Business Analyst Work Plan

Presented by:
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## Agenda

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Seminar Goals

• Goals
  – Exposure to standards for business analysis planning
  – Identify efficiency opportunities
  – Appreciate the benefits of planning your business analysis tasks
What is a business analysis work plan?
Why should I create a work plan?

OVERVIEW OF BUSINESS ANALYSIS PLANNING
What is Business Analysis Planning?

- Business Analysis Plan
  - Requirements Elicitation Activities
  - Requirements Analysis Activities
  - Solution Assessment and Validation Activities
- Requirements Management Plan
- Requirements Communication Plan
Business Analysis Planning Sequence

Plan Business Analysis Approach

Conduct Stakeholder Analysis

Plan Business Analysis Activities

Plan Business Analysis Communication

Plan Requirements Management Process

Manage BA Performance

BABOK Chapter 2
Benefits of Business Analysis Planning

• Provides clear business analysis approach and scope
• Establishes Business Analysis Communication vehicle and frequency
• Establishes estimates time commitments for:
  – Business analyst(s)
  – Stakeholders
• Allows determination of business analysis status
• Establishes business analysis deliverables
• Spending more time on requirements can actually accelerate software development
• Provides you a negotiation tool
Results?

• Creditability of Business Analyst
  – Keeps you organized
  – Make the most of stakeholder time
• Efficiencies gained in business analysis planning
• More accurate estimates

• Increased probability of Project Success
How much time should be spent on development of requirements?

- Percentage of total project effort spent on requirements development:
  - Wiegers sites success devoting 15% - 18% on small projects
  - Young sites approximately 8% to 12% in *Effective Requirements Practices*
  - Large project benchmark data indicates 3.7% to 10% - Jones 2000.

* Unsure how many of these were successful
Outputs of Initiation Phase
Identification of Project Characteristics
Stakeholder Analysis

INITIATING A BUSINESS ANALYSIS EFFORT
Outputs of the Initiation Phase

- Business Need
  - Product Vision
- Required Capabilities
- Solution Approach
- Solution Scope
- Business Case
  - Initial Risk Assessment
  - Cost/Benefit Analysis
- Project Request

These outputs represent culmination of high/mid level analysis.

Ensure that these outputs are SMART* appropriate and buy-in is obtained prior to planning detailed business analysis activities.

* Specific, Measurable, Achievable, Relevant and Time-bound
Influencing Factors BA Effort

Factors that accelerate

• Providers’ Skill set
  – Skilled/experienced analysts
  – Application experienced developers
• Extensive customer involvement
  – Appropriate user representatives
  – Timely response to questions
• Project Characteristics
  – Reuse from previous projects
  – Clear/stable vision and scope
• Frequent informal reviews

Factors that lengthen

• Stakeholders
  – Geographically distributed
  – Language barriers
  – Many or diverse user classes
  – Weak decision-making process
• Project Characteristics
  – Unfamiliarity
  – Large project
  – Concurrent components
  – Complex interactions
  – External dependencies
• No Business Analysis process
Project Characteristics

- Project Type
- Business Analysis Approach
- Project Complexity
Project Types

• Process improvement
• Organizational change
• New software development
  – In-house
  – Outsourced

• Software maintenance or enhancement
• Software package selection
• Feasibility studies
• Integration
• Others?

BABOK Section 2.3.4.2, 2.4.4.3

Opportunity for PM Alignment
Business Analysis Approaches

• Characterize the business analysis approach
  – Plan-Driven
  – Change-Driven
  – *In practice, most projects fall somewhere between these extremes*

• Determination based on:
  – Timing of Business Analysis Work
  – Formality and level of detail of BA Deliverables
  – Requirements Prioritization / Change Management
  – Business analysis Planning Process
  – Communication with Stakeholders
  – Project Complexity

BABOK
Section 2.1.4
Project Complexity Increase as These Increase

- Number of stakeholders
- Number of business areas affected
- Number of business systems affected
- Amount and nature of risk
- Uniqueness of requirements
- Number of technical resources required
- Non-Existent “As-Is” supporting documentation

BABOK
Section 2.1.4.8
Stakeholder Analysis

- Stakeholder Identification
- Stakeholder Complexity
- Stakeholder Attitude and Influence
- Stakeholder Authority Levels for Business Analysis Work

You will be building stakeholder profiles

BABOK
Section 2.2
Stakeholder Complexity Increases as These Increase

• Number and variety of user groups could require
  – Different approaches
  – Differing plans/reporting
  – Variance of formality
  – Impact a stakeholder’s ability to engage
• Number of interfacing business processes and automated system
  – Consider involvement of stakeholders as applicable
Stakeholder Attitude and Influence

• Attitude toward:
  – Business goals, objective, solution approach
  – Business analysis
  – Collaboration
  – Sponsor
• Influence over
  – Project
  – Organization
  – Other stakeholders

If the influence required vs. influence perceived is a mismatch; risk mitigation will be required

BABOK
Section 2.2.3, 2.2.5.3
Stakeholder Authority Levels

• Consider who will:
  – Approve deliverables
  – Inspect and approve requirements
  – Request and approve changes
  – Approve the requirements process to be used
  – Review and approve traceability structure
  – Veto proposed requirements or solutions
Project Characteristics Reflection

• What about this project I have been assigned?
  – What type of project is this?
  – What Business Analysis Approach will be taken?
    • Plan-Driven, Change-Driven, or some Hybrid
  – What is the experience level of the BA assigned?
  – How complex is this project?
  – How risky is this project?
  – How complex is the stakeholder group on the project?
COMPONENTS OF BUSINESS
ANALYSIS PLANNING

