The BA Guide's

Business Analysis Process

Project Initiation

- Identify & Define the Problem — Course #1
- Conduct a Strategy Analysis — Course #2
- Plan the Project — Course #3

Project Execution

- Elicit Business Analysis Information — Course #4
- Organize, Prioritize, & Manage Requirements — Course #5
- Analyze, Design, & Model Requirements — Course #6

Solution Implementation

- Transition to Solution — Course #7
- Solution Evaluation — Course #8

Business Analysis: Identify & Define the Problem

HIGHEST RATED

The BA Guide | Jeremy Aschenbrenner • Business Analyst Trainer & Coach

Use **business analysis** techniques to identify a **business** pain point, find its root cause, and sell the...

4.6

70 lectures · 3.5 hours · All Levels · CC

Business Analysis: Conduct a Strategy Analysis

NEW

The BA Guide | Jeremy Aschenbrenner • Business Analyst Trainer & Coach

Learn how to use business **analysis** to recommend the best solution and change **strategy** to meet your...

5.0

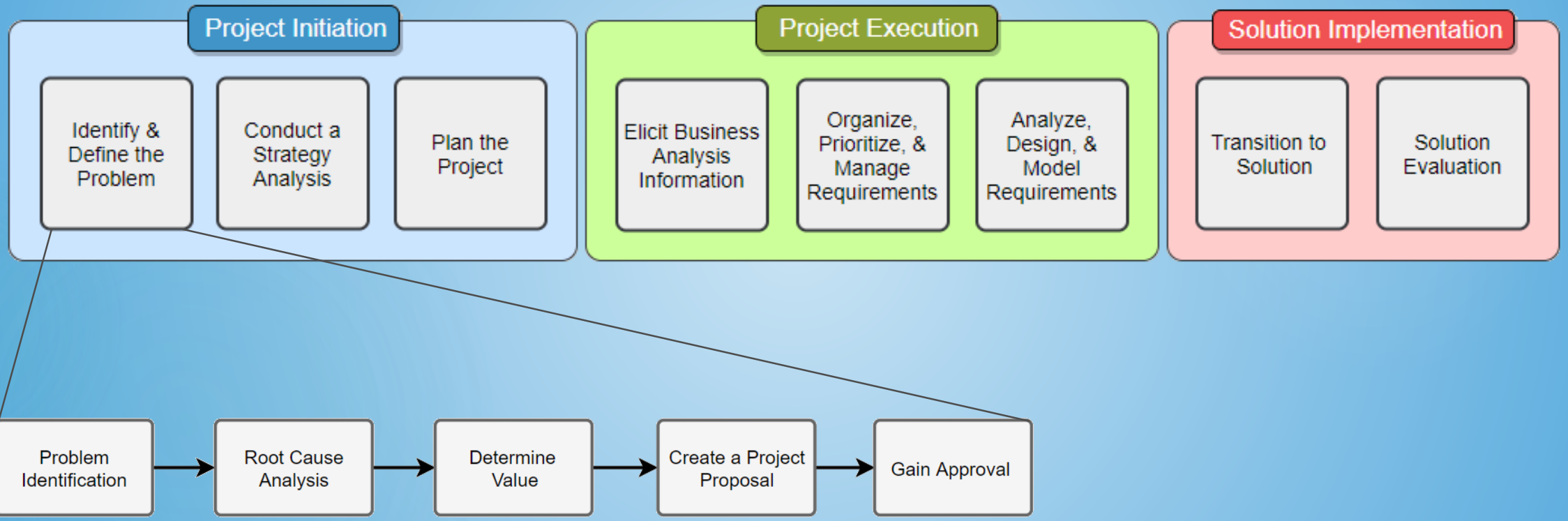
105 lectures · 7 hours · All Levels · CC

