White Paper

Remote Analysis: Challenges and Tips

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Increasingly, organizations are operating globally. Teams and processes span countries, continents and time-zones. This creates a challenge for the analysis and improvement of processes -- how can we find out what is really happening and propose improvements if our process stakeholders are dispersed around the world? How can we elicit, analyze and validate the core requirements for improving our processes if we can't meet our stakeholders in person? In this kind of organizational context, the art of remote elicitation and analysis becomes crucial.

In this white paper, we'll discuss the challenges of collaborating with stakeholders remotely, along with some useful and practical tips.

Challenges

If you are carrying out analysis on a process that spans multiple locations—even within the same country—there are a number of challenges. Arranging face-to-face meetings and workshops becomes more difficult, and in some cases may be almost impossible. If you have a stakeholder community that spans different countries, you'll have additional challenges too, including those shown in figure 1 on page 2.

Area	Challenges
Logistics	The mechanics of carrying out analysis remotely are different—with less ability to meet 'in person', technology can be used to aid collaboration and communication.
Language	Dealing with stakeholders in different countries may mean that you need to speak in a second language (or, that the stakeholders need to speak in their second language). Even if everyone speaks English there can be subtle differences and misunderstandings. After growing up in the UK, I spent a year of my life in the USA and can still remember confusion caused by words that had very different meaning in the States (in the UK, you walk on the pavement. In the USA you drive cars on the pavement, for example!). This creates a need for regular validation. Using diagrams and models with clear notation really helps. Diagrams and pictures—whether structured or un-structured can help transcend language barriers.
Culture	Different national cultures have different cultural norms. As someone who spent my life growing up in the UK, I almost certainly seem indirect to my international colleagues. As a UK resident, I might consider that a statement like "It would be useful if we could complete this by the 3rd June" is a clear way of communicating a desired deadline – but it may not be interpreted as such! Awareness of one's own cultural norms can be a useful starting point.
Time Zones	It is very easy to inadvertently schedule meetings for times that are anti-social to our stakeholders. Luckily there are useful online tools and apps that can help.
Relationships	It is harder (but not impossible) to build close working relationships remotely.

Figure 1: Example challenges

This list of challenges is by no means extensive. In fact, one additional challenge that can apply to situations where we need to work with a remote team is virtual meeting skepticism. Some people may have had previous bad experiences with remote meetings, and might be reluctant to engage. The best way to push through this is to discuss their reservations, and illustrate how productive a virtual meeting can be. In any event, it can be very useful, if budget and logistics allow, to hold at least one face-to-face meeting, early in the project. This allows people to meet, to build rapport and to get to know each other. It creates a solid foundation on which virtual collaboration can be built.

Even if it isn't possible to hold an initial face-to-face meeting, the good news is that if we plan our elicitation and analysis activities carefully, we can overcome the challenges. Whilst virtual collaboration undoubtedly requires additional forethought, experience has shown that it can be very effective. The remainder of this white paper discusses some tips and tools for making remote elicitation and analysis work.

Making Elicitation Techniques Work Remotely

Firstly, it is worth reflecting on the types of elicitation techniques available to us. These are the techniques that we can use to get information about the current 'as is' process, and also to understand requirements for any new or improved process. Seven commonly used elicitation techniques are shown below:

Six of these standard techniques can be relatively easily conducted remotely, provided there is relevant planning and we have access to the necessary virtual conferencing facilities. The one technique that is significantly more difficult is observation. Clearly, observing someone do their job and follow the steps that they undertake is tricky to do without being physically present, particularly if the work they undertake

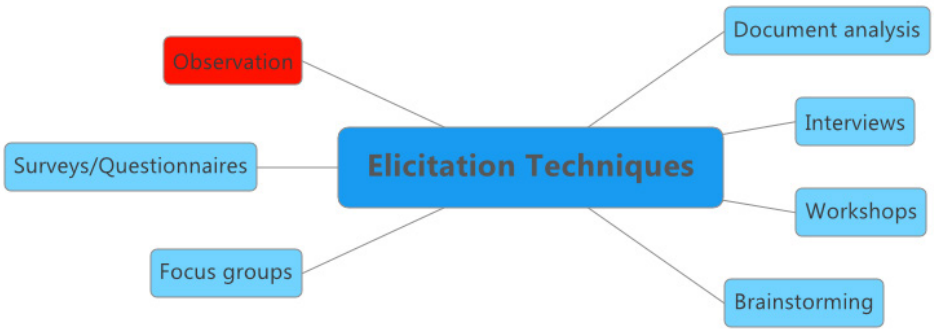

Figure 2: Elicitation techniques

involves manual steps, paperwork or any type of movement or routing of physical goods. The remainder of this section focuses on the remaining techniques, and discussed ways of utilizing them remotely.

