Clariteq Workshops for Business Analysts

CLARITEQ

Working With Business Processes	**WWBP**
Defining, Mapping, and Analysing Business Processes	*2 days*

Business processes matter, because business processes are how value is delivered. Understanding how to work with business processes is now a core skill for business analysts, process and application architects, functional area managers, and even corporate executives. But too often, material on the topic either floats around in generalities and familiar case studies, or descends rapidly into technical details and incomprehensible models. This workshop is different – in a practical way, it shows how to discover and scope a business process, clarify its context, model its workflow with progressive detail, assess it, and transition to the design of a new process by determining, verifying, and documenting its essential characteristics. Everything is backed up with real-world examples, and clear, repeatable guidelines. *Our most popular workshop!*

Data Modelling	**DM**
A Business-Oriented Approach to Entity-Relationship Modelling	*2 days*

Data modelling is critical to the design of quality databases, but is also essential to other requirements techniques such as workflow modelling and requirements modelling (use cases and services) because it ensures a common understanding of the things – the entities – that processes and applications deal with. This workshop introduces entity-relationship modelling from a non-technical perspective, provides tips and guidelines for the analyst, and explores contextual, conceptual, and detailed modelling techniques that maximise user involvement.

Use Cases and Services	**UCS**
Proven Techniques for Modelling Application Requirements	*2 days*

Use cases have offered great promise as a requirements definition technique, but many analysts get disappointing results. That's because published methods are often inconsistent, complex, or focused on internal technical design. This unique workshop clears up the confusion. It shows how to employ use cases to discover external requirements – how users wish to interact with an application – and how to use service specifications to define internal requirements – the validation, rules, and data manipulation performed behind the scenes. Better yet, it shows in concrete terms how the two perspectives interact, and demonstrates synergies with data modelling and business process workflow modelling.

Advanced Business Process Management	**ABPM**
Aligning Process Work with Strategic, Organisational, and Cultural Factors	*2 days*

We regularly hear about the importance of "alignment" in achieving success when working with business processes, but alignment with *what?* This workshop provides specific, repeatable techniques to help your business process initiatives align with human factors, organisational culture, and enterprise strategy and goals. Human and organisational concerns are sometimes dismissed as "the soft stuff," but pragmatic, proven techniques are available and are covered in this unique workshop. Rather than save these concerns for a single "think about people, culture, and strategy" phase, it shows how to incorporate them at every stage, from process identification, scoping, and initial assessment through to modelling, analysis, and design. This long-awaited follow-up to "Working With Business Processes" regularly receives rave reviews.

Advanced Data Modelling	**ADM**
Communication, Consistency, and Complexity	*3 days (2 days by request)*

After gaining some practical experience, data modellers encounter situations such as the enforcement of complex business rules, handling recurring patterns, satisfying regulatory requirements to capture complex changes and corrections, dealing with existing databases or packaged applications, integrating with dimensional modelling, and other issues not covered in basic data modelling classes. This hands-on workshop provides approaches for many advanced data modelling situations, as well as techniques for improving communication between data modellers and subject matter experts.

Clariteq Workshops for Business Analysts

Simple, list-based requirements techniques are fine as a starting point, but eventually requirements must be synthesised into a cohesive view of the desired to-be state. Only then will many important, additional requirements emerge. This three-day workshop shows how to accomplish this with an integrated, model-driven framework comprising *process workflow models*, a unique form of *use cases*, *service specifications*, and business-friendly *data models*. This distinctive approach has succeeded on projects of all types because it is "do-able" by analysts, relevant to business subject matter experts, and useful to developers. It distills the material from Clariteq's three, two-day workshops on process, data, and use cases & services.

