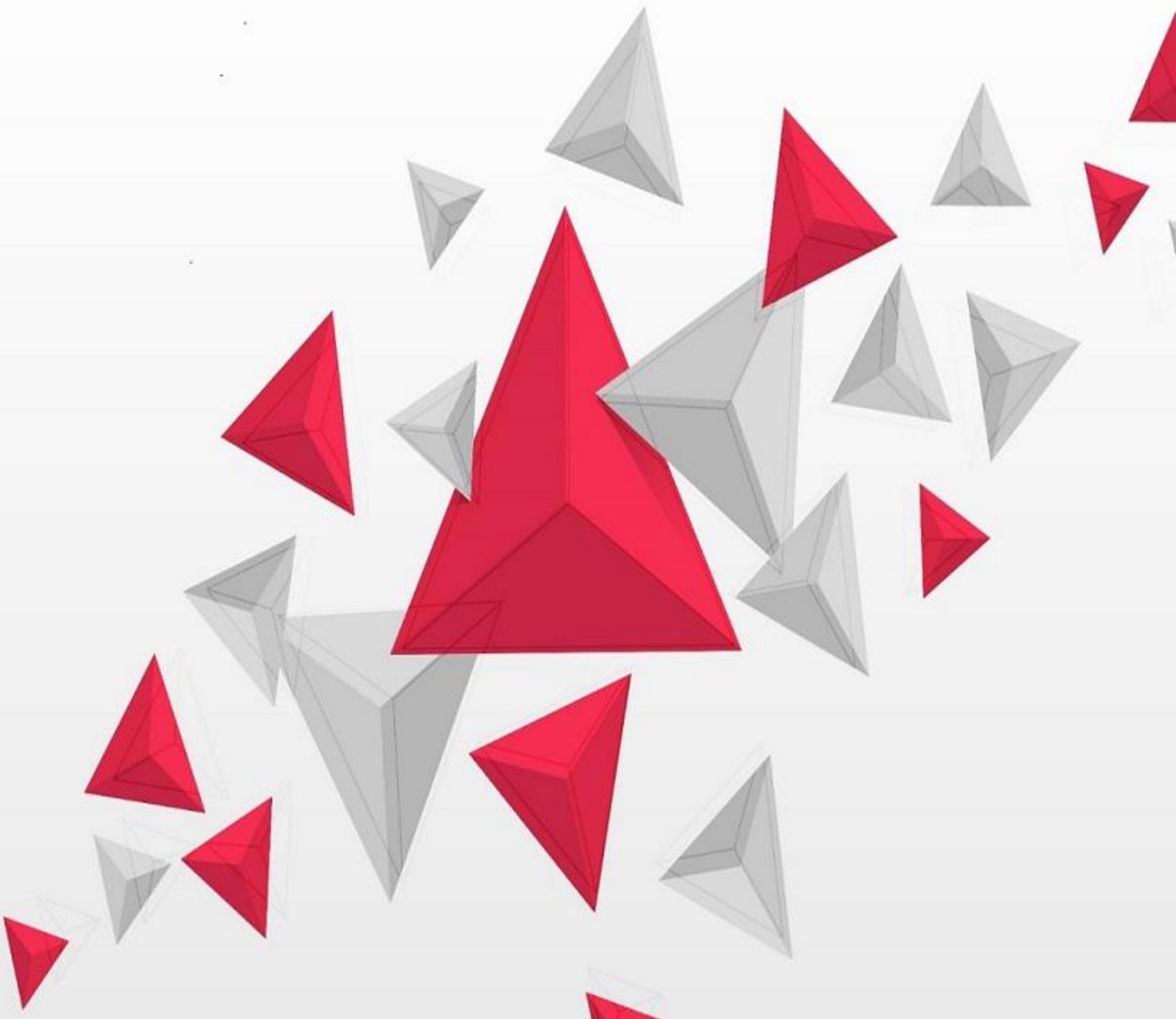


Discussion Tracking Sheet

Guide Book





DISCUSSION TRACKING SHEET – INTRODUCTION

A business analyst is engaged in elicitations, meetings, and brainstorming sessions with many different stakeholders throughout the day on varied topics. Not only that, the requirement documentation authored by a business analyst goes through reviews both internally by the PM and externally by the client.