Document Analysis

Document analysis can be a useful technique to use, especially when our stakeholders are remotely located. In this context, document analysis will involve referring to existing documents (or other relevant artifacts) that relate to a particular business process. Although we would rarely (if ever) rely solely on Document analysis, it provides a useful foundation of knowledge. There are two types of document analysis that we can conduct:

- **Process assets:** There is often documentation, forms or other artifacts that are used or consumed by the process itself. These documents can prove invaluable, as they hint at the type of data that is collected, and may even start to hint at some of the business rules that the process enforces too. Imagine if we were to analyze the process for applying for a bank account. Seeing the bank account application form would be extremely useful—we'd see the information and data that the customer has to fill out and we might also notice that they have to provide 3 forms of ID prior to an account being opened.

- **Wider organizational and project documentation:** In addition to process assets, there may be existing documentation about the process. In an ideal world this would be structured and stored in a common repository—but even if such a repository doesn't exist, there may be previous project documentation, help manuals, training guides and so forth. All of these documents can help us to understand how the existing process works—warts and all. However, it is dangerous to rely on documentation alone. It may be out of date—and even if it is current, we might find that people have tweaked and adapted the process to fit their specific department or team.

If these types of documents are readily available, they can be a very good place to start. Perhaps whilst we are arranging virtual interviews and workshops, we ask whether our stakeholders can send over any potentially relevant information. This gives us a 'head start', and ensures that we go into our virtual meetings prepared. It also allows us to see the types of terminology and language that our stakeholders use. We can start to pick up on any subtleties or nuances that we wish to discuss further during interviews or workshops.

Interviews

A stakeholder interview is a great way to gain an understanding of a specific stakeholder's perspective on a business situation. By asking a range of questions, we'll gauge not just only the part they play in a process, but also any problems they face and also any potential improvement opportunities that they see. A 'real-world' (face to face) interview is an excellent way of building rapport, and can help us build a good working relationship with our stakeholders. The same is true of a virtual interview, and a carefully planned and conducted interview can help create or cement a working relationship with a stakeholder.

The first challenge of holding a remote stakeholder interview is planning. If the stakeholder is in a different time-zone, thought should be put into the scheduling. A very good way to kill a working relationship before it has even started would be to ask someone to attend a meeting at 1am in their local time! There are a range of websites and apps that can help to ensure that you're scheduling meetings at a mutually convenient time. However, if necessary, it can be very useful to flex our diaries and perhaps dial in late at night/early morning when speaking for the first few times. This shows that we are appreciative of our stakeholder's time.

Remote stakeholder interviews can be held by telephone, or by a video-conferencing/web-conferencing system. Where possible, it is beneficial to use video and web-conferencing over a standard phone call. This has two main advantages: Firstly, if you are able to utilize video conferencing, you have the advantage of seeing your stakeholder. It is not the same as being physically present in the same room—but it does allow you to see their body language, and pick up on any important non-verbal cues.

Another significant advantage of video or web conferencing over teleconferencing is the ability to screen-share. Having the ability to share your computer screen with the interviewee (and for them to share their screen) can make remote interviews far more productive. Many conferencing systems will allow you to share a virtual 'whiteboard' where you can both draw. This is very useful to help surmount language barriers or even subtly different uses of the same language—the ability to 'draw' the problem can be extremely useful to validate a common understanding of the problem or process. Even if the conferencing service you use doesn't allow collaboration in this way, simple screen sharing will allow you to open up a document or drawing package and start making notes or drawings. The document itself becomes your virtual white-board, and acts as a useful summary of the meeting. This is particular useful when discussing process steps, as you can 'draw' the process in front of them, and validate that it looks right from their perspective. During the meeting, there is no need to draw it perfectly – it can be tidied up and drawn in a proper modeling package later.

For more about interviewing as a technique, you may find my previous Orbus Software white paper "Understanding More from Stakeholders" to be a useful read.

Surveys/questionnaires

When you have a wide range of stakeholders spread across different geographic locations, a questionnaire can be an effective way of gathering specific pieces of information. When analyzing processes, we're likely to need to ask a range of closed and open questions. An example of a closed question might be:

How many calls do you receive (on your direct line) from customers per day:

0-10 11-20 20-30 30-40 40+

Closed questions have the advantage that they produce results that can be tabularized and analyzed easily. However, in some cases we might need to provide our stakeholders with the opportunity to give a completely free-format response. Open questions allow a stakeholder to do this, but the results are more difficult to categorize and analyze. An example of an open question might be:

Please describe the most frequent type of customer query you receive.

