Customer Focus Groups (CFG) are one of the most important tools of Evolutionary Development. The primary objective of a CFG is to demonstrate a version of the application to the customer in order to evaluate its satisfactory execution of business functions, elicit changes desired by the customer, and note additional requirements specifications. An equally important objective is that a CFG is possibly the best technique available for building a customer's sense of ownership in the application and confidence in the development process. In addition, a CFG session defines the end of an evolutionary version.

CFGs have been used by marketing organizations for years to uncover new product requirements and refine products to meet customers' needs. In recent years, PC software vendors have made extensive use of "usability labs" to gain similar insight into how customers use their products. CFGs have shown that no matter how dedicated the developers are, customers often don't react to products the way developers thought they would, even after extensive "verbal" specifications in the beginning.

Description

One of the key messages of Evolutionary Development is the use of facilitated group meetings. CFGs, together with JAD sessions and technical reviews, form a potent combination for developing high-quality, customer-focused applications.

A CFG demonstrates a version of the product to the customers. The session is moderated by a trained facilitator, and each participant in the session has a specified role to play. The primary objective of the sessions is to uncover needed changes to the product. Participants should concentrate on *what* changes need to be made, not how they would be implemented. In order to gain the most benefit, the session should maintain its focus on the product as it is presented. If, for example, an area of significant functionality is discovered to be missing, the issue should be recorded and the session should move on to other things. For the missing functionality, a separate JAD session might be convened rather than try to develop specifications in the CFG meeting. This addresses one of the key challenges to successful meetings -- knowing the objective of each type of meeting, and not confusing one with another.

Like a JAD session, the CFG should have a clear objective and an agreed-upon agenda. Sessions may last 3-4 hours. The product demonstration should focus on business scenarios. These might be stated as, "show the system has the ability to enter catalog orders," or "show the system has the ability to produce an order summary report." This approach is in contrast to one that demonstrates how to update a file or how to navigate around the application. Customers are interested in solving business problems, not updating data files. It is important for CFGs to maintain that focus.

During demonstrations of early versions, the developers may "show" the application to customers because the software may be relatively unstable. As the product evolves towards completion, customers should take a more active role at the keyboard.

Customer Focus Group Basics

Participants

Details about the roles identified below are discussed more fully in the "High-Performance Team" section. Some additional information, specific to JADs and CFGs, is in the JAD description.

- Facilitator
- Customer
- Developer
- Scribe

Benefits

- Helps developers learn what "close to the customer" means
- Increases customer involvement. Provides a context more closely understood by the customer
- Forces progress with product review dates
- Teaches customers the application
- Creates product champions
- Focuses on business results, not technical means
- Helps developers to explore "fuzzy" areas

Challenges

- Getting a wide range of customers together
- Keeping the session on track

CFG Process Steps

1. Prepare for the CFG Session

Although the basic objective of demonstrating application capabilities and recording change requests is basic to every CFG, the objective of each CFG may be different and, therefore, needs to be explicitly stated. Three key questions need to be answered:

- What is the objective of the session?
- What does each participant need to get out of the session?
- What will be produced and who (and how) will each deliverable be used?

The ***facilitator*** has primary responsibility for CFG preparation. It is important that all participants understand their role in the process and that all relevant information be gathered and sent to participants ahead of time. In preparing for the session, the following items need to be done:

- Participants need to know the length of the session, and how the CFG fits in the development process.
- Participants who are not core team members should receive *written* invitations to the session.
- The facilitator will need to prepare some introductory material, especially for the first time participants.
- An agenda needs to be prepared ahead of time.
- A list of the "ability to" statements to be covered in the session should be part of the material sent to the participants, particularly those who are not core team members.
- The facilitator needs to sit through a "dress rehearsal" prior to the session.
- Arrange for a meeting space and its setup.
- Make sure adequate terminals (and overhead projectors for larger groups) have been setup.
- Decide on how change requests are to be recorded.
- Review the scribe's duties with him/her.