Business Analysts and around the globe are returning to robust but practical modelling techniques because of dissatisfaction with list-based ("the system shall…") methods. Data modelling in particular is seeing a resurgence since it so effectively improves communication by ensuring a common understanding of the things (the entities) that processes and applications deal with, providing a solid platform on which to build requirements. This workshop introduces entity-relationship modelling from a non-technical perspective, and integrates it with user stories and use cases to discover external requirements – how users wish to interact with an application – and service specifications to define internal requirements – the validation, rules, and data manipulation performed behind the scenes. The material is drawn from Clariteq's Data Modelling and Use Cases and Services workshops.

Instructor –
Alec Sharp, Senior Consultant

Alec has deep expertise in a rare combination of fields – business analysis and requirements specification, data modelling, strategy development, facilitation, and, of course, *business process modelling, analysis, and design*. His 35 years of hands-on consulting experience, practical approaches, and global reputation in model-driven methods have made him a sought-after resource in locations as diverse as Ireland, Illinois, and India.

He is also a popular conference speaker on the Business Process Management, Business Analysis, and Data Management circuits, mixing content and insight with irreverence and humor. Among his many presentations are: "The Human Side of Data Modelling – *Communicating with Stakeholders and Other Mere Mortals,"* "Getting Traction for 'Process' – *What the Experts Forget,"* "Analyst or Stenographer? – *Myths, Half-truths, and Successful Methods in Business Analysis,"* "The Soft Stuff is the Hard Stuff – *Human & Organisational Issues in Business Process Change,"* and "The Multi-Skilled Influencer – *Achieving Data Management Goals by Other Means."* At major international conferences every year, Alec is the highest-rated speaker. His 90-minute briefing "*Five Things You Need To Know About Business Processes*" has been delivered to senior executives at major organisations around the globe

At Enterprise Data World 2010, Alec was awarded DAMA's 2010 Professional Achievement Award, a global award given to one professional a year for contributions to the Data Management profession.

Alec literally wrote the book on business process modelling – "Workflow Modeling: Tools for Process Improvement and Application Development." Popular with process improvement professionals, business analysts, and consultants, it is consistently a top-selling title on business process modelling, analysis, and design, and is widely used as an MBA textbook. The completely rewritten second edition was published in 2009.

Alec's popular workshops on Working with Business Processes, Business-Oriented Data Modelling (introductory and advanced,) Use Cases and Services, and selected advanced topics are conducted at many of the world's best-known organisations. Conducted on four or five continents each year, his classes are practical and energetic, consistently earning "excellent" ratings.

Clariteq Workshops for Business Analysts

Working With Business Processes
Defining, Mapping, and Analyzing Business Processes   *2 days*

Description:

Whether a new application is purchased or custom-developed, it's almost certain that improved or redesigned business processes will be involved. This workshop will give business analysts a solid exposure to the modelling and analysis of a process workflow, the key phases and techniques, and the issues that must be addressed. With initiatives like enterprise application implementation and e-commerce driving the redesign of business processes, these skills can make a real difference to a project's success.

The workshop complements the techniques covered in our Data Modelling and Use Cases and Services workshops, and integrates proven analysis techniques with developments from fields such as business process management and quality management. First, participants will learn the key factors to consider when dealing with business processes, and then how to specify the scope and goals of a business process, model the current workflow, assess it, and apply three critical process redesign techniques.

Key principles are illustrated throughout with workshop exercises and discussions. Business professionals with responsibility for improving their processes and business analysts needing solid techniques will both benefit from this workshop.

Objectives:

On workshop completion, participants will be able to:
- Identify a "true" business process, and specify its boundaries and goals
- Describe the key factors that differentiate process and functional approaches
- Employ a variety of techniques to keep stakeholders involved, and promote "process orientation"
- Establish the scope, issues, and goals for a business process
- Model process workflow at progressive levels of detail using Swimlane Diagrams
- Stop process modelling at the appropriate point, and move on to other techniques or phases
- Conduct a structured assessment of a business process
- Transition to the design of a new process while avoiding common (and serious!) pitfalls

Prerequisites:

None. However, business analysts who expect to do extensive workflow modelling will find that some understanding of information systems concepts may be helpful in establishing context.

