



## Agenda

Click [here](#) for additional training and schedules.

### Tools and Techniques to Successfully Launch and Manage Your Projects

**Instructor(s):** Betsy Stockdale or  
Amanda Cardenas

**Length:** 4 days

**CEUs:** 2.8/see below for PDU breakdown

**Pework:** None

**Level:** Intermediate

**Training Topic:** Business Skill Enhancement

**Subtopics:** Resource Management, Problem Solving

#### Training Description:

By attending this 4-day training, learners will build confidence and the skills needed to identify problems and objectives, visually model requirements, manage requirements, prepare for elicitation sessions, conduct interviews, deal with difficult stakeholders, and apply models during the elicitation process using a combination of lectures, group activities, and individual activities designed to provide an opportunity to learn, explore, and test in a “safe” environment. The integrated training allows for additional practice on the concepts where learners can apply them to their own project challenges.

**Requirements Core Concepts Day 1:** This day is the perfect introduction for anyone looking to hone their team’s skills and knowledge around gathering requirements. This training also helps experienced business analysis teams level-set across an organization on requirements terminology and concepts. This training emphasizes the importance of understanding business objectives to manage scope, and will teach attendees to recognize the different types of requirements while getting an introduction to techniques for elicitation, scope management, models, and requirements review.

**Requirements Visualization Day 2:** This day provides intermediate and advanced business analysts, project managers, and product managers an incredibly powerful addition to their skill sets through requirements visualization. As an extension of the first day, it dives deeper into requirements models and when to use them. Understanding how to select models provides learners with the ability to communicate with any audience—customers, developers, product managers, and senior management.

**Elicitation and Facilitation Day 3:** This day provides intermediate and advanced business analysts, project managers, and product managers a set of elicitation and facilitation skills fundamental to their roles. The training guides learners on where to start with requirements elicitation on projects, including how to build an elicitation plan and individual agendas for elicitation sessions. The training builds confidence and teaches the skills attendees need to prepare for sessions, conduct interviews, apply models during the elicitation process, and take effective notes.

**Workshop Day 4:** This day encourages learners to practice the concepts from the previous three days of the training by applying them to their own personal projects. The instructor will facilitate the students working in groups and alone on business objectives models, business data diagrams (or ERDs), ecosystem maps, report tables and display-action-response models, process flows, requirements mapping matrixes/traceability matrixes, and any other models they select. Learners will be able to use more relevant examples than previously practiced so they can take the work products back to their jobs after training.

## Learning Objectives:

By the end of Requirements Core Concepts (Day 1), learners should:

- Understand the value of requirements (models).
- Understand various elicitation techniques.
- Create clear requirements using the attributes of a good requirement and requirements set.
- Analyze requirements for gaps using requirements models.
- Apply techniques for managing requirements.
- Understand how to measure the quality of requirements.

By the end of Requirements Visualization (Day 2), learners should:

- Create requirements models to organize complex information rather than using only thousands of “system shall” statements.
- Understand 15 different types of Requirements Modeling Language (RML®) models, including process flows, ecosystem maps, report tables, business data diagrams, and feature trees.
- Analyze and select the right model for the appropriate audience and situation.
- Understand how the proper use of models allows you to ensure the completeness of your requirements.
- Understand the different types of models and how they relate to each other.
- Apply learned concepts to use models together and create a complete understanding of the system.
- Integrate models with any development methodology—from predictive to adaptive.

By the end of Elicitation and Facilitation (Day 3), learners should:

- Apply various techniques to elicit requirements.
- Understand how to plan elicitation on a new project.
- Identify the right audience for elicitation sessions.
- Execute a tailored elicitation session for a particular audience.
- Create and execute facilitated sessions.
- Understand what tools to use within a facilitated session.
- Analyze and understand what to do with elicitation results.

By the end of Workshop (Day 4), learners should:

- Feel comfortable with the concepts learned in the previous 3 days of training.
- Know how to apply the concepts to their daily work/projects.
- Have their project-specific example work products started to take back to their project.

## AGENDA

### DAY 1: Requirements Core Concepts

- Introduction
- Types of Requirements
- The Requirements Process
- Eliciting Requirements
- Requirements Models
- Requirements Specification
- Requirements Validation
- Managing Requirements

### DAY 2: Requirements Visualization

- Introduction
- Overview of Models
- Details on Each Model
  - Objectives Models: Business Objectives Model, Key Performance Indicator (KPI) Model, Feature Tree, Requirements Mapping Matrix
  - People Models: Organizational Chart, Process Flow
  - Systems Models: Ecosystem Map, Display Action Response Table, Decision Tree, Decision Table
  - Data Models: Business Data Diagram, Data Flow Diagram, State Table, State Diagram, Report Table
- Relationships Between Models

### DAY 3: Elicitation and Facilitation


- Overview
- Soft Skills
- Facilitation Role
- Creating Elicitation Plans
- Facilitation and Elicitation
  - Group Facilitation Skills
  - How to Use Visual Models in Elicitation
- Post-Elicitation Activities

### DAY 4: Workshop

- Applying Concepts by Creating Models
  - Business Objectives Models
  - Business Data Diagrams
  - Ecosystem Maps
  - Report Tables
  - Display Action Response Models
  - Process Flows
  - Requirements Mapping Matrix

**Professional development units (PDUs)** are 1-hour blocks of time spent learning, teaching others, or volunteering. By attending this training, you will be able to achieve the following PDUs as learning hours to apply for PMI certification or to maintain your certification status with PMI. [View](#) how your PDUs align with the PMI Talent Triangle®.

	Technical	Leadership	Strategic	Total
<b>CAPM® / PMP® / PgMP®</b>	28	0	0	28.00
<b>PMI-ACP® / Agile*</b>	5	0	0	5.00
<b>PMI-SP®</b>	0	0	0	0.00
<b>PMI-RMP®</b>	0	0	0	0.00
<b>PfMP®</b>	0	0	0	0.00
<b>PMI-PBA®</b>	28	0	0	28.00



*\*Please note that the asterisked row above applies to the PMI® Agile Certification Journey and includes DASM™, DASSM™, DAC™, and DAVSC™ certifications.*