



The Business Analysis Process Framework:

Cultivating Your Success Mindset

Laura Brandenburg, CBAP



Agenda

- ▶ Welcome and Intro (30 Minutes)
- ▶ Step 1 – Get Oriented (1 Hour)
- ▶ Step 2 – Discover the Primary Business Objectives (1 Hour)
- ▶ Step 3 – Define Scope (1 Hour)
- ▶ {LUNCH BREAK}
- ▶ Reflection Exercise (30 Minutes)
- ▶ Step 4 – Formulate Your Business Analysis Plan (1 Hour)
- ▶ Steps 5–7 – Define the Detailed Requirements, Support the Technical Implementation, Help the Business Implement the Solution (1 hour)
- ▶ Step 8 – Assess the Value Created By the Solution (1 Hour)
- ▶ Closing Reflections and Take-Aways (30 Minutes)

What to Expect From Me

- ▶ I'm providing the framework for learning.
- ▶ I will facilitate the learning process.
- ▶ I will teach you “just enough”.
- ▶ I'll ask you questions, and facilitate discussion.

What to Expect From You

- ▶ Be engaged – listen, share, reflect, participate.
- ▶ Be on-time from breaks.
- ▶ Trust yourself to contribute. Everyone here has something valuable to share.
- ▶ Please put away and mute distractions (phones, laptops, etc.).

3 Things That Will Hold You Back

- ▶ I already know that...
- ▶ But that won't work for me because ...
- ▶ I must be the only one ...

How to Be Successful in the Real World as a Business Analyst



Keep your projects moving forward

Deal with aggressive timelines

Manage ambiguity

Avoid unnecessary work

Apply key principles

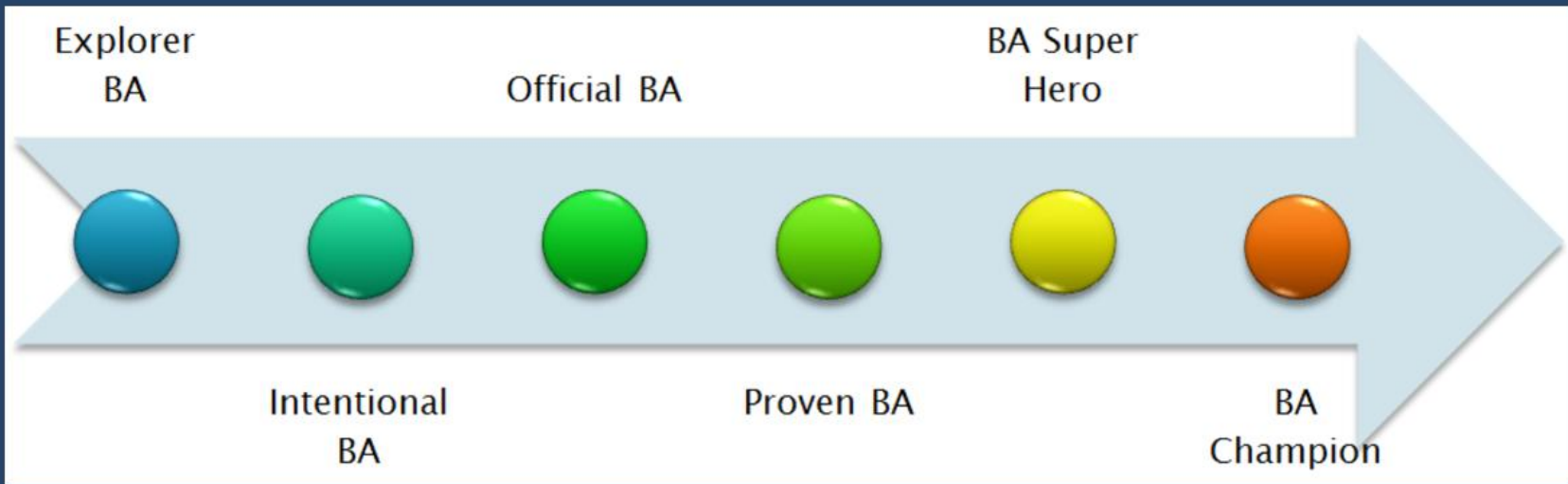
Success for a business analyst

means that all project
team members
understand and act
from the requirements,
and the requirements
represent the
best possible solution
to the business needs.



Introducing...

The Business Analyst Success Path



Workbook Exercise #1:

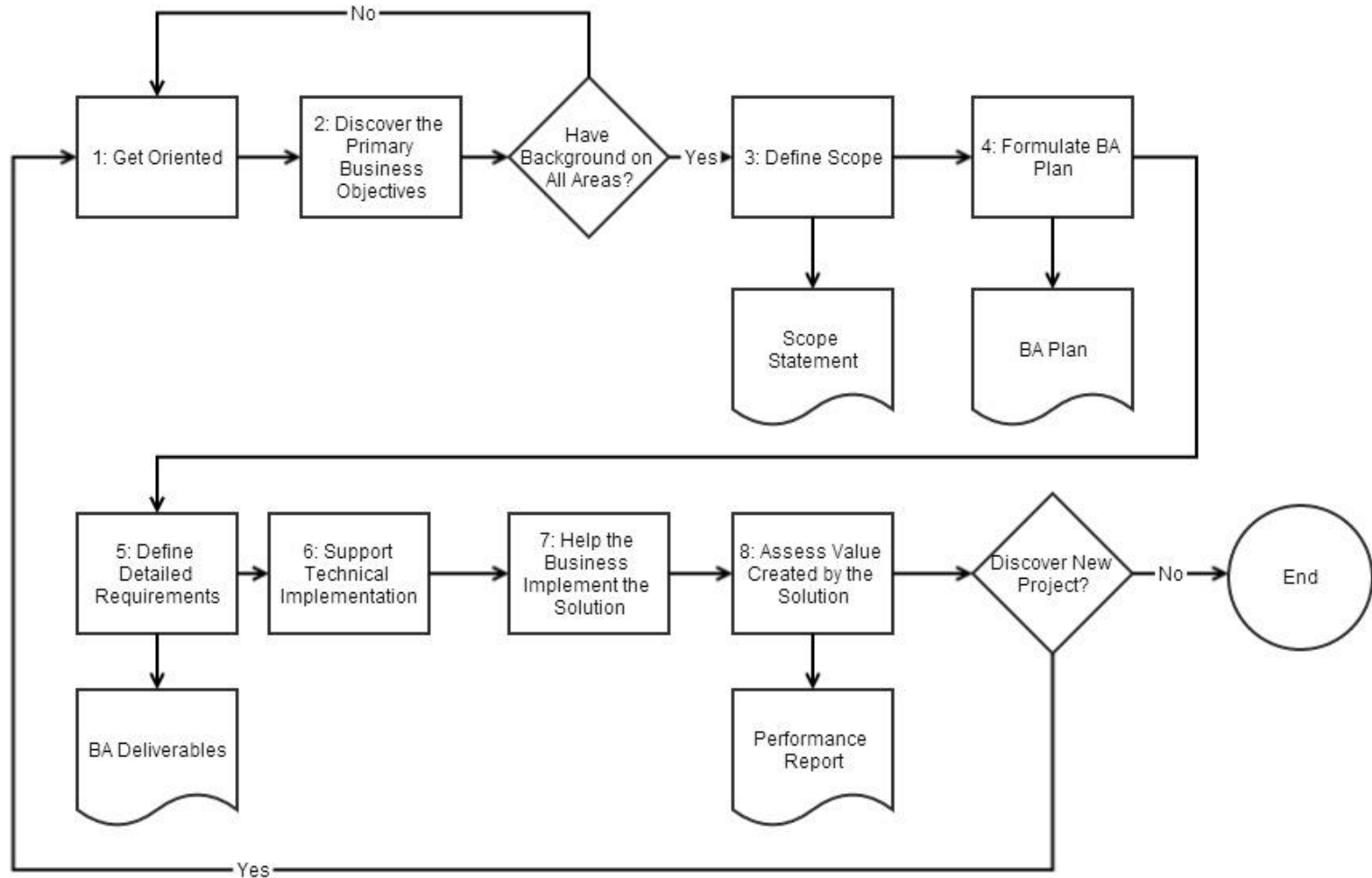
What are your active projects?

What are your top project challenges?