It should also be noted that whilst questionnaires can provide extremely useful insight, we are generally best advised to compare and validate the results with other elicitation techniques. We may get a skewed view through questionnaires if we get a low response rate, or we might find people mention issues that are front-of-mind (and that have happened recently), and forget the 'tacit' problems that they have come to accept in their workplace.

As with document analysis, questionnaires can provide useful insight, but this is only part of the overall picture.

Virtual Workshops, Focus Groups and Brainstorming

Workshops and focus groups can be a great way of understanding our customers or stakeholders views, as well as eliciting details about the current process or current business situation. As with interviews, thought must be put into the preparation and planning. The same issues relating to time-zones apply, and this can be multiplied when there are multiple delegates from around the world. Finding a commonly acceptable time may be a challenge, and it can often be worth ringing round to understand the hours people work. Some stakeholders might find a 7.30am start acceptable, if they get into work early anyway. Others may be happy to stay late. Either way, finding a time that works for all (or at least the majority) of the relevant workshop attendees is crucial.

As with interviews, when conducting a virtual workshop to elicit information about a process, it is extremely useful to utilize videoconferencing or web-conferencing facilities. It is crucial to have some kind of virtual interactive 'shared space' to write or draw ideas, and to have an active and prepared facilitator. In the same way that flip-charts, white-boards and post-it notes would be used in a physical workshop, it can be useful for the facilitator to use 'virtual' shared spaces and documents. How this works will depend entirely on the type of screen-sharing software you are using, but even using a basic screen sharing system will enable all delegates to see a common document. Proper planning and preparation are key. Having the following documents available, ready to 'share' during the meeting can be extremely useful:

- **Agenda:** A short summary of the agenda, with timings. This can be used to orientate the session at the beginning, and can be brought back on screen to check progress as the session progresses.
- **Actions log:** Perhaps a word document or Excel sheet where actions are created. If using basic screen-sharing functionality, the facilitator updates this when an action is raised. It is useful to record the action, an owner and a deadline or target date.
- **Parked items:** A document where any issues that can't be discussed immediately are 'parked'. Each parked item should have an owner, and ideally a date that it will be re-visited.
- **Notes:** A general document where any notes, decisions, or other information will be captured. Even with the most structured virtual meeting, it is likely that unexpected (but relevant) information will emerge, and it is very useful to capture it. This document can track comments as they are made, and can help to continually validate that there is a common understanding of what has been discussed.

This can be particularly useful when some delegates are speaking in a second or third language; having the visual as well as the verbal cue will help keep everyone on the same page.

It is also crucial to consider what techniques will be used during the workshop to elicit the relevant information. When eliciting information about an existing process we might 'brainstorm' issues, or we might walk through the process step-by-step (drawing it as we go). It is possible to utilize either of these techniques in a virtual environment too.

When acting as a facilitator, it is important to respectfully keep people on track, and also to ensure that everyone feels engaged. Beware of 'multi-tasking' – if your session does not engage your audience, it is likely they will have one eye on their e-mail instead of your meeting! Regular interaction and participating helps alleviate this.

Brainstorming

Brainstorming, particularly when conducted as part of a workshop, can be a useful way of eliciting information or problems about a current process. It can be equally useful for generating potential improvement opportunities. When running a brainstorming session, it is good practice to set a short, concise 'focus statement' that people will use to generate their ideas. There are many ways of phrasing and articulating a focus statement, but it should clearly communicate the broad topic being discussed. It may be kept deliberately broad to elicit different ideas. A simple example might be:

What causes the xyz process to fail?

It is useful to keep the focus statement on-screen when facilitating a virtual brainstorming session. Then, give the delegates a short period (perhaps 3-5 minutes) to brainstorm the ideas individually. If your virtual collaboration software allows it, they might scribe these directly onto a shared document. If not, they can simply write them on their own notepad.

Once the time is up, the ideas can be harvested. Each delegate reads out their idea, and the facilitator adds them to a list. Packages like PowerPoint or Visio can be used in combination with any basic screen-sharing service to create a shared space where 'sticky notes' are added, categorized and moved around. The diagram below shows a presentation package being used to capture 'sticky notes'. As the number increases, additional pages can be added to the document. Once all the generated ideas have been added, they can be grouped into themes and further discussion can take place:

Drawing a process in a virtual session

In a physical workshop, it is common practice to discuss and create a rough process model—often using sticky notes on a wall, or on a long sheet of brown wrapping paper. A similar exercise can be undertaken virtually, again using a program like PowerPoint or Visio to scribe up the process as it is discussed.

