

Project Business Analysis

PMG 461 – MGM 461

Lecture 6

Planning for Business Analysis

Prepared by
Eng. Ahmed Hussein, MBA, PfMP®,
PMP®, CMP APMG



Lecture

06

What we will cover

1. Planning for Business Analysis
2. Developing the business analysis Work Plan

Lecture
06

In Previous Lectures



Business Analysts elicit requirements from stakeholders using various qualitative and quantitative techniques. Selection based on project considerations and complexity, number of stakeholders and their location , available time and budget.



Business analysts contribute to identifying and engaging stakeholders as they serve as the bridge between the project technical team and business users. They engage stakeholders through applying various engagement strategies.



Business Activity Models captures Different stakeholders views of the problem, requirements, solution, and works to eliminate redundancies and conflicts creating a consensus model that includes all views.



Requirements are engineered through Elicitation, Analysis, Documentation, and Validation.

Lecture
06

Planning for Business Analysis



Planning for Business Analysis:

- Begins at the project start where the Business Analyst should understand project context and characteristics.
- Business analysis planning consists of the activities performed to ensure that the optimal business approach is selected for the project.

Lecture

06

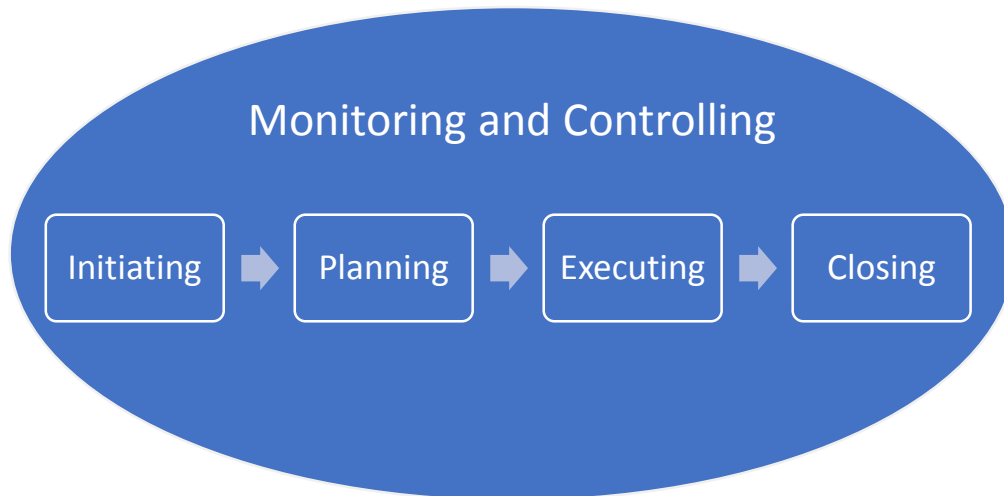
Planning for Business Analysis:

- Business analysis planning depends on project Lifecycle:
 - Traditional → upfront planning
 - Agile → some planning upfront and continued over the course of the project
- There is no one approach that will work for all projects, methods, tools, and techniques are tailored to the needs of the project.

Lecture
06

Planning for Business Analysis:

- Project Manager and Business Analyst work closely together to develop business analysis plan.
- Planning is integrated into the overall project plan (as part of Planning specifically Scope Management)



Lecture

06

What happens if we bypass Planning?



Lack of Scope of work understanding and stakeholder's expectations



Inaccurate estimates due to lack of understanding of time and effort needed.



Pressure on time and rushing activities resulting in inaccurate requirements and increased risks of changes or problems in delivered solution.

Benefits of a Business Analysis Plan

- Sets expectation with all stakeholders (sponsor, stakeholders, and project team).
- Clear definition of roles and accountabilities for business analysis activities.
- Buy-in and support for business analysis.
- Provides context to supports estimation of activities.
- Efficient execution of business analysis activities.

Lecture

06

How to Perform Business Analysis Planning?



Review Charter (for size, complexity, type, risk, lifecycle, technology, constraints, ...)



Review any planning documents



Review records of similar projects done in the past

Lecture

06

How to Perform Business Analysis Planning?



Meet with project manager and may be sponsor to understand the context of the project



Review (or sometimes perform or participate in) Stakeholders identified and stakeholder analysis, looking for:

Culture and Attitude, # of stakeholders, conflicting needs, ..)

Location, Impact, and Influence

Lecture

06

What is included in a Business Analysis Plan?

- Types of elicitation techniques to be used.
- Analysis and Modeling Techniques to be used.
- How requirements will be documented.
- Business Analysis deliverables.
- Roles and Responsibilities.

Lecture

06

What is included in a Business Analysis Plan?

