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USING A SMARTPEN IN BUSINESS ANALYSIS



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For those that aren't in the know, a smartpen allows you to capture the actual conversation taking place while you are writing notes.

By using [specially marked paper](#), the pen can synchronise the audio being recorded with what you are writing and, at a later stage, you can press the pen anywhere on the page (on which you have written your notes), and the conversation that was taking place at that particular time is played back to you.

I have used a smartpen in a lot of elicitation situations and, in this post, I would like to describe some of the “**lessons learned**”.

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WHICH SMARTPEN HAVE I GOT?

I've got a Livescribe smartpen.

There are several models of the Livescribe pen available. The latest version is the [Livescribe 3 Smartpen](#) and it offers some pretty cool functionality.

When I was originally looking at the pens, 3.0 hadn't been released yet. And I also reasoned that I did not need real-time syncing to the cloud.

As such I chose the [Echo smartpen](#). You can see what this pen is capable of [here](#) and [here](#).



HOW I USED IT?

I'd use the smartpen in business analysis in any [elicitation situation](#) where I was taking notes.

I would use the Echo to keep a record of the actual conversation taking place, and at the same time, I would take be writing notes.

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After the session I would playback the conversation at various points, to confirm that my notes were correct, or to expand on what I had written (you know that written notes don't always capture *everything* that was discussed).

Using the Livescribe Desktop app, I was able to convert my written notes into a dynamic PDF that could be archived, or distributed to others in the team. This PDF had the audio embedded and the reader could click on any word to playback the discussion taking place at that time.

WHEN I WAS NOT THE ONE TAKING NOTES

Often when you are running an elicitation workshop, you are up in front of everyone, leading discussions, asking questions, prompting and encouraging responses. You can't do this and write everything done.

In this case, there is usually someone else who has been assigned this task (the **scribe**).

When I was in this situation, I was still able to use the Livescribe. Whenever there was a change in the subject being discussed, or a particular point that could be summarised in a word, I would write that on the special dotted paper.

After the session, I could still playback what was said at that point.

THE ADVANTAGES OF USING A SMARTPEN

Using the Livescribe pen has a lot going for it:

- You are able to capture the whole discussion and tie it in with your notes.
- The audio is synchronised to the notes you have written, so you can **playback** the conversation that was taking place at specific points.
- The notes with audio can be **shared** with other members of the team, or with the stakeholders (if desired), as part of your [Work Product](#).
- You are confident that you can go back over the audio to pick up things that were said, but not written down.



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LESSONS LEARNED

Using the smartpen in business analysis has been very handy, but it also has its downsides.

What follows are some of the “lessons learned”.

ASK PERMISSION

Before actually using the pen during any elicitation event where other people are involved (workshops, interviews, active observation, etc.), ask if it is OK to record the conversation. Usually, people are pretty good about this and don't mind.



However, it is important to reassure participants that you are using the pen merely as a tool to support the notes you are taking. And as a professional BA, you need to remember that, also.

DON'T LET THE PEN BE A REPLACEMENT FOR ACTIVE NOTE-TAKING

Use the pen to capture the conversation, but don't be lazy. You still need to actively *listen* and write down the important points from the conversation.



YOU STILL NEED TO CONFIRM

Just because you have an audio record of the conversations that you have, does not mean that you don't have to validate, that the stated requirements match the stakeholder's understanding of the problem and the stakeholder's needs.



What is written, and what was said, still might not be what was actually meant.

MAKE YOUR NOTES MEANINGFUL

As I mention above, in a workshop situation you might just write a word or two and let the pen capture the conversation.

I've had situations where, after a series of seven one-hour workshops I've gone back over my notes, and haven't been able to work out which part of the workshop the squiggle on the page tied in with, or what



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that strange sentence that I wrote (which meant something at the time – three days earlier) actually referred to.

When writing “headings” to describe certain parts of a conversation/discussion, write something meaningful, so that, after five days, it will still be clear. The discussions in workshops, or interviews, don’t always take place in nicely define “sub-sections”.

NEVER *JUST* RECORD THE SESSION!

This is a classic newbie mistake and relates to something I wrote above. Never, ever, just record the elicitation session with the intention of “*writing up the notes later on*”.

You might have had a three-day workshop. Remember – when you playback the audio, it will take three days to listen to it! (And this includes all those side-conversations, jokes, and irrelevant comments that get made.)



SECURE THE OUTPUT

This is related to “[Ask Permission](#)” above.

Regardless of whether you have been given the OK, by the session participants, to use the Livescribe, be aware that a lot of things are said during the workshop/interview/active observation session that might not be relevant, or are “off-record”.



It may not be your intent, but you don’t want a situation where something someone says is later used against that person.

HAVE A WAY OF CHARGING THE PEN

The pen can be used for several hours, but it won’t last forever.

With the Echo, I could plug a USB cable into it, and plug that into my PC. This allowed the pen to be constantly charged while I wrote notes.



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ENSURE YOU HAVE ENOUGH PAPER

The live scribe uses paper with [microdots](#) on them. This allows the smartpen to be able to map what is being written, and the location on the page.



Livescribe sells this paper in the form of notebooks. Ensure that you have an extra notebook with you.

You might never use it, but, then again, you might. (You can print out the Micro Dot paper yourself, but read the next “Lesson Learned” for more on this.)

KEEP TRACK OF THE PAGES

Each page in the notebook has a unique, sequential, ID. This way, the Livescribe can keep all the pages in the correct order.



Don't write your notes on random pages. It makes it difficult when it comes to working with the notes, and audio when you are back at your computer.

PRINTED PAGES

As mentioned above, you can print out the Micro Dot paper yourself. If you do this, you will have several loose sheets. These are handy if you want to put the sheets in a ring binder, etc., but be aware that, as with the notebooks, each page is in sequential order. Keep them in the correct order (the page number is printed on each). This saves a lot of pain when exporting to a PDF, etc.





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THE LESSONS LEARNED INFOGRAPHIC



[Download a large \(800px X 2000px\) version](#)

(<http://www.markjowen.com/download-10-lessons-learned/>)

CONCLUSION – WOULD I RECOMMEND USING THE PEN?

The pen is an incredibly handy tool (with the later version offering, even more, functionality, as well as looking like a real pen).

However, for the purposes of Business Analysis, I would **not**, personally, recommend using it.

WHY?

As I alluded to in some of the Lessons Learned, being able to record the conversation taking place is valuable. But it also makes you relax.

It's easy to think "Oh I won't write that down – I'll go back over the audio later."

WRONG! The idea of the elicitation session is to actively capture the main points. In real-time.

[That's part of being a good BA. Active Listening and Active Note Taking.](#) You are in the elicitation session to really understand the message that the stakeholders are communicating. And you need to make sure that you have captured it properly.

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Going back over a recording of a session, in my opinion, is of little value. The real value should be in your notes. If they need expanding upon, or clarifying, that is something that needs to be done directly, with the appropriate stakeholder.

I'm not saying that a smartpen is worthless. But if you think about it, BA's have been taking notes as part of the elicitation process for years. How many have recorded the session?

However...

My conclusion above, however, is how I feel about it.

For you, fellow BA, it might be a different situation.

In fact, someone pointed out to me that their handwriting was terrible, and they often could not read their own notes. Having the pen would mean that they could, indeed, dive into what was being said at the time the notes were made.

I can't argue with this reasoning...

OTHER REVIEWS

For other reviews of the Livescribe pens, click [here](#).

YOUR OPINION

Have you used a smartpen in business analysis? What are thoughts on it?

Do you think that I am wrong in not recommending it for BA work? Feel free to let me know in the comments