



BUSINESS ANALYSIS PROCESS SERIES

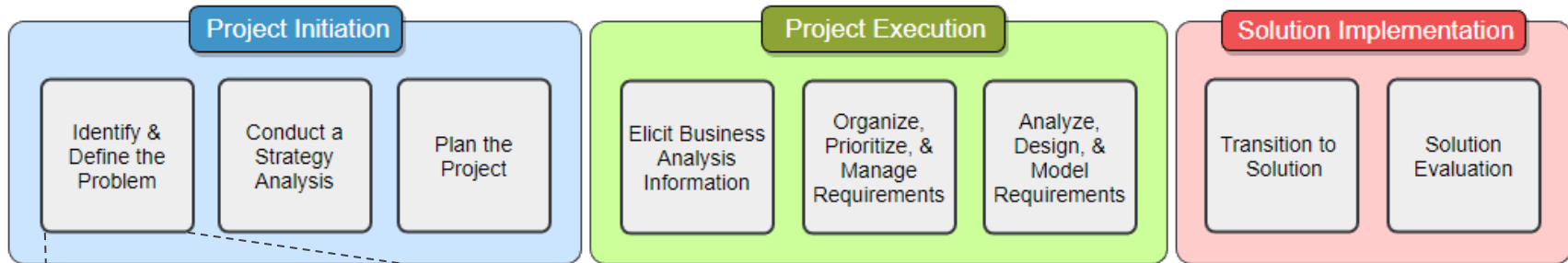
Student Workbook



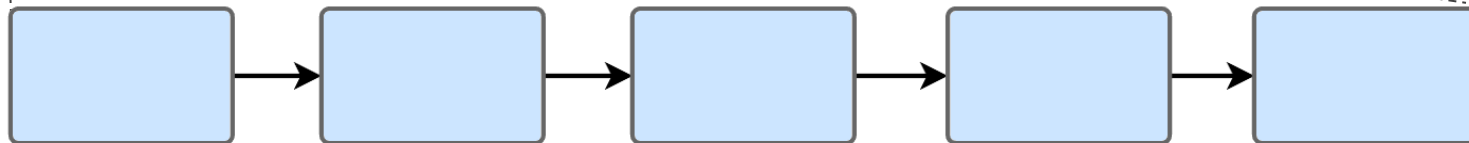
Identify and Define the Problem – Worksheet A1

Directions: Fill out the blanks in the process and term definitions

The BA Guide's Business Analysis Process



Identify and Define the Problem Process



Need =

Project =

Value =



Identify and Define the Problem – Worksheet A2

Directions: Take notes on the most common initiators and fill in the blanks

Problem Identification

Most Common Initiators

Organization:

Self-Initiated:

Focus on the _____, not the _____.



Identify and Define the Problem – Worksheet A3

Directions: Utilize this worksheet for your notes about the Observation technique

Observation Technique

Benefits:

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Challenges:

--

Things to remember:

--



Identify and Define the Problem – Worksheet A4

Directions: Utilize this worksheet for your notes about the Interview technique

Interview Technique

Benefits:

Challenges:

Things to remember:



Identify and Define the Problem – Worksheet A5

Directions: Utilize this worksheet for your notes about the Survey technique

Survey Technique

Benefits:

Challenges:

Things to remember:



Identify and Define the Problem – Worksheet A6-1

Directions: Utilize this worksheet for your notes about the additional techniques

Additional Problem Identification Tools

Process Analysis and Modeling:

Quick sketch

Pareto Chart:

Quick sketch



Identify and Define the Problem – Worksheet A6-2

Directions: Utilize this worksheet for your notes about the additional techniques

SWOT Analysis:

Quick sketch

Market Analysis:



Identify and Define the Problem – Worksheet A7

Directions: Fill in the blanks to outline the three-step process to choosing a technique

Choosing a Technique

Step 1: _____

Notes:

Step 2: _____

Notes:

Step 3: _____

Notes:

Observation	Process Analysis
Interview	Pareto Chart
Survey	SWOT Analysis
	Market Analysis



Identify and Define the Problem – Instructions for Worksheets A8-1, A8-2, A8-3

Directions: Get familiar with these instructions before completing the next three worksheets

Choosing a Technique or Tool – Instructions

This activity can also be found on the Udemy platform. It is highly recommended you also complete it there, so you can receive instructor feedback.

For this assignment you will be given a scenario and then you will be asked a series of questions about it. Many of these questions will ask you about what technique or tool would fit well into the situation.

YOUR OPTIONS:

Observation -- Interview -- Survey -- Process Analysis -- Pareto Chart -- SWOT Analysis -- Market Analysis

If you chose interview, observation, or survey, be sure you also provide the additional details pertaining to it.

The 'details' I'm referring to are the items you can find on the top of the corresponding Elicitation Notes template. For this assignment, what is highlighted in yellow is required and the items highlighted in blue are optional.