Target Audience:

Business analysts who are responsible for requirements specification or are involved in business process re-design or improvement; business managers and content experts who will participate in process re-design or process-oriented application development efforts.

Course Topics:

- Thinking in process terms – concepts, terminology, principles, and techniques
- A three-phase approach to completing a process-oriented project
- Framing the process - discovering a business process, and clarifying its purpose and scope
- Initial assessment of the "as-is" process and goal-setting for the "to-be" process
- Modelling process workflow – practical tips and techniques for using swimlane diagrams
- Controlling detail – three levels of workflow model, and when to stop modelling
- Applying workflow modelling to the as-is process – facilitating a workflow session
- Final assessment of the as-is process – a framework for assessment, relation to redesign
- Characterising the to-be process – generating creative improvements and assessing them
- Wrap-up – summary, tips, and resources

Clariteq Workshops for Business Analysts

Data Modelling
A Business-Oriented Approach to Entity-Relationship Modelling   *2 days*

Description:

Data modelling was originally developed as a tool for improving database design, but has become a fundamental analysis technique in modern environments, whether the analyst is primarily concerned with data structures, application logic, the user interface, or business processes.

A key driver is that applying data modelling early, in any type of initiative, allows analysts and clients to develop a common understanding of the business entities (e.g., Customer, Order, Product, Part, etc.) that business processes and information systems deal with, their interrelationships, and the rules that govern them. This eliminates the problems of inconsistent terminology and conflicting assumptions that otherwise plague application development. The technique is being successfully applied successfully in Business Intelligence/Analytics, Big Data, application software selection and configuration, and even business transformation initiatives.

This workshop introduces entity-relationship modelling from a non-technical perspective, thoroughly covering the basic components of a data model - entities, relationships, attributes, and identifiers. In addition to showing how and when to use these components in developing a data model, it includes many tips, quality checklists, and common pitfalls. Just as important, it contains far more advice on the process of developing a data model than other courses, including specific methods for getting subject matter experts involved and maintaining their commitment.

Objectives:

On workshop completion, participants will be able to:
- Apply a variety of techniques that support the active participation and engagement of business professionals and subject matter experts;
- Use entity-relationship modelling to depict facts and rules about business entities at different levels of detail, including conceptual (overview) and logical (detailed) models;
- Use top-down and bottom-up approaches to initiating development of a data model;
- Recognise the four basic patterns in data modelling, and when to use them;
- Effectively use definitions and assertions ("rules") as part of data modelling;
- Use an intuitive approach to data normalisation within an entity-relationship model;
- Apply various techniques for discovering and meeting additional requirements ;
- Read a data model, and communicate with specialists using the appropriate terminology.

Prerequisites:

An understanding of information systems concepts.

Target Audience:

Business analysts and application developers responsible for the analysis and design of any component of an application, including the database, application logic, or the user interface. Also, business professionals and managers needing to understand how this technique can uncover and resolve inconsistency in business terminology, policy, and rules.

Course Topics:
- Overview of data modelling: terminology, types of models, and key concepts
- The essential data model components - entities, relationships, attributes, and identifiers
- A three-phase approach to completing a data model
- Initiating a conceptual data model using a bottom-up approach
- Four common errors in identifying entities, and how to avoid them
- Eliminating confusion and misunderstanding with well-structured entity definitions
- Four entity types, and rules and guidelines for dealing with them
- Adding detail and rigor - evolving the conceptual model into a logical data model
- Patterns for common situations - multi-valued attributes, redundant data, and reference data
- The world's simplest guide to normalisation
- Primary and foreign keys in logical data models – conventions, rationale, and limitations
- Specifying assertions and constraints – rules that can't be shown on the E-R diagram
- Drawing the Entity-Relationship Diagram for maximum readability
- Techniques for discovering, assessing, and meeting new requirements
- Wrap-up – summaries and resources

Clariteq Workshops for Business Analysts

Use Cases and Services
Proven Techniques for Modelling Application Requirements   ***2 days***

Description:

This highly participative workshop introduces proven techniques for discovering, documenting, and verifying application requirements. In three-tier architecture terms, it covers both the Presentation Services (User Interface) and Business Services (Logic and Rules) layers, and integrates closely with the Persistence (Database) layer.

