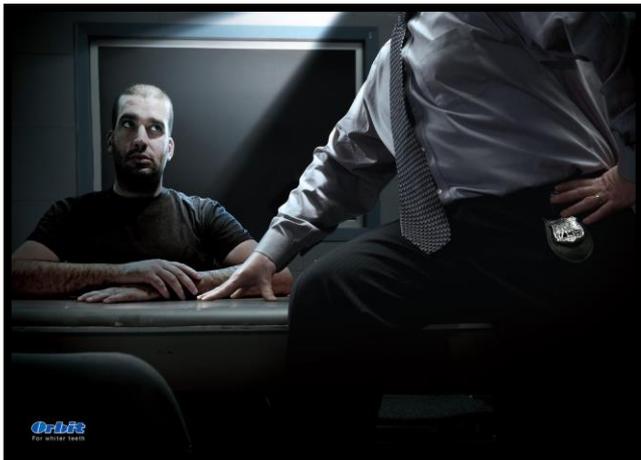


Confirm Elicitation Results

Per the BABoK “The purpose of Confirm Elicitation Results is to check the information gathered during an elicitation session for accuracy and consistency with other information.”

- Step 1: Compare Elicitation Results Against Source Information
- Step 2: Compare Elicitation Results Against Other Elicitation Results





Detective Work

Trust, but Verify

- Interrogate the elicitation results
- Don't believe everything you hear
- Ensure your results align with both prior and past elicitation results

Key Questions:

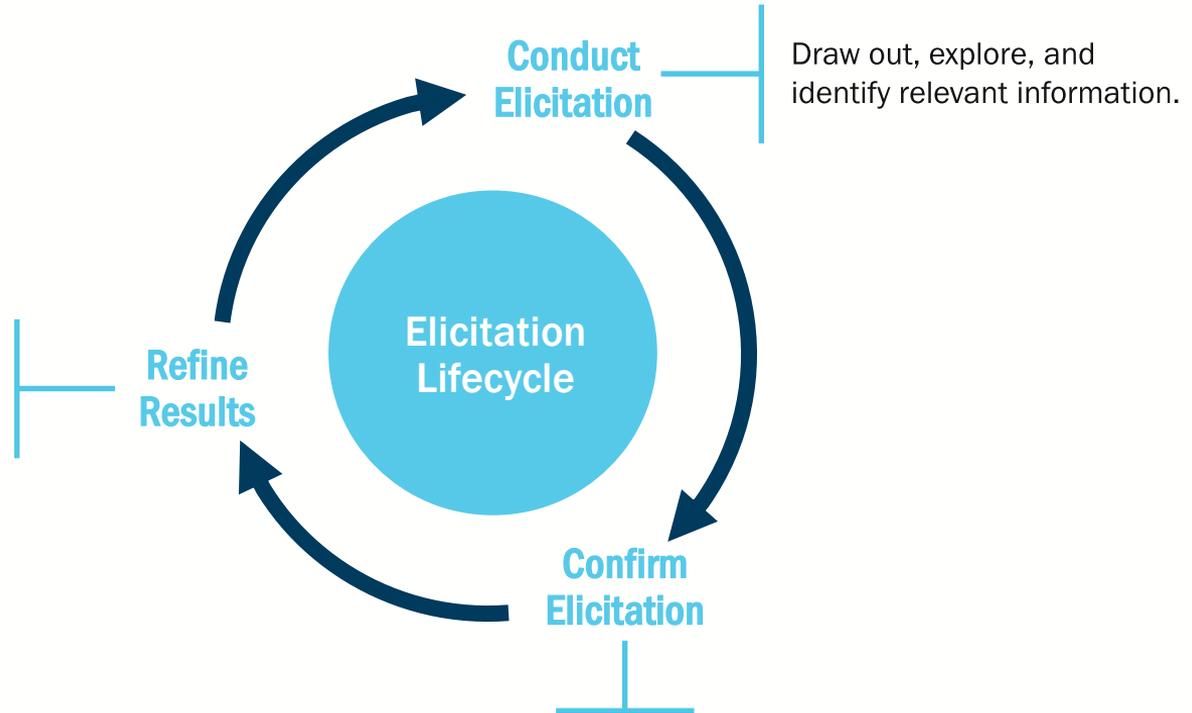
- Why hasn't this need been addressed before?
- Does an unspoken bias exist?
- What might the motivations be of the stakeholders?

Has this happened before to you?