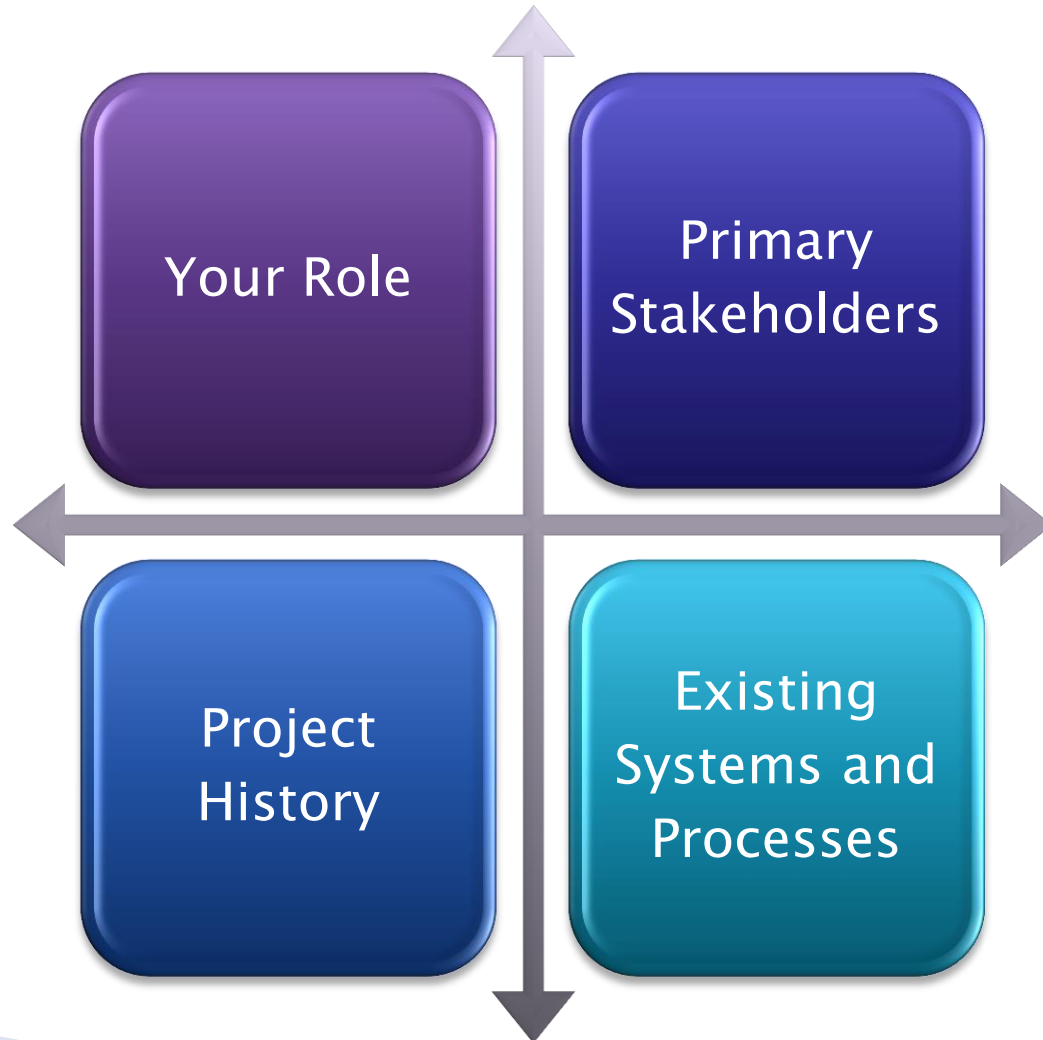
Discussion:

**What one issue would
you most like to solve
today?**

Business Analysis Process Framework



Step 1 – Get Oriented



Clarify Your Role



Questions to Ask

- ▶ What's the primary goal for the BA to accomplish?
- ▶ What inputs will I receive before starting work?
- ▶ What deliverables is the BA responsible for creating?
- ▶ Who receives each of these deliverables? What's the next step they take?
- ▶ What meetings does a business analyst typically schedule throughout the lifecycle of a project?
- ▶ Are there any standing meetings I'm expected to attend or facilitate?
- ▶ What tools does the business analyst use?

Exercise #2 (Discussion):

Describe your role.

Identify any questions you have.

Determine Your Primary Stakeholders

Your most important stakeholders

Sponsor

- Who is funding the project?

Manager

- Who do you ultimately report to?

Additional Primary Stakeholders



Workbook Exercise #3:

Identify ~

Your Primary Stakeholders

*Sponsor

*Manager

*Additional Stakeholders

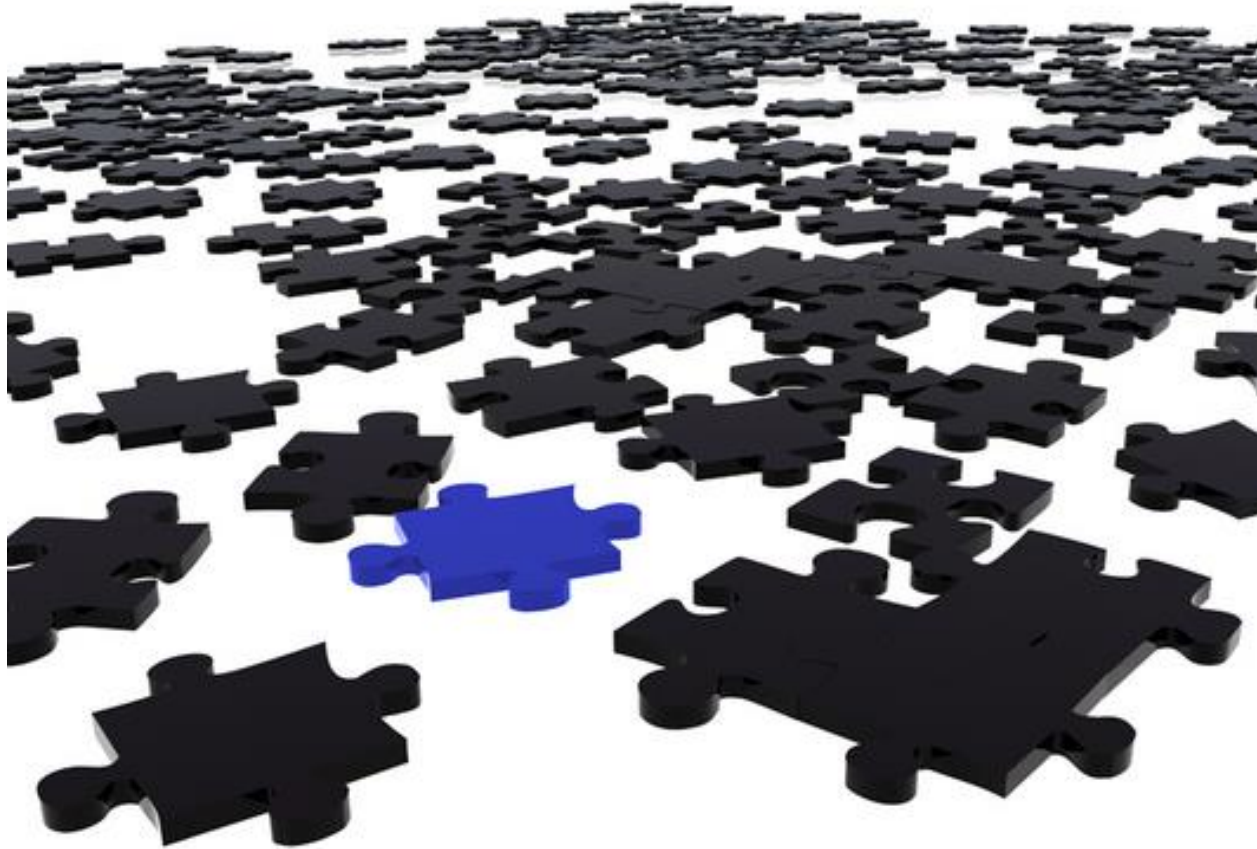
Understand the Project History



Questions to Ask

- ▶ What has been **discussed** about this project so far? Who has been involved in those discussions?
- ▶ What documentation exists?
- ▶ What **decisions** have been made?
- ▶ What are the primary objectives of this project?
- ▶ Who all needs to be involved?

Understand Existing Systems and Processes



Techniques to Get Up-To-Speed

Demo

Observation

Technical Overview

Follow-Up Questions

Access to Systems

Step 1 – Get Oriented



Step 2 – Discover the Primary Business Objectives



Business Objectives Are Important Because...

Gaining alignment on business objectives is the quickest path forward to a successful project.

Your Goal



Define a set of 2–5 business objectives that define the impact of the solution on the business environment.

Examples

- ▶ Increase number of new customers each month by 10%.
- ▶ Reduce the number of hours required by a salesperson to close a new customer by 10 hours.