The workshop uses an "outward-looking" form of use cases to define external (Presentation Services) requirements – that is, how a user wishes to interact with a system using various UI technologies. To define internal (Business Services) requirements – the validation, rules, and data updates performed "behind" the user interface – a variety of techniques are covered, including event analysis, state transition diagramming, and service specification. Important synergies between these techniques are demonstrated, as well as making use of the analysts's other main techniques – data modelling and process modelling.

This unique class bridges the gap between two common extremes. At one end are simplistic, easily understood prototyping or list-based approaches that work for simple applications, but are too imprecise and incomplete enterprise-scale work. At the other extreme are techniques that are so complex they are indecipherable to most users and analysts, and thus produce results that are just as undependable .

Objectives:

On workshop completion, participants will be able to:
- Use a variety of techniques to identify a system's use cases and business services.
- Discover and document "external" application requirements, especially UI behaviour
- Discover and document "internal" application requirements, particularly logic and rules
- Understand how use cases and services fit with process models and data models

Prerequisites:

None, although some understanding of multi-tier information systems concepts, and data modelling in particular, will be helpful.

Target Audience:

Business analysts, systems analysts, UX designers, and developers responsible for defining application requirements, or documenting legacy/custom/packaged application behaviour in a structured way. Also, technical specialists interested in requirements definition, project leaders needing to understand current analysis techniques, and content experts with a significant role to play in specifying requirements.

Course Topics:

- Application requirements definition – goals, issues, and approaches that work in real life
- Use cases and services ("application logic") - terms, concepts, and interrelationships
- Discovering use cases and services at the right granularity - a multi-pronged method
- Documenting use cases with progressive detail and precision – a phased approach
- Documenting "out of context" use cases – dealing with recurring and reusable elements
- Discovering process scenarios and use case scenarios – making the use cases real
- Developing use case and use case scenario dialogues – refining use cases and requirements
- Service specification – invocation, validation, rules, and updates
- State transition analysis – relating events, entity states, and business rules
- Wrap-up – summary, "what's next?," and resources

Clariteq Workshops for Business Analysts

Advanced Business Process Management
Aligning Process Work with Strategic, Organisational, and Cultural Factors   2 days

Description:

Many organisations radically improve their performance through business process change initiatives, while others fall short. It's easy to blame failure on technical factors, but they are almost never the primary cause. Experience shows three recurring themes in successful initiatives:

1. True end-to-end processes were identified, and the right ones were selected for transformation;
2. A *holistic* approach balanced technical factors with *human*, *organisational*, and *cultural* factors;
3. That *holistic* understanding was reflected in an *implementable* and *sustainable* process design.

This intense workshop provides proven, repeatable methods, well beyond what is covered in introductory courses. In particular, individual and organisational behaviour and culture often defy analysis, but specific techniques for discovery and assessment of these soft factors are a centrepiece of this unique workshop. Throughout, the emphasis is on methods that support shared understanding and engagement, leading to buy-in. Participants will be well-prepared for the challenges of successful business process analysis and design.

Topics will be covered with a discussion of the issue, a review of techniques, guidelines and examples, a *brief* workshop exercise, and a group solution and debriefing. The emphasis is on maximising the delivery of content while keeping everyone engaged. Real-life case studies are employed throughout – some participants say the examples of *how* the techniques are applied in practice is the best part of the workshop.