However—a pitfall awaits experienced process modelers here. Often there is a temptation to start drawing beautiful and accurate process

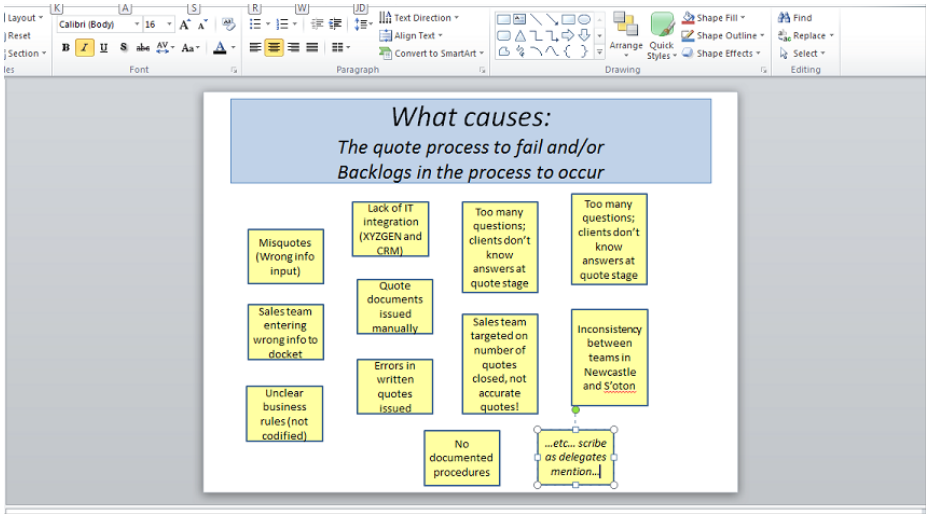

Figure 3: Using presentation software to capture ideas in a virtual meeting

models at this stage. It is tempting to start worrying about BPMN notation and semantics—and whilst those things are undoubtedly important, it is generally better to worry about them later! At this stage, capturing boxes for tasks, lines and arrows for sequence flow, and diamonds for decisions is enough. There is significant benefit in finessing this into a formal notation later, and sharing it via a common repository so that stakeholders can formally validate the details.

Other Considerations

So far in this paper, we've considered some of the mechanics of carrying out analysis remotely, and we've discussed the importance of considering time-zones, building relationships and validating understanding (to help ensure that everyone is on the same page, especially when there are language differences).

Alongside these factors, it is also important to consider some of the cultural differences that we may encounter. Softer skills are crucial to effectively facilitate and collaborate virtually. This is a much wider consideration, and worthy of an entire article or volume itself. However, the work of Geert Hofstede, including 'cultural dimensions' can be a useful indicator. It can be useful to understand how others perceive your own national culture, and building this kind of self-awareness can help to avoid any unexpected cultural clashes.

There are a whole range of other underlying softer skills that underpin effective remote elicitation and analysis. Whilst these skills are also important for face-to-face meetings and workshops, the need for them is amplified in a virtual collaborative environment. As practitioners, it's essential that we continue to refine them. Resources are included in the further reading section for readers who are interested in reading more about this topic.

Conclusion

It is more and more frequent for business analysts, process analysts and other change practitioners to need to work and collaborate remotely with stakeholders. Virtual collaboration creates a different set of challenges when compared with working face-to-face, but careful preparation can ensure that we elicit and analyze processes and requirements effectively. Utilization of technology such as video and web-conferencing can help. Additionally, it is important that we are mindful of cultural, language and time-zone differences.

Further Reading

Readers interested in the topics raised in this paper may find the following resources useful:

Hoffstede, G. (1991) “Cultures and Organizations: Intercultural Cooperation and Its Importance for Survival: Software of the Mind”, McGraw-Hill

Hofstede Centre [Online] http://geert-hofstede.com/

IIBA® (2015) “A guide to the Business Analysis Body of Knowledge® (BABOK® Guide) Version 3”, IIBA, Toronto

Paul, D & Yeates, D. (eds) (2014) “Business Analysis 3rd Edition”, BCS, Swindon

Pullan, P, Archer, J et al (2013) “Business Analysis & Leadership: Influencing Change”, Kogan Page, London

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www.orbussoftware.com/resources/downloads/understanding-more-from-stakeholders/

Reed, A “Running Effective Process Analysis Workshops” [Online] www.orbussoftware.com/resources/downloads/running-effective-process-analysis-workshops/

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