

# The Box Fight Analogy: A Blueprint for Pre-Sales Requirements Engineering Workshops

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**Abstract.** Requirements engineering (RE) is typically associated with the creation of a service or product. Its activities are usually not immediately considered to be part of the pre-sales phase. Yet, not only sales- but a lot of requirements engineering activities actually do occur during this phase. Besides tender processes where customers provide a detailed Request for Proposal (RfP) and a potential contractor provides the answers, there are also alternate ways for a customer seeking a solution. The purpose of pre-sales workshops is to learn more about a specific product or service and to get to know potential vendors to inform a later RfP or to directly proceed with the solution at hand. For vendors they provide a chance to attain some of the customer's goals and business requirements to position their product in a favorable way. Staff having not only sales but RE skills are likely to be involved, since they own a large degree of product knowledge and they know how to run these workshops. The only thing they usually lack is an appropriate workshop strategy for the pre-sales phase mastering its specific challenges. This paper presents an overview of these challenges and a strategy blueprint based on analogy to a famous sports event: box fights.

**Keywords:** Pre-sales requirements engineering, requirements workshops, box fight analogy

## 1 Introduction

The major goal of the pre-sales phase is to provide the customer with a compelling offer that exactly fits his needs and an attractive price indication. In order to achieve this not only sales but also requirements engineering (RE) activities are applied to learn about a customer's business goals and needs. These activities usually differ from regular or post-sales RE since they encounter a completely different set of risks [1] restricting the specialists in what and how requirements engineering techniques can be applied. Everything in the pre-sales phase is a pre-investment. Customer contacts are strongly limited in time, and are often rather driven by assumptions than knowledge. At the same time competitors try to close the very same deals on their end. The share of the "unknown" is the largest at this stage while the customer's conception of a

solution is a constantly moving target. U-turns in the customer's decision making should not be a surprise but anticipated.

Customers typically approach a contractor either by a Request for Proposal (RfP) [2] or by requesting for a workshop where they can learn more about a product or service. But in the pre-sales phase these often become typical sales events where only a product's unique selling propositions, features and advantages get presented. Yet, with sales approaches like Miller Heiman's Conceptual Selling®, those events start assimilating to current RE practices when sales people eventually start listening to customers and business needs and requirements are acknowledged to be important [3]. As another incentive a well conducted workshop might lead the customer to skip the rather unpopular RfP process and to continue with the solution at hand [4]. In consequence bid process managers are likely to involve people with requirements engineering skills, since they own a large degree of product/service knowledge and they know how to run RE workshops. The only thing they lack is an appropriate workshop strategy for the pre-sales phase mastering the aforementioned challenges.

This paper presents a strategy blueprint for requirements workshops in the pre-sales phase stemming from practical experience. In order to understand its concepts and procedures the pre-sales challenges they respond to are outlined in the first section. Next the blueprint's core concept is introduced demonstrating the use of an analogy to a famous sports event: box fights. The final section provides some discussions and conclusions from its application.

## 2 The Pre-Sales Workshop Challenges

The pre-sales phase involves lots of challenges that distinguish it from the post-sales phase. This is a closer look at the ones especially affecting the workshop itself. All of them must be addressed by an appropriate workshop strategy. Taking a closer look they are not only challenges but the initial set of risks of a project: "A risk is an uncertain event or condition that, if it occurs, has a positive or negative effect on the projects objectives" [5]:

- **The large unknown:** At the beginning of a new relationship there is a large deal of assumptions and guessing on the one hand, causing a large revealing effort on the other. There is a lot of room for misunderstandings, false assumptions, the unsaid, the implicit, and the deliberately false.
- The customer might not be open and honest about his business details and his attitudes to every potential contractor due to the **lack of trust** or the lack of another incentive like an existing contract.
- Especially the customer's attitudes are to be emphasized separately since they are the basis of another challenge: the phase's **fragility**. It might abort quickly due to reasons completely unrelated to the proposed technical or business details. Feelings and attitudes have the potential to break deals even if the solution offered ranks best of breed.