Now, if a business analyst is not keeping track of all these discussions and review comments, it will not take long for all this to become overwhelming and chaotic.

To save all you busy BAs of the hassle, we are now going to discuss how to meticulously track all the important meetings and discussions around the project and record them for future references through the 'Discussion/Review Comments tracking sheet'.

I would personally vouch for the effectiveness of a tracking sheet like this and have found them to be immensely helpful in cataloging the day-to-day project activities and conversations.

Note - Since this tracking sheet is exclusively for the project's analyst, there are no audiences of this sheet apart from the analyst himself.



HOW TO CREATE A DISCUSSION TRACKING SHEET

Let's discuss the discussion tracking sheet, a template of which is available with this lesson. Although the document is comprehensive in itself, however, if required, you can add more columns or remove some of the existing columns based on your project needs.

- **Functionality**

All project discussions happen against a functionality, module, or component, which should come in this column. You can write the User Story/Use Case Name, document name, or any other identifier for the discussion.

- **Discussion Mode**

All the discussions can be broadly classified into email/chat, call, meeting, & review, and you should select the appropriate mode of your discussions amongst them. However, if you want, you can track issues and clarifications as well by just adding them to this column.

- **Discussion/Review Date**

Associating each of the discussions with a date aids in optimal tracking and recollections. Also, such notes double up as evidence in case of confrontations and confusion amongst the stakeholders.

- **Stakeholders**

Name and details of all the parties with whom the discussions have happened should come to this column. The BA should also specify whether the stakeholders were internal, external, or belonged to a 3rd party.

- **Discussion/Review Comments**

This section should contain the actual conversations, decisions, and review comments. Occasionally, when pressed against time, the Business Analyst, rather than writing the complete summary, copy and paste the discussions as it is – which is also totally acceptable. After all, this document is not a deliverable, and its sole purpose is the log and track all the conversations.

- **Notes**

This section will include any personal notes or informal comments the BA would like to mention against the discussions.

- **Status**

Each of the discussions or review comments needs to be tracked for their status. It should be mentioned whether the discussion is 'open' for further clarifications, whether its implementation is 'in-progress', or is it 'pending' for the time being or is successfully 'closed'.

For the ones that do not warrant status and are only a kind of memory note, the BA can select NA (Not Applicable) for them.

- **Closure Date**

If discussions have been marked for closure, then the closure date needs to be specified so that it can be easily seen in which comments or discussions stand closed.

- **Documented in Use Case/User Story?**

It's a best practice to document every approved change in the respective project artifact, update the document version, and communicate the changes to all the stakeholders

involved. This column makes it easier for the BA to track whether he has updated the allied documents.



DISCUSSION TRACKING SHEET - BEST PRACTICES

Our discussion tracking sheet is pretty straightforward and helps a BA handle the job responsibilities without worrying about remembering all the conversations or shuffling pages of a diary containing unstructured, running notes.

The use of this template is limited only by your imagination as one can use it for maintaining the issues encountered in the project, the clarifications we sought from different stakeholders, or even tracking the pending project tasks. What's more, if you find yourself working on various projects simultaneously, you can still maintain just a single tracking spreadsheet and have a different tab for each of your projects. Additionally, since we are using a spreadsheet, you can quickly sort the discussions by 'date' or filter them by 'discussion mode'.

Not recollecting some discussions is quite common in the thick of things, and to help my way out, I have always maintained such a template for all my projects. It's my personal hack that has really helped me on numerous occasions – be it referencing 2 years old discussions, pulling out old notes for confirmations, or tracking whether all my documents are up to date with the latest changes.

One final piece of advice before we move on - As metrics of every project are different, I strongly recommend that you tweak and personalize this template based on your project needs and keep yourself up to date with all the conversations happening in the project.