- How Requirements will be Prioritized.
- How requirements will be tracked.
- How requirements will be validated and verified
- Acceptance criteria for requirements.
- Communication Approach

Planning for Elicitation

Includes:

- Which techniques to use
- Sequence of activities

Factors to consider:

- Project Lifecycle
- # of stakeholders and location
- Time and Budget Constraints
- Type of deliverables required
- Level of details needed

Lecture

06

Elicitation Plan will impact Project:



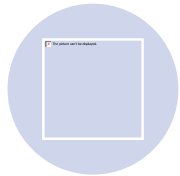
Resources



Time



Cost



Quality



Risks



Communication



Stakeholders

Lecture

06

Strategies for Sequencing Elicitation Activities

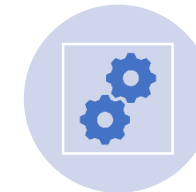
Business Analyst should consider which areas to address first based on several factors as:



Highest Business Value



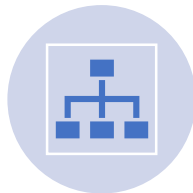
Higher Risks



Technical Challenges



Dependencies



Organizational Hierarchy

Requirements Prioritization

Defines how requirements will be prioritized prior to elicitation.

- Sets expectation with stakeholders
- Minimizes conflict

Factors to consider:

- When to do prioritization?
- Who will be involved?
- Techniques to be used
- Criteria
- Who will approve?

Must Have (HIGH)

Should HAVE (MEDIUM)

Nice to Have (LOW)

Lecture

06

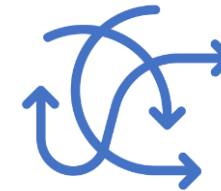
Requirements Prioritization Criteria

**Value**

Addressing high-value or important requirements first to realize benefits early.

**Cost**

Evaluate criteria based on their costs

**Difficulty**

How difficult to fulfill the requirement

Lecture

06

Requirements Prioritization Criteria



Regulatory

Mandated requirements for compliance with regulations and legislations



Risk

Implementing high-risk requirements first

Lecture

06

Requirements Traceability



A Traceability Matrix is a grid that allows linking requirement to deliverables.



Use to track realization of requirements throughout the project.



Ensures each requirement has value.



Provides a structure for managing changes.



Includes Requirement attributes.

Lecture

06

Traceability Decisions

Types of requirements to be traced

Level of detail (each deliverable or WBS level)

Attributes to be traced

Different requirement status (approve, reject, cancel)

How will traceability be performed and tools used?

Timing

Who will trace?

Lecture

06

What do we Track and Monitor?

Business needs

Objectives

Detailed Requirements

Design Components

Development Components

Test Scenarios and use cases

Lecture

06

Benefits of Tracing Requirements



Ensure each requirement
adds business value



Meet customer
expectations



Manage scope

Lecture
06

Sample Requirements Traceability Matrix

Requirement Information			Relationship Traceability			
ID	Requirement	Source	Business Objective	Deliverable	Verification	Validation
Unique ID for requirement	Description of the requirement	Name Of person who identified the requirements	List the business objective that is met by fulfilling the requirement.	Identify the deliverable that is associated with the requirement.	Describe the metric that is used to measure the satisfaction of the requirement.	Describe the technique that will be used to validate that the requirement meets the stakeholder needs.

Validation vs. Verification

Validation

- Assurance that requirements for a system or product or deliverable meets the needs of the stakeholder.
- Done as part of Elicitation.
- BEFORE working on delivering the requirement,

Verification

- Evaluation if a system or product or deliverable complies with set requirements or specifications.
- Done as part of execution, monitoring and controlling
- AFTER delivering the requirement.

Lecture

06

Communication Approach

- Describes how and when business analysis information will be structured and communicated to stakeholders.
- Forms part of the overall project communication plan.
- Considerations:
 - Which information
 - To Who
 - Stakeholder preferences
 - How (method)
 - Tools
 - Who will prepare and send the information

Lecture

06

Sample Requirements Documentation Template

ID	Requirement	Source	Category	Priority	Acceptance Criteria	Test
A unique ID for the requirement.	Description of the requirement	Name of person who identified the requirement).	Functional Non Functional Business ...	Must have, Should have, or Nice to have.	The criteria that must be met for the stakeholder to approve that the requirement has been fulfilled.	The method that will be used to verify that the requirement has been met.

Requirements Change Process

- Describes how we will manage changes to requirements throughout the project.
- Part of the overall project change management.
- Considerations:
 - How requirement changes will be proposed?
 - How changes will be reviewed?
 - How decisions for changes will be made?
 - How changes will be communicated?

Lecture
06

Sample Business Analysis Plan (1/4)

Business Analysis Plan							
Project ID:				Project Title:			
Project Sponsor:				Project Manager:			Date Prepared:
Requirements Collection: Describe how requirements will be collected or elicited. Consider techniques such as brainstorming, interviewing, observation, etc							
Requirements Analysis: Describe how requirements will be analyzed for prioritization, categorization, and impact to the product or project approach.							

Lecture
06

Sample Business Analysis Plan (2/4)

Business Analysis Plan							
Project ID:				Project Title:			
Project Sponsor:				Project Manager:			Date Prepared:
Requirements Categories: Identify categories for requirements such as business, stakeholder, quality, etc							
Requirements Documentation: Define how requirements will be documented							
Requirements Prioritization: Identify the prioritization approach for requirements.							

