

Facilitated Workshops – When & Why?

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Overview

The “good old workshop”. As a business analyst practitioner and trainer I often get asked the question “Should we use a workshop?” quickly followed by “How do we run it?”

This article addresses the first question - subsequent articles will look at the second.

When to use a workshop?

The first job in deciding whether to run a workshop (as opposed to more traditional approaches such as interviewing) is in understanding our objectives for the workshop i.e. what do we want to achieve and what deliverables are we after?

Are we looking at producing a project terms of reference, the scope for a project, a decision, a project plan, an improved process, a risk mitigation plan, a set of requirements (particularly for IT related projects) or a course of action from many possible alternatives? After all, your real objective is to maximise the potential for the success of your project or initiative.

Research by Ellen Gottesdiener (in a 2001 paper for Software Management magazine entitled Facilitated Workshops in Software Development Projects) showed that a workshop may:

1. Reduce the risk of scope creep from 80% to 100%
2. Accelerate the delivery of early lifecycle phases by 30% to 40%
3. Increase function points by 40% to 85%
4. Provide a 5% to 15% overall savings in time and effort for the whole project

While these numbers are related specifically to software projects it is not a large leap to relate the four points to most projects. It is always useful to come to the party armed with numbers versus emotion. A famous quote by W. Edwards Deming “In God we trust, all others bring data” articulates this idea quite well. Ellen’s data supports a very powerful argument in the discussion between the BA, Project Manager and Project Sponsor regarding the use of a workshop.

In saying that, workshops can be expensive to convene and execute and therefore should only be used when specific combinations of requirements or circumstances exist. The following four points not only outline the requirements/circumstances but also go a reasonable way to define when a workshop may be appropriate.

1. When the answer is not already defined. Usually, if the answer is defined, the communication and education medium is in the form of a meeting where the manager can inform the team or other stakeholders of the decision or action. In that situation the information flow is from the decision maker to the other stakeholders.
2. When the information flow needs to be from the participants or SMEs (Subject Matter Experts) to the decision maker. The participants have valuable knowledge and/or expertise that will contribute to a richer solution. The manager has “management” expertise but not necessarily the detailed process knowledge or the cross-functional process knowledge required to plan or decide a course of action.

3. When the participants/contributors are required to “own” the solution in order to implement the strategy, plan, decision, new procedure or system. Cooperation from many people is required. These people will have many other goals they need to achieve or activities they need to undertake. Ownership of the solution will assist in maximising the priority of the project.

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When to run a workshop

4. When no one person has the knowledge to advance a reasonable or acceptable solution. The power of the team can be called upon to deliver a more robust solution - usually as a result of the more open discussion a workshop allows. Alternate views will be discussed. Creative thinking may introduce some totally new lateral directions. People build on each other’s thoughts and ideas.

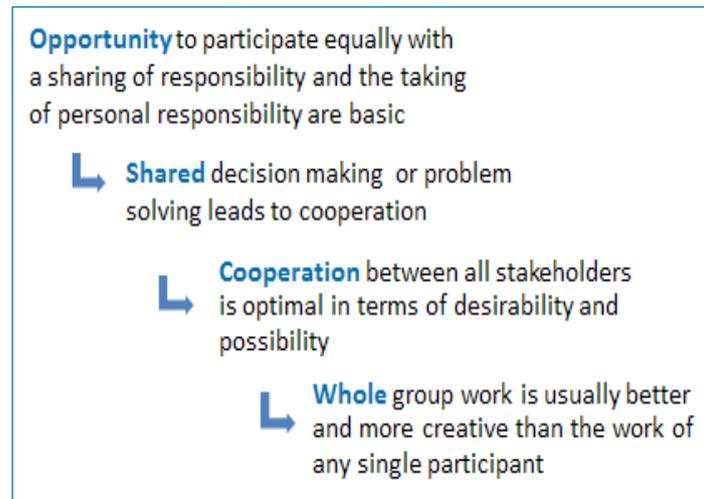
Why use a workshop?

BAs that undertake the role of workshop facilitators generally believe that organisational and personal value is gained by the participating group. A combination of opportunity, sharing, cooperation and team creativity. While I realise I am generalising here, people tend to be “social animals”. They enjoy working together as groups in a workshop situation. This is only true as long as they perceive they are achieving both the workshop’s stated goals and their own objectives. They will participate as long as they feel they and the group are gaining effective and efficient value for the time spent. Under these circumstances cooperation is more easily given. Most people that come to workshops are articulate, skilled, and knowledgeable and have some value to add.

What is valuable about workshops is that they are relatively fast and therefore good for accelerator methodologies. Before you yell at me, I am not competing with Agile techniques for software development. Remember, I am talking about the use of workshops to assist in achieving many different organisational objectives.

What’s good about them? We get one version of the requirement/answer. There is nothing worse than interviewing a business person who says the output needs to be “red” and the next interviewee states it needs to be “blue”. With both stakeholders at the workshop we have the ability to decide on a single requirement which may be a compromise between two or more perspectives.

With all the appropriate stakeholders in one room - including decision makers - we can look for commitment to go forward. The final deliverable from the workshop may not be totally complete but, having been at the workshop, the decision makers are much more inclined to give us the approval to continue into the next phase given they are comfortable with what they have seen achieved at the workshop.



The benefits of a workshop

One problem I have come across in the past is differing stories relayed to the other stakeholders by interviewees after an interview has taken place. Depending on the interview, differing perceptions occur. After participating in a workshop, the communication to others by the workshop attendees is usually much more attuned – the same story being told by all.

With both cross-functional and multi-level representation we have all the input data in one room. All the information required to make the plan, or decision, or analysis, is there together at the one time with all organisational perspectives covered.

One of the additional value-adding outcomes of the workshop is the potential to solve other related problems or to “pick the low hanging fruit”. This might be the first time some the participants have had a chance to discuss what they do in the overall process and how it affects others participating in the workshop. For example, someone creates a report for another attendee who never reads it – so let’s stop the report production and allow the person to undertake more productive activities. We are now adding value to the organization quickly and easily and the project has hardly begun. Good news for all involved.

While it all sounds too good to be true we do need to be careful of what’s not so good. Given we need to get many people together and some could be from other geographic areas there could be a long lead time to organise. The concept of “Group Think” is another potentially negative aspect. It is a psychological phenomenon in which people strive for consensus within a group. In many cases, people will set aside their own personal beliefs or adopt the opinion of the rest of the group. We have all been in workshops where someone who is relatively shy will say something once but will retreat if challenged. People who are opposed to the decisions - or the overriding opinion of the group as a whole - frequently remain quiet, preferring to keep the peace rather than disrupt the uniformity of the group. Their opinion is often highly valuable, but often it can be the noisy ones that get the decision they want. Giving quiet people the opportunity to speak is not a reason for having the workshop, but simply something that needs to be identified and managed by the workshop facilitator.

The Bottom Line - Synergy

A workshop is more likely to gain consensus and courses of action are likely to be more effective in both quality and take-up speed given they have been agreed by the whole group. The bottom line is about gaining synergy. The concept being that individuals are working together to produce an enhanced result. The power of the team!

There is a time and place for workshops as every project and situation is different. The value a business analyst adds is to understand the appropriate tools, techniques and methodology to bring to a particular situation. A workshop is simply one of those techniques. Personally, my standard approach is to use a workshop unless there is a good reason why not.

This paper is based upon our 2-day training course [Workshop Facilitation Skills](#).

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