

The Courage to Scribe Part 1

At a recent conference I overheard a conversation that went something like this:

Participant #1: "How can we get organizations to use business analysts (BAs) more strategically?" Good question I said to myself. I began thinking of ways to encourage organizations to use BAs as trusted advisors when the other participant spoke up.

Participant #2: "You're absolutely right. I'm so tired of being nothing but a scribe in my company. I could be doing so much more."

Recognizing that I was not only eavesdropping but in jeopardy of interjecting my unsolicited and unwanted two cents worth, I got up and left the table, silently exclaiming, "I love scribing!" I was amazed that anyone could denigrate its importance. I wondered what it meant to "do so much more" when scribing required proficiency in so many skills.

Ancient Scribes in Egypt. Many ancient societies valued scribes. In Egypt, for example, scribes were at the center of activities such as government, defense, and religion. "In truth very little happened in ancient Egypt which did not involve a scribe in

by:

*Elizabeth Larson, PMP, CBAP, CSM
Co-Principal, Watermark Learning, Inc.*



ENHANCED PERFORMANCE. ENDURING RESULTS.

View more articles on our website at:
www.WatermarkLearning.com

The Courage to Scribe, Part 1 (cont.)

some manner.¹” Today effective scribes are –or should be–at the center of requirements activities.

What do scribes do? Ancient scribes were considered artists, able to draw and create. Scribes today certainly create—they create structure from chaos by documenting the important results from elicitation activities. However, creating an alternate reality is not part of the job. Filtering information to skew the meeting results does not serve the organization well and should be avoided. We need to use our scribing skills to accurately reflect what occurred during the workshop, not what we wished had happened.

I often say that the person with the pen has the power. Over the years I have seen many scribes take over facilitation during an elicitation activity. These scribes start asking questions and the next thing you know they are “running” the meeting. As scribes we can reinvent history. We can emphasize what we think is important. We can influence outcomes to promote our own agenda. We can do all those things, but we never should.

When is a scribe needed? If the meeting is small and if the objective of the meeting is to relay information to others, we probably don’t need either a

facilitator or scribe. However, when we elicit requirements from various stakeholder groups, there are bound to be different opinions, viewpoints, requirements, and issues. If stakeholders agreed on everything, there would be no need for requirements workshops. We could just interview one person and be done. But it is in the best interest of the project to have stakeholders articulate their differences. The sooner we are aware of these issues, the sooner we can resolve them and achieve consensus. Having a neutral facilitator helps ensure that all ideas are expressed and that consensus is ultimately reached. Having a neutral scribe helps ensure that the results are documented and confirmed, preventing the “amnesia syndrome” where people forget what was said and agreed to.

Facilitator or scribe? If I had to choose—not that I want to make such a choice—but if I had to choose, I’d take a scribe over a facilitator. I can almost hear a chorus of “You gotta be kidding!” No, I’m quite serious. How many meetings and workshops have we all attended where there was a weak facilitator or none at all? Such meetings are by no means pleasant for participants. They can be pretty painful. Excruciating, even. But what happens when there is no scribe? Can any of us remember, let alone agree on, what happened? On which decisions were made? On who agreed to do which action items? Probably not.

Complex skills. Being an effective scribe is hard work and requires a set of fine-tuned skills including these:

- **A consultant vs. order-taker mentality.** Order-takers are often good note-takers. They are able to document conversations and requirements. However, order-takers take what’s given to them. Consultants provide advice to the facilitator without disrupting the meeting. They do the necessary prep work, such as discussing roles and responsibilities, how they will work together, and how to manage the facilitator/scribe “dance.” They



“Scribes today certainly create – they create structure from chaos by documenting the important results from elicitation activities.”

The Courage to Scribe, Part 1 (cont.)

know when it is OK to ask questions and to whom, so that the facilitator continues to work with the participants and the scribe continues to work with the facilitator.

- **Critical thinking skills** help us sort through what is important and what is not. Scribing involves taking in a great deal of disparate, sometimes contradictory information, synthesizing it, and presenting the results back to the participants so that they are easy to read and confirm. We need to actively listen while writing. After the workshop or meeting we need to prioritize what we heard. Although we never decide which requirements to include or eliminate, we do get to choose how much of the conversation and back story is needed. In other words, critical thinking helps ensure that the proverbial wheat and not the chaff is documented, simplifying the results and making them both readable and understandable.
- **Analytical skills.** An effective scribe will capture both the high-level and detailed requirements. They will break high-level requirements into the necessary detail and ensure that each detail is linked to higher-level requirements. A good facilitator will ask for this detail and relay it to the scribe. A great scribe

will ensure that even if not discussed, the right level of detail necessary to develop the solution surfaces.

- **Written communication skills** provide clarity which is so necessary in creating structure from chaos. Even if we have developed fine-tuned critical thinking and analytical skills, we need to communicate in a way that everyone can understand. There is an art to taking a random discussion and turning it into concise, consistent, well-organized results.

Courage. Many organizations do not understand the importance of scribing and view it as a waste of time. In those organizations there is apt to be pushback about having a separate scribe role in requirements workshops and in spending the time needed to document the results.

Stay tuned for Part 2 in which I will explore why courage is needed in the face of pushback, as well as the benefits of having scribes and why they are critical to project and organizational success.

¹ <http://www.ancientegyptonline.co.uk/scribe.html>, viewed on November 2, 2012.

About Watermark Learning

Watermark Learning helps improve project success with focused business analysis, project management, and business process management training and mentoring. We foster results through our unique blend of industry best practices, a practical approach, and an engaging delivery. We convey retainable real-world skills to motivate and enhance staff performance, adding up to enduring results.

Watermark Learning offers public, private, and online training. With our academic partner, Auburn University, we also provide Masters Certificate Programs to help organizations be more productive, and assist individuals in their professional growth. Watermark is a PMI Global Registered Education Provider, and an IIBA Endorsed Education Provider.



7301 Ohms Lane, Suite 360
Minneapolis, MN 55439
800-646-9362
www.WatermarkLearning.com