



**State University of  
Telecommunications**



**Department of System Analysis**

# Information systems requirements analysis.

## Part 1

**Specialty:** 124 "System Analysis"

**Lecturer:** Zolotukhina O.A.

# Contents

- Why IT-projects are impaired and ultimately cancelled?
- Requirement definitions
- Requirements Engineering: processes, tasks, activities
- Stakeholders: definition, categorization examples, identification
- Types of requirements



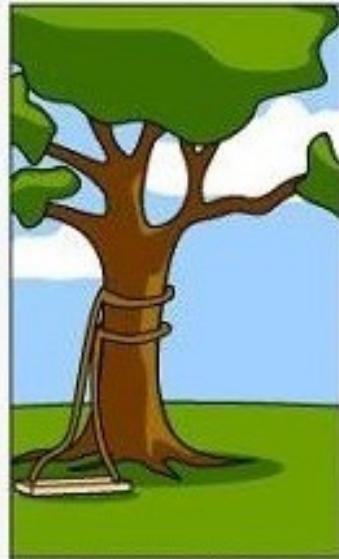
How the customer explained it



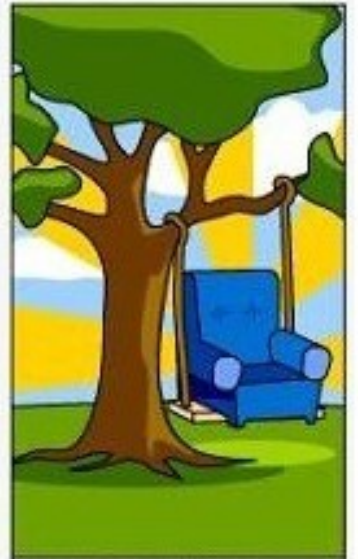
How the Project Leader understood it



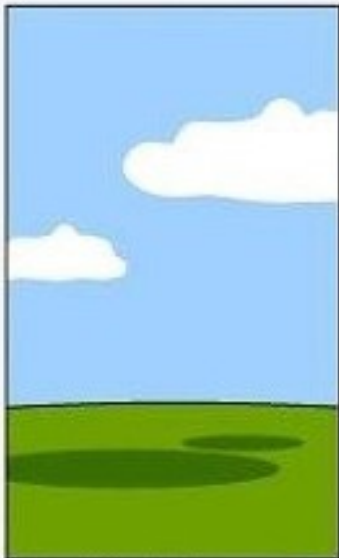
How the System Analyst designed it



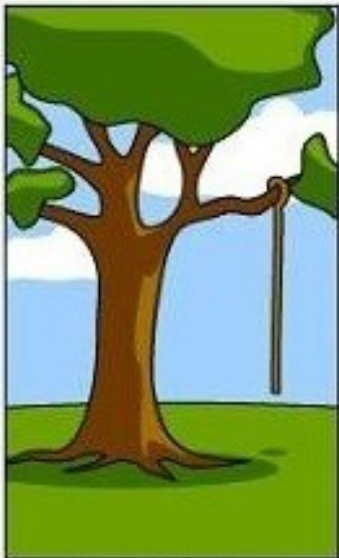
How the Programmer wrote it



How the Business Consultant described it



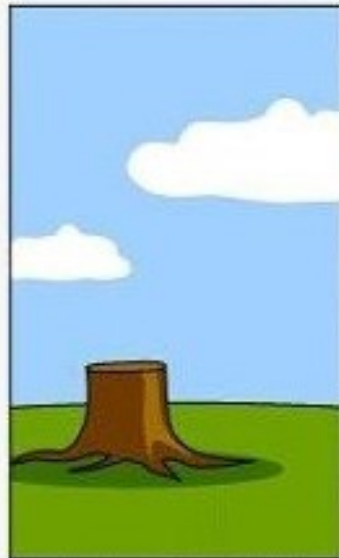
How the project was documented



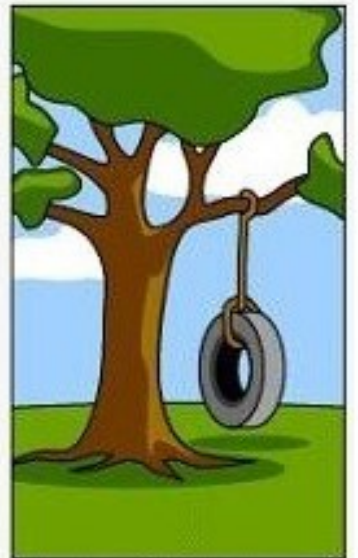
What operations installed



How the customer was billed



How it was supported



What the customer really needed

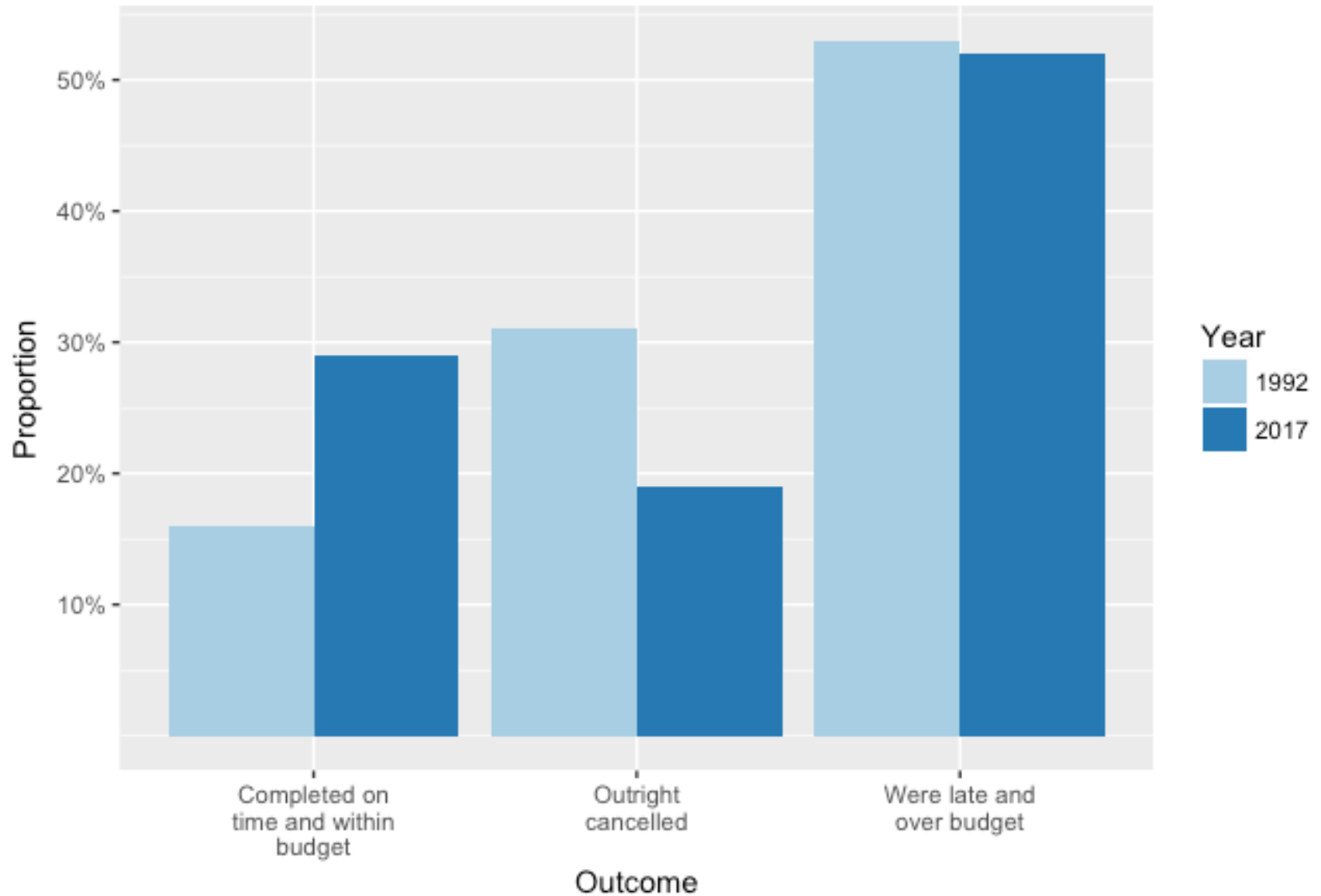
# Standish Group CHAOS Report 2016

## MODERN RESOLUTION FOR ALL PROJECTS

	2011	2012	2013	2014	2015
SUCCESSFUL	29%	27%	31%	28%	29%
CHALLENGED	49%	56%	50%	55%	52%
FAILED	22%	17%	19%	17%	19%

- 71% of IT-projects in 2015 failed or were challenged
- For every 100 projects that start, there are 94 restarts.

# Outcomes of IT-projects



# The reasons why IT-projects are impaired and ultimately cancelled

Project Impaired Factors	% of Responses
1. Incomplete Requirements	13.1%
2. Lack of User Involvement	12.4%
3. Lack of Resources	10.6%
4. Unrealistic Expectations	9.9%
5. Lack of Executive Support	9.3%
6. Changing Requirements & Specifications	8.7%
7. Lack of Planning	8.1%
8. Didn't Need It Any Longer	7.5%
9. Lack of IT Management	6.2%
10. Technology Illiteracy	4.3%
Other	9.9%

# What is a requirement?

A requirement is a **singular documented physical** or **functional need**, that particular design, product or process **to satisfy**

**Product requirements** prescribe properties of a system or product

BABOK

SWEBOK

RUP

IEEE

# A Guide to the Business Analysis Body of Knowledge (BABOK® Guide), Standard Glossary of Software Engineering Terminology(IEEE)

1. A condition or capability needed by a stakeholder to solve a problem or achieve an objective.
2. A condition or capability that must be met or possessed by a solution or solution component to satisfy a contract, standard, specification, or other formally imposed documents.
3. A documented representation of a condition or capability as in (1) or (2).



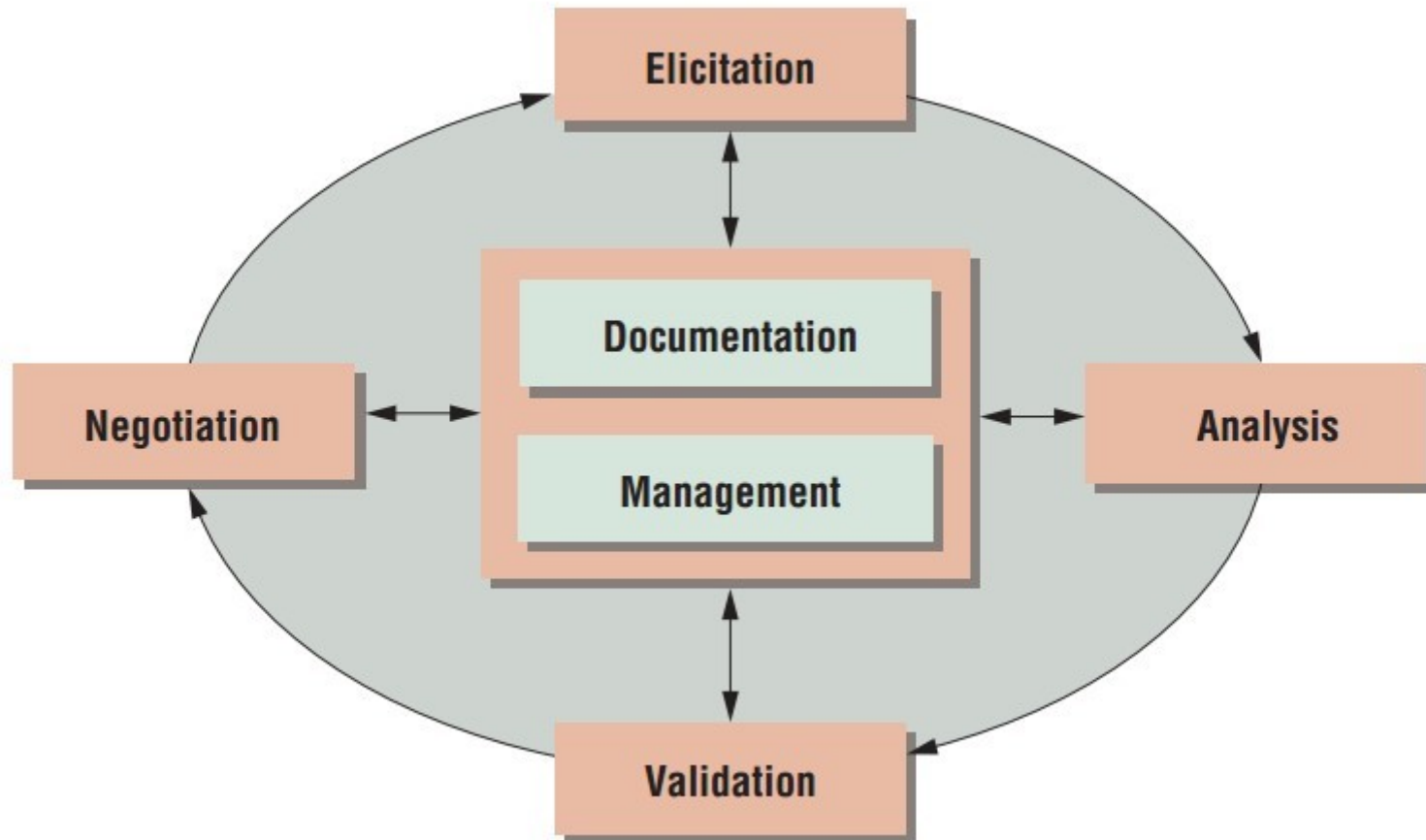
# Software Engineering Body of Knowledge (SWEBOK)