2. Conduct the CFG Session

The facilitator conducts the CFG session, leading the developers and customers through the planned business scenarios. In general, like JAD sessions, the facilitator is responsible for keeping the session on track and moving forward with agenda items. For example, since the focus of version 1 is on scope and concept, the facilitator would steer questions about screen layout preferences to later sessions. Participants are responsible for deriving the content from the sessions. A sample agenda for a session might include:

- CFG process overview and session objectives
- Session ground rules
- Short review of the project data sheet, particularly the project objective statement and trade-off matrix
- Short progress review of the project
- Demonstration of the product using business scenarios
- Review of any open issues identified during the session
- Summary review of change requests
- Review the date and content of next CFG meeting

ProjMgmtNote - Convergence

One of the challenges of CFGs, and Evolutionary Development in general, is the potential for iterations to diverge rather than converge. The facilitator, in fact the whole development team needs to maintain an awareness of this possibility. *Divergence* can be caused by unclear or differing objectives, differences about the approach to development, political differences, poor matching of the product to initial specifications, or other reasons. It is imperative in these circumstances that someone on the team "raise the red flag" and the group needs to decide; firstly, if in fact the team is "spinning," and secondly, what to do about it.

3. Review the Session

There are four items to be considered in CFG session review: firstly, a review (or retrospective) of the session itself; secondly, consolidation and publishing of any documentation developed during the session; thirdly, a strategy session on how to handle the requested changes, and finally, assignment of issues raised in the session for resolution. The review of the session is done by the core Project Team.

The review items mentioned above may actually be done in two meetings. The team should convene immediately after the CFG to share impressions of how the meeting went, and gather recommendations for improving the subsequent sessions. Also included might be items of an organizational or political nature that may be impacting the project -- e.g., needing a representative from an additional area. This meeting should be short. The team has just been through an often grueling CFG session, but it is important to get meeting impressions out before they are lost.

The remaining items mentioned above can be addressed the next day. They can actually be part of "replanning" the next version.

CFG Session Tips

- This is not a review of documents. This is a review of a product version.
- This is a customer review of the product. Technical developers should limit comments to clarifications requested by the customers.
- Keep in mind that both positive and negative comments about the product are equally good information. Negatives lead to changes that, in some ways, are even more "positive" to customer/developer relationships in the long run.

- Defensiveness and/or over-explanation of "why" something was done a certain way by the developers will destroy the usefulness of the session. Checking "egos" at the door is hard, but critical to success. Usability labs put developers behind one-way, sound-proof glass for a reason!
- Make sure there is an adequate cross-section of customer reviewers. It is easy to have the system biased towards one group at the expense of another.
- The Facilitator should write on a flip-chart and keep it hidden until the appropriate time. **Predictions:** "The experts will not agree on business rules." "We will get hung-up on usability issues." When one of these occurs, unveil the prediction as a way of re-focusing the meeting.
- Hold sessions from 10:00 a.m. to 3:00 p.m., with lunch as a break.
- It is the customers' responsibility to prepare for the session also. They need to develop business scenarios that will adequately test the system. They need to understand the objectives of each session and commit to being full participants in the process.
- All change requests should be recorded. The resolution of all requests should be communicated back to the customer.
- Room requirements:
  - Flip Charts of the Project Data Sheet, Project Risk Assessment, and the Visual Data Model should be prominently displayed;
  - An overhead projection device for more than 2-3 reviewers;
  - U-shaped or round tables;
  - Comfortable chairs;
  - Room with adjustable lighting;
  - Flip-charts and/or whiteboards; and,
  - Coffee, etc.
- Session ground rules:
  - Should be agreed to by all to limit disagreements and facilitate consensus-building (refer to the JAD practice for ideas on ground rules);
  - May be different for some roles. For example, developers are more observers than participants in CFG sessions;
  - Should provide customers with choices when possible. "Would you like the screen layout with totals at the top, or the bottom?;" and,
  - Developers should refrain from doing changes "on the fly" (which is all too possible with some high-powered tools) or promising when something might be done.