Interview Details	
Purpose of Interview:	<input type="text"/>
Name:	<input type="text"/> <i>*Not their name, but who they are</i>
Title:	<input type="text"/> Email: <input type="text"/>
Date:	<input type="text"/> Time: <input type="text"/>
Location:	<input type="text"/> Record?: <input type="text"/>

Survey Details	
Purpose of Survey:	<input type="text"/>
Sending To:	<input type="text"/>
Method:	<input type="text"/>
Start Date:	<input type="text"/> End Date: <input type="text"/>
Incentive Description:	<input type="text"/>

Observation Details	
Purpose of Observation:	<input type="text"/>
Name:	<input type="text"/>
Title:	<input type="text"/> Email: <input type="text"/>
Date:	<input type="text"/> Time: <input type="text"/>
Observation Type:	<input type="text"/> Location: <input type="text"/>



Identify and Define the Problem – Worksheet A8-1

Directions: Read the scenario and answer the questions that follow.

Choosing a Technique or Tool – Test Your Skills

Observation

Interview

Survey

Process Analysis

Pareto Chart

SWOT Analysis

Market Analysis

1. ABC Company wants you to focus on the internal help desk. They support the company by taking internal calls for things like password resets, hardware fixes/replacements, software installs, etc. While the company has only grown by 1% over the past 12 months, the call volume has skyrocketed (164% increase). They track each call, the prompts selected, the reported problem, the actual problem, and the solution implemented. They want to understand why the volume has gone up, so they can create a project to decrease it.

a. What technique or tool is the best to start this analysis off with? What would you be hoping to learn?

b. After you learn those details, what are your most likely next steps and why?



Identify and Define the Problem – Worksheet A8-2

Directions: Read the scenario and answer the questions that follow.

2. Automotive Repair has 25 locations spread across the Midwest. Over the past few years, a competitor (123 Auto) has begun opening locations in and around Automotive Repair’s current territory. Executives at Automotive Repair fear if they don’t differentiate themselves, their sales could decrease sharply.

a. What technique or tool can identify areas of opportunity for Automotive Repair? Why?

b. What technique or tool could be utilized to generate (and later analyze) ideas and thoughts from over 3,000 employees spread across five different states? Why?

c. What technique or tool could be utilized to uncover automotive repair industry best practices? Why?



Identify and Define the Problem – Worksheet A8-3

Directions: Read the scenario and answer the questions that follow.

3. Homes-4-You, a non-profit organization, is amid their annual spending audit. These audits are done every year to validate donated money is being spent in places with the highest impact. You were asked to look through the auditing process and identify any potential areas for improvement.

a. What is the best tool to help you lay out and visualize the audit procedure?

b. What two techniques could be utilized to help you gain the necessary information for the selected tool? Be sure to include the technique details in your answer.



Identify and Define the Problem – Worksheet A9

Directions: Choose the best technique to solve the problem. Be sure to list any details that go with the technique.

Root Cause Analysis Techniques

Five Whys:

Fishbone Diagram:

Quick sketch



Identify and Define the Problem – Worksheet A10

Directions: Fill in the blanks

Determine Value

Value is when a _____ is _____.

- _____ = something you can see, feel and touch (eg - money)
- _____ = something not able to be seen or felt (eg - time, brand awareness)

Value is both _____ sensitive and differs based on _____.

Steps in determining value:

1. What is the value?
2. Who is the beneficiary?
3. How long will it be of value?

Final value validation question: _____



Identify and Define the Problem – Worksheet A11-1

Directions: Take notes on the project proposal and its various sections

Project Proposal

Project Proposal (definition)

Section 1: Statement of the Problem or Need



Identify and Define the Problem – Worksheet A11-2

Directions: Take notes on the project proposal's various sections

Section 2: Project Deliverables and Value

Section 3: Key Stakeholders



Identify and Define the Problem – Worksheet A11-3

Directions: Take notes on the project proposal's various sections

Section 4: Additional Notes

Section 5: Approval Signatures



Identify and Define the Problem – Worksheet A12

Directions: This can be utilized at your discretion for any final notes and thoughts

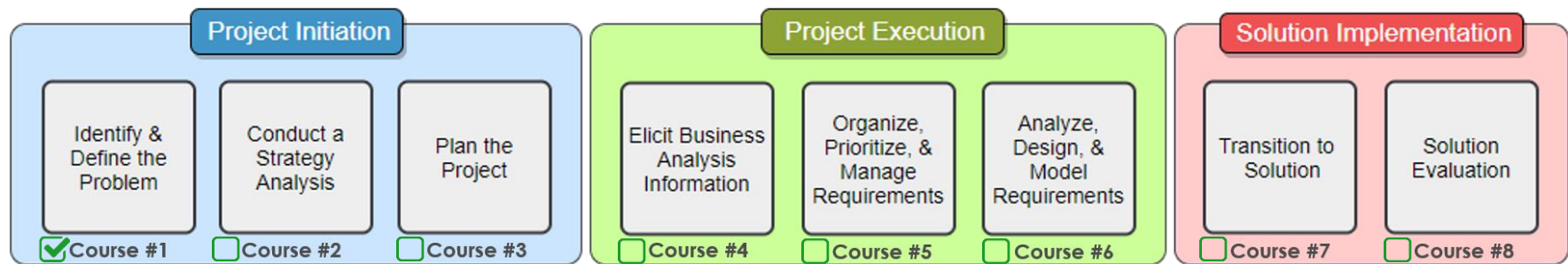
Additional Notes and Thoughts:



The BA Guide's Business Analysis Process – Course Series Checklist

Directions: Check off each course in the series as you complete it

The BA Guide's Business Analysis Process: Course Completion Checklist



To learn more about this series and receive special discounts, head over to

www.TheBAGuide.com/BASeries