Lecture
06

Sample Business Analysis Plan (3/4)

Business Analysis Plan							
Project ID:				Project Title:			
Project Sponsor:				Project Manager:			Date Prepared:
Requirements Metrics: Document the metrics that requirements will be measured against.							
Requirements Traceability Structure: Identify the information that will be used to link requirements from their origin to the deliverables that satisfy them.							

Lecture
06

Sample Business Analysis Plan (4/4)

Business Analysis Plan							
Project ID:				Project Title:			
Project Sponsor:				Project Manager:			Date Prepared:
Requirements Tracking: Describe how often and what techniques will be used to track progress on requirements.							
Requirements Reporting: Describe how reporting on requirements will be conducted and the frequency of such reporting.							
Requirements Validation: Identify the various methods that will be used to validate requirements such as inspection, audits, demonstration, testing, etc.							

Approving Business Analysis Plan

Business Analysis Plan should be Reviewed and Formally Approved.

Reviewers and Approvers may be Project Manager, Project Sponsor, or key stakeholders.

Lecture
06

Developing the Work Plan



Lecture

06

Business Analysis Workplan



Covers the tasks and activities to be performed.



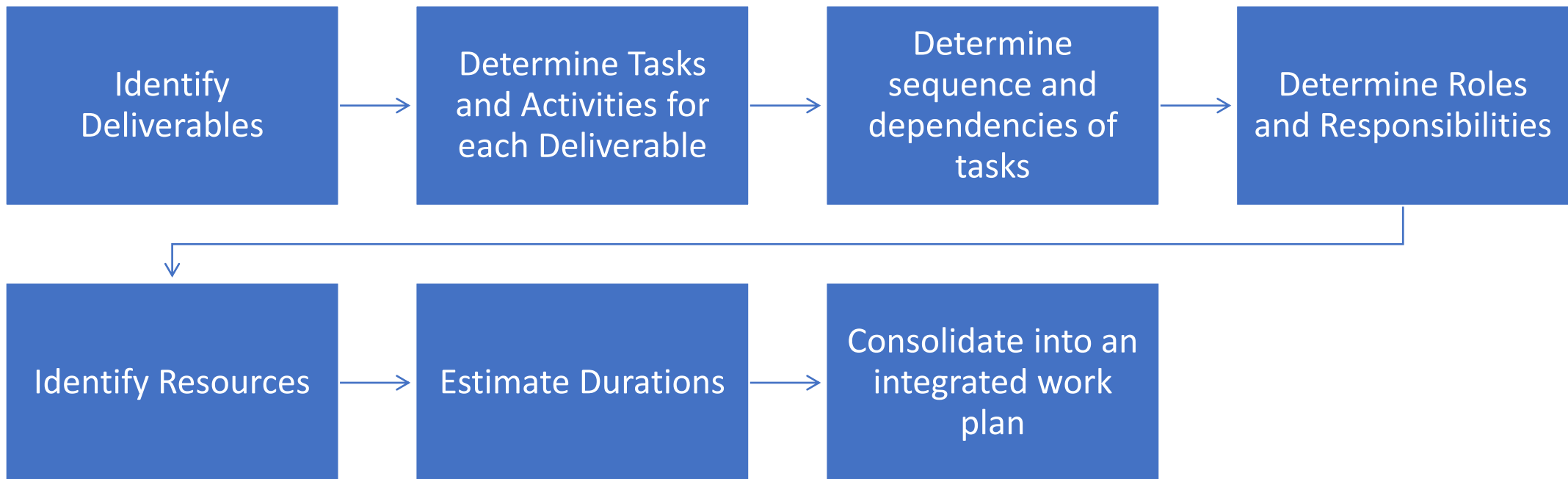
Includes sequence, dependencies, durations, start and finish dates, and responsibilities.



Similar to and usually integrated with the Project Schedule

Lecture
06

Business Analysis Workplan



Lecture
06

Sample Business Analysis Workplan Template

ID	Deliverable	Task	Dependency	Resources	Duration	Start Date	Finish Date	Responsible

	Wednesday	Thursday	Friday	Gantt Saturday	Chart Sunday	Monday	Tuesday
Define Prob.							
Brainstorming							
Research							
Select Approach							
Make a model							
Refine							
Conclusion							
Present							

Lecture

06

Key Points

- Business Analysis Planning is crucial for effectiveness of business analysis efforts.
- Business Analysis planning is done in coordination with overall project planning.
- Business Analysis plan is concerned with key considerations and decisions for business analysis.
- Business Analysis Workplan is concerned with activities, dependencies, estimates and is part of project schedule.
- Business Analysis plans should be reviewed and formally approved.

For Discussion Panel and Next Lecture:

- Watch the video: [“Business Analyst Full Course In 2 Hours | Business Analyst Training For Beginners | Simplilearn”](#)
- Watch the video: [“Business Analyst Training for Beginners | Business Analysis Tutorial | Invensis Learning”](#)

Lecture

06



For Discussion Panel and Next Lecture



Thank You