- A software requirement is a property that must be exhibited by something in order to solve some problem in the real world
- It is verifiable as an individual feature as a functional requirement or at the system level as a nonfunctional requirement
- Software requirements, software testing, and quality personnel must ensure that the requirements can be verified within available resource constraints

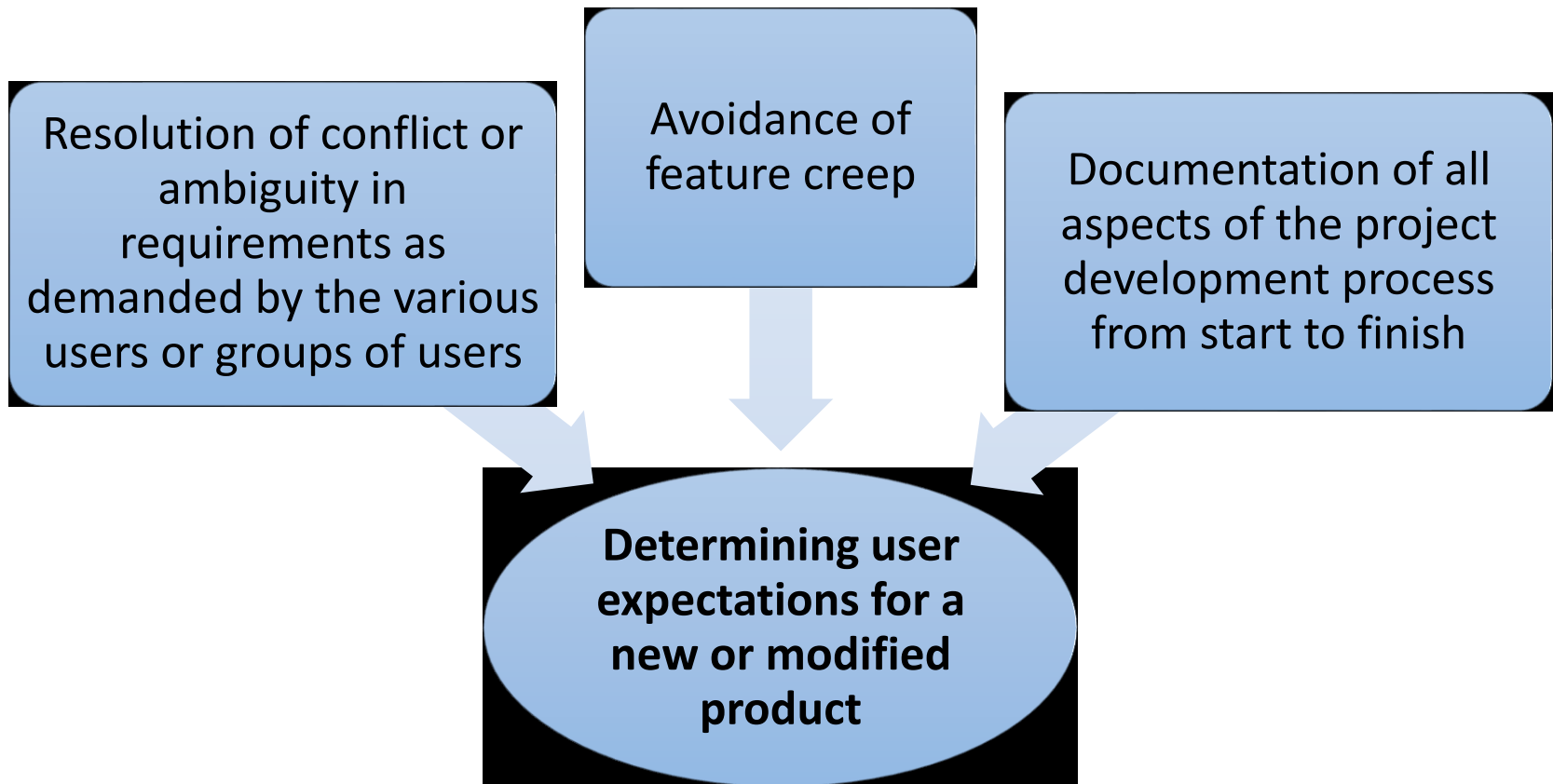
# Rational Unified Process (RUP)

- A requirement describes a **condition** or **capability** to which a **system must conform**
- Either derived directly from user needs, or stated in a contract, standard, specification, or other formal agreement.

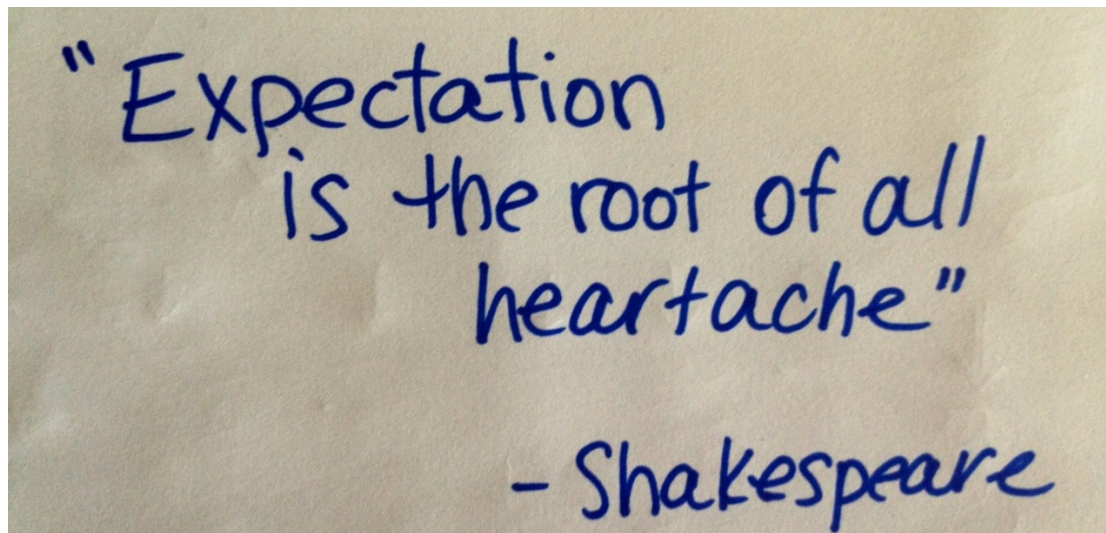
# Requirements Engineering processes



# Requirements Engineering tasks



The final system or product must meet the needs of customers, rather than trying to generate user expectations in accordance with the requirements!!!

A photograph of a piece of light-colored, textured paper with a handwritten quote in blue ink. The quote is written in a cursive, slightly slanted font. The text reads: "Expectation is the root of all heartache" followed by "- Shakespeare" on a new line.

"Expectation  
is the root of all  
heartache"  
- Shakespeare

# Types of activities in the Requirements Engineering

1. Requirements Elicitation
2. Requirements Analysis
3. Documenting Requirements
4. Requirements Management

# 1. Requirements Elicitation (requirements gathering)

- Identify and gather sources of information about the software system
- Communicate with customers and users (stakeholders) to determine what their requirements are



## 2. Requirements Analysis

- Understand the requirements of the **customers/stakeholders** including overlaps and conflicts
- **Determine** whether the collected requirements are
  - unclear,
  - incomplete,
  - ambiguous,
  - or contradictory,
- and then **solve these problems**



# 3. Documenting Requirements

- Requirements can be documented in various forms, such as simple descriptions, usage scenarios, user stories, or process specifications
- The main points for business analyst:
  - Stakeholder Analysis
  - Business Analysis Plan
  - Current State Analysis
  - Scope Statement Specification
  - Functional Requirements Specification
  - Wireframes and Other Visual Documentation
  - Information or Data Model Documentation
  - Test Plans, Test Cases, or User Acceptance Test Plans
  - Change Management
  - Throughout the Project

# 4. Requirements Management

- The main processes:
  - documenting,
  - analyzing,
  - tracing,
  - prioritizing and agreeing on requirements and then controlling change and communicating to relevant stakeholders
- It is a continuous process throughout a project
- A requirement is a capability to which a project outcome (product or service) should conform



# Stakeholders

A ***stakeholder*** in the architecture of a system is an individual, team, organization, or classes thereof, having an interest in the realization of the system

- **Primary stakeholders:** those ultimately most affected, either positively or negatively by an organization's actions
- **Secondary stakeholders:** the "intermediaries," that is, persons or organizations who are indirectly affected by an organization's actions
- **Tertiary stakeholders:** those who will be impacted the least
- **Key stakeholders:** those with significant influence upon or importance within an organization; can also belong to the other groups

# Stakeholder Categorization (example 1)

<b>Acquirers</b>	Oversee the procurement of the system or product
<b>Assessors</b>	Oversee the system's conformance to standards and legal regulation
<b>Communicators</b>	Explain the system to other stakeholders via its documentation and training materials
<b>Developers</b>	Construct and deploy the system from specifications (or lead the teams that do this)
<b>Maintainers</b>	Manage the evolution of the system once it is operational
<b>Production Engineers</b>	Design, deploy, and manage the hardware and software environments in which the system will be built, tested, and run
<b>Suppliers</b>	Build and/or supply the hardware, software, or infrastructure on which the system will run
<b>Support Staff</b>	Provide support to users for the product or system when it is running
<b>System Administrators</b>	Run the system once it has been deployed
<b>Testers</b>	Test the system to ensure that it is suitable for use
<b>Users</b>	Define the system's functionality and ultimately make use of it

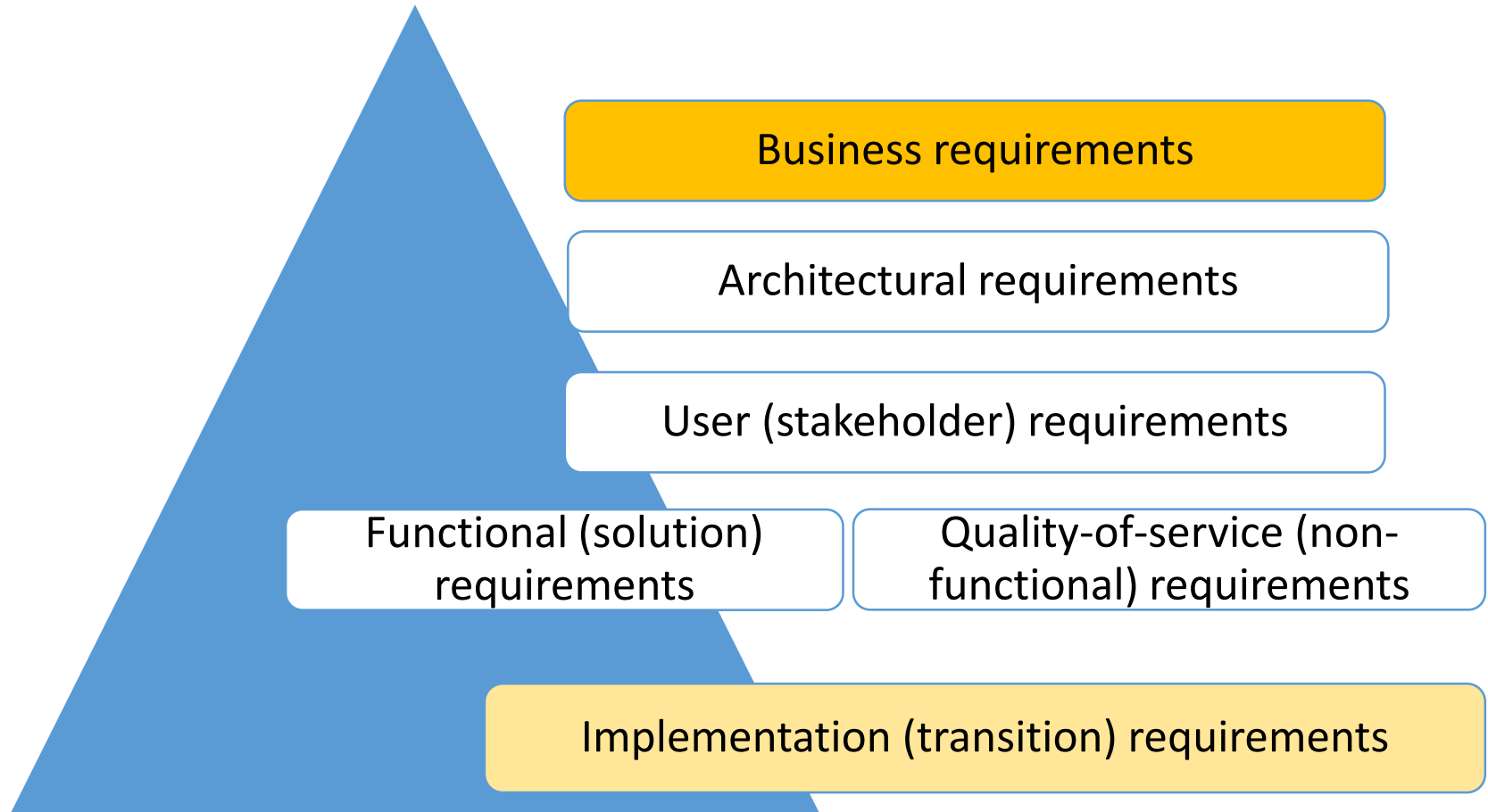
# Stakeholder Categorization (example 2)