Plan Elicitation Activities
Plan Requirements Analysis Activities
Plan Solution Assessment and Validation Activities
Establish Communication Plan
Establish Requirements Management Plan
Plan Elicitation Activities

Elicitation Portion of BA Plan

- Business Analysis Approach
- Organizational Process Assets
- Stakeholder List, Roles and Responsibilities
Elicitation Plan Purpose

• Ensure involvement of a combination of stakeholders providing:
  – Collaboration
  – Domain knowledgeable and experience
  – Representation of typical users
  – Authority to reach closure on requirements
  – Commitment of time and energy
• Provides focus on requirements efforts and high-priority stakeholders
• Encourages management support of elicitation
• Promotes effective use of time
## Elicitation Considerations

<table>
<thead>
<tr>
<th>Technique</th>
<th>Stakeholder Involvement</th>
<th>Timing</th>
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<tr>
<td>Brainstorming</td>
<td>Requires access</td>
<td>Days</td>
</tr>
<tr>
<td>Document Analysis</td>
<td>Does not require access</td>
<td>Days or weeks</td>
</tr>
<tr>
<td>Focus Groups</td>
<td>Requires access</td>
<td>Weeks</td>
</tr>
<tr>
<td>Interface Analysis</td>
<td>Does not require access</td>
<td>Days or weeks</td>
</tr>
<tr>
<td>Interviews</td>
<td>Requires access</td>
<td>Days or weeks</td>
</tr>
<tr>
<td>Observation</td>
<td>Requires Access</td>
<td>Days or weeks</td>
</tr>
<tr>
<td>Prototyping</td>
<td>Requires Access</td>
<td>Hours, days or weeks</td>
</tr>
<tr>
<td>Requirements Workshops</td>
<td>Requires Access</td>
<td>Days or weeks</td>
</tr>
<tr>
<td>Survey / Questionnaire</td>
<td>Requires Access, not physical</td>
<td>Weeks or months</td>
</tr>
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Plan Requirements Analysis Activities

- Organizational Process Assets
- Stakeholder List, Roles and Responsibilities
- Business Analysis Approach

Requirements Analysis Section of BA Plan
Requirements Analysis Tasks

• Organize Requirements

• Specify and Model Requirements
  – Define Assumptions and Constraints

• Verify Requirements
• Validate Requirements
• Prioritize Requirements
Choosing the Right Analysis Models?

**Transactional Business Domains**
- Describes How – Functional decomposition, Use cases, User stories, Process modeling, Prototyping,
- Describes Why – Actors, Business rules analysis

**Structural Domains**
- Describes What – Data models, Data Dictionary, Glossary
- Describes Why – Business rules for data

**Dynamic Domains**
- Describes When – Event-response tables, State diagrams, Sequence diagrams, Data flow diagrams
- Describes What – Data Models (and who if interfaces involved)

**Control Oriented Domains**
- Describes Why – Business rules, Decision analysis
- Describes What – Data Models
Plan Solution Assessment and Validation Activities

Solution Assessment and Validation Section of BA Plan
Solution Assessment and Validation Activities Estimations

- **Solution Assessment**
  - Assess solution options
  - Allocate requirements
- **Solution Validation**
  - Technical design review
  - Review of test plans and test cases
  - Address inquiries and defects
- **Organizational Readiness**
  - Transition requirements
  - Implementation support
Plan Business Analysis Communication

- Stakeholder List, Roles, and Responsibilities
- Business Analysis Plan / Approach
- Organizational Process Assets

Business Analysis Communication Plan

BABOK – Section 2.4.3
Business Analysis Communication Plan Purpose

• Approved communication plans ensure collaboration
• Involvement of knowledgeable and experience domain stakeholders
• Representation of typical users
Elements of Communication Planning

- Geography
- Culture
- Project Type
- Frequency
- Formality
Stakeholder Communication Considerations

- What needs to be communicated?
- How does it need to be communicated?
- Who is the appropriate audience?
- When should the communication occur?
- Stakeholder needs and constraints:
  - Physical location
  - Communication approach
  - Required types of communication
  - Requirement types and elicitation techniques
  - Requirement package communications
  - Time and resource availability
Plan Requirements Management

Requirements Management Plan

- Business Analysis Plan
- Business Analysis Approach
- Organizational Process Assets
Requirement Management
Components

• Repository
  – Ensure single source
  – Accessible
Requirement Management Components (continued)

• Traceability Architecture
  – Associations
  – Necessity
  – Effort
  – Subset
  – Cover
  – Value
Requirement Management Components (continued)

• Requirement Attributes

  Unique Identifier  Priority
  Author            Resource Assignment
  Ownership         Revision Number
  Source            Complexity
  Cost              Risk
  Stability         Status
  Urgency

ASPE SDLC Training
Requirement Management Components (continued)

• Requirement Prioritization Process
  – Risks
  – Cost
  – Benefits
  – Implementation Time
  – Dependencies
  – Resource Constraints
Requirement Management
Components (continued)

• Change Control Process
  – Request for change process
  – Change Request Form Definition
  – Who performs impact analysis
  – Who authorizes changes

• Gauge likely volatility of change
Practical Example
In Summary...

- Planning provides
  - Opportunity to determine tasks and time estimates for effective requirements development
  - Highlight BA responsibility to raise issues to management (PM) such as plan revisions, lack of user involvement, scope issues, etc

- Go forth confidently and humbly to negotiate and navigate the environment.