Project Manager and Business Analyst Collaboration

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Bio

Mike Sandberg, a Certified Business Analysis Professional™ (CBAP®), is a Director of the Business Analysis Center of Excellence at Novell, Inc. He currently manages a team of Business Analysts that support Novell's IT projects.

With 19 years of experience in the software industry, Mike has worked as a Business Analyst (BA) on multi-million dollar COTS implementations of enterprise applications as well as smaller custom in-house applications. Over the past several years, Mike has been tasked with building a BA practice in Novell's IT group. Most recently, he has worked extensively on developing BA processes and tools that support outsourced IT projects.

Mike holds a Masters Degree in Organizational Behavior.
Acknowledgements

- Whitepaper: “Partnering for Project Success: Project Manager and Business Analyst Collaboration” by Barbara Carkenord, CBAP; Chris Cartwright, PMP; Robin Grace, CBAP; Larry Goldsmith, PMP; Elizabeth Larson, PMP, CBAP; Jen Skrabak, PMP; and Cornelis (Kees) Vonk, PMP. This was first published as part of Proceedings PMI Global Congress 2010 – Washington, DC. It was developed over several months by a joint task force of representatives from both PMI and IIBA (International Institute of Business Analysis).

- Findings from the task force were also subsequently presented at the 2010 BBC Conference in Washington, DC, and again presented recently in an IIBA Webinar here: http://static.slidesharecdn.com/swf/ssplayer2.swf?doc=2011-03-09iibawebinarthebaandpmpartnership-110313112715-phpapp01&stripped_title=2011-0309-iiba-webinar-the-ba-and-pm-partnership&userName=tracycook

- Material in this deck that draws directly from the whitepaper, task force, and webinar is referenced with * in select slide titles.
Overview

- Understanding the BA Role
- Implications of the Role
- What the Task Force Said
- Best Practices / Guidance
UNDERSTANDING THE BA ROLE
Project Role Definitions

• Project Manager (PM)
  • “The person assigned by the performing organization to achieve the project objective.” (PMBOK, Fourth Edition)

• Business Analyst (BA)
  • “A business analyst works as a liaison among stakeholders in order to elicit, analyze, communicate, and validate requirements for changes to business processes, policies, and information systems.” ([www.theiiba.org](http://www.theiiba.org)) Sometimes more broadly defined ...
  • Also known as business system analyst, systems analyst, requirements engineer, process analyst, product manager, product owner, enterprise analyst, business architect, management consultant, or anyone else doing BA work.
  • Historically, these roles often have been combined into a dual job responsibility, but increasingly the BA role is becoming separate and distinct.
Why BA’s?

Business Analysts provide project initiatives with:

• A bridge between the business and technology, often aligned with specific functions in the business.
• A dedicated role focused on solving business problems; improving systems, policies, processes, and operations; and completing projects more efficiently.
• The ability to facilitate shared understanding that allows for solutions we build or buy to meet customer needs.
• **Bottom line:** BA’s elicit and articulate **requirements**, then work with project team to champion and validate those requirements in the solutions they produce.

• Personal Case File: My secret identity as a BA
The Case for Great Requirements ...

- Over one trillion dollars are spent globally each year on software and related services.
- Two-thirds of software projects fail ... often the reason cited is poor, missing, incorrect, or misunderstood requirements.
- The best, most adept project management function will struggle and often fail when the requirements are poor, just as the best, clearest requirements document will struggle when the project management function is lacking.
- A dedicated function for requirements is able to serve the business both in the short term (for the project) and for the long term (for the ultimate solution or suite of solutions supporting the business).
Requirement Definition

1. A condition or capability needed by a stakeholder to solve a problem or achieve an objective.
2. A condition or capability that must be met or possessed by a solution or solution component to satisfy a contract, standard, specification, or other formally imposed documents.
3. A documented representation of a condition or capability as in (1) or (2).

As defined in the Business Analysis Body of Knowledge v.2.0
Types of Requirements

• **Business Requirements** are higher-level statements of the goals, objectives, or needs of the enterprise.

• **Stakeholder Requirements** are statements of the needs of a particular stakeholder or class of stakeholders. Stakeholder requirements serve as a bridge between business requirements and the various classes of solution requirements.

• **Solution Requirements** describe the characteristics of a solution that meet business requirements and stakeholder requirements. They are frequently divided into sub-categories, particularly when the requirements describe a software solution:
  
  • **Functional Requirements** describe the behavior and information that the solution will manage. They describe capabilities the system will be able to perform in terms of behaviors.
  
  • **Non-functional Requirements** capture conditions that do not directly relate to the behavior or functionality of the solution, but rather describe environmental conditions under which the solution must remain effective or qualities that the systems must have. They are also known as quality or supplementary requirements.

• **Transition Requirements** describe capabilities that the solution must have in order to facilitate transition from the current state of the enterprise to a desired future state, but that will not be needed once that transition is complete.
Requirements Examples

- **Business Requirement**
  - Company leaders need to understand how the business is investing its resources.