<b>Customers</b>	finance a project or purchase a product to solve some business problems
<b>Users</b>	interact directly or indirectly with the application (subclass of customers)
<b>Analysts of requirements</b>	write requirements and pass them on to developers
<b>Developers</b>	create, deploy and maintain the product
<b>Testers</b>	determine the correspondence of the behavior of the software to the desired
<b>Technical writers</b>	responsible for creating user manuals, training materials and help system.
<b>Project manager</b>	plans the process and manages the development team right up to the successful release of the product
<b>Legal Department staff</b>	ensure that the product does not conflict with applicable laws and regulations
<b>Manufacturers</b>	must build a product containing this software
<b>Employees of the sales department, marketing, service support and others</b>	will have to work with the product and its users

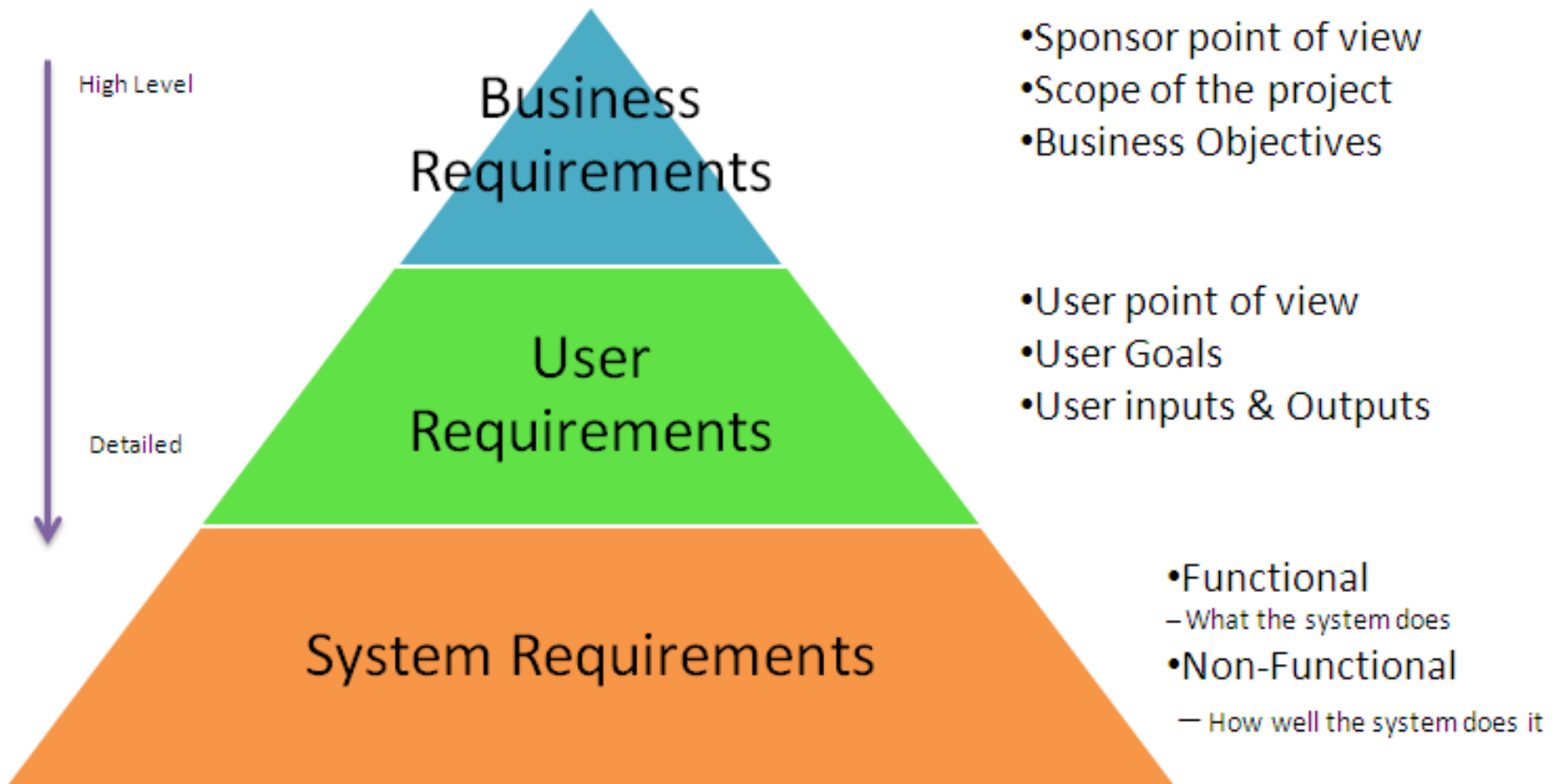
# Stakeholder Identification

- Anyone who uses the system (users and staff)
- Anyone who benefits from the system (functional, political, financial and social)
- Anyone involved in the purchase or provision of a system
- Organizations that regulate aspects of the system (financial, security and others)
- People or organizations that are opposed to the system (negative stakeholders)
- Organizations responsible for systems that interact with the system according to the project
- Organizations that combine horizontally with the organization for which the analyst designs the system