BUSINESS ANALYSIS PROCESS SERIES

Student Workbook

The BA Guide's

Business Analysis Process



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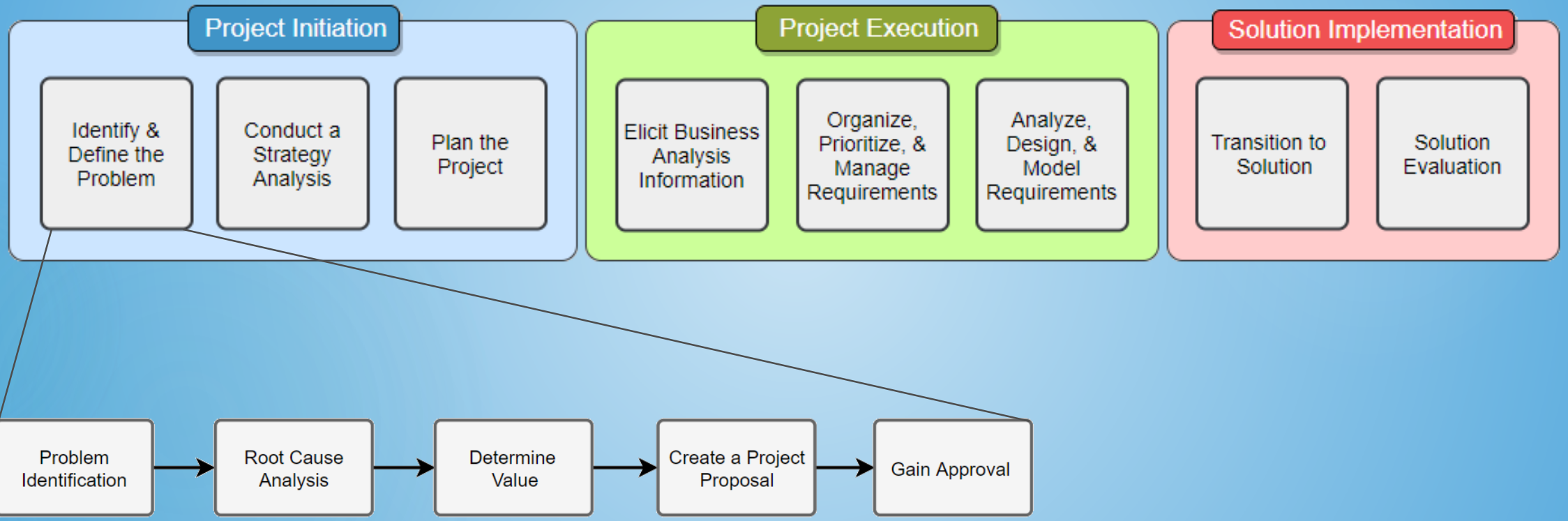
Business Analysis Process



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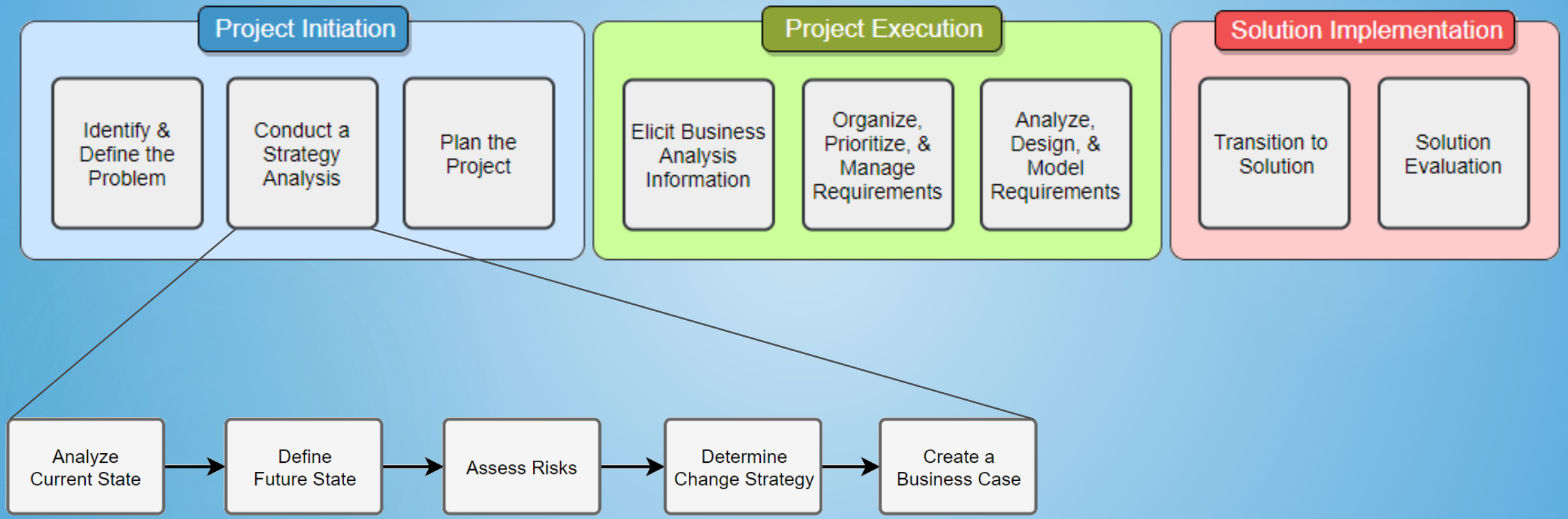
Business Analysis Process



