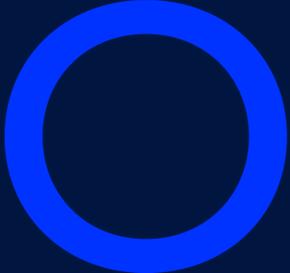# Information Gathering, Modelling and Workflows

Outline

Information-Gathering Techniques

Models and Modelling

Workflow Documentation

Information-Gathering Techniques

An overview:

- *Interviewing users and other stakeholders*

- *Distributing and collecting questionnaires*

- *Reviewing inputs, outputs, and documentation*

- *Observing and documenting business procedures*

- *Researching vendor solutions*

- *Collecting active user comments and suggestions*

Interviewing Users and Other Stakeholders

- Prepare detailed questions
- Meet with individuals or groups of users
- Obtain and discuss answers to the questions
- Document the answers
- Follow up as needed in future meetings or interviews

Interviewing Users and Other Stakeholders

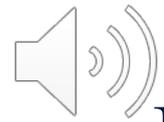- Themes for Information Gathering Questions:

Theme	Questions to users
What are the business operations and processes?	What do you do?
How should those operations be performed?	How do you do it? What steps do you follow? How could they be done differently?
What information is needed to perform those operations?	What information do you use? What inputs do you use? What outputs do you produce?

Interviewing Users and Other Stakeholders

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Interviewing Users and Other Stakeholders

Question Types:

- Open-ended questions
  - "How do you do this function?"— encourage discussion and explanation.

- Closed-ended questions
  - "How many forms a day do you process?"—are used to get specific facts.

Focus of Questions—Current System or New?

Interview Organisation

- Preparing the interview
  - Establish the objective
  - Determine who to interview
  - Compile detailed questions
  - Make final interview arrangements and communicate to participants
- Conducting the interview
- Following up the interview

Checklist for Conducting an Interview

Before
- Establish the objective for the interview.
- Determine correct user(s) to be involved.
- Determine project team members to participate.
- Build a list of questions and issues to be discussed.
- Review related documents and materials.
- Set the time and location.
- Inform all participants of objective, time, and locations.

During
- Arrive on time.
- Look for exception and error conditions.
- Probe for details.
- Take thorough notes.
- Identify and document unanswered items or open questions.

After
- Review notes for accuracy, completeness, and understanding.
- Transfer information to appropriate models and documents.
- Identify areas needing further clarification.
- Thank the participants.
- Follow up on open and unanswered questions.

Interview Organisation

- Preparing the interview
- Conducting the interview
  - Plan ahead, arrive early
  - Time management
  - Look for exception and opportunities to ask "what if"
  - Probe for details
  - Take careful notes
- Following up the interview

Discussion and Interview Agenda

Setting

Objective of Interview
Determine processing rules for sales commission rates

Date, Time, and Location
April 21, 2016, at 9:00 a.m. in William McDougal's office

User Participants (names and titles/positions)
William McDougal, vice president of marketing and sales, and several of his staff

Project Team Participants
Mary Ellen Green and Jim Williams

Interview/Discussion

1. Who is eligible for sales commissions?
2. What is the basis for commissions? What rates are paid?
3. How is commission for returns handled?
4. Are there special incentives? Contests? Programs based on time?
5. Is there a variable scale for commissions? Are there quotas?
6. What are the exceptions?
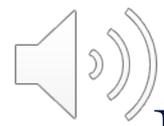
Follow-Up

Important decisions or answers to questions
See attached write-up on commission policies

Open items not resolved with assignments for solution
See Item numbers 2 and 3 on open items list

Date and time of next meeting or follow-up session
April 28, 2016, at 9:00 a.m.

Interview Organisation

- Preparing the interview
- Conducting the interview
- Following up the interview
  - Absorb, understand, and document the information
  - Resolve "what if" questions
  - Make a list of new questions for the next interview

Sample open-items list:

ID	Issue title	Date identified	Target end date	Responsible project person	User contact	Comments
1	Partial shipments	6-12-2016	7-15-2016	Jim Williams	Jason Nadold	Ship partials or wait for full shipment?
2	Returns and commissions	7-01-2016	9-01-2016	Jim Williams	William McDougal	Are commissions recouped on returns?
3	Extra commissions	7-01-2016	8-01-2016	Mary Ellen Green	William McDougal	How to handle commissions on special promotions?