# Types of requirements (BABOK)

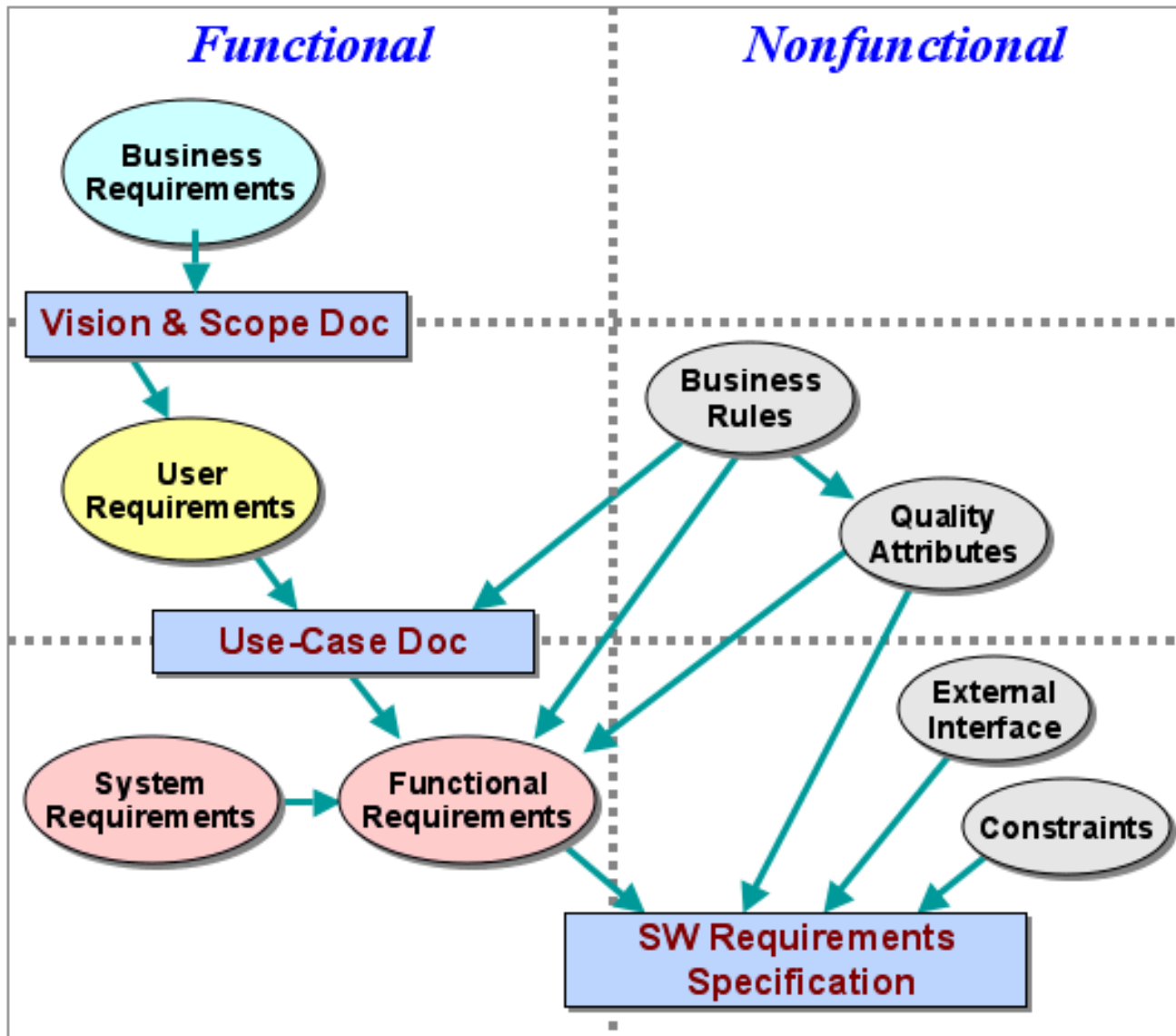


# Types of requirements (SE)

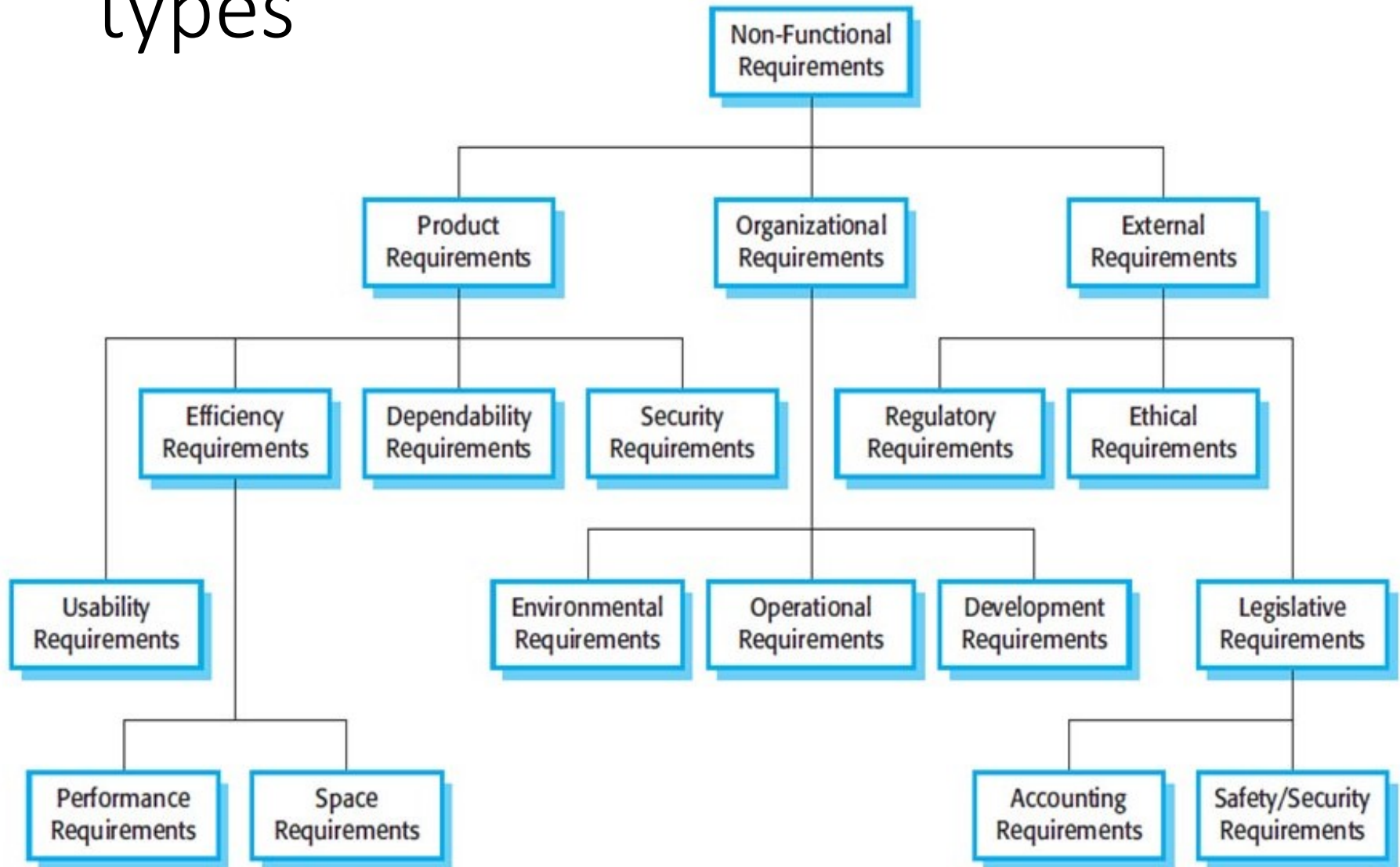




# Software requirements types (Virers)

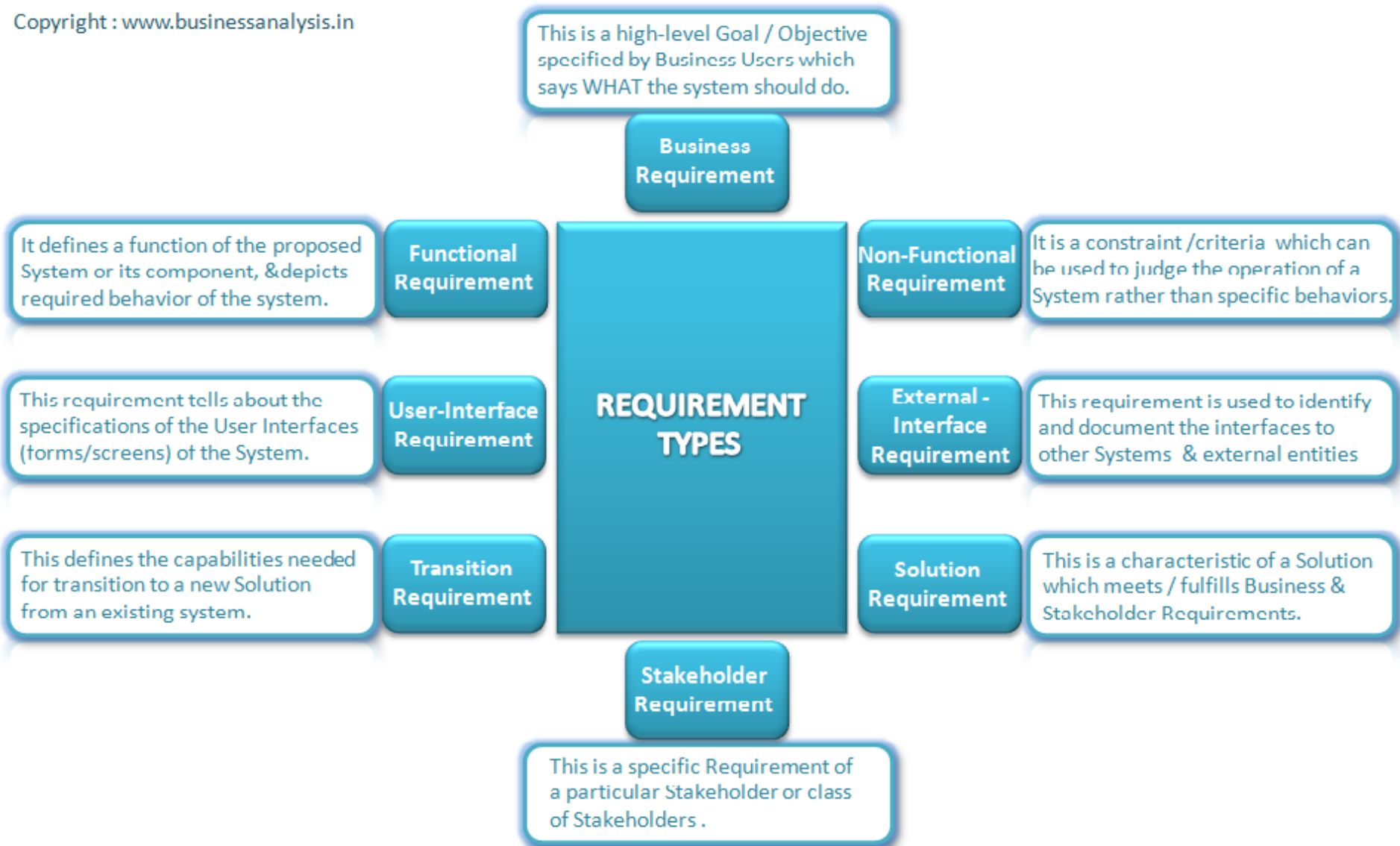


# Non-functional Requirements types



# Software requirements types

Copyright : [www.businessanalysis.in](http://www.businessanalysis.in)





**State University of  
Telecommunications**



**Department of System Analysis**

# Information systems requirements analysis.

## Part 2

**Specialty:** 124 "System Analysis"

**Lecturer:** Zolotukhina O.A.

# Contents

- Components of Requirements Elicitation
- Requirements Elicitation Process
- The problems of Requirements Elicitation
- Requirements Elicitation methods

# Components of Requirements Elicitation

# Requirements Elicitation (requirements gathering)

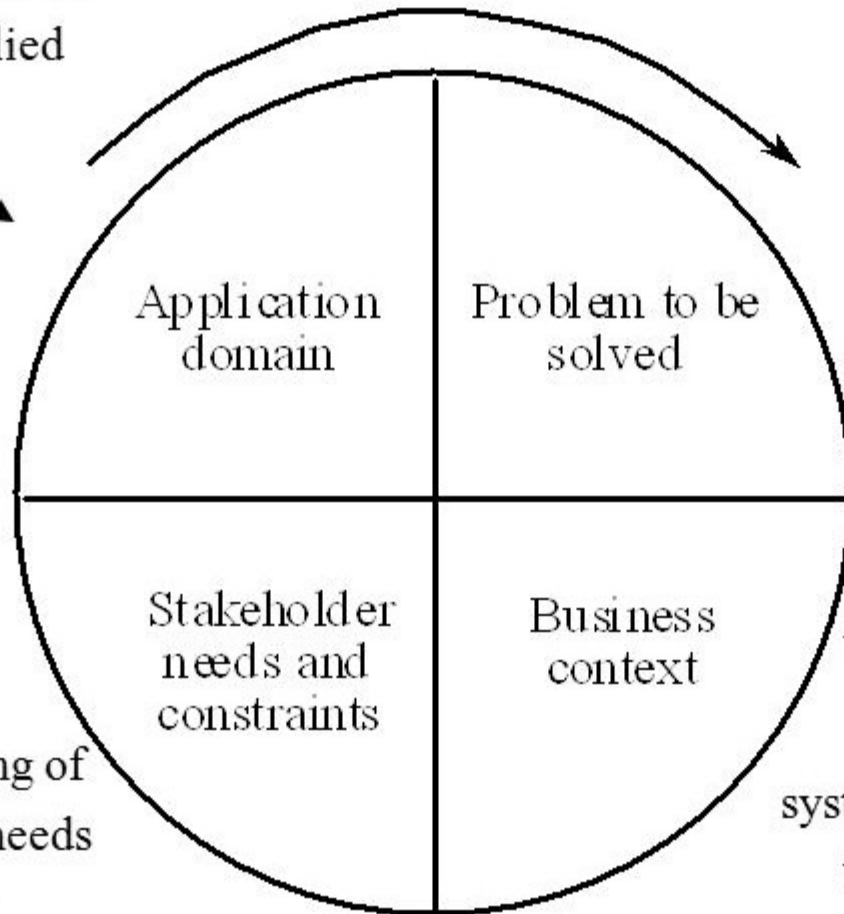
- **Identify and gather** sources of information about the software system
- **Communicate with customers and users (stakeholders)** to determine what their requirements are



# Components of Requirements Elicitation

Knowledge of general area  
where system is applied

Understanding of specific  
customer problem  
to be solved



Detailed understanding of  
specific stakeholder needs  
and constraints

Understanding of how  
systems interact and contribute  
to overall business goals



# Application domain

**Application domain** – a set of common requirements, terminology, and functionality for any software program constructed to solve a problem in the area

## **Domain requirements problems:**

- Understandability
  - Requirements are expressed in the language of the application domain
  - This is often not understood by analysts who develop the system
- Implicitness
  - Domain specialists understand the area so well that they do not think of making the domain requirements explicit

# How to understand and explicate the application domain?

- **Glossary**

- Documents terms unique to the domain, in order to ensure that all stakeholders understood what is meant when certain words are used
- A term relevant to the domain and a unique definition for each, as well as cross-referencing aliases

- **Data Dictionary**

- Standard definitions of data elements, their meanings, and allowable values. Contains definitions of each primitive data element and indicates how those elements combine into composite data elements

- ***Primitive Data Elements***

- Name – unique, referenced by the composite data elements
- Aliases – alternate names
- Values/Meanings – list of acceptable values
- Description – definition in the context of the solution

- ***Composite Data Elements***

- Sequences – primitive data in order
- Repetitions – Multiple occurrences of the primitive element
- Optional Elements – may or may not occur

# Problem to be solved

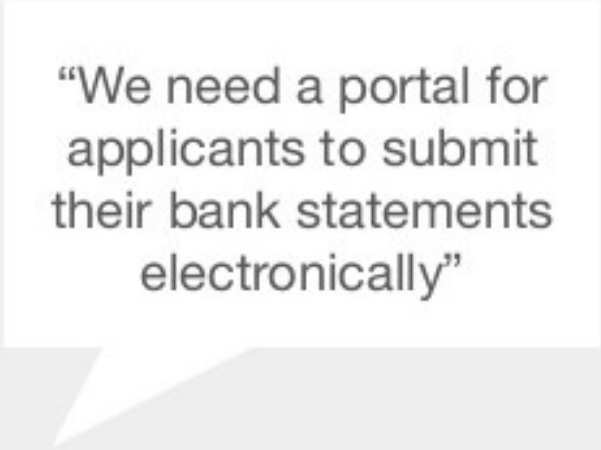
**The better you  
define the problem,  
the better the  
solution**

- Getting to the right problem
- The right kinds of solutions
- Building in the right kind of way

# Problem or solution?

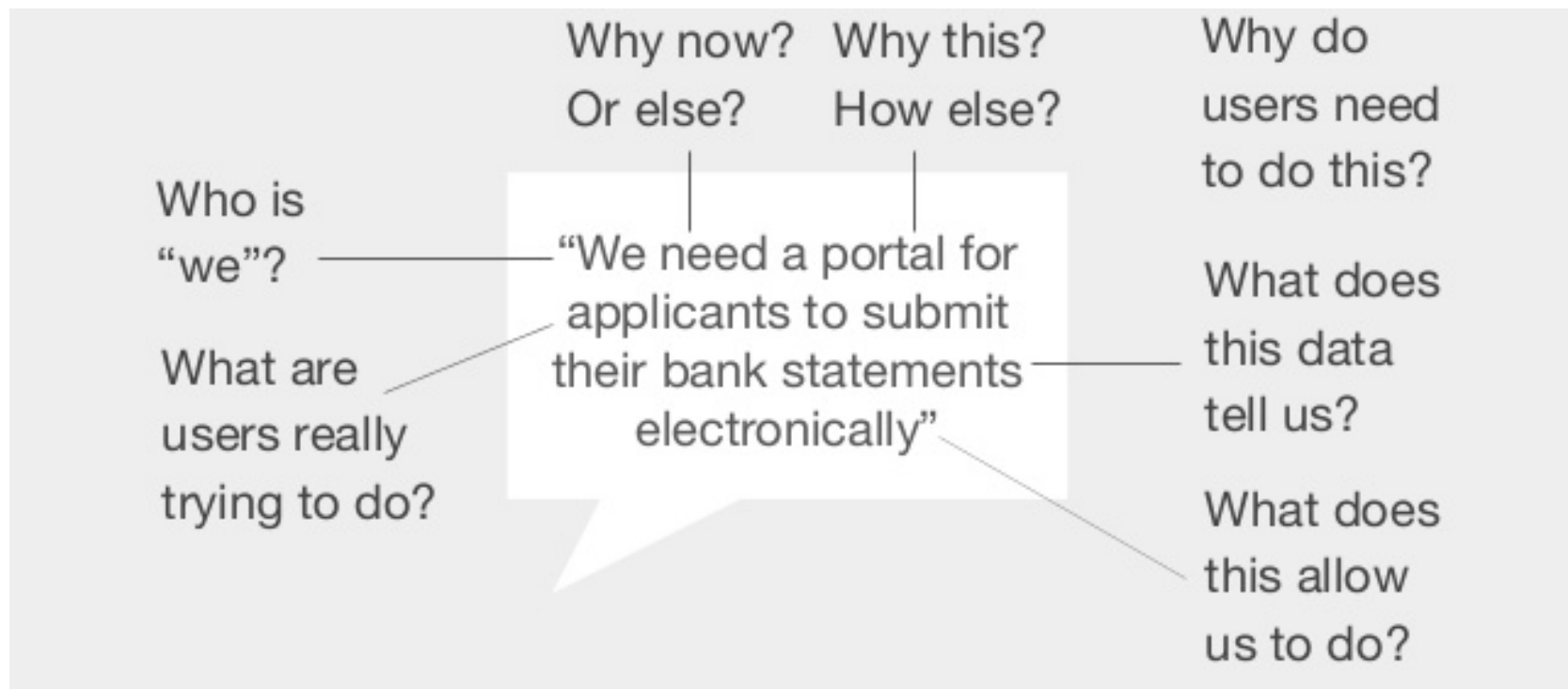
- “Let’s scan documents to cut down on paperwork”
- “An online portal will modernise our process”

# Step 1. Break down the brief



“We need a portal for applicants to submit their bank statements electronically”

# Step 1. Break down the brief



## Step 2. (Re)write the brief

- What is it we couldn't do before? Why do it?
- Who is it for, i.e. users and internal people?
- What outcomes are they looking for?
- What do we do now and why?
- What critical things are we assuming?
- Anything we need to be aware of?
- How would we know we're successful?

# Step 3. Frame the problem

- What are people ***actually*** doing or what's the end-to-end service as they would know it?
- What core need does the service meets?
- Where does the work fit in that?
- What does the work make better on a service level?



**Services exist  
because  
someone wants  
to do something**

# Problem-solution text pattern

<b>Parts</b>	<b>Explanation</b>
Situation (optional)	The writer states the situation or context for the problem.
Problem	The writer indicates some factor in the situation which causes a problem or difficulties.
Solution	The writer recommends one or more ways the problem or difficulties can be solved or corrected.
Evaluation	The writer judges the possible or real results of the solution and may offer a future recommendation.