Target Audience:

Anyone involved in Business Analysis, Business Change, and Business Process Management (BPM) especially BPM professionals, Process Analysts and Designers, Process Architects, Business Analysts, and Project / Programme Managers. Also, Business Managers responsible for effecting process change, and Organisation Development professionals needing to learn more about business processes.

Prerequisites:

It would be helpful, but not be absolutely essential, to have some practical experience with process analysis and redesign, or an introductory course in working with business processes.

Instructor – Alec Sharp

With 35 years of worldwide consulting, Alec has hands-on experience with process change initiatives in a wide variety of settings, from small and medium organisations through to the world's largest and best-known enterprises. That's what sets this workshop apart – it's based on what *really* works, not what *should* or *might* work. When a process change project has "gone off the rails," Alec is frequently brought in to help stakeholders see the underlying reasons and get things back on track. He has delivered hundreds of workshops around the world on working with business processes and related business analysis techniques, as well as top-rated presentations at international conferences. A few of these are "Gaining Traction for 'Process' – What the Experts Forget," "Process Architecture on a Budget," "Modelling Failure – How Process Modelling Goes Wrong and What to Do About It," "From Process Redesign to IT Requirements," and "Integrating Change Into Your Business Process Approach." These are often rated "best conference presentation," and are virtually always rated in the top two or three at a conference. Alec is the author of "Workflow Modeling, Second Edition" (Artech House, 2009) which is a consistent best-seller in the field, and is widely used as an MBA text and consulting guide.

Topics and key features:

See next page for a detailed description of the workshop contents.

Clariteq Workshops for Business Analysts

Topics and key features:

Practical techniques and clear guidelines will be provided in five main areas:

1. Communicating about "business process" with executives, managers, and individual contributors
    * Why senior executives often misunderstand "process"
    * Five key points to cover in an executive briefing
    * Six enablers of a business process – balancing technical and social/organisational factors
    * How measurement and reward systems often harm process performance
    * Winning over the masses - why people fear "process," and how to get them on board
    * A brief history – the rise and fall and rise again of BPx
    * Business processes within a framework for Business Analysis
2. Discovering processes and developing a process architecture… within your natural lifetime!
    * Getting everyone on the same page – process fundamentals, components, and conventions
    * Six criteria for a true end-to-end business process
    * A bottom-up approach, and when to use it (and when not to!)
    * Multiple techniques for building a process architecture with tight budget and time constraints
    * Why you need to be cautious about using "off-the-shelf" process reference frameworks
    * Conveying the essence of a process with Process Scope Diagrams and Summary Charts
    * Using the Process Architecture to assess initiatives, and select processes for transformation
3. Encouraging change by discovering relevant human, organisational, and cultural factors
    * Organisational culture – not really as "squishy" or impossible to describe as you thought.
    * Building a convincing and blame-free Case for Change, and a compelling Vision
    * Understanding the strategic differentiator, and its impact on process change
    * How to discover the factors that influence the behaviour of individuals and organisations
    * Frameworks for assessing culture and its impact on business process design
    * Overcoming resistance by identifying core beliefs and how they drive current attitudes
    * Consolidating what you've learned into characteristics of a new process design
4. Process modelling for people - techniques for maximising engagement and progress
    * When to model *what* vs. when to model *who and how* – avoiding logical/physical confusion
    * Common errors in process modelling (or process mapping) and how to avoid them
    * Why we *really* model as-is workflow, and how to keep it relevant to business stakeholders
    * "Scope before flow" – why and how to clarifying scope before mapping
    * "Flow first, detail later" - a fast approach to building a first-cut flow model, and then refining it
    * Dodging the "all in one model" issue – when to shift to use cases, procedures, or other forms
    * Using a business process workflow model as a framework for holistic assessment
5. Designing for success – creating an implementable and sustainable business process
    * Assessing the as-is process using seven common problems and six enablers as frameworks
    * Identifying leverage points to focus on high-value features (characteristics) of a new process
    * Characterising the to-be process – generating, assessing, and choosing characteristics
    * Revealing unanticipated consequences – an enabler-based assessment of characteristics
    * Establishing "what" the process must include before factoring in the "who and how"
    * What to do when there is no "as-is" – you're designing a totally new process
    * Factors that contribute to a sustainable process