Continually Refine Your Results

Determine next steps after confirming elicitation results

- Clarify details
- Attack ambiguity
- Challenge what you think you know





Closing the Loop

The Need to Finish What You Start

Would a farmer fail to harvest their crop after cultivating the field, sowing seed, and watering all season?



How many points do the Packers score when they've A) practiced the perfect 2-minute drill, B) get the ball with 2 minutes left, and C) fail to kick a field goal or get into the end zone?

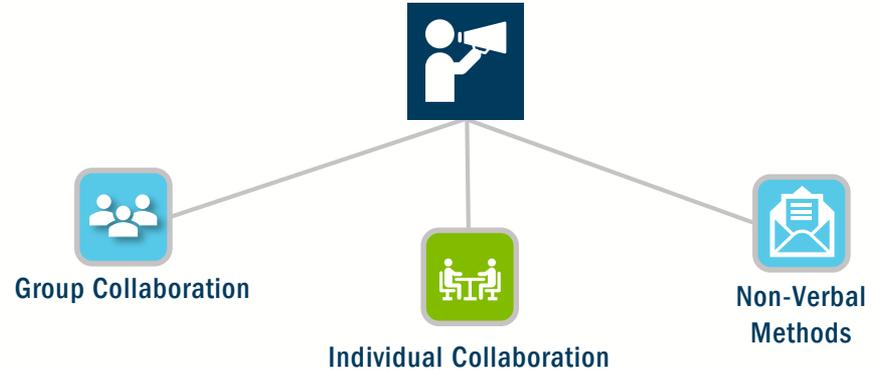
Critical Communication

Don't lose momentum from your well-run meeting and don't make assumptions that your stakeholders have or will maintain the same understanding that you have.

Per the BABoK "The purpose of Communicate Business Analysis Information is to ensure stakeholders have a shared understanding of business analysis information."

- Determine objectives and format of communication
- Communicate business analysis package

Communication Platforms



The Business Analysis Package

Key

-  Formal Documentation
-  Informal Documentation
-  Presentations



Assign Action Items

Why?

- Increases stakeholder engagement
- Builds a sense of community
- Play to the strengths of others

When assigning, be clear on:

- What is expected
- Who is responsible
- When is the deliverable due
- Why their input will be valuable

Don't leave action items to chance. Always communicate them in at least two ways.



Inform Your Peers

Date: Wednesday, November 11th | 8:30-9:30AM | Fast Feet Conf Room

Good Morning Team,

We've had some very productive conversations regarding expanding the target audiences for our footwear. Per our meeting earlier today, here are the deliverables we'll need completed prior to our next discussion on November 30th.

Jamie → Will draft marketing content / messaging which would resonate with the “non-runner” audience. To be sent to Stan by 11/18.

Frank → Work with the data team to generate sales forecasts for the next fiscal year. One assuming a pessimistic market, one assuming an optimistic market, and one assuming a status quo market. To be sent to Stan by 11/22.

Stan → Complete slide deck, including Jamie's content & Frank's forecasts, so that we can conduct a dry-run on the 30th before the board presentation.

Date: Friday, November 13th | 3:30-4:30PM | Badger Conf Room

Good Afternoon All,

We're starting to make some headway regarding the recent surge of issues with our order entry system. Building off our discussions this morning, here are our next steps. We'll meet again on 11/20 to reconvene, review findings / outcomes from these steps, and determine our next round of action items.

- Kevin → Coach our current users on the workaround we identified until the root cause issue can be addressed by IT.
- Betsy → Will work with Ned and the Development team to determine the rough size of a fix and what the timeline would be.
- Ron → Increase the RAM on the problematic server. (To be accomplished ASAP as a stop-gap.)

Accountability

Just because the work has been identified and assigned clearly does not mean that it will, in reality, be completed as expected.

Dos

- Ask what additional information you can provide.
- Ask how you can assist or tag-team.
- Ask who we can talk to about delegating / transitioning.

Don'ts

- Assign blame
- Use absolutes like “never” and “always”.
- Fall into the “That’s not my job” trap.



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Keys to Preparation



Understand how successful preparation can set the stage for more efficient collaboration

Driving Engagement



Drive better engagement from team members, stakeholders, executives, etc.

Closing the Loop



Ensure action items are carried out as planned / expected.



Conclusion

- Feedback, questions, comments, etc. are all welcome.
- Thank you very much for your time!
- Please connect with me so we can learn from each others' experiences.



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