



Lower Your Consulting Costs – Host Your Own Oracle JAD Session

By Leigh-Anne McDonald

Editor's Note: An insightful look into the Oracle® JAD Session process from identifying the participants to a sample format to lessons learned. This white paper provides proven tips throughout to help you assemble and manage your own effective, solution-driven meeting.

Introduction

Every notice that, regardless of which consulting organization you partner with, the first few days to weeks are always the same? Meetings, meetings, and more meetings that the consultants lead to define your project charter and gather, validate, analyze, and document your business requirements. Why is this? Many, but not all, companies either don't know how to prepare for a project or they lack the time and resources. Their solution is to partner with an Oracle consulting organization but often in conjunction with a limited budget.

Want to know a secret? You can do a lot of the upfront work yourself, without consultants, which means when they come on site they really do hit the ground running. How you ask? By planning for and conducting your own in-house JAD sessions for your pending Oracle projects, which translates into a win-win for everyone.

If your company has the time and resources, kick starting your next project by hosting your own JAD session reduces the cost of bringing in a team of consultants to assist with this activity. More importantly, the JAD sessions will produce a well-defined project charter with scope, definition, and requirements, which in turn aids in your selection of Oracle consulting vendors.

Okay, so now that I have sparked your interest, and you see the potential for becoming the company hero, how do you do it? What follows is a JAD Session 101 overview designed to help you be successful and lower your consulting costs.

Why conduct a JAD Session?

How do you design an Oracle system or solution that your end-users really want and can use if you do it without direct contact? You can't. You have to help your end-users design their system or solution by reaching a clear understanding of what they want and don't want. If you are telling your business users how to solve their problems rather than asking for their input, then you are missing the point. It is your responsibility to work with your internal client to establish a relationship that gets beyond what they believe the problem is in order to discover the real issues and determine solutions. In a nutshell, the real problem is typically significantly different than the one first perceived by your business user. To be a problem solver, you need to dig deep.

Tip # 1 **Never assume that one person knows everything about every problem.**

What Is a JAD Session?

Let's start with the basics.

JAD stands for Joint Application Development and is a management process that helps technology and business users collaborate effectively towards the development of business solutions that really work.



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The purpose of a JAD session can be high level or very detail driven. You can use a JAD session to define your Oracle project (from scope to budget to resources to project completion). You can use a JAD session to discuss very specific project milestones, identifying issues, discussing possible solutions, and reaching consensus.

What is a JAD session's scope? Not to be confused with project scope, a JAD session should cover the full life cycle development of a specific issue – be it the project as a whole or one task within the project – and can take a waterfall or iterative approach depending on the size and complexity of the project.

- Tip # 2** Technology systems and business processes rarely exist in isolation. The best Oracle systems that meet the needs of the business are designed when all groups work together on a project as equal contributing partners.

The Players

What makes a good JAD session? Easy question and easy answer: the participants AND managing their expectations. Why? Because it:

- Promotes clear, concise communication
- Builds consensus and ownership
- Improves design quality, which in turn produces the best solutions

Sponsors

Typically a JAD session has a sponsor. This is an executive within the organization with decision-making authority and the power to provide the necessary resources and support for the Oracle project. In short, the sponsor owns the issue the JAD session is addressing and is accountable for its delivery.

Leaders

The Oracle project or task leader conducts JAD sessions. Why? Because these individuals make or break a project. A good leader is committed to the delivery and success of the project, has the background to support the business area, is a powerful communicator, and is sensitive to the political issues that challenge any deliverable.

Gate Keepers

During a JAD session, it is important to have a record keeper and a timekeeper. The record keeper takes detailed notes during the session, edits them into a concise summary, and distributes them to the group members.

- Tip # 3** Record Keeping is NOT a transcription of who said what.

The timekeeper is responsible for keeping the meeting running on time, for ensuring the group uses its time wisely, and ensuring that everyone is allowed to be heard.

- Tip #4** Use a talking stick rule so everyone actively speaks and actively listens.



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Business Users

Oracle Business Users are the internal client, the intended users of the delivered system or solution. They understand how the solution will be used in the real world. They are critical to the JAD process because they bring to the table expertise for their specific job and department. This in turn means misperceptions are corrected and oversights are unearthed. Typically there are two types of business users: those who use the system or solution and those who manage the policies and procedures that govern the system. Both play a key role, and one without the other usually results in a solution that is either too restrictive or does not grow as the company grows.

- Tip # 5** No detail is too small to mention. Sometimes minor details have the biggest impact.