Discover Expectations from Primary Stakeholders



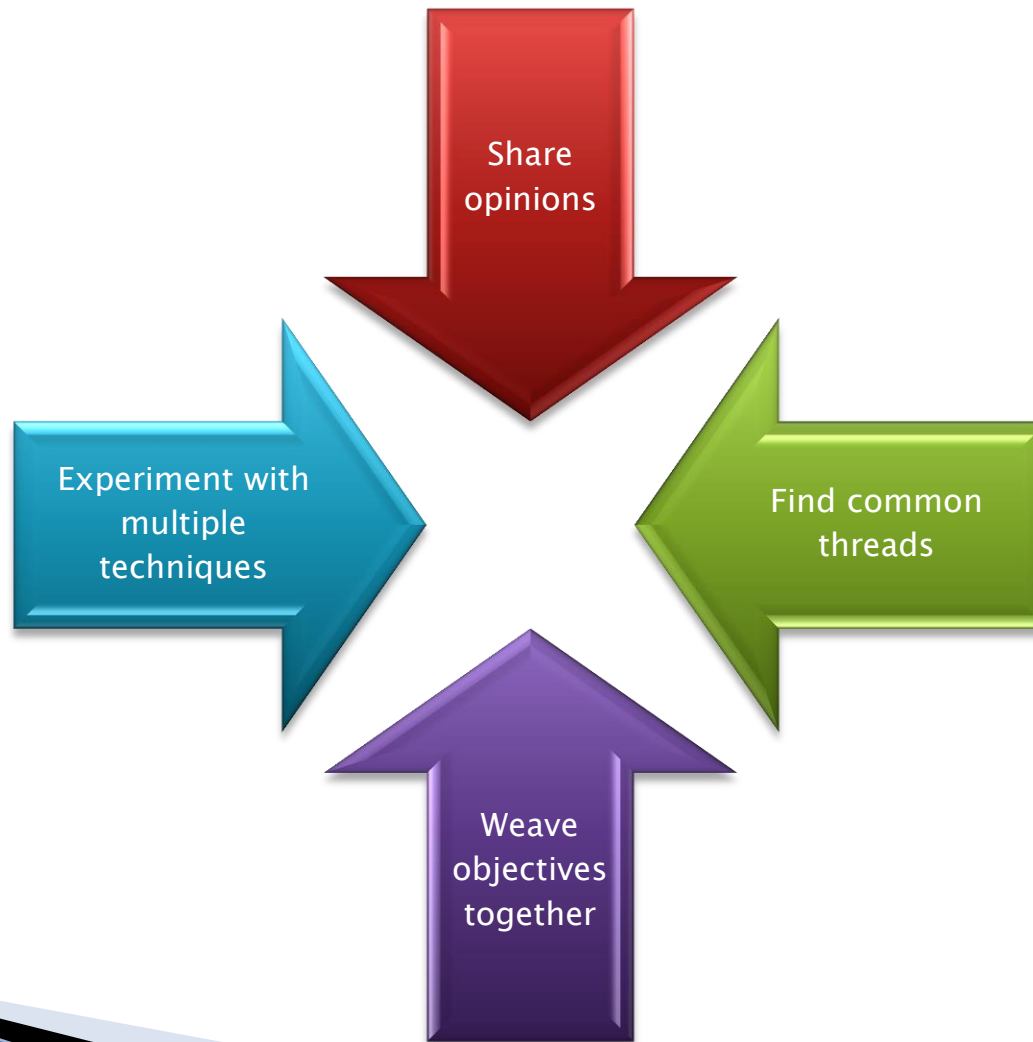
Questions to Ask

- ▶ What do you expect out of the project?
- ▶ What do you see as the key business problem to be solved by the project or the key business opportunity to be taken advantage of?
- ▶ What is the ultimate financial measure of success for this project?
- ▶ What other measures will we use to gauge the success of the project?
- ▶ How have you attempted to solve this problem previously and what was the result of that effort?
- ▶ If one thing could change as the result of this project, what would it be?
- ▶ How does this project relate to other proposed or active projects?
- ▶ How does this project support the goals of the organization?

Techniques to Use



Reconcile Conflicting Expectations



Ultimately...

The **business sponsor** owns the final decision about the business objectives driving the project and influencing key stakeholders.

SMART Objectives

Objectives

Specific

Measurable

Scope

Achievable

Realistic

Time-Bound

Making Objectives *Actionable*



Could you facilitate a brainstorming session to elicit specific solution ideas to meet this objective?

Workbook Exercise #4:

Identify ~

**2–3 Primary Business
Objectives**

You Are Ready to Move On

You have a good understanding of the various objectives, have reconciled conflicting interests, and have captured business objectives that are clear and actionable.

Step 2 – Discover the Primary Business Objectives



Step 3 – Define Scope

Define the Solution Approach

Use Analysis Techniques to Analyze Scope (Optional)

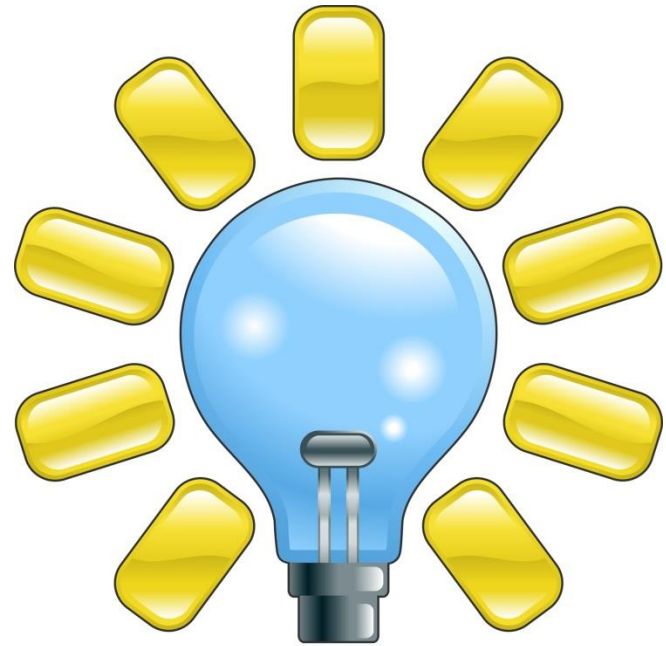
Draft a Scope Statement

Prioritize Requirements / Features

Review and Validate the Scope Statement

Confirm the Business Case

**Scope makes the
business objectives
tangible.**

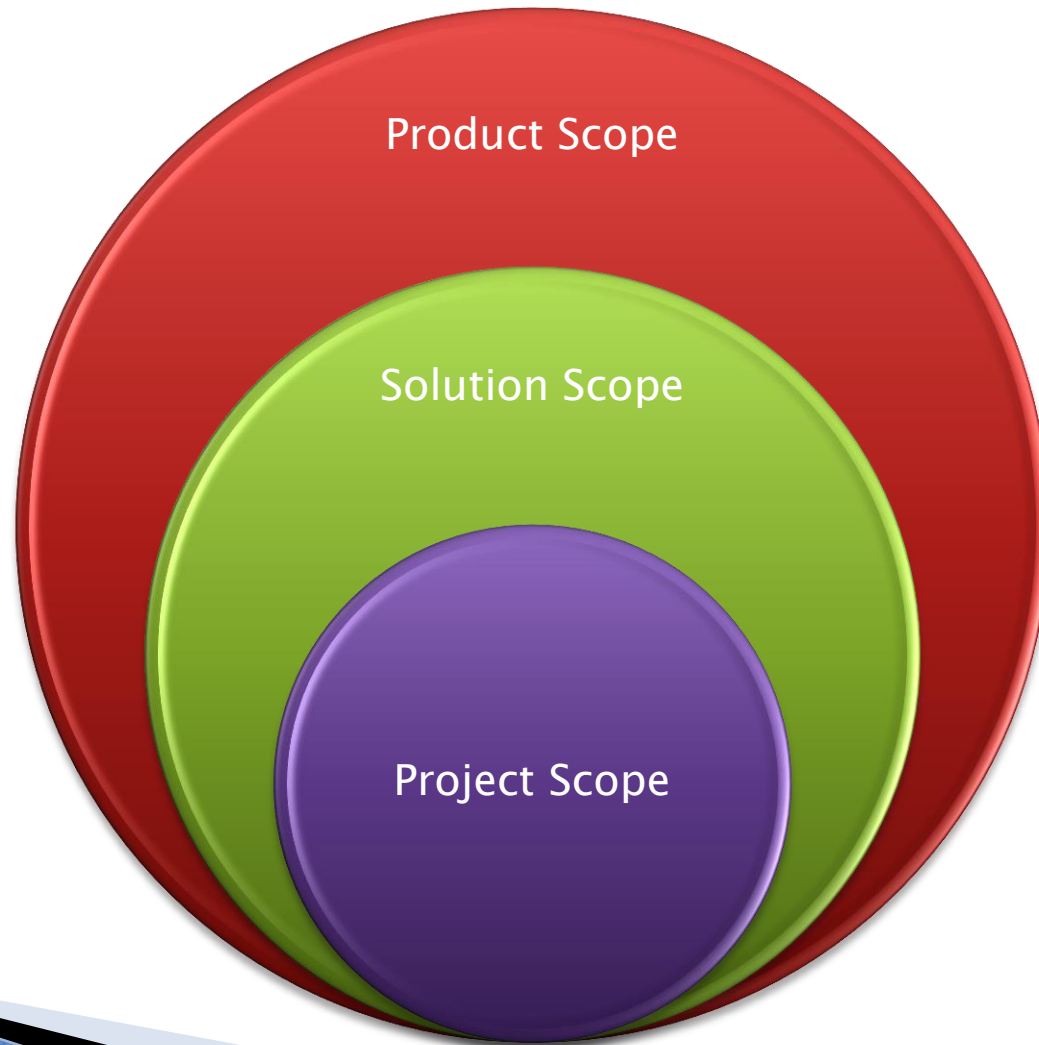


Your Goal



Create a clear and concise statement of scope that is understood and agreed to by all project stakeholders.