- Dealing with the large unknown becomes even worse when there is only **limited time**. Yet, it is the nature of the pre-sales phase to be short. This especially affects workshops which in this case usually last not days but only a few hours.
- Making it even more difficult, the large unknown is a constantly **moving target**. Both, not only the potential contractor but also the customer learn a lot in the early stages and consequently adapt their earlier decisions. U-turns should be anticipated. A very large angle for decision making is rather sound and common at this point to find the best solution.
- For the workshop itself it is extremely important to have the **right people** participating. Otherwise it becomes a waste of time and a waste of money since everything is a pre-investment.
- The same accounts for when there is doubt about the **seriousness of interest**. Sometimes the customer's interest might be faked just to acquire some external proficiency or feedback for free (or rather at the contractor's expense). It must be possible to derive a discrepancy (i.e., a business reason or attitude) which urges him to find a solution.
- Last but not least the **timing** of the workshop has to be chosen carefully especially when the customer did not approach the contractor for a workshop himself.

All of these risks have to be addressed in order to successfully conduct a workshop in the pre-sales phase. A workshop strategy blueprint to encounter these risks is presented in the following sections.

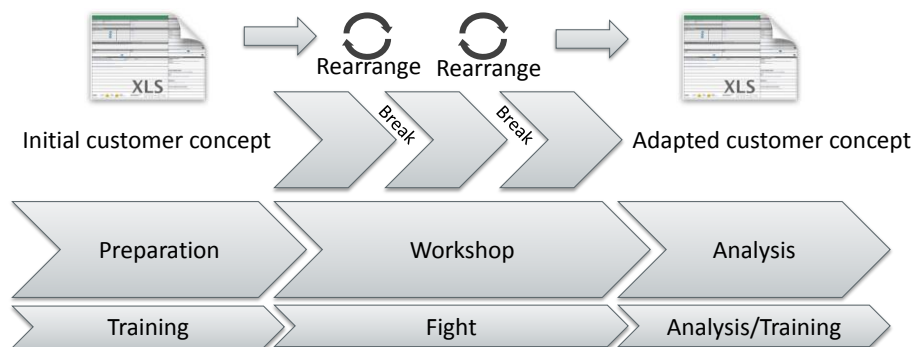
### 3 The Box Fight Analogy

An adequate workshop strategy for the pre-sales phase basically needs to define two major parts: **risk responses** (i.e., actions to avoid, transfer, mitigate, or accept a given risk [5]) and **exit criteria** (i.e., certain levels at which the contractor ought to quit the bid process). Both of them are needed to secure the pre-investment, eliminate uncertainty and to safeguard the sale's aftermath. To address most of the above challenges at once an analogy to a famous sports event appeared to be very inspiring and helpful: box fights. It is applied to extend a concept which is based on the pre-sales requirements engineering grounding on Miller-Heiman's sales approach [1][3]. Its core is the **customer's concept** which starts out as a set of assumptions and is refined and amended later as the workshop evolves (cf. Fig. 1). The following describes briefly how this analogy informs the strategy in its setup (roles and phases) and how it responds to the pre-sales risk setting.

#### 3.1 The Idea

On first sight box fights seem to fit well into the world of sales and marketing with terms like *war rooms* and *battle cards*. Thinking of box fights, a lot of images come to mind: the box ring, the bell, two opponents, the coaches etc. The most obvious commonality is probably the limited time. In box fights there is only time until the

next sound of the bell to strike or to knock out the opponent. In between there are breaks which the coach and his fighter use to rearrange their initial strategy which was setup before the fight started, i.e., there are phases of preparation, fighting and rearrangements. The fight is over when the time elapsed, the opponent is knocked out (i.e., the moving target is not moving any longer) or when the coach throws the towel indicating he wants to quit the fight (which basically corresponds to meeting one of the above mentioned exit criteria).



**Fig. 1.** An overview of the overall process from preparation to analysis.

### 3.2 Roles and Phases

Inside the box fight analogy there are roles and phases that are to be translated to the pre-sales scenario: The **fighter** is the person doing the talking or moderating of the workshop. S/He is the one actively engaging the moving target. He acts according to the previously defined customer concept (i.e., the result of the preparation phase, see below) in a conversation with the customer asking the prepared questions to gain the knowledge needed. The **coach** is somebody equally skilled as the fighter, maybe a little more experienced. His main task is to listen and to make adaptations and amendments to the concept if needed. He informs the fighter during breaks or even takes over the “fighting” himself if required. This means workshops are attended by at least two people from the potential contractor in order to catch every new piece of information and every change in direction to properly address the moving target challenge. It is simply too hard to listen, to write and to talk at the same time. Last but not least: The **opponent** is not the customer but the moving target solution. In order to capture it the right way, the customer is actually part of the extended coaching team. Here, s/he acts as a matter expert for that very particular opponent.