Clariteq Workshops for Business Analysts

Advanced Data Modelling:
Communication, Consistency, and Complexity   *2 or 3 days*

Description:
After gaining some practical experience, data modelers encounter situations such as the enforcement of complex business rules, handling recurring patterns, satisfying regulatory requirements to capture complex changes and corrections, dealing with existing databases or packaged applications, integrating with dimensional modelling, and other issues not covered in introductory data modelling classes. This hands-on workshop provides approaches for many difficult situations, as well as techniques for improving communication between data modellers and subject matter experts.

Topics will be covered with a discussion of the issue, a review of guidelines and examples, a workshop exercise, and a group solution and debriefing.

Three main themes will be explored:
1. The technical side of data modelling - getting better at modelling difficult situations
2. The human side of data modelling - improving processes and communication skills
3. Developing and using data models in new ways

Objectives:
On workshop completion, participants will be able to spot various advanced situations (listed below in "Course Outline/Topics") as they arise in their own modelling assignments, and deal with them efficiently and effectively.

Prerequisites:
Practical experience with data modelling, for instance, *Data Modelling* and/or six months or more of applying the techniques

Target Audience:
Business analysts, application developers, data modelling specialists, database administrators, and anyone else with substantial data modelling experience who needs additional skills.

Course Topics:
- Recapping the basics: conventions, basic structures, and "the four Ds of data modelling"
- Dealing with reference data and the "category vs. types vs. instances" problem
- Vector modelling – entity or attribute?
- Using multi-way associations and relationship constraints to handle complex rules
- Advanced normal forms - resolving circular relationships and cyclic dependencies
- Modelling time, history, corrections, and time-dependent business rules
- Analytic data structures – building star schema or dimensional models from ER models
- Roles, generalisation (subtyping,) and aggregation – when to use them, and when not to
- Implementing lists, trees, and networks with recursive relationships:
- Modelling difficult rules by combining subtyping and recursion
- Preparing and delivering a data model review presentation

Clariteq Workshops for Business Analysts

Integrated Business Analysis and Requirements Definition
Model-Driven Techniques for Processes, Applications, and Data   *3 days*

Description:

Being a business analyst is not easy, and many common requirements definition methods don't make it any easier. At one extreme are simplistic list-based approaches that are too imprecise, incomplete, and inconsistent for all but the simplest applications. At the other extreme is a knot of complex techniques that are indecipherable to most users and analysts, and thus produce results that are equally undependable.

What is needed are techniques that are repeatable by analysts, understandable and relevant to business subject matter experts, and useful to designers and developers. They should also divide the problem space into a reasonable number of perspectives, offer well-defined, progressive levels of detail, play well together, and be practical enough that you can achieve good results within your natural lifetime!

That's a tall order, but it's possible. This intensive, three-day workshop shows how to discover, document, and verify requirements using a small number of business-friendly yet powerful modelling techniques – workflow models, use cases, service specifications, and data models. Each addresses one fundamental aspect of the problem space:

- What the business processes are, how they work now, and how they should work
- How the application should behave in support of the process and people working in it
- What the application should do in terms of validation, rules, functions, and record-keeping
- What data structures will support the process, the application, and the reporting requirements

The material is drawn from Clariteq's core offerings for business analysts – Working With Business Processes, Data Modelling, and Use Cases and Services.

Instead of textbook theory about what should work or what might work, this workshop covers what really works. You'll get clear methods, templates, guidelines, and tips to help you get quality results and maximise the involvement of business subject matter experts. That's because this workshop was developed by practitioners, for practitioners. The techniques have been developed, refined, and proven over years of real-world project experience. They've been used to support in-house development, offshore development, and package selection and implementation. Surprisingly, they've even been popular with Agile teams, because they support "just enough" modelling to get into the ballpark and then let iterative development take over.