3 Kinds of Scope



Your Responsibilities

Define the Solution Approach

Use Analysis Techniques to Analyze Scope (Optional)

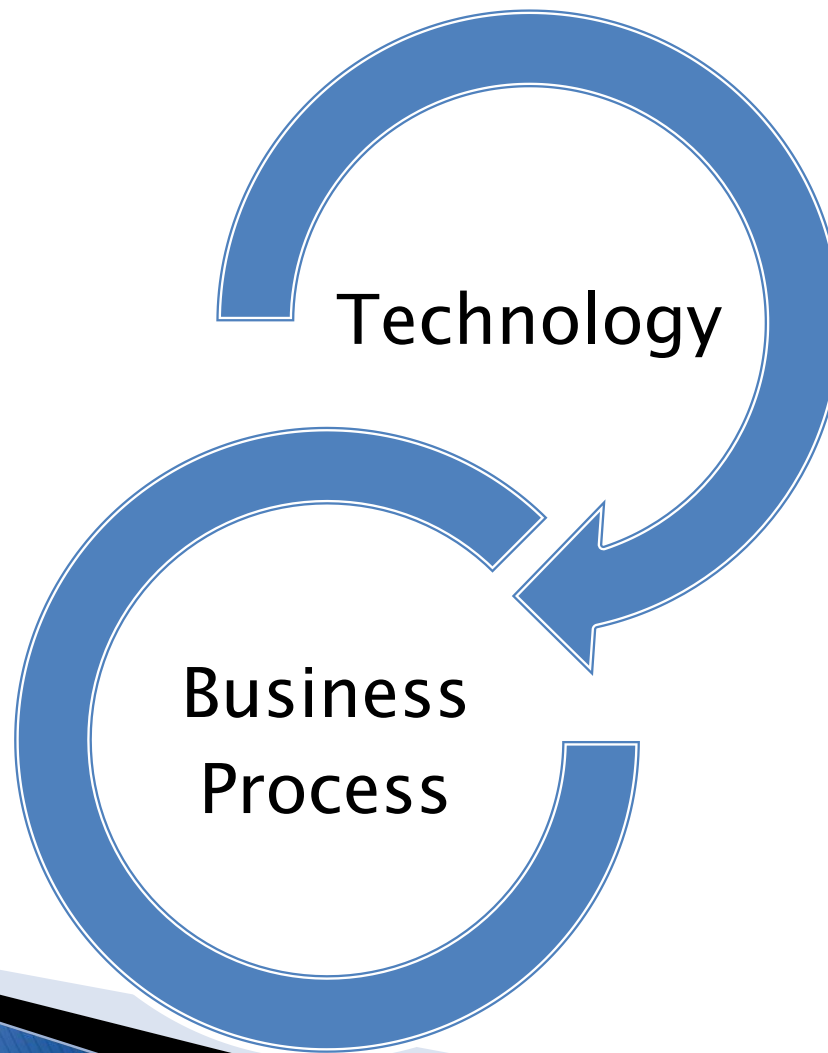
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Define the Solution Approach



Technology Solutions

Purchase or license new third-party applications

Build new technology systems

Update existing technology systems

Customize third-party technology systems

Enable capabilities in existing tools

Business Process Solutions

- Create a new business process
- Revise an existing business process
- Shift the work assigned between job roles
- Consolidate and streamline
- Create new work aids
- Change how hand-offs occur
- Eliminate redundant or unnecessary steps

Draft a Scope Statement

Project Overview

Business Objectives

Solution Approach

High-Level Business Requirements

Out of Scope

Where Does Scope Live?

Scope Statement

Business
Requirements
Document (BRD)

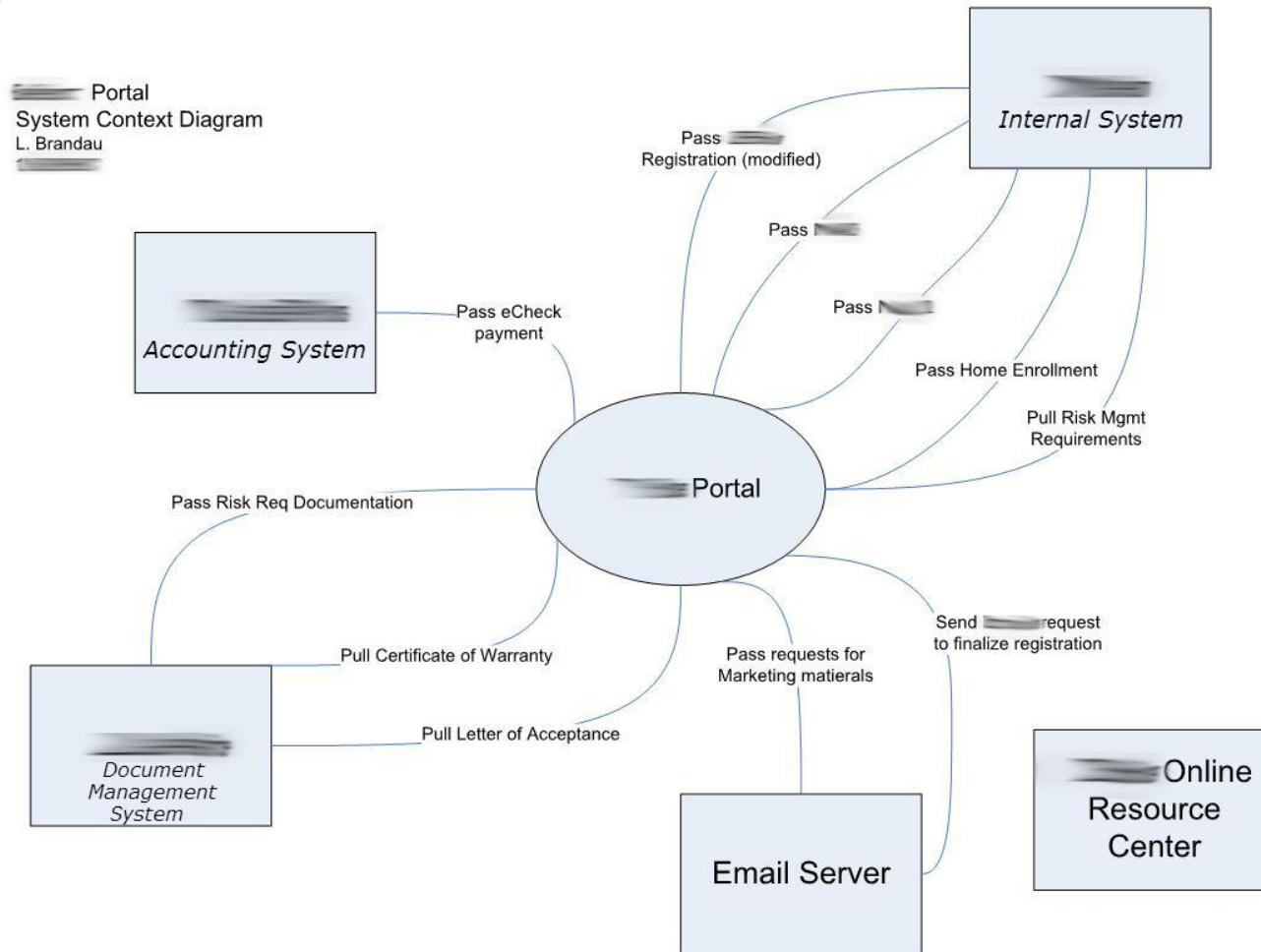
Software
Requirements
Specification (SRS)