- **Stakeholder Requirement**
  - Engineering wants to understand how the engineers are spending their time (new product development vs. maintenance work on existing products).

- **Solution Requirements**
  - **Functional Requirement**
    - Employees shall track their time weekly in a system that accounts for each hour worked.
    - The time tracking system shall reference all current projects employees work on.
    - Projects referenced shall be classified as New Product Development or Maintenance.
  - **Non-functional Requirements**
    - The system shall be available 24 hours a day, 7 days a week.
    - On average, users shall be able to enter a timesheet in less than 5 minutes.

- **Transition Requirements**
  - All employees shall have access to training on the time tracking system two weeks prior to the system roll-out.
How BA’s Typically Work

- Tend to support a specific Business Function.
  - (Operations, Sales, Marketing, Finance, etc.)
- Begin involvement at Initiating stage of a project (often earlier, in pre-Initiating or Enterprise Analysis activities).
- Drive the capture of requirements during Planning; document them in a Requirements Package.
- Offer requirements clarification throughout the Project Execution phase.
- Validate that requirements are satisfied in final solution.
- Assess the business outcome of a project after the project is completed.
Sample BA Project Deliverables

- **Project Stakeholder Analysis** – identifies people that have requirements for your project and how you will elicit them
- **BA Activity Plan** – outlines your activities on the project
- **Requirements Package**, including
  - **Scope diagrams** – map relating all the systems on the project
  - **Use cases** – scenarios describing how users will use the solution
  - **Requirements** – document what the system must do and be
  - **Process flows** – describe work steps across functions
- **Traceability Matrix** – tracks the delivery of every requirement
- **User Acceptance Test Plan** – outlines how you will verify business requirements and use cases
- **Benefits Realization Plan** – describes how the solution will be measured when in production.
BA Knowledge Areas

Graphic based on BABOK Guide 2.0
BA Role in a Nutshell

- The BA role has emerged as a distinct, professional role dedicated to doing project requirements right.
- The role may exist stand-alone or be combined with other roles depending on the formality of the organization’s processes and methodologies.
- The focus is on requirements, from inception to realization.
- There’s a growing industry awareness / formality around the role.
- Standards and certifications in Business Analysis exist and are evolving through efforts by organizations like the IIBA.
Industry Support

Resources:

- [www.theiiba.org](http://www.theiiba.org)
- BABOK v.2.0
- Groups on LinkedIn, Facebook (search on Business Analysis)
- Local chapter of IIBA [http://saltlake.theiiba.org](http://saltlake.theiiba.org)
IMPLICATIONS OF THE ROLE
Implications of Two Roles

- Having two roles naturally creates divisions, turf, conflict, competition
Fears

PM Fears about BA

• BA endlessly collecting requirements without effective coordination, facilitation, or realistic deadline.
• BA will create unrealistic expectations with stakeholders regarding project commitments that jeopardize deadlines.
• PM left out of the loop on critical meetings and conversations (BA off talking to sponsor and stakeholders alone – after requirements are locked!)
• BA doesn’t have functional or technical knowledge to articulate requirements accurately.

BA Fears about PM

• PM is unwilling to fully investigate and analyze stakeholder needs.
• PM doesn’t understand the complexity of defining, analyzing, and managing requirements; rushes the BA.
• PM sees the BA as an assistant and not owning anything.
• PM moves on after project is done, but BA has to live with the consequences (good or bad) and face the sponsor far into the future.
Thought Questions

• In organizations that have a formal BA role, should the PM / BA relationship be a peer-to-peer relationship? If so, why? If not, why not?

• What other implications exist for having a distinct role for requirements work?

• If you are in a distinct PM or BA role, what is your primary concern with the other role? (Role itself, not person in the role).
WHAT THE TASK FORCE SAID ...
Key Areas of Overlapping Responsibilities*

**Scope**
- Project Scope
- Product Scope
- Solution Scope

**Requirements**
- Collect Requirements
- Requirements Mgmt Plan
- Tracing Requirements
- Documenting Requirements

**Communications**
- Communications Management
- Stakeholder Management
- Stakeholder Identification
- BA Communications Plan

**PMBOK components**

**BABOK components**
Scope Management*

• Scope management terminology differs in the two BOKs, but here is one suggested approach for defining respective roles:

  • “The PM focuses on planning for the project processes and integrating the business analysis approach and deliverables into the overall project and the work required to deliver a product, service, or result.

  • “The BA focuses on planning and defining the product scope – the features and functions that characterize a product, service, or result and the business analysis approach and deliverables aligned within the overall context of a project.