# Business context

- **Why does business need this?**

- market demand
- production needs
- customer needs
- technical progress
- legal restrictions or norms

- **Product goals and success criteria**

- financial
  - To reach the sales volume of X units for Z months
  - Get X% of profit within Y months
  - Save X \$ per year, which is currently spent on system maintenance
  - Reduce the cost of maintaining the system by X% for Z months
- non-financial
  - Increase the performance of transaction processing by X%
  - Reduce the level of data errors to no more than Y%
  - Develop a reliable platform for family-related products

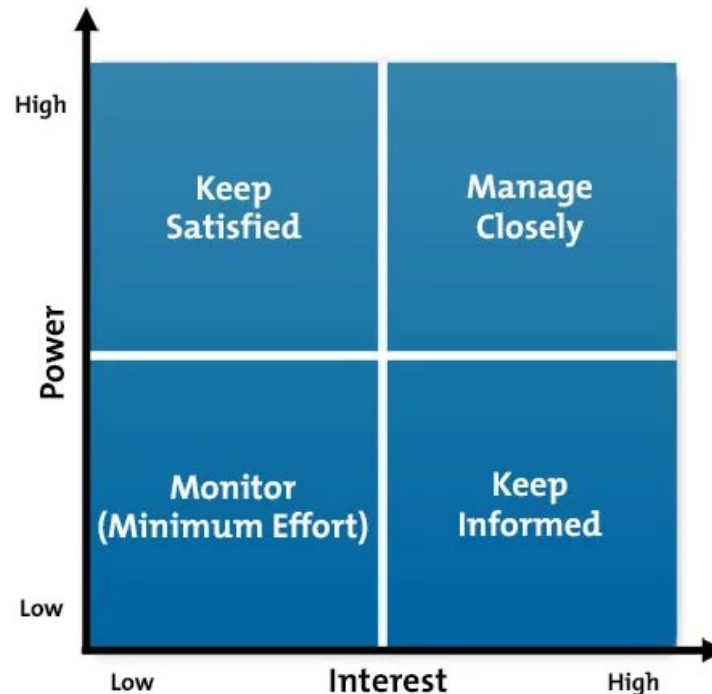
# Stakeholders analysis

- List all the stakeholders in your project, no matter how little their power or interest in your project
- Categorize them based on their interest in the project and their decision-making power
- Place them in the appropriate quadrant
- Monitor them continuously and move them round the quadrant as their interest/power evolves

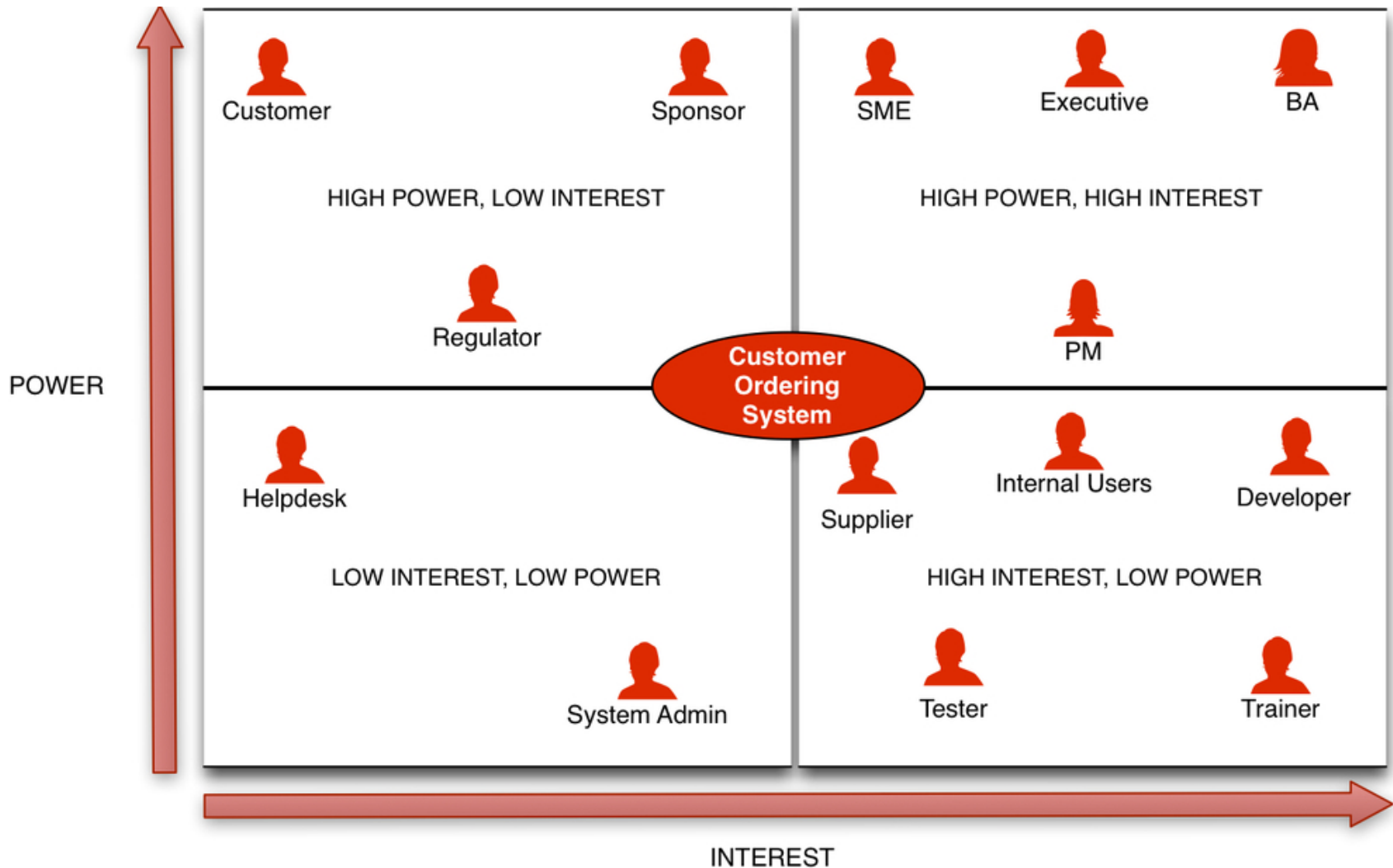


# Power/Interest stakeholders matrix

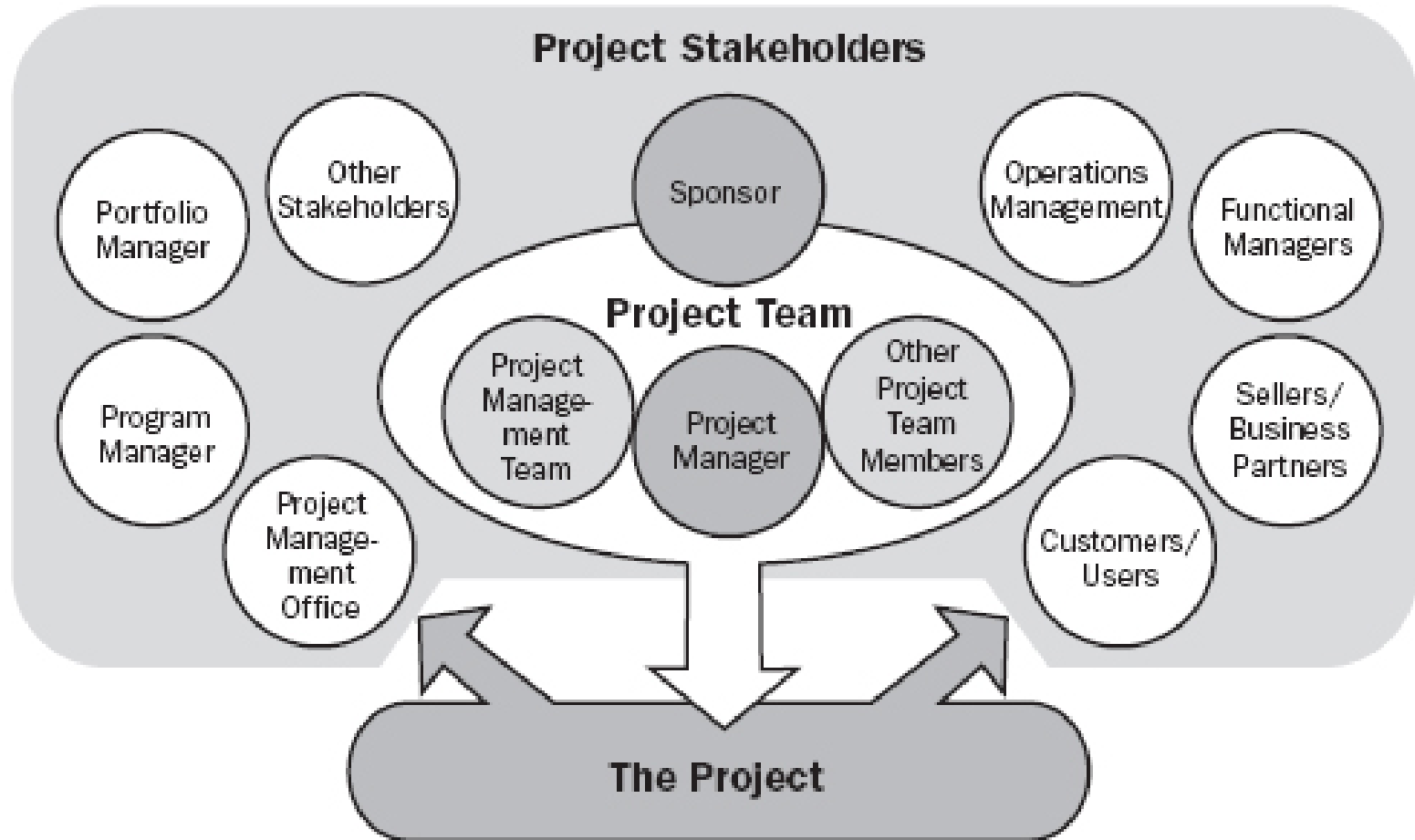
- **High power, highly interested people (Manage Closely):** you must fully engage these people, and make the greatest efforts to satisfy them.
- **High power, less interested people (Keep Satisfied):** put enough work in with these people to keep them satisfied, but not so much that they become bored with your message.
- **Low power, highly interested people (Keep Informed):** adequately inform these people, and talk to them to ensure that no major issues are arising. People in this category can often be very helpful with the detail of your project.
- **Low power, less interested people (Monitor):** again, monitor these people, but don't bore them with excessive communication.



# Example of Power/Interest stakeholders matrix



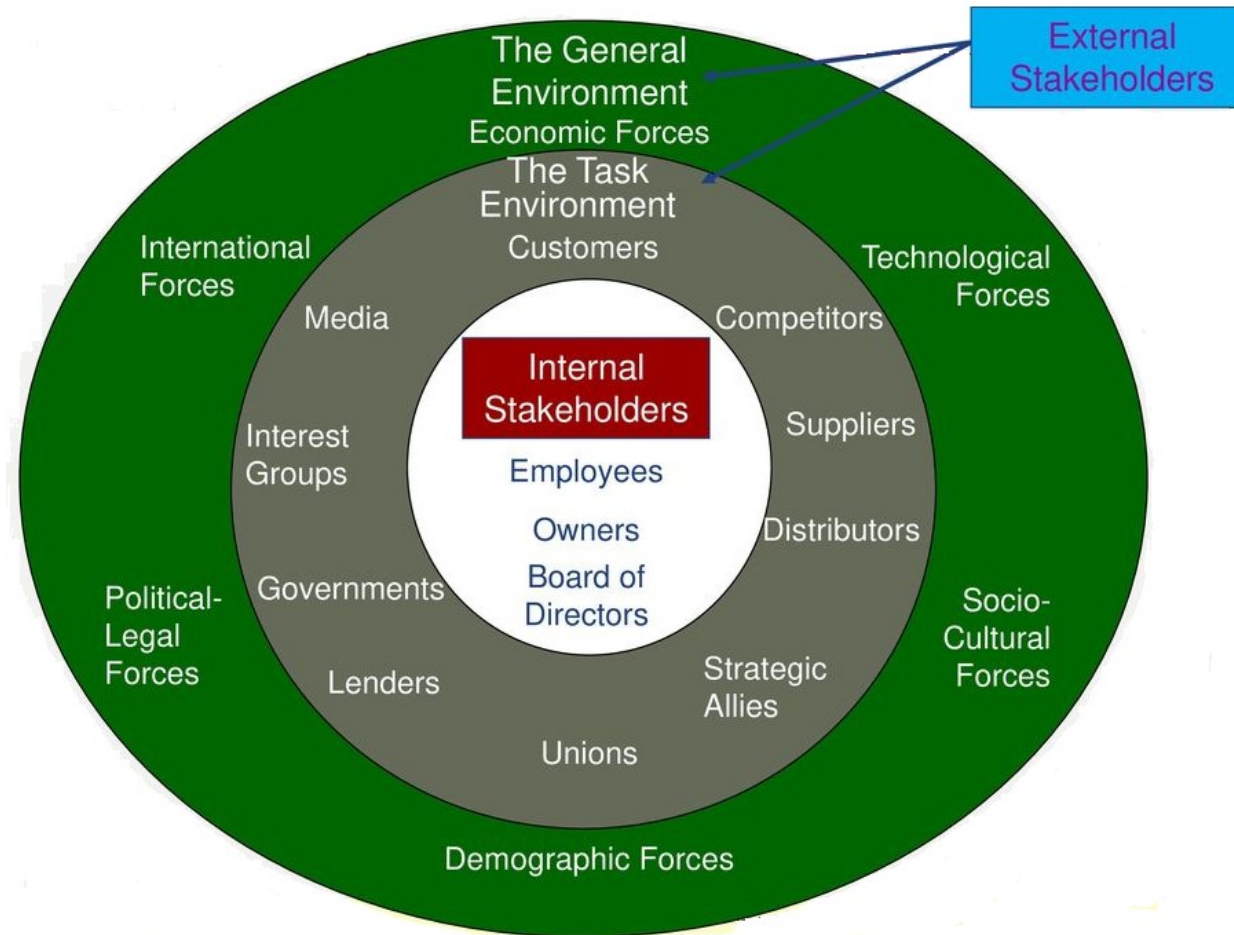
# Project Stakeholders





# Stakeholders needs & constraints

- Constraints are not related to the fulfilling the stakeholders' needs
- They are restrictions imposed on the project by **external forces**



