

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

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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



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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.

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Part 2

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

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The Courage to Scribe – Part 2 (cont.)

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

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



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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.

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The Courage to Scribe: 42's Trusted Advisor

Recently I saw the movie "42," based on the true story of Jackie Robinson, who in 1947 bravely fought custom, bigotry, and violent hostility to become the first African American to play major league baseball. His courage came from his inner strength which allowed him to withstand with dignity the cruel behavior from fans, other team managers and players, and at first some of his own teammates.

As I watched the movie, I was equally taken with the story of Robinson's "scribe," Wendell Smith. Also an African American, Smith bravely fought many of the same obstacles as Robinson, but not as visibly, to become a respected sports writer who in 1994 was posthumously inducted into Baseball's Hall of Fame.

Wendell Smith introduces himself to Robinson early in the movie as Robinson's "Boswell," a reference to James Boswell, the biographer of the 18th-century writer, Samuel Johnson. In his Life of Johnson, Boswell chronicles his conversations with Johnson written on their travels together. Like Boswell, Smith chronicles his travels with Robinson. The movie describes the relationship between these two black men struggling to do what each does so well; Robinson to play baseball and Smith to depict the fight to be able to play the game.

From the beginning, Smith establishes his role not only as "scribe," but also as trusted advisor. He warns Robinson about the difficulties facing the baseball player. He describes probable situations and provides advice on how Robinson should respond.



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The Courage to Scribe: 42's Trusted Advisor (cont.)

In preparation for those difficulties, Smith gives Robinson an abundance of advice not related to playing baseball, but how to react to the physical and verbal abuse he is likely to encounter. As is common with decision-makers when confronted with advice, Robinson often views the advice as well-intentioned but ill-conceived, so he often pleasantly ignores it, usually to his detriment. Sometimes, however, Robinson reacts hostilely. Smith, who has also suffered race-related indignities throughout his career, reminds Robinson of the courage needed to succeed. As the trusted advisor, he encourages Robinson to use his strong moral character to avoid reacting violently to violence.

From HBO's *Game of Thrones*, to Sam Gamgee in the *Lord of the Rings* trilogy, trusted advisors literally and figuratively take their life in their hands when providing advice that is clearly in the best interest of the decision-maker, but equally unsought and unwanted. Their advice is often neglected at best. At worst, decision-makers react with anger, or in the case of tyrants, even death. Yet despite the physical and/or emotional danger, trusted advisors do not often get much recognition. Writing about Smith, a Los Angeles Times post poignantly reminds us that "As Jackie Robinson was making history, Wendell Smith wrote it. Many fans remember Robinson and his struggle, but few remember Smith, who sat in the stands typing on a manual typewriter writing about integration on the field, while being barred from the press box because he was black."¹

So what does all this have to do with the BA both as scribe and trusted advisor?

As with Smith, shunted off to the stands, we scribes are often shunted off to the back of the room. In virtual sessions, scribes are often

forgotten and not even introduced. After the workshops, participants tend to remember who facilitated and participated, but not who scribed. Yet we scribes are, after all, the ones who have the greatest opportunity to create structure from chaos. Scribing requires us to actively listen, absorb, synthesize a great deal of information, and structure elicitation results, such as requirements, issues, workarounds, decisions, etc., into documentation that can be easily read, understood, and confirmed.

As scribes who are also trusted advisors, we often courageously go out on a limb by articulating the need for the role of scribe in organizations which don't see the need, working with the project manager to account for scribing tasks in the project, and ensuring that the elicitation activity results are documented ethically. In addition, we need to speak up and be heard when remaining silent could jeopardize the accuracy of the documentation. As trusted advisors, then, we need to work behind the scenes to ensure that the organization provides strong, experienced skilled scribes.

Secondly and importantly, we may not feel like we're in the center of requirement activities, but we really are. What will be remembered is dependent on the job we do scribing. Just as Smith "accompanied Robinson throughout his first major league season, creating his image, reporting his words and crusading for his rights," we scribes accompany the facilitator; make sense of often rambling and contradictory discussions, while "crusading" always for the right thing for the project and for the organization.

¹ Bill Plaschke, <http://www.latimes.com/sports/baseball/mlb/dodgers/la-sp-0414-plaschke-20130414,0,3199706.column>, April 14, 2013, viewed on April 14, 2013.

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