

Breakthrough IT Requirements Discovery Method

Successful Method for Locating
Strategic Opportunities, Documenting Strategic Business Requirements, and Identifying
Executive Information Needs

Are you truly finding the most valuable IT opportunities for your business?

This step-by-step method for helps IT staff work with clients to discover high-ROI opportunities for IT, by soliciting requirements directly aligned with clients' business strategies.¹

The method is based on a semi-structured interview that drills down on clients' strategies to their critical success factors, and within those to information success factors and functional requirements.

Many IT executives wonder if their staff needs to learn new methods of "needs assessment" Here are some common reasons they give:

"We've already got a backlog of systems requests. We don't need to go out there and add to it."

"We already do systems analysis and that takes care of opportunity assessment."

"We've already got process redesign projects going on all over the place and those projects will generate systems opportunities."

First of all, most of the projects in the backlog are *not* strategic. And with needs assessment, we aren't trying to add to the backlog; we're trying to improve the *quality* of the backlog by discovering far more strategic opportunities for information systems.

Neither systems analysis nor business process work takes the place of strategy-driven needs assessment.

Systems analysis helps with solving problems, but it doesn't help identify the right problems to solve.

Business process analysis is a valuable method for optimizing existing business processes, but it doesn't contain an explicit method for matching technology to

¹ Mary Boone's ground-breaking study of strategic requirements planning was first documented in *The Information Edge* in 1987. In the past decades, she perfected the method and the training curriculum that prepares IT staff to find truly strategic IT applications.

information needs. A clear, practical, replicable needs assessment method is a perfect adjunct to a successful business process program.

One of the most common mistakes information systems professionals make is to ask executives: "What information do you need?" Executives answer only in terms of what they have gotten from IT in the past. In order to break through old paradigms and technical biases, IT professionals need a new translation method for converting business opportunities into information opportunities.

Mary Boone's well-tested needs assessment method works step-by-step, tracing the path from the client's mission and role in corporate strategy to critical business success factors. Boone's method is similar to other assessment methods in that it utilizes the concept of critical success factors (CSFs). But CSFs alone aren't enough..

In her interview process, Boone bridges the gap between critical success factors and tools with a unique approach called "Information Success Factors." This highly effective approach insures the best possible match for any given application.

Effective client interviews establish a mutually understood, logical path from the client's mission to a specific information tool. Not only does this insure a strategic solution, but it also makes benefits measurement and cost justification much easier.

Boone's instructional approach integrates lectures on techniques, small group work, video feedback, interactive role-playing case studies, and actual interviews in order to transfer expertise with opportunity identification into your own organization. This information-packed course is a must for IT professionals. Participants leave with proven, practical, applicable methods for working with business leaders to identify strategic systems opportunities.

Program Overview

Classroom Workshop

A two and a half day workshop gives internal IT relationship managers a grounding in many of the skills needed to successfully identify strategic systems. The following workshop segments provide a more detailed understanding of the method.

Strategy Tree and Needs Assessment: Theories and Methods

This series of mini-lectures interspersed with question and answer sessions provides a theoretical base for the workshop. Boone presents the methods for finding strategic opportunities and for interviewing selected executives.

Information Tools Discussion

In this session, participants break out into small groups to identify functional, clear definitions of a variety of information tools. This session is particularly valuable in helping IT professionals to broaden their horizons for potential applications and to help them avoid bias in recommending systems.

Information Success Factors

Once again, participants break into small groups and, building on the previous exercise, they will match information tools with information success factors.

Case Studies

Participants use a fictional case study to practice all of the skills they acquire during the workshop. They use the Strategy Tree Method to identify who should be interviewed in the fictional company, and they use additional case studies to conduct mock interviews. Video feedback is used to help participants hone their interviewing skills.

Notetaking Skills

A highly specific method of notetaking during interviews helps participants keep interviewees on point and allows them to create a structured understanding of the interviewee's key business challenges.

Interview Practice

Additional mock interviews will be conducted on day two, with one real interview taking place towards the end of the session.