System Analysts

And finally, a JAD session to produce a technology driven solution cannot succeed without Oracle System Analysts present who can speak in non-technical-eze to help all participants understand and fully utilize the Oracle technology available.

It goes without saying that all JAD session participants have the following responsibilities:

- Availability
- Commitment
- Active Listening
- Active Participation
- Identify Concerns / Offer ideas / Recommend solutions
- Assist with project tasks
- Agree in the best interest of the company and not the individual

Are You Ready to Host an Oracle JAD Session?

The first JAD session is normally a kick off meeting that sets the tone for all future meetings. This meeting is used to introduce the JAD session definition and over all goals, and to reach consensus on both points. This meeting serves as an opportunity to introduce the team members, and to discuss the format.

JAD Session Format

- Determine meeting frequency, time, and location
- Determine roles (Record Keeper and Time Keeper)
- Determine format for communication

JAD Session Execution

- Meet
- Discuss problems and challenges
- Make decisions jointly
- Set goals
- Assign tasks

- Tip # 6** Assign as many JAD session tasks as possible to participants – this builds buy in and creates a perception of ownership.



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< Oracle JAD Session Planning Template >

Date / Time	Purpose
JAD Session Planning Check List	
Identify Oracle Business Users to invite	
Identify Oracle System Analyst to invite	
Confirm Attendee availability	
Reserve Meeting Space	
Prepare Agenda	
Issue Invitation with Agenda	
Prepare Meeting Space (visual aids, clip chart, etc.)	

Were You Successful?

Congratulations! You conducted your first JAD session and want to know how you did? Well, ask yourself these questions:

- Was the meeting well attended?
- Did the right people know about it and have an active role in the decision-making?
- Did you solve problems?
- Was your solution acceptable to the end-users?
- Was it timely?

Okay, so maybe your first JAD session didn't solve world hunger; here are some pitfalls to avoid:

- Lack of sponsorship
- Unclear goals and lack of direction
- Scope Creep
- Too many or too few participants
- Poor communication
 - 1 or 2 participants dominate the conversation, alienating everyone else
 - participants are afraid to speak up because management is in the room
- Meetings are not well facilitated
 - no agenda or agenda is not followed;
 - no follow up at next meeting;
 - start and end times are not respected

Tip #7 Want people to speak up during a JAD session? Whenever possible, avoid having a worker and his or her direct supervisor on the same team unless they have a very positive, open relationship.

communication, Communication, COMMUNICATION

Oracle Business Users and Oracle System Analysts communicating? What's that old adage about a round peg and a square hole? Believe it or not, it is possible for these two seemingly disparate groups to effectively communicate, understand each other, work together, and produce solutions that meet the needs of the business. Here are the rules:



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Oracle Business Users, when speaking to Oracle System Analysts, need to:

- Speak up, there is no wrong question, and analysts are counting on you to explain your requirements and clear up any misconceptions and oversights.
- Help the analyst help you. Give detailed information about how you do your job today and how achieving the business requirements will help you tomorrow. And provide examples.
- Separate your requirements into must haves and nice to haves.
- If you don't understand an answer or are confused, ask for clarification; I promise you will not be alone. For further impact, restate the analyst's response in your own words.
- Don't assume the analyst is a mind reader or that problems will work themselves out. Again, help the analyst help you.
- Keep an open mind, and try to avoid the classic them and us barrier to effective problem solving.

Oracle System Analysts, when speaking to Oracle Business Users, need to:

- Ask probing questions, remember there is no wrong answer, and encourage users to speak up.
- Never assume anything is common knowledge.
- Avoid technical explanations and jargon, and if absolutely necessary, provide a list of terms and definitions.
- Remember the business users are counting on your expertise to point out potential landmines.
- Be very clear about expectations in terms of delivered functionality, custom functionality, and what is absolutely not possible to achieve because the technology does not support the requirement.
- If you don't understand an answer or are confused, ask for clarification; I promise you will not be alone. For further impact, restate the user's response in your own words.
- Keep an open mind, and try to avoid the classic them and us barrier to effective problem solving.

Tip # 8 **Don't assume that a problem not mentioned is a problem that doesn't exist.**

Conclusion

Be it the start or middle of an Oracle project, specific issue or change management process, realize the importance of defining your own JAD session charter and selecting a cohesive team to meet the objectives. As a result, the core team will better manage to survive the RFP process and vendor selection for software, hardware, and consulting; your Oracle business users will have the system they want and that your company can support, which in turn contributes to the bottom line.

About the Author

Leigh-Anne McDonald, Managing Editor – ORAtips. Leigh-Anne has over 17 years of experience as a project manager and 10 years of Oracle experience, managing mid to large-scale projects



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