Business Case

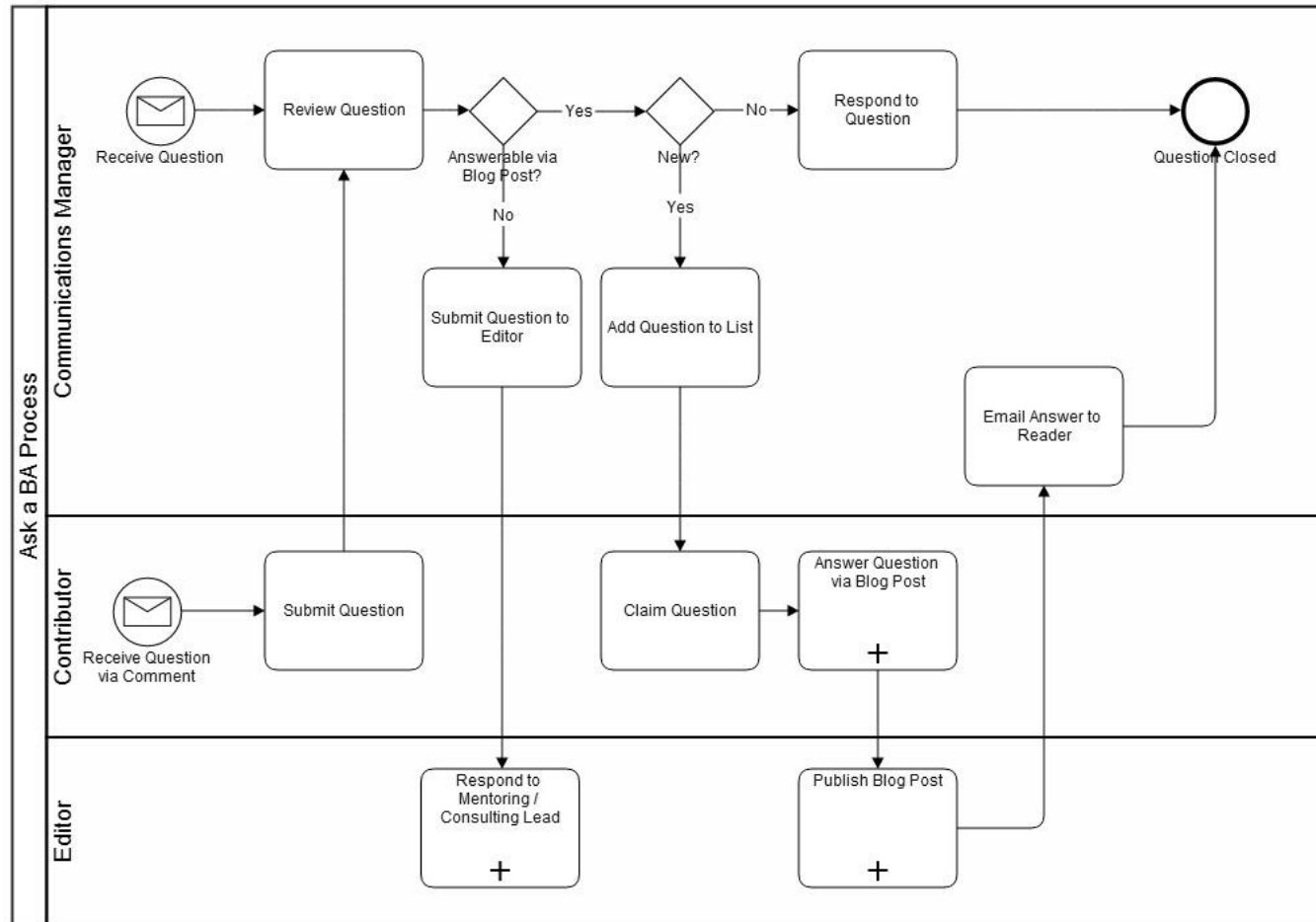
Project Plan

Epic

Use System Context Diagram to Articulate Boundaries Between Systems



Use a High-Level Process Model to Show Gaps and Inefficiencies



Prioritize Requirements / Features

- ▶ Link business requirements and features to business objectives.
- ▶ Prioritize each requirement or feature and indicate it's potential value to stakeholders.

Confirm the Business Case



Will the project
deliver a
positive Return
on Investment
(ROI)?

You Are Ready to Move On

You've created a statement of scope, all primary stakeholders approve it, and you've confirmed a positive ROI.

Exercise #5

Hot Seat

**What challenge do you face
confirming scope?
(Let's make this specific.)**

**Let's enjoy
LUNCH!**

**Proposed discussion topic:
What was the ROI on the
most impactful project
you've worked on?**

Exercise #6 -

Creative Cycle ~

Saturate

Percolate

Create

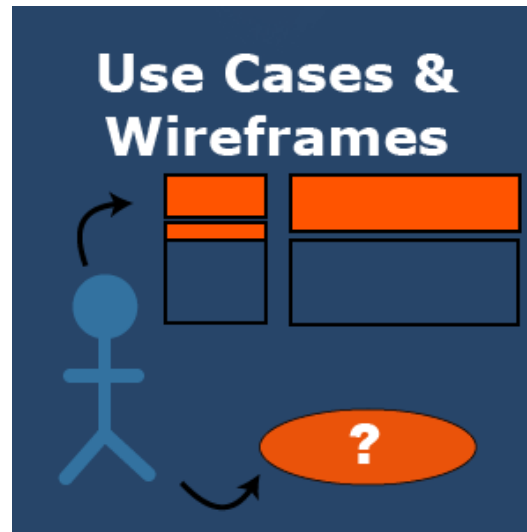
Celebrate

Rejuvenate

Group Discussion:

**Share 1 AHA or reflection
from the morning session.**

Additional Bridging the Gap Learning Opportunities



Online, On-Demand, Instructor Supported
20% Discount through October 15, 2019

Step 4 – Formulate the Business Analysis Plan

Career Tip:

In the absence of defining a credible and realistic plan, a set of expectations may be defined for you.



Questions Your Plan Answers

- ▶ When will the requirements be complete?
- ▶ What is everyone's role in the requirements process and how much time will this take from me and my team?
- ▶ Will the requirements be usable documentation that gives me what I need to be effective at my job?

Your Goal



Identify how the BA will drive the requirements process to an implementable set of detailed requirements.

