INFORMATION GATHERING PROCESS FOR DOCUMENTATION AND/OR TRAINING PURPOSES

1. Identify the scope of the business that will be documented, and the number of interview sessions (groups or individuals) that will be included.

2. Identify potential interviewees that:
   - Have a sound knowledge of what they do and why they do it
   - Are supportive of the requirements gathering exercise ("champions" for the cause)
   - Preferably are logical thinkers

3. Issue a questionnaire to those people to be interviewed. The purpose of this is twofold:
   - Obtain a starting point for the interviews
   - Get the person to start thinking about what they do prior to the interview

4. At the interview, take notes:
   - Start by asking what their job role is, in a single sentence.

     [eg. Local Council Customer Service Officer – My job is to serve customers who phone or visit]

   - Then ask what <u>functions</u> they perform in order to do their job – this phase, along with determining the activities that make up the functions, is known as functional decomposition.

     [eg. Enquiry support; Dog management; Hall hire, etc]

   - Then ask what <u>activities</u> they perform in order to perform the functions.

     [eg. Redirect phone queries; Issue Dog licence; Book hall, Issue hall keys, etc]

   - Then ask what <u>steps</u> (tasks) they do, from cradle (ie. what triggers the process) to grave (ie. what terminates this process), to perform each of these activities – this phase is known as sequential analysis

     [eg. for "Book hall": customer phones or visits; …then customer provides requirements such as the required date, and for how many people to cater for..…; then Customer Service officer checks a hall register; then…..etc]

5. Document from the notes the processes that they do.
   - Where things are unclear (such as names of objects, or there is a gap in what happens, or a logical flaw in what has been said) insert a question for the reviewer (who is often a supervisor or other line manager), and highlight [yellow highlighter within brackets is good]
   - Highlight all objects (such as people (ie. position name), physical documents, IT systems, paper folders, filing cabinets, etc) that are involved in the process – ***bold italicised***

6. Issue the draft documented processes for review.

7. Update the draft documentation from the returned review. If still unclear, can either send an email requesting clarification, or arrange to meet with them personally to discuss.

8. Reissue the documented processes for final review, requesting signoff that the process has been sufficiently and correctly captured.

9. If required, each process can be rendered as graphical workflow, by using such products as 4TQFLOW or MS Visio. This assists the next step of generating training material (which may require sample screen shots).

Note:

The ***depth*** to which the interviewer will go with each process will depend upon the functional breadth to be covered in the interview, and also the limiting factor of time available for the interview itself and subsequent documentation and review. A process within a process may not even be documented if it is agreed to be relatively insignificant.

A pragmatic approach can be taken to this iterative process of reaching down to capture and document to a certain level: to finely capture and document to full detail could be counterproductive to achieving helpful documentation in an adequate timeframe ("80/20" rule applies).