# Constraints Include

- **Business and Economic:**

- Cost and pricing, availability, marketing and licensing issues

- **Environmental:**

- External standards and regulations that are imposed on the development project

- **Technical:**

- The technologies that the project is forced to adopt or the processes that the project has to follow

- **System:**

- Compatibility with existing systems and operating environments

- **Schedule and Resources:**

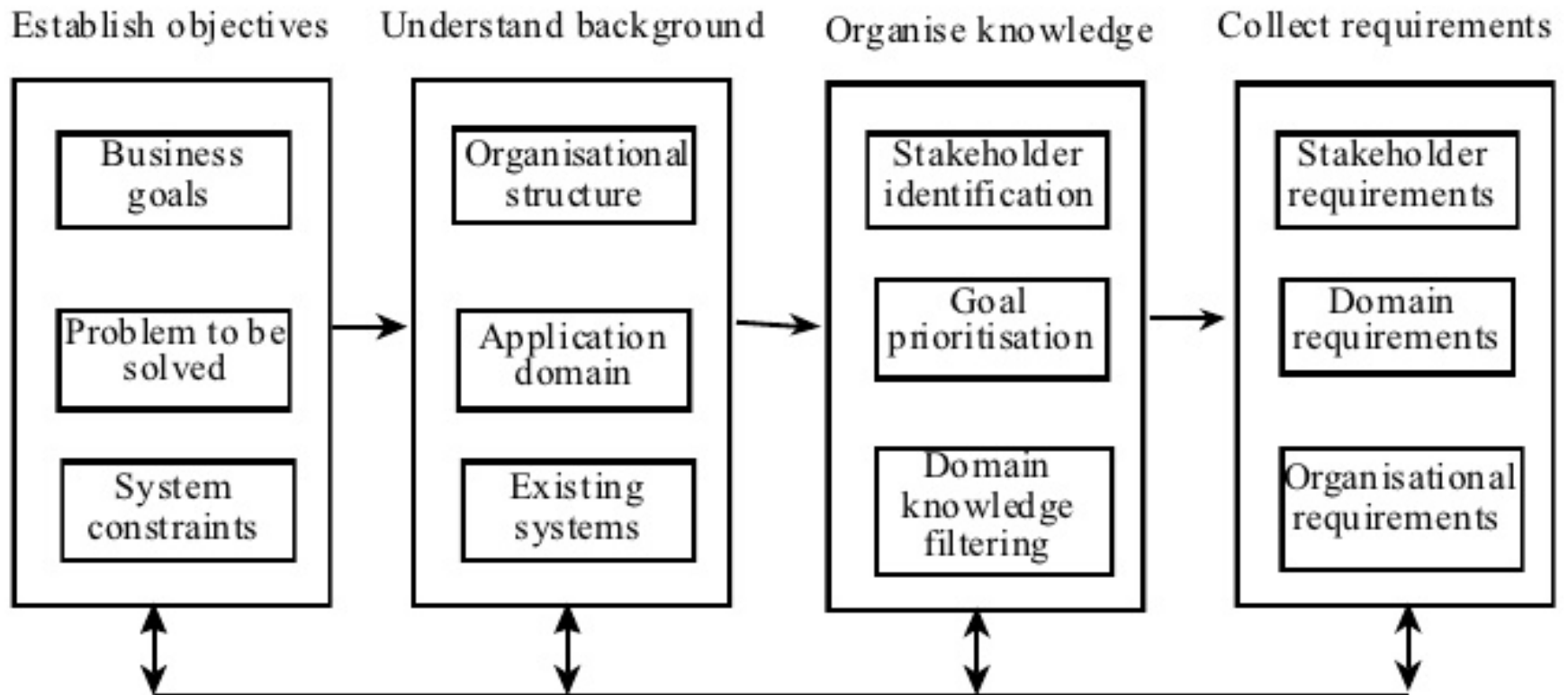
- Dates the project has been committed to or limitations on the resources that the project must use

# Requirements Elicitation Process

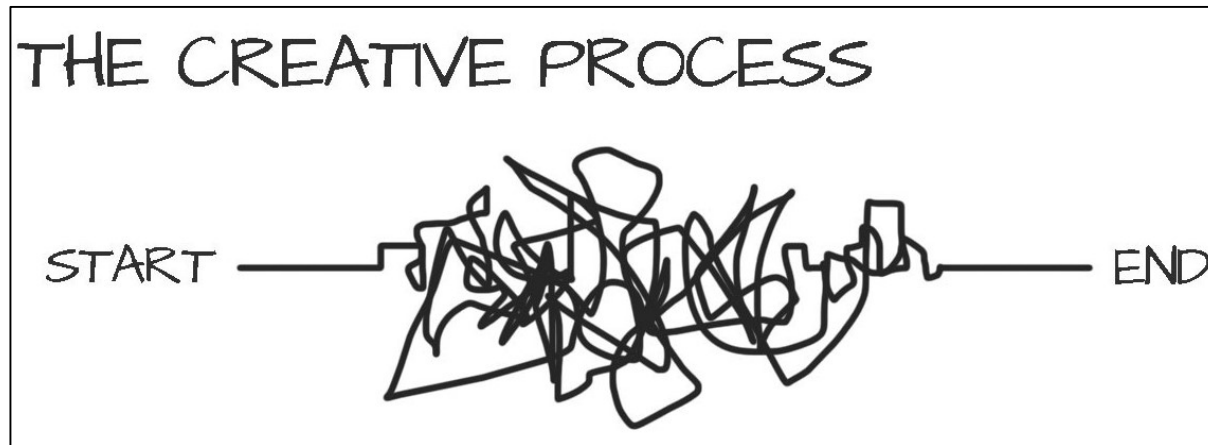
# Requirements Elicitation Process

- the most difficult
- important
- prone to error
- requiring intensive communication

# Requirements Elicitation Process



# Requirements Elicitation - it is the creative process



## THE CREATIVE PROCESS

1. This is AWESOME
2. This is TRICKY
3. This is SHIT
4. I AM Shit §
5. This MIGHT be OK
- 6 This is AWESOME

# Meet client's needs!



*How some analysts decide to meet their client's needs.*

# The problems of Requirements Elicitation



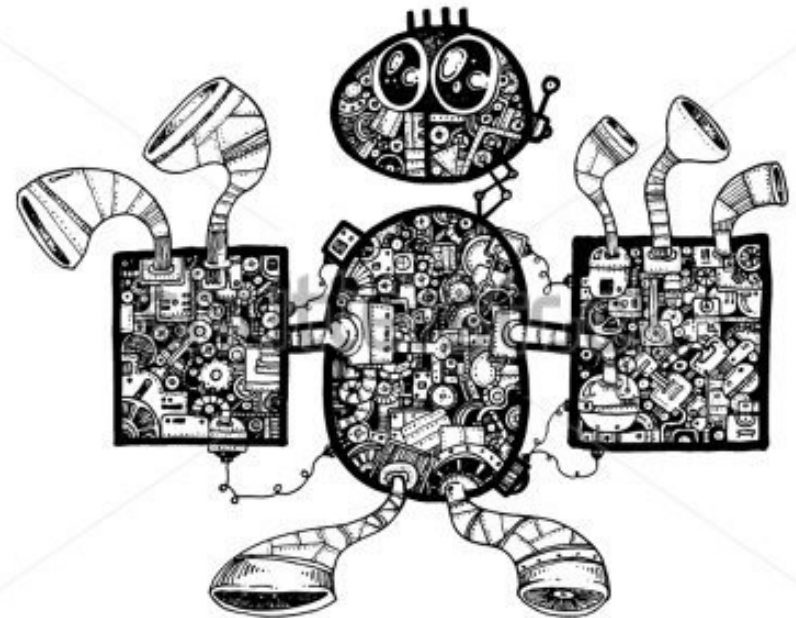
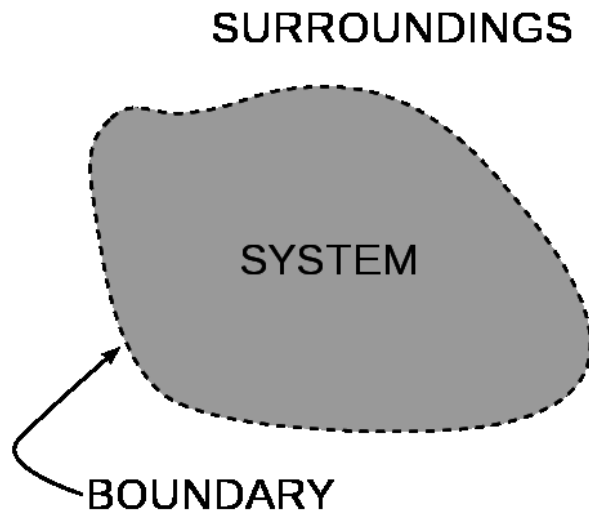
# The problems of Requirements Elicitation

- Problems of scope
- Problems of understanding
- Problems of volatility (variability, inconstancy)



# Problems of scope

- The boundary of the system is ill-defined or the customers/users specify unnecessary technical details that may confuse, rather than clarify, overall system objectives



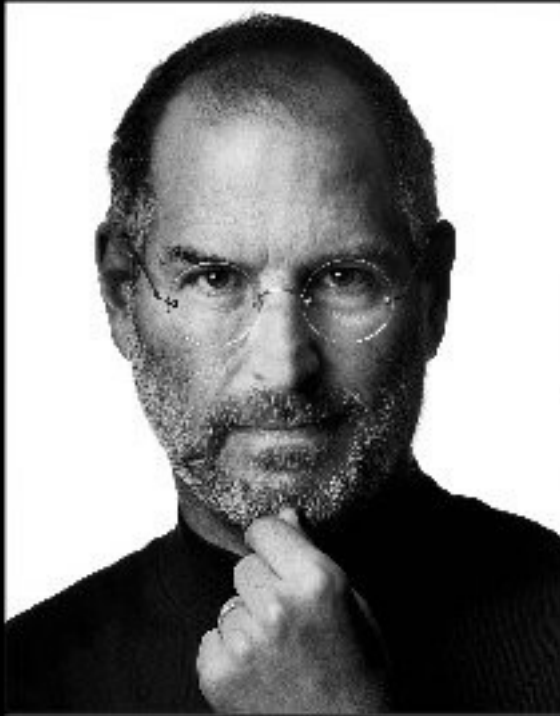
User's vision of the system technical implementation

# Problems of understanding

The customers/users:

- are not completely sure of what is needed
- have a poor understanding of the capabilities and limitations of their computing environment
- don't have a full understanding of the problem domain
- have trouble communicating needs to the system engineer
- omit information that is believed to be “**obvious**”
- specify requirements that conflict with the needs of other customers/users
- specify requirements that are ambiguous or untestable

# Problems of understanding

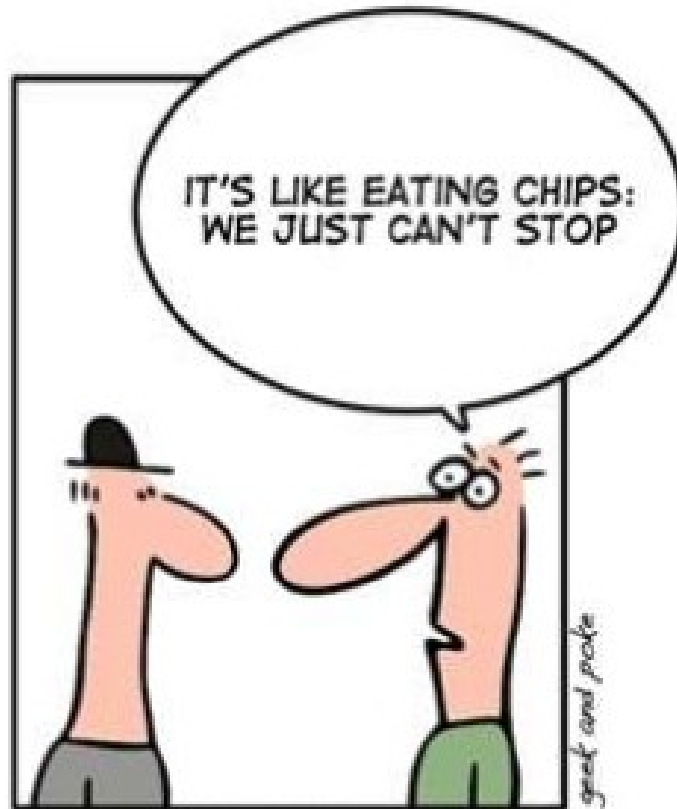


*“A lot of times,  
people don’t know  
what they want  
until you show it to  
them.”*

*- Steve Jobs, Co-  
founder of Apple*

# Problems of volatility

- The *requirements change over time*.
- The rate of change is sometimes referred to as the level of requirement volatility