Prerequisites:

None, although some understanding of information systems concepts will be helpful.

Target Audience:

Business analysts, systems analysts, and developers needing an introduction or refresher in modern, model-driven requirements specification techniques. Also, technical resources (programmers, UI designers, DBAs) interested in requirements definition, and project leaders, architects, and methodologists needing to understand current business analysis techniques.

Course Outline:

- Requirements definition – goals, issues, and an integrating framework
- Process discovery and workflow modelling – idenitfying, scoping, and mapping processes
- Data modelling – creating a common language and "world view"
- Service specification – capturing business rules, data updates, and other internal behaviours
- Use cases – discovering user expectations about a system's external behaviour
- Wrap-up – summary, guidelines, and notes on integrating the techniques

Clariteq Workshops for Business Analysts

Requirements Modelling
Proven Business Analysis Techniques for User Stories, Use Cases, Services, and Data   2 days

Description:

This intensive workshop presents a practical, proven, and integrated set of three model-based techniques for discovering, documenting, and verifying application requirements:

- Concept models (data models) – develop a common understanding of the *things* the processes and application operate on;
- Use cases – describe *how* an application should behave *externally* to support the people using it;
- Service specifications – describe *what* the application should do *internally* independently of *who* is using it, or *how*;

The content is drawn from Clariteq's two-day courses on model-driven application requirements specification – *Data Modelling* and *Use Cases and Services* – compressed into a two-day workshop.

Business Analysts around the globe are returning to robust but practical modelling techniques. The return to model-based techniques is due to dissatisfaction with list-based ("the system shall…") methods that lead to documents containing thousands (!) of requirements, but little value. Written requirements have their place, but lack consistent granularity, don't cross-validate, and provide little or no context. Model-based techniques address these shortcomings, but many BAs have avoided them because so many models were little more than "pictures of the physical design."

This workshop introduces business-friendly modelling techniques that have been proven on both custom development and packaged software projects. They are repeatable by analysts, relevant to business subject matter experts, useful to developers, and are popular with Agile teams because they support "just enough" modelling to get into the ballpark and then let iterative development take over.

Objectives:

On workshop completion, participants will be able to:

- Understand how use cases, services, and data collectively represent application requirements
- Discover and document an agreed-upon "world view" with business-friendly data models
- Discover and document "internal" application requirements (logic and rules) with services
- Discover and document "external" application requirements (UI behavior) with use cases
- Apply all techniques at contextual (scope,) conceptual (overview,) and detail (specification) levels

Prerequisites:

None, although an understanding of information systems concepts will be helpful.

Target Audience:

Business analysts, UX designers, systems analysts, and developers responsible for the analysis and design of any component of an application, including the data structures, application logic, and the user interface, or for documenting legacy/custom/packaged application behavior in a structured way. Also, technical resources and project leaders needing to understand current business analysis techniques, and content experts with a significant role in specifying requirements.

Course Topics:

- Application requirements definition – goals, issues, approaches, and a proven framework
- Example: How a concept model, service specifications, and use cases were used to quickly discover and document application requirements
- Making sense of contextual (scope,) conceptual (overview,) and detail (specifications) modelling
- Why these techniques are being embraced by the Agile community
- Core guidelines for the essential data model components – entities, relationships, and attributes.
- A simple language-based way to initiate a concept model and keep the business engaged
- Use cases (external behaviour) and services (application logic) – terms, concepts, and rationale
- Four techniques for discovering a system's use cases and business services
- Templates for documenting use cases and services at the conceptual and detail levels
- Making detailed use cases "real" with dialogues and use case scenarios
- Creating detailed service specification – invocation, validation, rules, and updates
- Easing the transition from conceptual to logical with the world's simplest guide to normalisation

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