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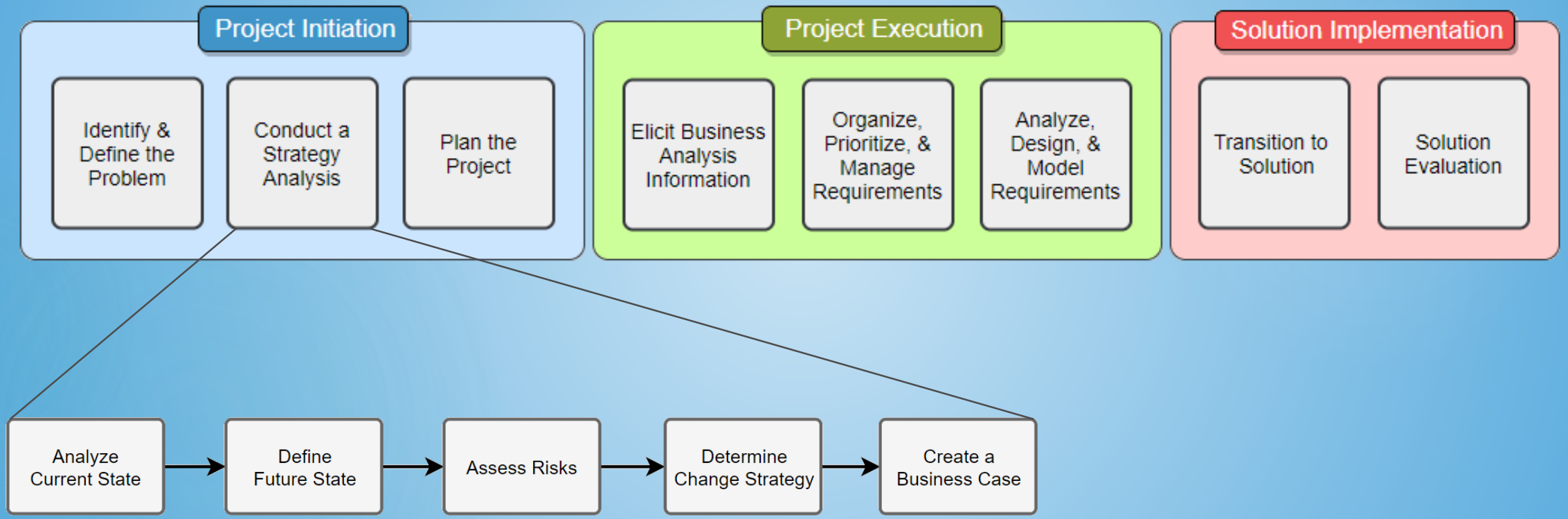
Business Analysis Process



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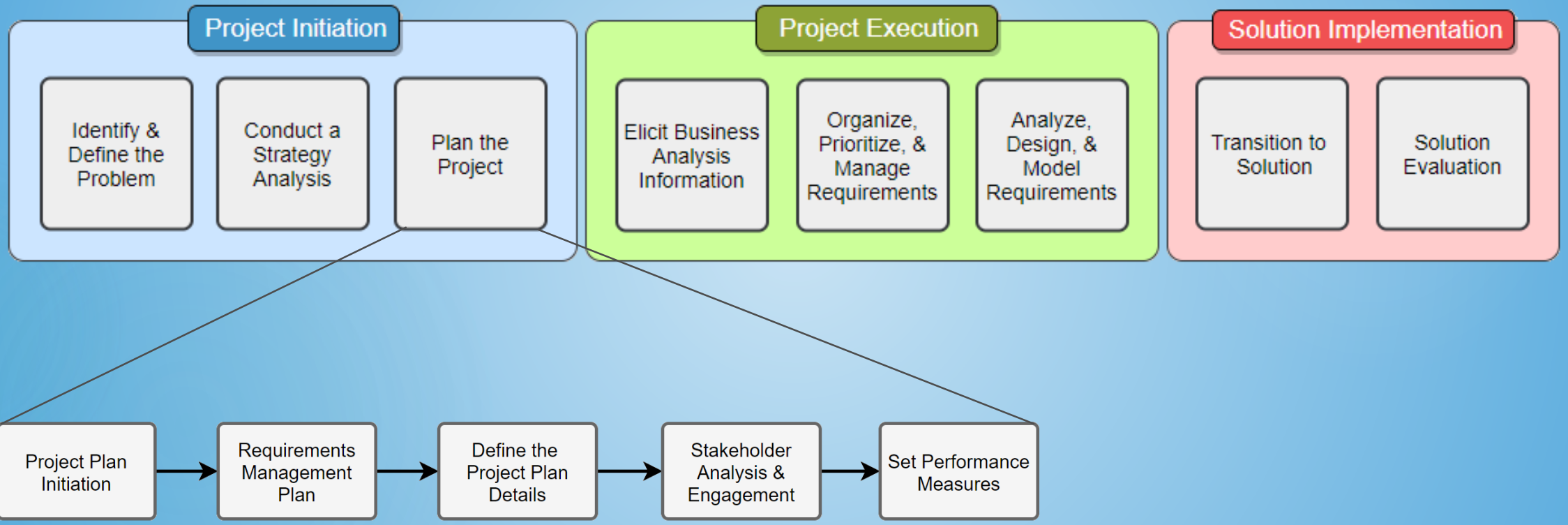
Business Analysis Process