Your Responsibilities

Define the
Types of BA
Deliverables

Define the BA
Deliverables
List

Identify Project
Stakeholders

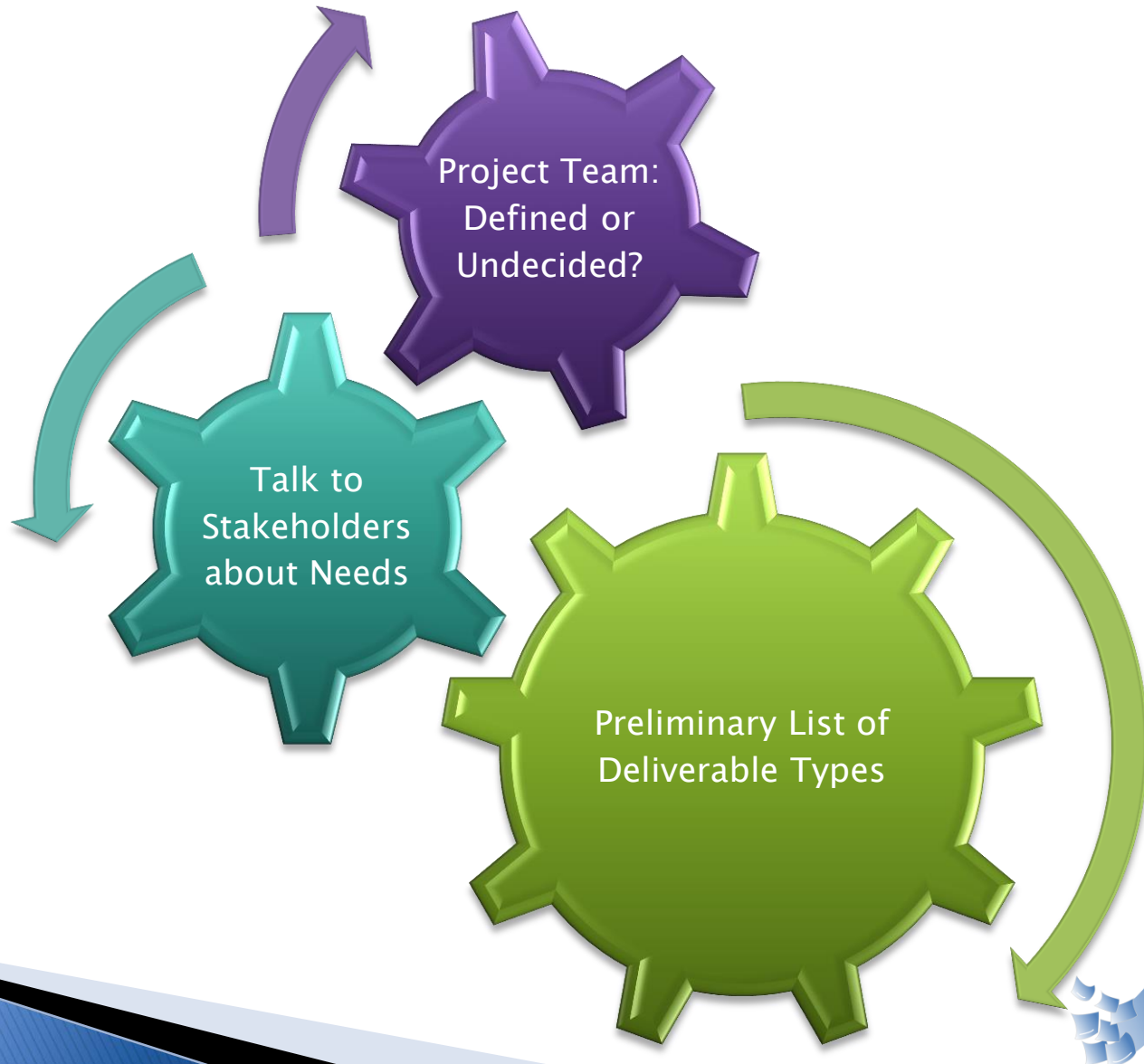
Layout Your
Timelines

Gain Buy-In on
the BA Plan

Define the *Types* of Deliverables



Project Methodology



Deliverable Types

- ▶ Business Process Models
- ▶ Business Rules
- ▶ Data Migration Specification
- ▶ Data Model
- ▶ Functional Requirements Document
- ▶ Non-Functional Requirements List
- ▶ Training Guide
- ▶ Use Cases
- ▶ User Acceptance Test Plans / Cases
- ▶ User Interface Specification
- ▶ User Stories
- ▶ Wireframes

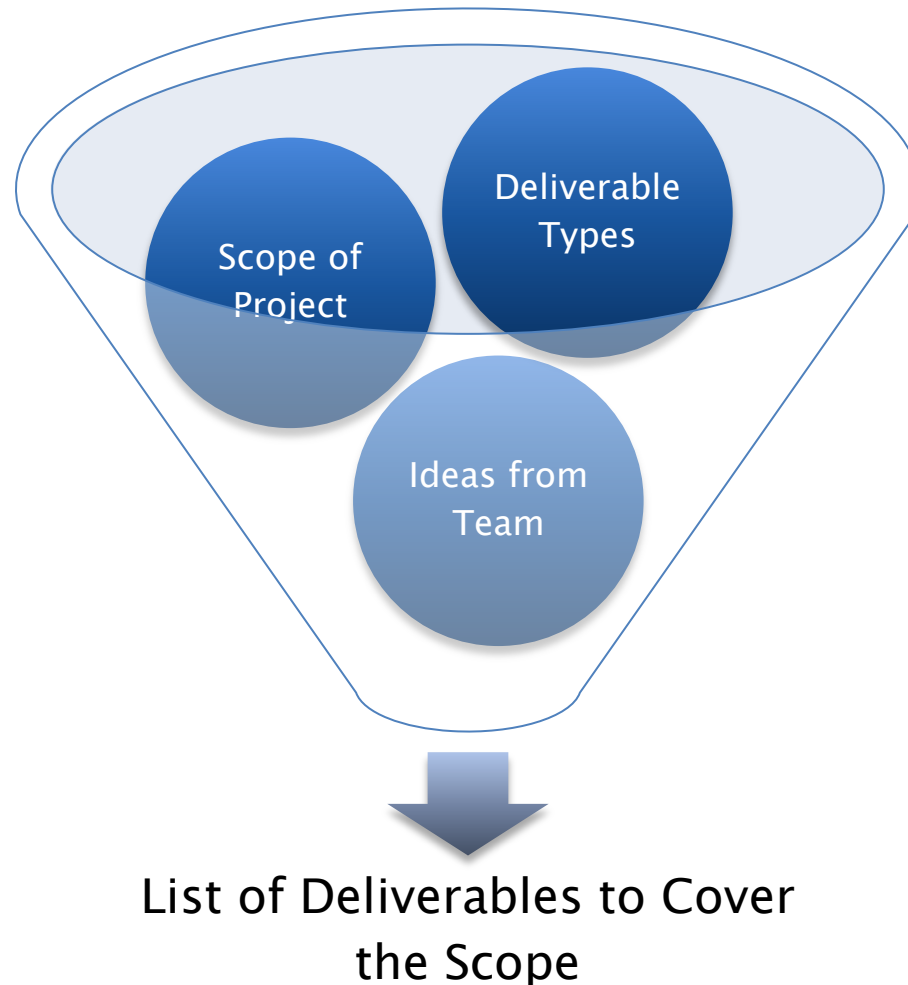
Will your deliverables cover the project scope?



Workbook Exercise #7:

**What deliverable types will
you create?**

Define the Business Analysis Deliverables List



Potential List of Deliverables

▶ *Current State Business Process Models*

- Identify Lead
- Manage Lead
- Close Lead

▶ *Use Cases*

- Manage Lead (Updated)

▶ *Future State Business Process Models*

- Identify Lead (Updated)
- Manage Lead (Updated)
- Close Lead (Updated)
- Research Lead (New)

▶ *Training Guides*

- Sales
- Lead Research

Workbook Exercise #8:

Draft a preliminary list of the deliverables you will create.

Identify Project Stakeholders

Responsible

- Those who do work to achieve the task.

Accountable

- The person who ultimately owns the deliverable.

Consulted

- Those whose opinions and input is solicited.

Informed

- Those who are updated on progress but not directly involved.

Layout Your Timelines



Questions to Help You Estimate Your Time

- ▶ How many meetings it will take to discover the information to complete an initial draft of the deliverable.
- ▶ How many drafts or iterations it will take to create a complete deliverable.
- ▶ How long it will take to make updates from each discussion.

Turning an Estimate Into Duration

of Requirements Sessions

Availability of Stakeholders

Other Responsibilities

Drafting a Timeline

Sequence deliverables

Acknowledge dependencies

Take stakeholder commitment into account

Set target date for each deliverable

Gain Buy-In on the BA Plan



Host an independent review meeting



Present your plan to stakeholders informally.



Email the plan to stakeholders and ask for feedback.

“Homework”:

**Create your full business
analysis plan.**

Exercise #9

Hot Seat

**What challenge do you face
with planning?
(Let's make this specific.)**

You Are Ready to Move On

You've drafted a business analysis plan, deliverables list, and target dates for each deliverable, and reviewed with your project team.

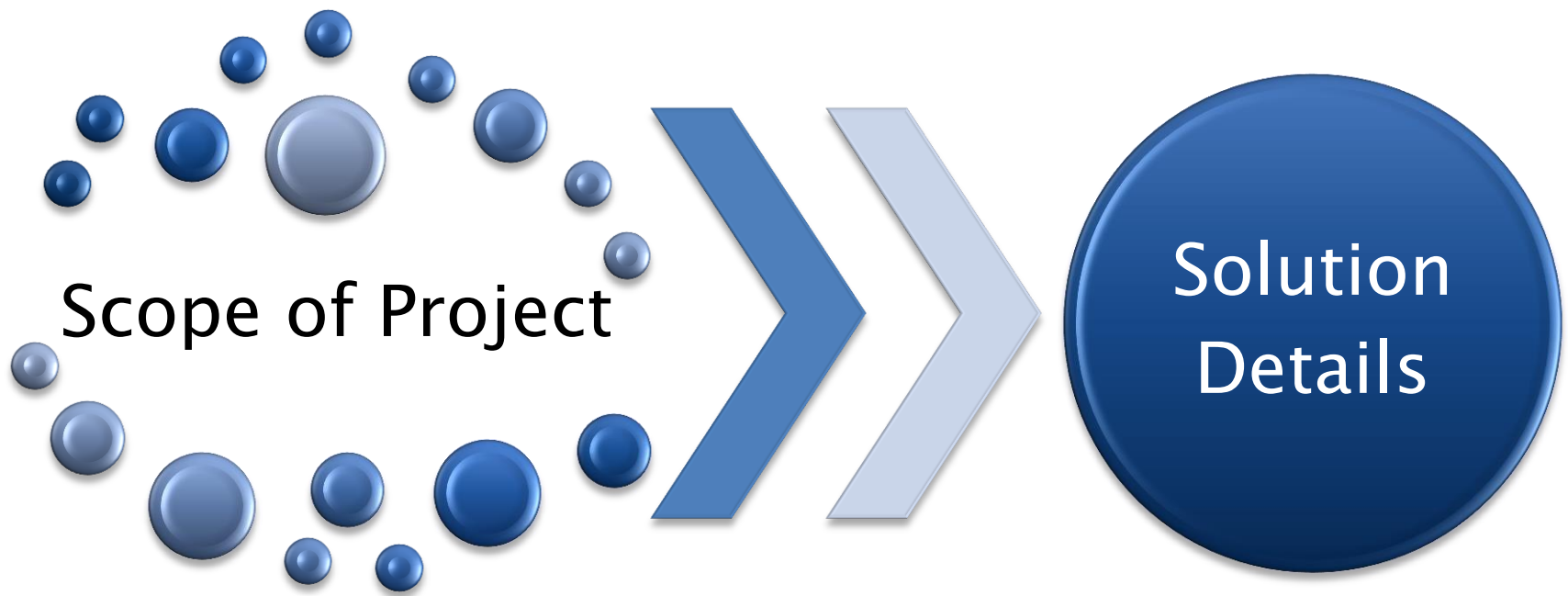
Step 4 – Formulate the Business Analysis Plan