Requirements elicitation methods

*Is there an ideal method for requirements elicitation?*

# Requirements elicitation methods

## BABOK:

- Brainstorming
- Document Analysis
- Focus Groups
- Interface Analysis
- Interviews
- Observation
- Prototyping
- Requirements Workshops
- Survey/Questionnaire

## Other methods:

- Protocol analysis
- Job application design
- so on

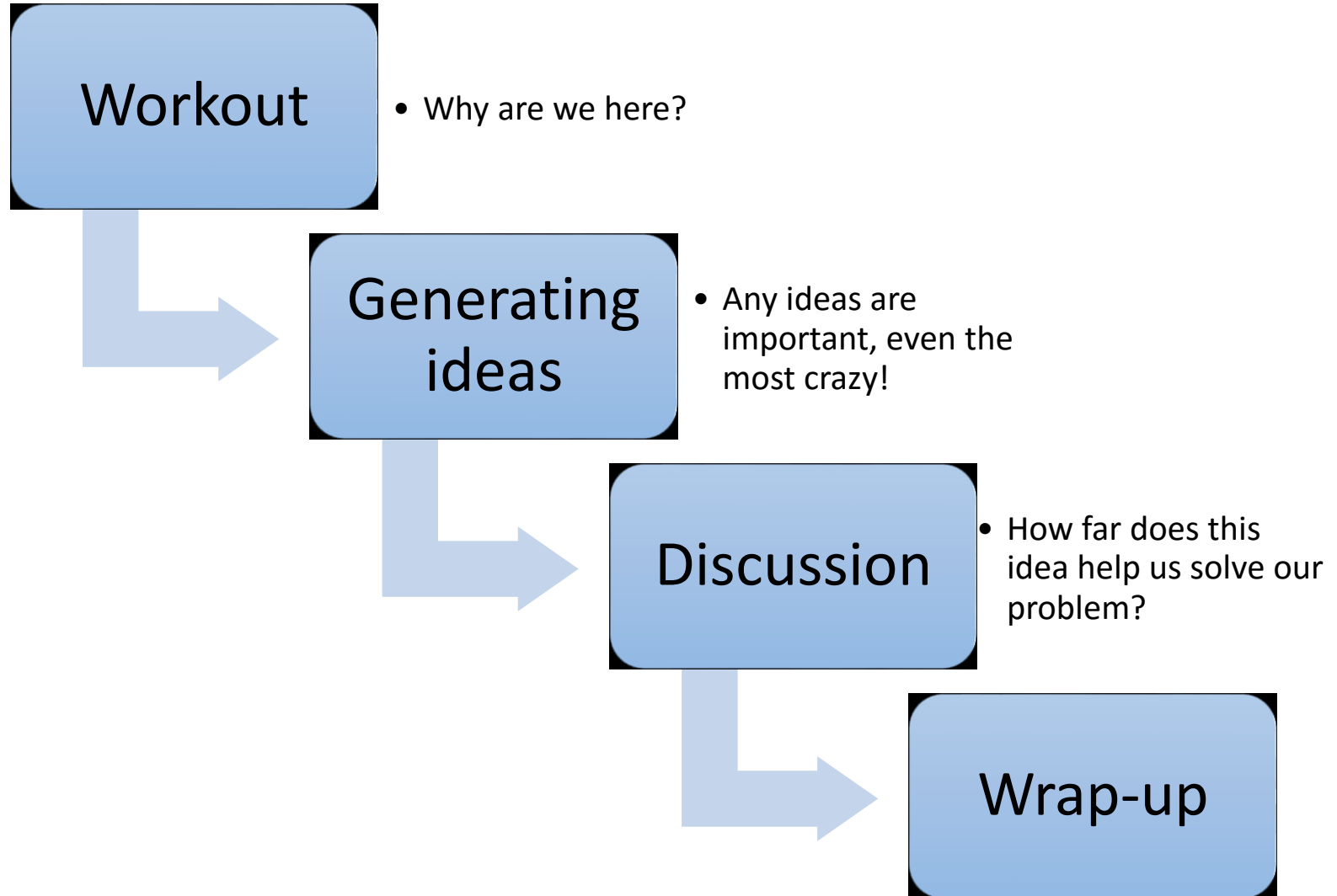


# Brainstorming

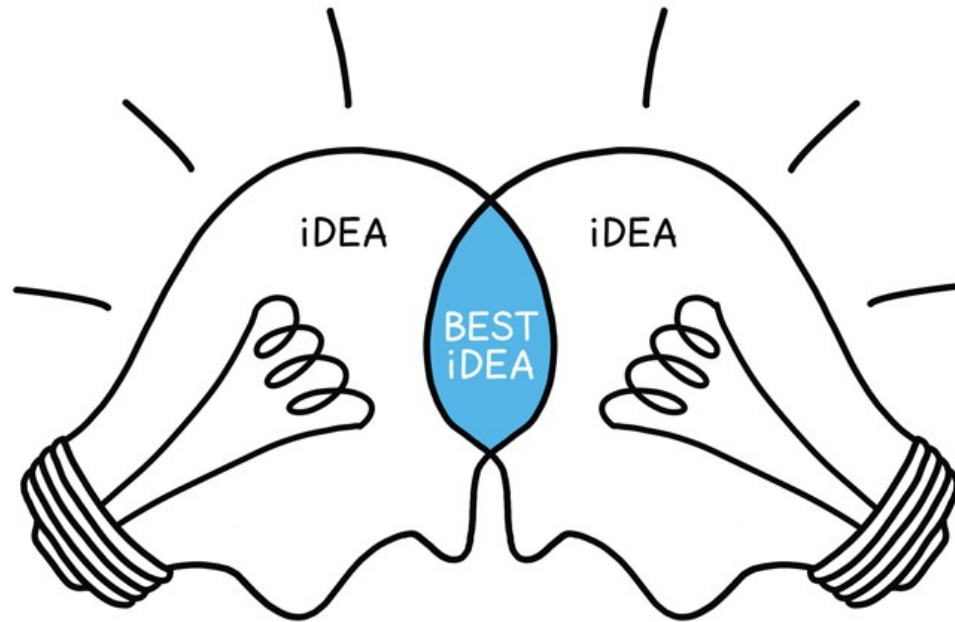


- Clear statement of purpose and/or objectives and constraints
- Ensuring maximum freedom for participants
- Careful formation of the participants
- Hierarchical conduct of discussions
- The huge role of the "leader" and the democratic leadership style

# Brainstorming. The main stages

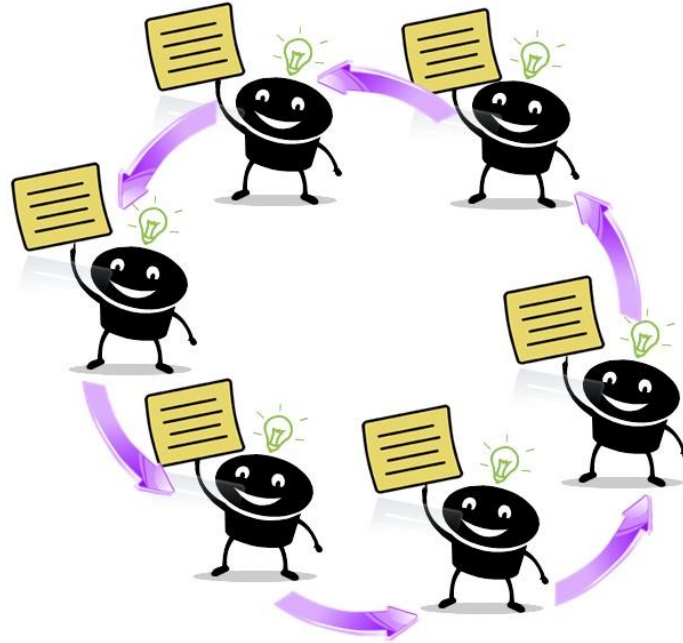


# It is important!



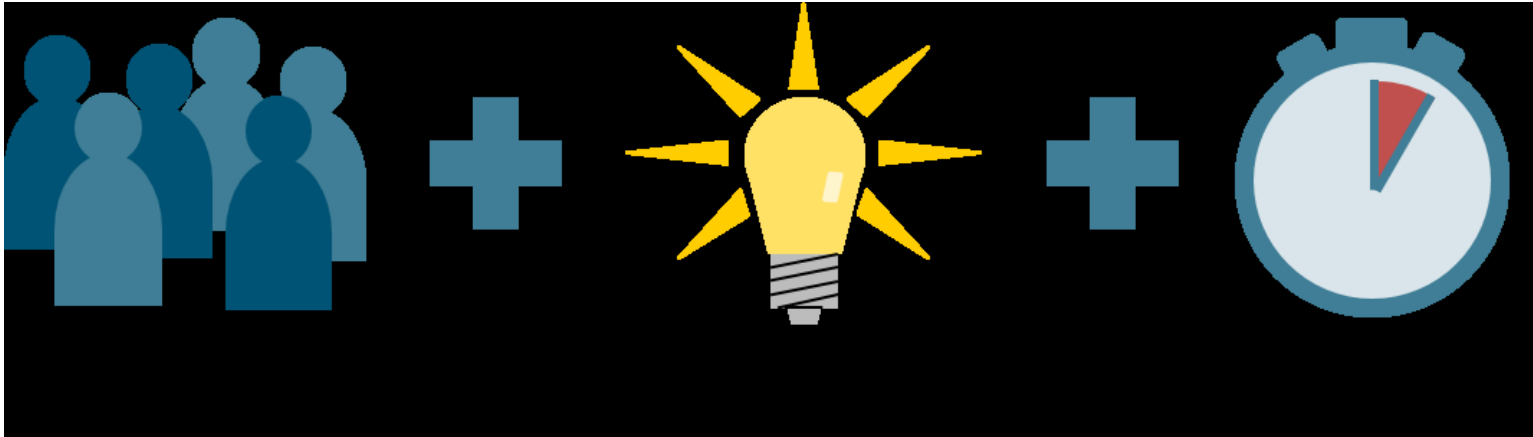
- **An activity done in a group, not individually**
- **Having a completely different purpose than the focus group technique:**
  - A brainstorming group is normally composed of organizational stakeholders who are generating ideas that will be refined later
  - A focus group is normally composed of customers who are giving their feedback about the already-refined ideas
- **Specifically defined for one stated purpose**
  - Brainstorming I BABOK aims to answer a specific question

# Brainwriting



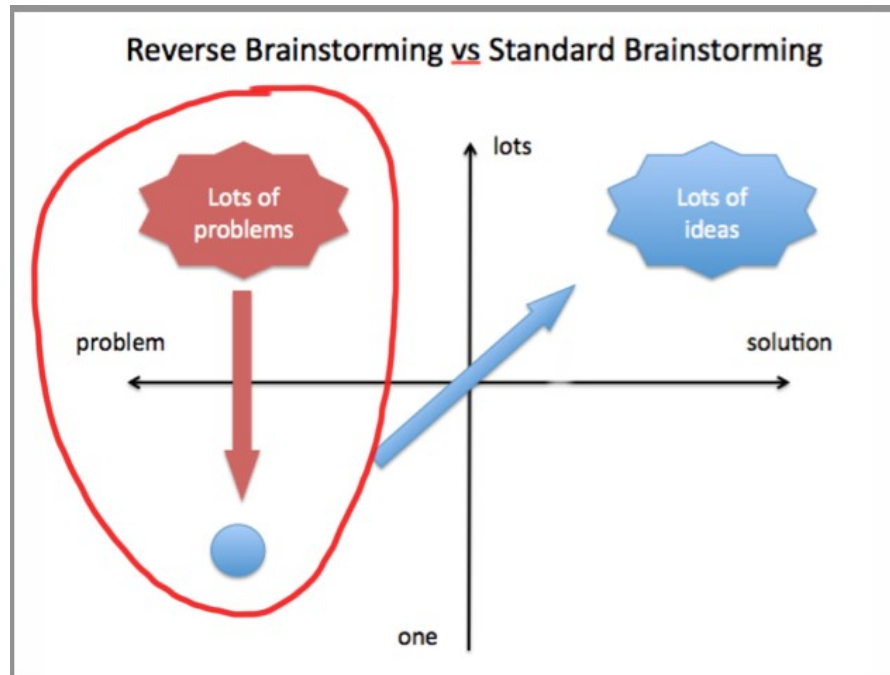
- The participants express their proposals not in a loud voice, but in writing
- They write their ideas on sheets of paper and then exchange them with each other
- The idea of a neighbor becomes an impetus for a new idea, which is introduced into the resulting sheet

# 6-3-5 Brainstorming



- 6 participants write 3 ideas on a given question in 5 minutes
- The sheets with their thoughts are passed in a circle
- In the next 5 minutes, each participant must review all his neighbor's suggestions and detail them (or add 3 new ideas)
- After half an hour, as a maximum, 18 (108) of the elaborated proposals are done
- The next half an hour is given to discuss, supplement and select the best options

# Reverse brainstorming



## Using:

- when creating a new improved design, a new service, or developing a new idea

## Tasks:

- identification of existing products, services, ideas of the maximum number of disadvantages
- Maximizing these disadvantages in a new product or service

## Goal:

- drawing up the most complete list of disadvantages of the object or idea under consideration

# Document Analysis



Elicit requirements through the study of the available documents of existing and comparable solutions, and identify relevant information

# Document Analysis. The main stages

## 1. Preparation

- Evaluate which existing documents about the business and system are relevant, available and appropriate

