The Courage to Scribe
Part 2

by:

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

In Part 1 I discussed the role of the scribe, how the scribe and facilitator work together, and some of the critical skills that effective scribes need to turn the chaos of random discussions into the structure needed to develop the solution. In Part 2 I will explore why organizations need courageous scribes.

Courage to push back on the pushback. It takes courage to scribe well. In many organizations we encounter pushback related to scribing. We hear lots of reasons why not to scribe. Remarks like those below can discourage us unless we have the courage to educate project and resource managers on why scribes are needed and influence them to assign this important role.

"We simply don't have the resources for both a facilitator and a scribe. You'll have to be a facilitator and try to scribe as best as you can." When we wear multiple hats, like facilitator and scribe, we simply cannot be effective. It takes all one's energy, concentration, and focus to ensure all voices and ideas are heard correctly. As facilitators we can't be focused and "present" if we try to scribe, too. It takes courage to influence others (resource managers, project managers, other BAs) to ensure that someone scribes all requirements workshops. "We'll just get the admin to scribe." There is a false assumption that anyone can scribe. In Part 1 we looked at some of the complex skills needed. The most effective scribes understand both the project

and business context, both of which are needed in order to synthesize the vast amount of information elicited during requirements workshops. Although the scribe's role is neutral, as is the facilitator's, it requires enough understanding to make sense of all the concepts, contradictions, terminology, and acronyms commonly tossed about.

"We'll ask one of the participants to bring in their laptop and take notes." Taking notes is not scribing. Taking notes is just that. Notes are abbreviations, more like brief summaries than a synopsis of the discussion or a distillation of ideas. However, we need synopses and distillations, not abbreviations and summaries. In addition, having someone type away can distract participants from doing what they need to do—participate.

Courage to include scribing tasks in the project. Having courage means that the scribe also provides advice to the project manager. The seasoned scribe knows that for each workshop there will be tasks related to preparation, scribing during the meeting, and follow-up. The experienced scribe knows that the meeting itself takes the least amount of time and that follow-up has to include not only documenting the results, but asking additional questions and enhancing the documentation with the answers to those questions.

Courage to discuss risks. It takes courage to explain the risks associated with not having such a

"When we are effective, honest scribes, we admit what we don't know and keep asking questions."

role or trying to combine it with the facilitator or participant role. In some organizations risks are considered negative and those who highlight risks are the messengers who get "shot." It also takes courage to explain why it is necessary to take the time to document the results in a way that is easy for stakeholders to read, understand, and confirm them. And as we know, making things easy is hard!

How can we ensure that this important role is filled? What can we BAs do to influence project and resource managers? First determine if there is a real need for both a facilitator and scribe. If so, remind people of the cost and time overruns related to undefined and ambiguous requirements. Apprise them of the risks as well as the benefits of having a competent scribe.

Helping projects and organizations. Here are five reasons why courageous scribes help organizations achieve their goals.

1. *Scope management.* Using analytical thinking skills helps the scribe ensure that requirements are defined at the right level of detail, which in turn helps manage scope. There is much less time spent arguing over whether a requirement is new or changed or was part of the original baseline.

2. *Vendor partnerships.* There is far less chance of conflict with vendors, conflict that often causes failed projects and failed relationships. Having an effective scribe documenting requirements for vendor requests for proposals helps reduce these types of misunderstandings related to scope.

3. *More questions = more requirements.* Documenting requirements clearly is one of the best ways I know to generate questions, which in turn generate more requirements. When we are effective, honest scribes, we admit what we don't know and keep asking questions. We ask questions about the high-level context and about the detail. We question the whys and the whos and the hows. I worked on a project where the scribe documented three-quarters of a page of requirements that became ten after he started asking

questions. Of course lengthy documentation for its own sake does not add value. Uncovering hidden requirements, though, does.

4. *Fewer missed requirements.* When requirements are well-organized and clear, participants can go right to the requirements and approve or reject them as soon as they are published. Having no documentation, wading through lengthy and often unnecessary documentation, or trying to decipher meaning from vague inference usually results in missed requirements. The scribe can communicate the disposition of those that are approved or rejected (deferred to another project, or phase, or iteration, cancelled, etc.) to all stakeholders. Clear, well-organized requirements increase the chance that they will actually be read and dealt with immediately, before they get filed and effectively buried forever.

5. *Quicker consensus.* When requirements are clear and easily understood, it's harder to fall into the "amnesia" trap where participants forget what the requirements were. We can more easily avoid the tired refrain-- "but I don't remember saying that." The amnesia syndrome is often a key factor in why requirements keep churning and changing and the cost of business analysis and the project keeps increasing.

To summarize, well-written, well-organized requirements prevent rework, confusion and disagreements, allowing the team to move forward sooner and more productively.

I can hear the arguments already. Can't we get these benefits without effective scribing? My answer is that I don't know how we can unless we are on small projects. When there are hundreds of requirements and weeks or months of requirements workshops, it is virtually impossible to define requirements completely, correctly, efficiently, at the right level of detail, all of which reduce project costs, reduce business frustration and participant contention, and are by far the best thing for the organization.

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.

Watermark Learning
ENHANCED PERFORMANCE. ENDURING RESULTS.

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