Career Tip:

In the absence of defining a credible and realistic plan, a set of expectations may be defined for you.



Step 5 – Define the Detailed Requirements That Connect....



Your Goal

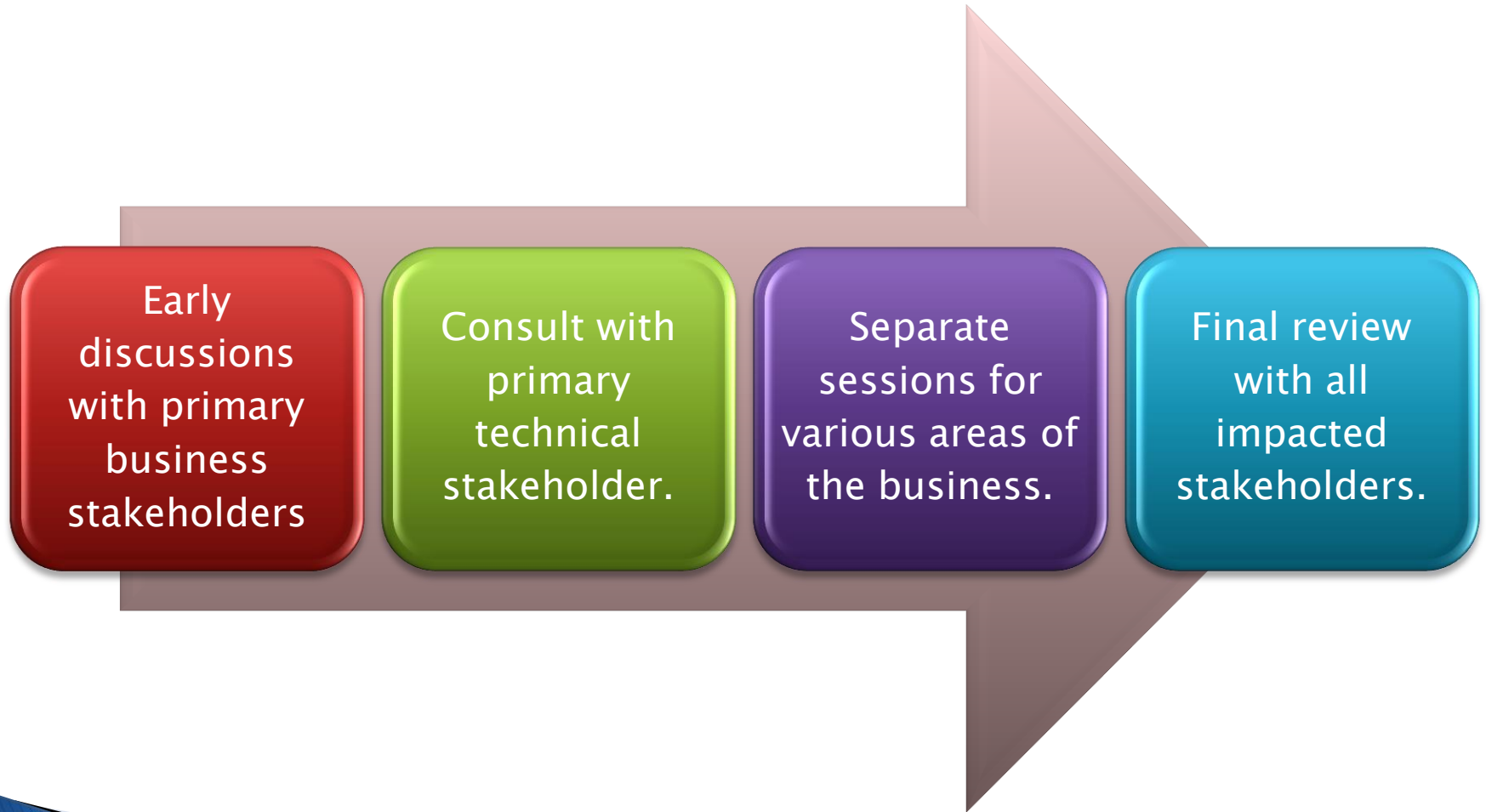


Create a set of clear, concise, and actionable detailed requirements that fully cover the project scope.

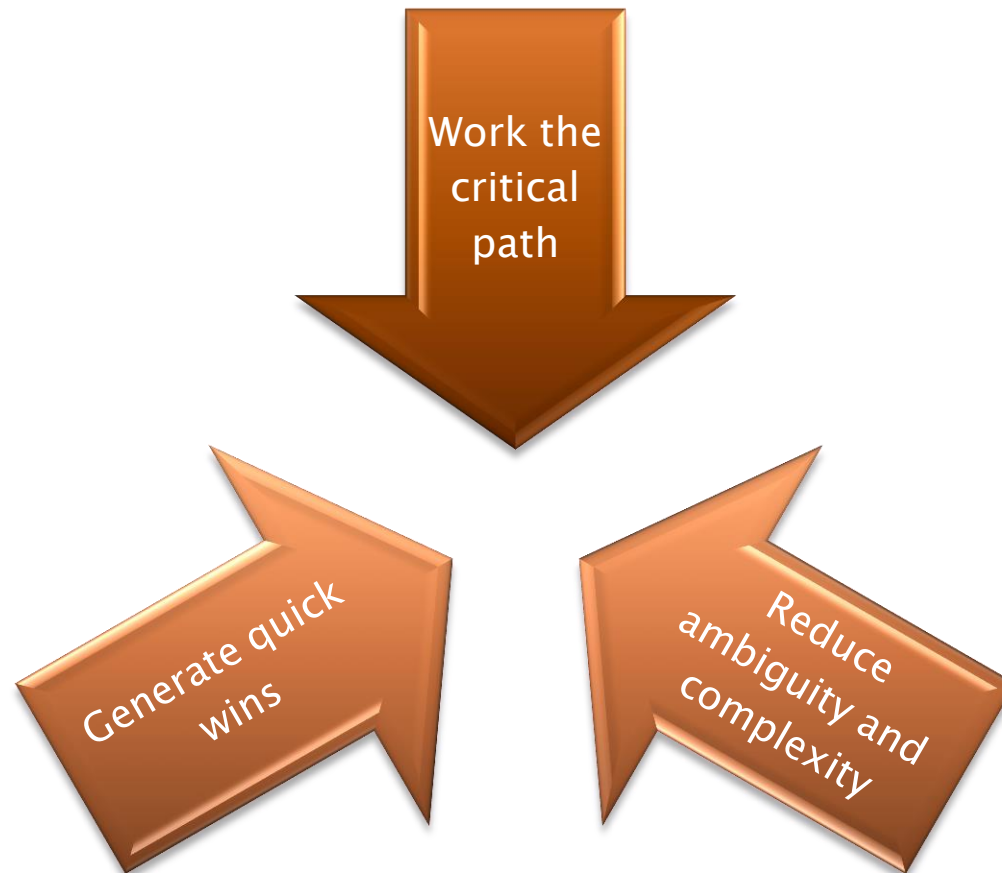
Your Responsibilities



A typical best practice



3 Ways To Maximize Your Effectiveness Consciously Sequence Your Deliverables



#1 – Work the Critical Path



Choose deliverables that move the project forward the fastest.