Communication Skills

A series of highly interactive discussions help participants to identify and sharpen interviewing and communication skills. These discussions also help participants to watch for common pitfalls in conducting interviews with executives.

Process Design: The Relationship

In this segment, participants learn how and when to apply the needs assessment method in association with process design.

Contracting

Too often, information systems professionals overlook the importance of contracting with clients. Many misunderstandings and disagreements can be avoided through clear contracting. In this segment, participants are given a

template of a good contract and they learn ways of applying it in their particular organizations.

Interview Follow-up Procedure

Good follow-through is a hallmark of successful applications. Participants will receive a set of clear follow-up steps along with a suggested timeline for completing them once an interview is conducted.

Strategy Tree Exercise

This half day workshop gives participants an opportunity to get a broad understanding of the strategic direction of their own organization, identify alignment issues, and select potential interviewees. It assists relationship managers in focusing their efforts as they play a more strategic role with clients. The workshop starts with a discussion of organizational strategy and how that strategy plays out in various areas of the organization. Then a discussion of key opinion leaders ensues, and the CIO is asked in to assist with this conversation. Next, a series of filters is applied to the organizational chart of the company in order to determine where consultancy efforts are best placed. This exercise ensures that all efforts of the consultancy are in alignment with strategy and also helps the group leverage limited resources.

Experiential Training

There's no substitute for experience. While the workshop provides a strong theoretical basis for understanding the needs assessment method, actual interviews with direct feedback are essential to internalizing the method.

As a result of the Strategy Tree Workshop, we will have identified key people in your organization who need to be interviewed. Boone will accompany each consultant as they have a chance to apply what they have learned in the classroom in an actual needs assessment interview with a key client. After the interview is completed, Boone conducts an in-depth debriefing session with each consultant.

This approach accomplishes two goals:

- Strategic applications are uncovered.
- Consultants have a chance to apply the method with Boone present to back them up if they need assistance during the interview.
- Internal consultants are fully trained and ready to conduct the next round of executive interviews on their own.

Coaching and Mentoring

A project progress review day entails reviewing interview and functional requirements write-ups. Boone also uses this time to work one-on-one with participants, addressing individual problems and concerns and designing customized professional development plans.

Biographical information

Mary Boone is the industry's leading authority on the methods of finding strategic systems opportunities. Author of *Managing Interactively* (McGraw-Hill, 2001), *Leadership and the Computer* (Prima Publishing, 1993) and co-author of *The Information Edge* (Dow-Jones Irwin, 1989; NDMA Publishing, 1995), her research has examined hundreds of strategic systems in a wide variety of corporate and public organizations. She has derived from this research a method for uncovering strategic information requirements for executives, which is the basis of this professional development program.

Ms. Boone is president of Boone Associates, located in Essex, Connecticut (USA). Her work has received widespread attention in both the IT and general business communities. Among those praising Boone's work are *The New York Times*, *CNN*, *The Financial Times*, *Computerworld*, *Byte*, *CIO Magazine*, and *Industry Week*.

In 1995, *Leadership and the Computer* was selected as "required reading" for Congress by the Speaker of the House, and *Successful Meetings Magazine* selected Boone as one of the top 25 speakers for 1996.

Boone served as a contributing editor to *Business TV Magazine* and *Telespan* where she was recognized for her cover story interviews with figures such as Ted Koppel and Tom Peters. She served as a visiting scholar at the Institute for the Future (an offshoot of the Rand Corporation) and has authored over 75 articles for general business and information systems publications.

Endorsements

Comments from Clients

"Mary Boone is excellent! This course is extremely useful. It is a very, very practical course, and teaches the details on how to do these interviews."

"Excellent. Very topical in the current environment where major organizations are attempting to align business and technology strategies."

"Mary Boone is a dynamic, informed, and effective instructor."

"Mary Boone did an excellent job of communicating her interview methodology. Her informal and personal style of teaching significantly enhanced the opportunity for the participants to get involved."

"Boone had excellent command of the subject and presented it well."

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