  • “In order to effectively meet business needs, the BA can identify, recommend, or even advocate project scope changes ... but cannot make commitments. The PM has the responsibility to manage the project scope.”
Communication Management*

A suggested approach:

- “The PM is accountable for all project-related communication with all project stakeholders.
- “BA work primarily involves stakeholders who are ... affected by the product (solution) requirements .... When BAs have direct reporting responsibilities to a business domain, they also maintain ongoing communications with that organization.”
- Because communications involve stakeholders, the stakeholder list or register becomes a critical document for the project that both the PM and the BA are heavily invested in. Clear boundaries need to be in place about the list, how it gets built and used, and what the rules are for communicating with people on it.
BA’s and Project Managers*
Requirements Management*

- A suggested approach:
  - If the BA role has been formalized in a project, they will tend to own the elicitation, analysis, and documentation of requirements (working under the leadership of the PM).
  - The BA creates a requirements management plan that feeds into the project management plan.
  - Once requirements are locked, the BA traces requirements through remaining stages of the project (design, test, user acceptance, close) using a traceability matrix.
  - The BA is actively involved in change requests (under the supervision of the PM).
  - As applicable and appropriate, the BA organizes and leads the user acceptance test activities as a means of ensuring that the requirements are met in the delivered solution.
Critical Success Factors for Effective Cooperation*

Clear, documented, and mutually agreed roles and responsibilities

- Project Management Plan
- Project Schedule / WBS
- RACI
- BA Activity Plan
- BA Approach (PM/BA)

Constant and open communication (check in: formally and informally)

Collaboration (openly discuss the relationship: peer or subordinate?)

Active business sponsor engagement by both roles (use the graphic!)

Partnership based on mutual trust & respect (the secret sauce)
BEST PRACTICES / GUIDANCE
Discuss BA Deliverables

Hold a discussion between PM and BA about the BA deliverables needed to get good requirements.

- Deliverables based on guidelines from BABOK.
- These inform activity planning.
- Document the agreement.

### BA Deliverable by Checkpoint

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**Legend**
- **C** = Create deliverable in this phase.
- **R** = Revise/update deliverable in this phase.
- **F** = Finalize deliverable in this phase.

*Orange 4 background = BA tracked deliverable.*
BA Activity Planning

- This plan helps the PM understand timing of BA work and can roll into the project WBS.
- As the PM and BA review together and make edits, both parties can assess risks when adding or removing tasks.

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Sample RACI*

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<td>Project Stakeholder Register</td>
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<td>C</td>
</tr>
<tr>
<td>BA Communications Plan</td>
<td>A</td>
<td>R</td>
</tr>
<tr>
<td>Project Communications Plan</td>
<td>A/R</td>
<td>C</td>
</tr>
<tr>
<td>Requirements Management Plan</td>
<td>A</td>
<td>R</td>
</tr>
</tbody>
</table>

R = Responsible
A = Accountable
C = Consulted
I = Informed

- Another vehicle for having the conversation about how roles intersect.
- Unfortunately often skipped because people assume everyone knows who is doing what.
BOK Mappings

<table>
<thead>
<tr>
<th>BABOK® Guide Technique</th>
<th>PMBOK® Guide Technique</th>
<th>Referred to in PMBOK® Guide Task</th>
<th>I</th>
<th>P</th>
<th>E</th>
<th>MC</th>
<th>C</th>
<th>BAPM</th>
<th>E</th>
<th>RMC</th>
<th>EA</th>
<th>RA</th>
<th>SAV</th>
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<tbody>
<tr>
<td>9.1 Acceptance and Evaluation Criteria Definition</td>
<td>Product Acceptance Criteria</td>
<td>5.2.3</td>
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<tr>
<td>9.2 Benchmarking</td>
<td>Benchmarking</td>
<td>8.1.2.4</td>
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<tr>
<td>9.3 Brainstorming</td>
<td>Group creativity techniques (Brainstorming, nominal)</td>
<td></td>
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</tr>
</tbody>
</table>

PMBOK® Guide Process Groups

- Business Analysis
- Planning and Monitoring
- Pre-Initiating
- Initiating
- Planning
- Executing
- Monitoring and Control
- Closing

- The task force went to a great deal of work to cross-reference the BOKs. The results are available in the whitepaper. Email me if you want a copy.
Mutual Trust and Respect

• Grant Trust. Honor and Live Up to Granted Trust.
  • "If we could read the secret history of our enemies, we should find in each man's life sorrow and suffering enough to disarm all hostility." – Henry Wadsworth Longfellow

• The best process often can’t compensate for poor relationships when something goes wrong in the plan, but solid relationships are much better equipped to compensate for unexpected process breakdowns or changes in plans.

• Check in formally at least monthly (weekly?) with each other.
An increased focus on getting better requirements has led to the development and evolution of the Business Analyst role.

Those doing BA work now have a wealth of resources available to them (regardless of whether the role is formal or not).

Specialization and separation of requirements responsibilities can lead to substantial benefits in the quality of requirements, but can also produce conflict that is counter-productive.

Conflict on projects can be overcome by:

- Clear role definition that details responsibilities
- Formal, regular discussions about deliverables, activities, dates
- Mutual trust and respect; cadence for feedback.
Questions?