Eliminate dependencies on the requirements.

Sync your plan with the development / design plan

#2 – Reduce Ambiguity and Complexity

Unknown business requirements

Potential for changing business requirements

Anticipated disagreement among stakeholders

Core features or business processes

Unknown or new solution/technology components

Features that drive the core technical architecture

#3 – Generate Quick Wins



Key Success Principle: Establish a Rhythm



**Weekly or Bi-
Weekly Meetings**



Plan Iterations



**Plan All-Day
Meetings**

Exercise #10:

Evaluate your deliverables list.

- 1 – What's on the critical path?**
- 2 – Where is the ambiguity and complexity?**
- 3 – Where are the quick wins?**

Watching Out For Scope Creep



- Expect it.
- Map every requirement to business value.
- Look at the big picture.

Step 6 – Support the Technical Implementation

Review Solution Design

Updating / Repacking
Requirements

Review Test Plans / Test Cases

Be Available For Questions /
Issues

Revise Requirements / Manage
Requirements Changes

Lead User Acceptance Testing



Your Goal



Ensure that the technical aspects of the solution meet the business objectives of the project by being a supportive collaborator with all members of the technical team.

You Are Ready to Move On

You've satisfied yourself and the business stakeholders that the technical implementation meets the objectives of the project.

Step 7 – Help the Business Implement the Solution



Process
Development

Training

Update
Organizational
Assets

Career Tip:

If your business user's don't use the solution as intended, your project won't deliver on it's objectives.

Your Goal



Help the business stakeholders change in response to what the project delivers.

Your Responsibilities

Process
Development

Training

Update
Organizational
Assets

Manage
Business-Driven
Change Requests

Supporting the
Implementation
Rollout

**Less Is More **

You Are Ready to Move On

Business workers are independently using the solution to complete their work without ongoing support or involvement from the project team.

Exercise #11 -

Group Discussion:

**Collaboration Challenges
During Implementation**

Step 8 – Assess Value Created by the Solution



Evaluate progress

Communicate the results

Suggest new projects

It's easy to lose track of the big picture....



Your Goal



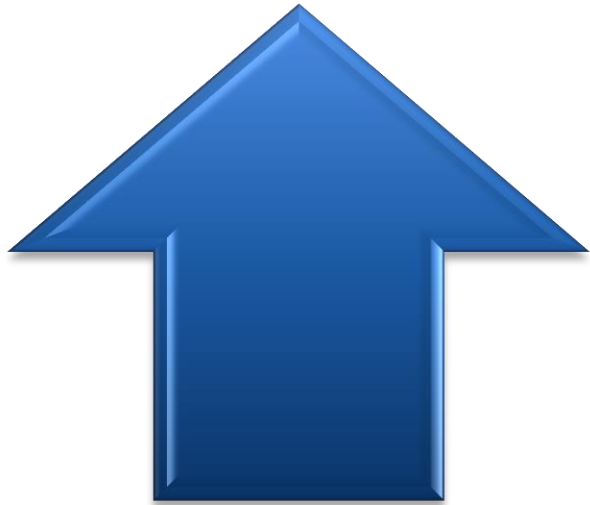
Create a clear picture of the value created by the solution and communicate these results to the business sponsor, project stakeholders, etc.

Evaluate Progress Against Business Objectives

Review the Statement of Scope You Created in Steps 2 and 3



2 Ways to Evaluate Progress



Qualitative

- Abstract Evaluation



Quantitative

- Involves Measurements and Data

For example:

- ▶ **Qualitative:** We eliminated 3 of the 8 steps salespeople need to take to close a new customer through automation or reassigning those tasks to other departments.
- ▶ **Quantitative:** In the month following the project, the average time a salesperson invested in closing a new customer dropped from 50 hours to 44 hours.

Measure the Results

Common data points include:

- ▶ Number of New Leads
- ▶ Number of Sales
- ▶ Number of Repeat Sales
- ▶ Number of Orders
- ▶ Number of Leads in a Specific Step in Your Sales Pipeline/Process
- ▶ Revenue
- ▶ Costs
- ▶ Profit
- ▶ Issues Reported

Workbook Exercise #12:

Identify 1 measurement you can evaluate to show the results of your project.

Group Share:

**Share 1 Result From Your
Project
(Actual or Intended)**

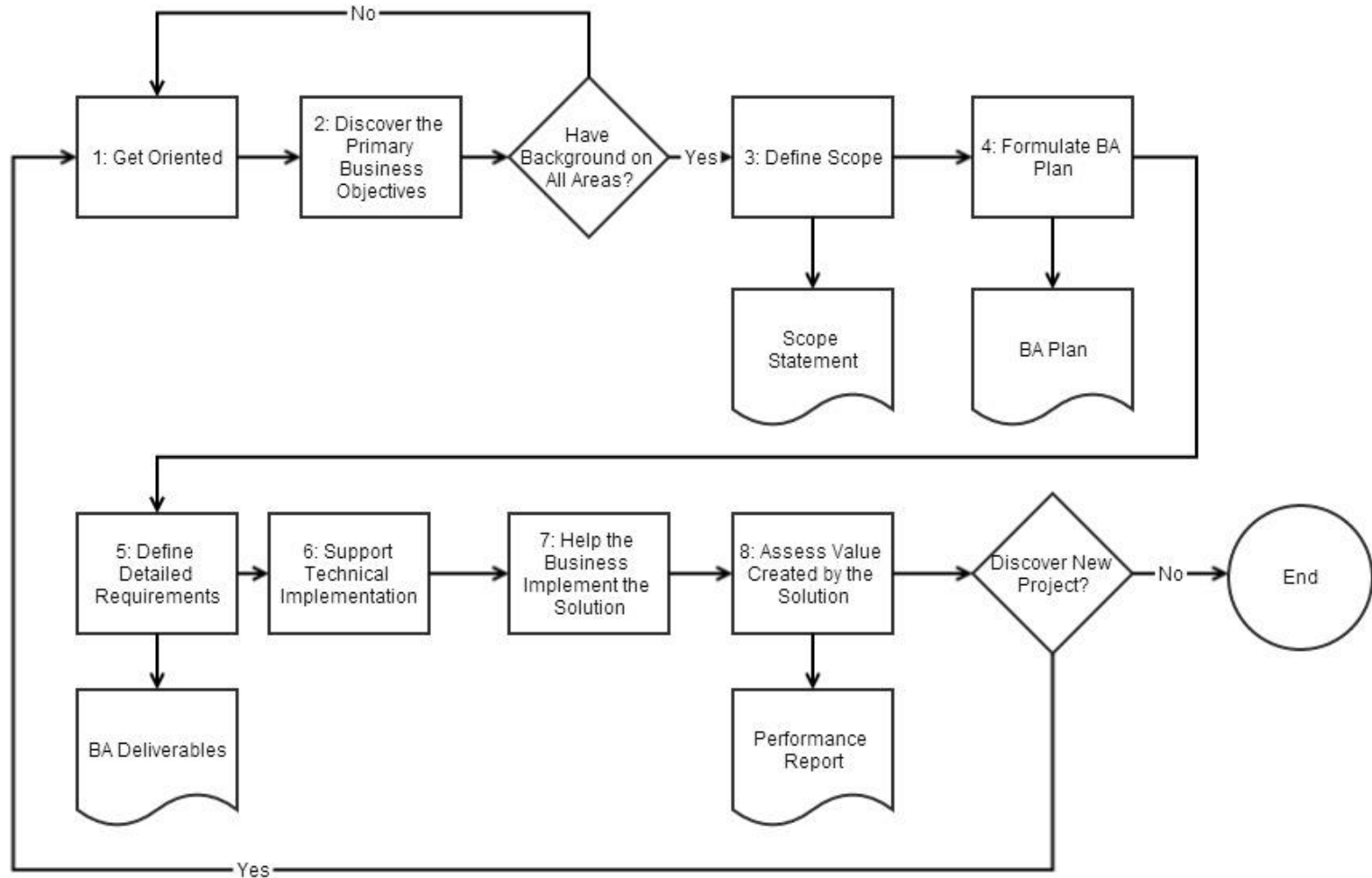
Tip: Start with the data your organization already collects



Then, identify what data points would tell a more complete story.

- ▶ Figure out how to collect it on a temporary or ongoing basis.

Business Analysis Process Framework



Creative Cycle ~

Saturate

Percolate

Create

Celebrate

Rejuvenate

Workbook Exercise #13:

Percolate

Create 2 lists:

***Take-Aways**

***Action Items**

Group Share:

Share your **COMMITMENT**
to **ONE** action.

I will _____ by _____.

Thank you.



**We build our
profession one
BA at a time.**