There are three phases in box fights which can be translated to the pre-sales workshop (cf. Fig. 1): the preparation (or training), the workshop itself (the fight), and its analysis thereafter. During the **preparation** phase the initial customer concept is compiled. Already known information is gathered and amended by confirmation questions (for assumptions), new information questions (for the unknown), and attitude questions. They are grouped by topic and topics are ordered by (assumed) cus-

customer priorities. The phase should conclude with a risk assessment and a decision whether to continue or to quit the process. The **workshop** is structured in a sequence of rounds and breaks. A workshop round follows the typical pre-sales requirements engineering cycle pattern [1] of getting information, giving information, and getting commitment. It uses the initial customer concept as conversation guideline. During the conversation a lot of information is gathered which has to be integrated into the concept. Breaks are used to rearrange the concept and the workshop's direction. Finally, when the workshop is over its **analysis** finalizes the customer concept and prepares it to serve as a basis for effort estimations and price indications. It also monitors customer commitment and helps to improve the overall approach.

### 3.3 Risk Responses and Exit Criteria

The phases mentioned in the previous section not only provide the basis for the overall process but also the risk responses to the pre-sales challenges. Table 1 outlines responses by risk also adding exit criteria to the overall picture.

**Table 1.** Risk responses and exit criteria for pre-sales workshops.

<b>Risk</b>	<b>Risk Response</b>	<b>Exit Criteria</b>
The large unknown	Strong focus on preparation of the customer concept. Priorities are used to focus on the most important parts. The workshop gathers information; its breaks allow for rearrangements.	No customer commitment to find answers to reduce the unknown. No provision of data or extra material by the customer.
The lack of trust	During preparation a set of trust building measures like customer references need to be defined. They are used during the workshop.	There are basic issues disturbing the relationship that cannot be resolved during the workshop.
Fragility	Preparation includes attitude questions. These are explicitly asked during the workshop or addressed during its breaks.	There are attitudes that contradict the current business approach.
Limited time	Strong focus on preparation and priorities, rearrange to focus on the most important items.	Customer unable to name priorities; insufficient time
Moving target	Workshop phase uses breaks to rearrange according to the moving target.	Target moved far out of scope of the potentially suggested solution
Right people	Preparation phase checks on participants; Workshop asks for customer commitment (budget, time, data) and about the decision making process.	No participants available to answer the commitment questions; Participants not involved in the decision making process.
Seriousness of interest	Preparation and workshop ask for customer commitment (budget, time, data, participants); preparation and determines a discrepancy or business need	Insufficient commitment; no discrepancy.
Workshop timing	Preparation determines potential discrepancies and valid business reasons; these need to be confirmed during the workshop	No discrepancy, no valid business reason.

## 4 Conclusions

This paper showed briefly how box fights provide a useful analogy to inform the design of requirements workshops in the pre-sales phase. It puts a large emphasis on regarding the pre-sales phase's specific challenges: the large unknown, the limited time, and the moving target. It was also shown which prerequisites have to be covered as part of the workshop's preparation phase in order to save the contractor's pre-investment.

While this paper simply represents a blueprint there are certainly many ways to actually put it into practice with a customer. For instance, there is a more covert style which does not state any of the concepts above to the customer but simply uses them. The ratio of rounds and breaks strongly depends of the overall time of the workshop and has to be adapted to the particular context. With increasing proficiency the rearrangement of the concept may be done in course of the workshop instead of using real breaks. But there are also customers that really appreciate the use of clear breaks to rearrange their own model themselves. Additionally, breaks also add another advantage: they are very helpful to learn about the customer's individual attitudes and opinions usually not uttered in a larger auditorium.

As with pre-sales requirements engineering overall, there are some aspects new to requirement engineers: they might be not used to such time constraints and explicitly asking for attitudes and feelings. Some might not be used to the strong emphasis on preparation for a workshop. Having to think about when to quit surely adds a new constraint as well. Yet, more importantly, RE in the pre-sales phase becomes a team activity that has to be practiced to unfold its value—with the downside being higher costs.

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