## 2. Document review

- Study the material, identifying and documenting relevant details

## 3. Wrap-up

- Review and confirm the details selected
- Organize information in the form of requirements



# Document Analysis. Types of DOC

- Benchmarking studies
- Business plans
- Business process and procedure documentation
- Company memos
- Competing product literature and reviews
- Customer contracts
- Customer suggestions
- Requests for proposals
- System defect reports
- System specifications (of existing systems)
- Training guides
- Vision documents for related projects

# Focus Groups



- Similar to brainstorming, more structured, with less breadth, creativity and exaggerations
- Meeting in the same room or remotely
- Sharing and re-evaluation of prospects
- Moderator manages the work, facilitates the session, produces the report
- Observer records or monitors the group, without participation
- Results are analyzed and reported as themes
- Medium used during any stage of the cycle
  - Product Development – Update of the requirements
  - Product in production – Reviews for the next deliver

# Focus Groups. The main stages

## 1. Preparation

- Participants
  - 6 to 12 participants (can be extended), varies with the topic
  - Composition
    - Homogeneous – Similar features, different perspectives are not shared
    - Heterogeneous – Different historical and perspectives, self-censorship because of discomfort
- Moderator and recorder
  - Promote discussion, open-ended questions, group interaction, keeping focus, neutral, adaptable and flexible
- Discussion Guide
  - Goals/Objectives of the session (5, 6 open questions)
- Local and Services
  - Local, support, equipments for the session

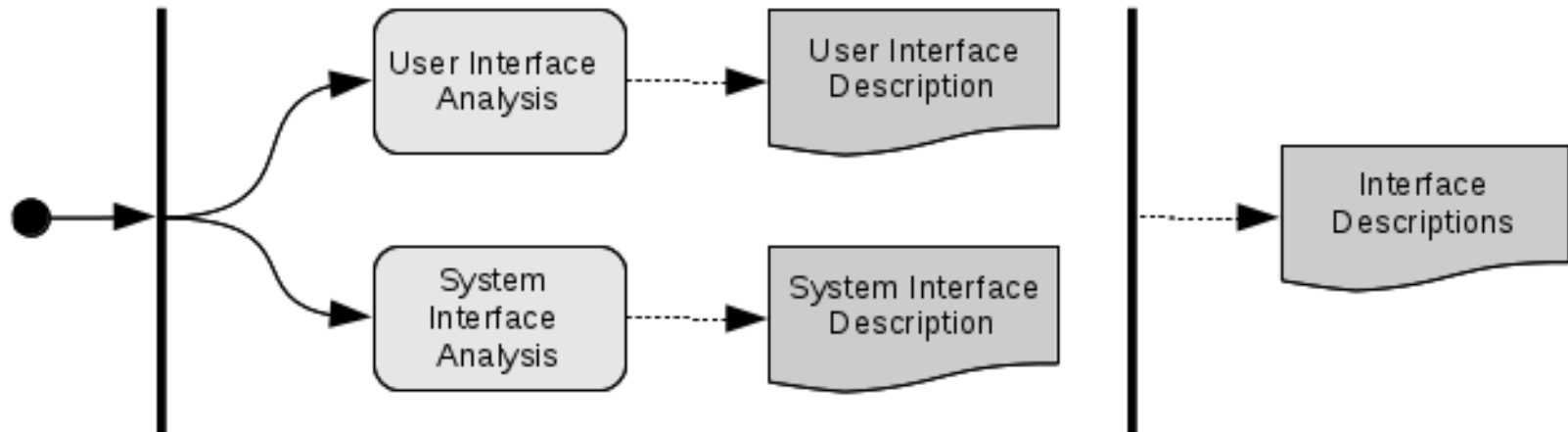
## 2. Conduct focus group session

- Moderator guides the discussion 1-2 hours by a pre-planned scrip (transparent), to ensure reaching goals
- Recorder captures the group's comments

## 3. Produce the report

- Moderator analyzes and documents the areas of agreement or not between the participants and synthesizes on themes

# Interface Analysis



Identify interfaces between solutions and/or components of the solution and define requirements that describe how they will interact

# Interface Analysis

## 1. Prepare for interface identification

- Review the actual documentation containing indications of requirements

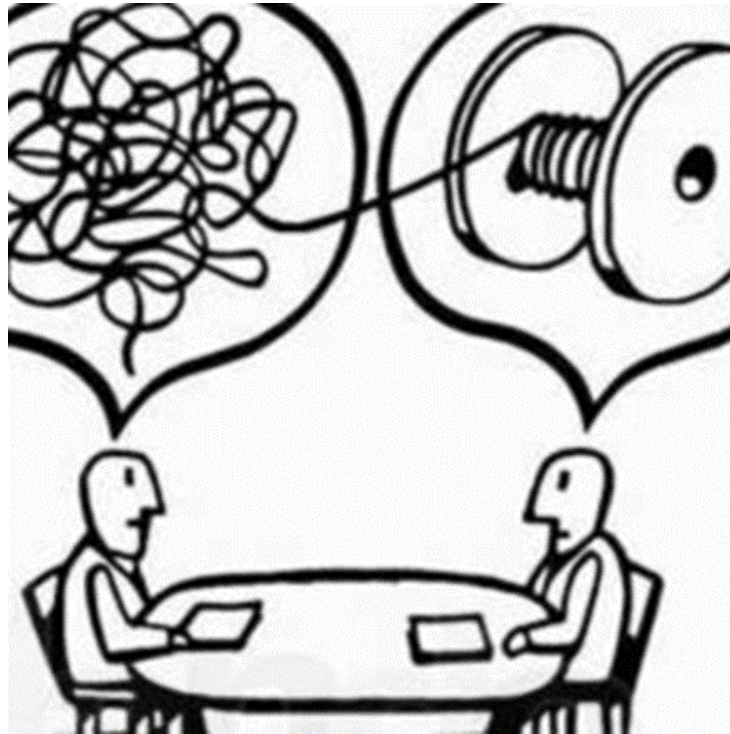
## 2. Conduct Interface Identification

- Identify what interfaces are needed for each stakeholder:
  - Describe the interface purpose
  - Evaluate which type of interface is appropriate
  - Elicit high level details, depending on its type
    - User-System – Use prototyping
    - System-System – Content and name of the events

## 3. Define interfaces

- Requirements focused on describing the inputs and outputs of the interface
- Validation rules and events that trigger interactions
- Interactions specified individually

# Interviews



Elicit informations from a person or group of people through a conversation with an interviewee, with questions and documented responses

# Interview. The main stages

## 1. Preparation for the interview

- Define the focus or the interview goal
- Identify the interviewees in potential
  - Who holds a confiable/authentic/current information
  - What's the stake in the initiative
- Design the interview, adapted for each interviewee
- Contact the interviewees in potential. Justificate the interview goal

## 2. Conduct of the interview

- Opening the interview
  - Purpose statement and notes to me made and shared at the end
- During the interview
  - Focus on goals and pre-defined questions
  - Concerns of the interviewee attended during the interview or documented for future interview
  - Active listening to confirm the understanding of the information
- Closing the interview
  - Check for neglected issues
  - Summarize the session
  - Remember the review process and thank the interviewee

## 3. Follow-up interview and confirmation

- Organize information, send for review of the interviewee
- View of all the related context, pointing out incorrect or missing items
- Documenting information and not to evaluate the requirements

# Observation



Evaluation of the work environment of the stakeholder, to document the details of the current processes to improve or change the current process



# Observation. The main stages

## **1. Prepare for the observation**

- Determine sampling of users will be observed and what activities and questions to ask

## **2. Observe**

- Present to the observed
- Ensure to the observed that there is no question about his work, only observation to study
- Explain that there may be disruption to questions
- Suggest “thinking aloud” while working
- Observe the work, take notes necessary with or without questions

## **3. Point Observation Wrap-Up – Documentation and Confirmation**

- Get answers to the original or new
- Summarize the notes for revision and clarification
- Many users: compile notes (common points)

# Included observation



An observer is a direct participant in the process  
(playing user roles)

# Not included observation



The observer only registers the processes, facts and phenomena without being a participant

# Prototyping

**Prototyping** is a quick "black" implementation of the basic functionality for the analysis of the system as a whole

## **The following steps:**

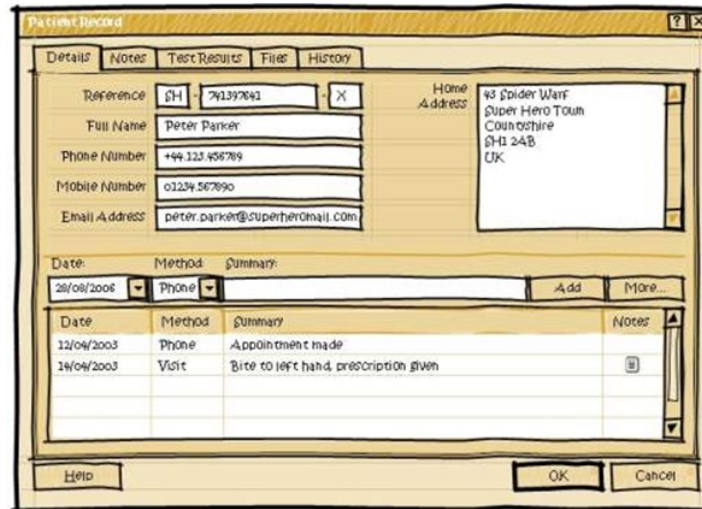
- view architecture of the system
- development
- implementation
- testing of the final product

## **Primary goals that require prototyping:**

- clarify the unclear requirements to the system
- choose one of the different conceptual solutions
- to analyze feasibility

# The purpose of prototyping.

## Detection of unclear requirements



- It is difficult for the customer to formulate the requirements for what he expects from the system
- The User Interface (UI) prototype, created promptly by the results of the interview, gives him the opportunity to see a schematic implementation of how the executor saw the relevant part of the system
- Any prototyping result is useful

# The purpose of prototyping.

## Identifying alternative solutions



- Any technical problem can be solved in different ways
- Various decisions can be expressed in different requirements formulations
- Different solutions can be expressed in different UI implementations



# The purpose of prototyping.

## Feasibility analysis



- The combination of functional and non-functional requirements and constraints can be such that there is a risk of being unable to implement them
- The main risks are the incompatibility of the requirements for the system's performance at known limitations of the environment implementation
- The solution is to create prototypes (not necessarily related to the UI) that implement the relevant part of the system, to simulate input data streams and their processing

# Requirements Workshops



*Joe did his best to prepare for his first Requirements Workshop.*

- Structured way of capturing requirements, used to investigate, discover, define, prioritize and achieve the closure of the requirements.
- Effective way to deliver promptly high quality requirements, promoting trust, mutual understanding and strong communication among stakeholders, producing deliverables that structure and guide future analysis



# Requirements Workshops



# Requirements Workshops.

## The main stages

### 1. Prepare for the workshop of requirements

- Clarify stakeholder needs and purpose of the workshop
- Identify critical stakeholders to participate
- Set agenda and determine the means of documentation
- Schedule sessions and organize logistics of the room, seating and equipment
- Send materials in advance
- Conduct pre-workshop interviews to ensure understanding of the purpose of the workshop
- Determine the number of participants

### 2. Conduct the workshop of requirements

- Elicit, analyze and document requirements
- Obtain consensus on conflicting views, maintaining focus
- Facilitator
  - Establish objective and professional tone for the meeting
  - Present goals and agenda of the meeting
  - Imposing discipline, basic rules and manage the meeting
  - Facilitate decision making and building consensus, ensuring that all views were heard

### 3. Closing post-workshop of requirements

- Track open items of recorded actions in the meeting
- Complete and distribute documentation to stakeholders

# Survey/Questionnaire

Are you childish? <input type="checkbox"/> Yes  <input type="checkbox"/> No	Are you nervous? <input type="checkbox"/> Yes  <input type="checkbox"/> No
Are you paranoid? <input type="checkbox"/> Yes <input type="checkbox"/> No, why?	Are you racist? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Are you drunk? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Are you an idiot? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Elicit information from many people (anonymous or not) in a short period of time, collecting information about customers, products, work practices and attitudes

# Self-filling!

## **Prerequisites:**

- the distance between the respondent and the interviewer
- anonymity of the received data

## **Format:**

- the questionnaire is transmitted personally in hands and removed after filling
- the technical means of communication are used: postal mailings, e-mail distribution

# Survey/Questionnaire. The main stages

## 1. Prepare

- Define the purpose of research and target group
- Identify goals and group to be searched
- Choose the type of search: Semi-structured interview (open questions) x structured (closed questions)
- Select the sample group: Small interview of all/ Grand subset of users
- Geographical distribution, regulatory differences, lack of standardization in office or business processes
- Select distribution methods
- Projecting desired level of response (% acceptable return)
- Communicate the purpose, goals and reason of the search
- Be aware of group characteristics, historical, environment and terminology
- Focus on requirements, the questions must be directed towards the stated objectives
- Easy search, quick to be answered, limited and ordered
- Clear and concise questions, addressing a specific theme
- Avoid negative, complex and uncomfortable questions
- Test the search for possible adjustments

# Survey/Questionnaire. The main stages

## **1. To send the survey based on:**

- Organizational policies
- Urgency in obtaining results
- Security level required
- Geographical distribution of participants

## **2. To document search results:**

- Collect the responses, evaluate details and emerging themes of open questions
- Analyze and summarize the results
- Report findings to the sponsor