



## **White Boarding/ Design Session at SAI Systems International, Inc. (A narrative in perspective)**

SAI Systems International, Inc. (SAI) has over the years perfected their project management methodologies and has acquired adeptness in executing collaborative and participative development and design methodologies. SAI extensively uses the “white-boarding/ design” sessions along with client representatives to achieve consensus on project designs and manage expectations.

This session is similar to a JAD (Joint Application Development) session. These sessions involves client or end user in the design and development of an application, through a succession of collaborative workshops. SAI uses this technique for development of software, building quality management plan or even for defining a project.

The advantages of having these “white-boarding/design” session includes shortened development time, better quality of final product by focusing on the up-front portion of the development lifecycle and to reduce the probability of errors that are possible during the development. The reduction in time comes from removing the time required to move information from person to person as seen during the traditional software development lifecycle.

There is no time delay or no misinterpretation of the requirements as everyone right from decision makers; and knowledge providers are present at the same time. There is also a minimization of scope creep setting in, which results from poor initial requirements gathered in traditional way of software development.

These design sessions are structured meetings and are aimed to be more productive than just a normal conversation. Some of the characteristics of a design session are:

1. They are focused and have a detailed agenda.
2. Visual aids such as flow diagrams, and prototypes.
3. Conducted in a dedicated environment.
4. Presence of decision makers, end users, domain experts, analysts, project leaders, programmers, other related knowledge providers, facilitator, and observers.

5. The members would discuss the major requirements, interface design and solution / application architecture.
6. Elimination of user disagreement.
7. Elimination of revisits and repetitions.
8. Definite schedule
9. Successive drafting of the minutes of the meeting.
10. Least gap between the meetings.
11. Every design session must have a take away(s) / milestone(s).



SAI Systems Team in action

### How it works?

A basic design session has a set of formal techniques and clearly defined individual roles that are applied to maximize productivity. These include:

#### 1. **Executive sponsor: (Client Project Sponsor)**

The executive sponsor is the one who owns the system. He / She must be the final decision maker and the information provider from the organization who can make decisions and provide the necessary information and support the project.

The executive sponsor must attend the opening and closing session necessarily.

**2. Facilitator(s): (SAI/Client)**

Normally trained and experienced facilitators chairs the design session. They make sure that the discussion stays focused and the meeting rules are followed. The facilitator is responsible for identifying those issues that can be solved as a part of the meeting and those which need to be assigned at the end of the meeting for follow-up analysis and decision. The facilitators do not contribute information to the meeting and only facilitates the discussions.

**3. Scribe(s)/ Note Keeper(s): (SAI/Client)**

Someone must be appointed to record the information flowing across during the discussions, document decisions made and make notes of any action items. They do not contribute information to the meeting. In case of a co facilitator at the meeting, the second person can be a note keeper or the scribe.

**4. Project Manager/ Leader: (SAI/Client) -**

The project manager or the leader who heads the project team answers the questions about the project regarding the scope, time, coordination issues, and resources. They may contribute to the sessions as long as they do not restrain the participants.

**5. Users: (Client Domain experts)**

Experts in their field who can make decisions about their work and are directly or indirectly affected by this project are the source of input in the design session.

**6. Observer: (SAI/Client)**

Generally members from the application development team that are assigned to the project and would silently observe the proceedings of the session. They are not allowed to interrupt or speak during the session.

Besides the above, there can be **tiebreakers** that are senior managers and assist in breaking a tie between the end users.



The objective of the design session is to go through all of the items that need to be discussed, clarified and reach a consensus on what needs to be done.

For a design session to be successful, the following guidelines are to be observed carefully:

1. Engage experienced and skilled facilitators for the session.
2. Commitment and support from the executive sponsor.
3. Participation of the right people with predefined roles and responsibilities for the session.
4. Clearly defined, well-understood, and obtainable objectives should be set for the session.
5. Detailed agenda should be planned.
6. Deliverables should be defined in advance.
7. Minimal use of technical jargons.
8. Produce final document quickly.

## **Deliverables**

Upon completion of the design session, SAI/Client may be required to produce the following deliverables:

- Straw-man Solution Architecture Document
- High Level Project Plans for Design and Development Phases
- Ballpark Quotations for Design and Development Phases