Requirements and Specification, ESOF 328, Spring 2020
Guidelines for Client Meetings, Notes, Analysis and Updating the SRS.

Updated: Jan. 25, 2020

Student roles:
- Leader
- Presenter
- Participant

Pre-meeting:
- Agenda is sent at least 24 hours in advance. We'll develop agenda as a class, but the leader is responsible for final updates and getting the agenda to all stakeholders. A presenter and time must be associated with each agenda item. The presenter may be the leader (leader's responsibility)
- Materials are sent at least 24 hours in advance (leader's responsibility)

During the meeting:
- Leader starts the meeting on time
- Leader begins the meeting by welcoming people and thanking them for coming.
- Leader passes out the agenda and goes over it, to get everyone on the same page and let them get ready to listen
- Leader goes over the past decision made
- Visual aids are used effectively (leader/presenter's responsibility)
- Useful and accurate information is obtained and decisions are clearly noted (leader/presenter's responsibility)
- Professionalism and respect is shown to all participants (all participants)
- Client/participant questions are answered accurately (leader/presenter's responsibility)

Post-meeting:
- Outstanding issues are followed up on within a reasonable time-frame (leader's responsibility)
- Brief thank you email is sent within 24 hours after meeting and specifies any outstanding items and major decisions (leader's responsibility)
- Each students turns in a complete set of meeting notes and analysis at the beginning of the next class (all participants)

Guidelines for note taking:
- Have a copy of what will be discussed (all participants)
- Notes can be placed directly into the SRS, on the agenda, or in a separate document (all participants)
- Decision, outstanding issues, major points, and priorities are accurately recorded (all participants)

Meeting notes/analysis:

- Meeting notes/analysis serve two purposes
    1. To help us create an accurate SRS.
    2. To help us move forward on understanding the proposed system.
- Creating excellent meeting notes, along with appropriate analysis, is an art. It takes attention and good note taking at the meeting, considerable analysis during and after the meeting, and time to accurately record useful information.
- Notes condense the discussion, yet capture its essence, attempting to use the “voice” of the speaker. Often, however, clients are not skilled in talking about software or developing requirements, so considerable effort is required to rephrase information to add clarify. Often contradictory information is presented and both sides need to be accurately presented.
- Who said what is only recorded when the information will be needed later.
- Meeting notes appear within the agenda with relevant discussion items placed under the relevant agenda item (extra items can be placed at the end). This may not match the order in which the discussion took place.
- While often agendas do not use complete sentences, use only complete sentences in meeting notes and analysis.
- Records all major decisions accurately.

Updating the SRS:

- Decision, outstanding issues, major points, and priorities are accurately incorporated into SRS
- Changes made to SRS are complete and accurate, yet concise
- Information added to SRS is placed in the most appropriate location. In the long run the information may be superseded by other information and removed, but in the meantime, record it where it seems most appropriate.
- Changes made are consistent with the rest of the SRS. It may be necessary to update other portions of the SRS to keep the document internally consistent.