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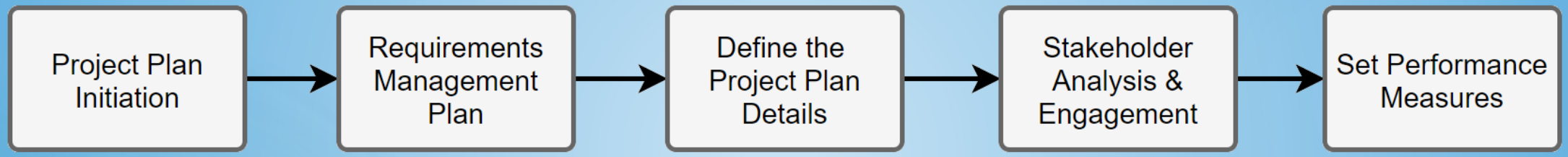
Plan the Project

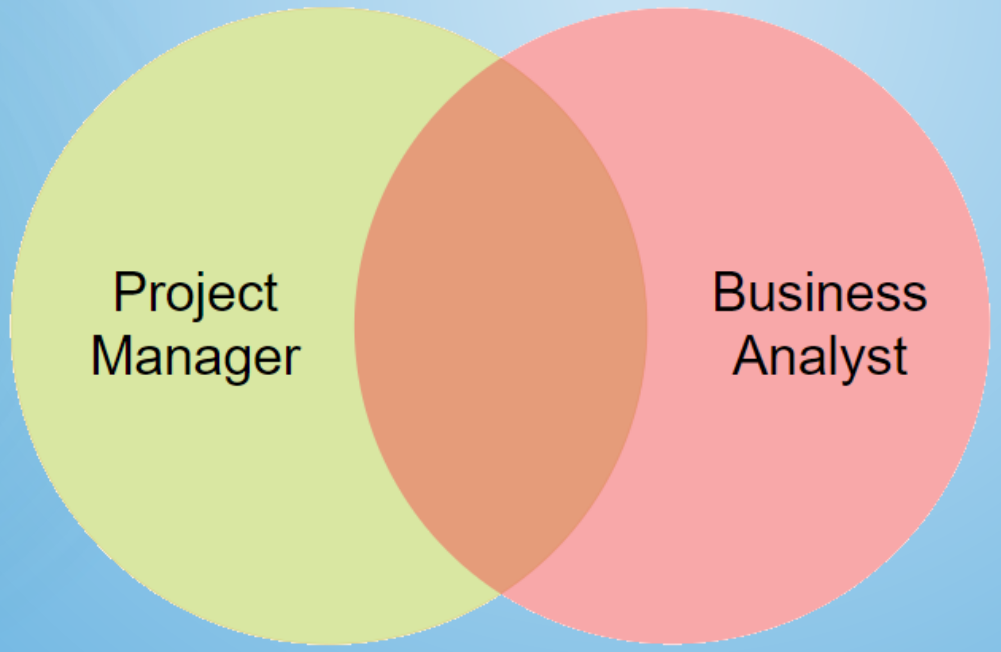


Project Manager

- Leads the project
- Communicates status
- Responsible for project success

Business Analyst

- Bridges gap between teams
- Uncovers business needs
- Responsible for solution success



Project

Stakeholder

Requirements

Project

Stakeholder

Requirements

Project

- Stakeholder

Requirements

Project

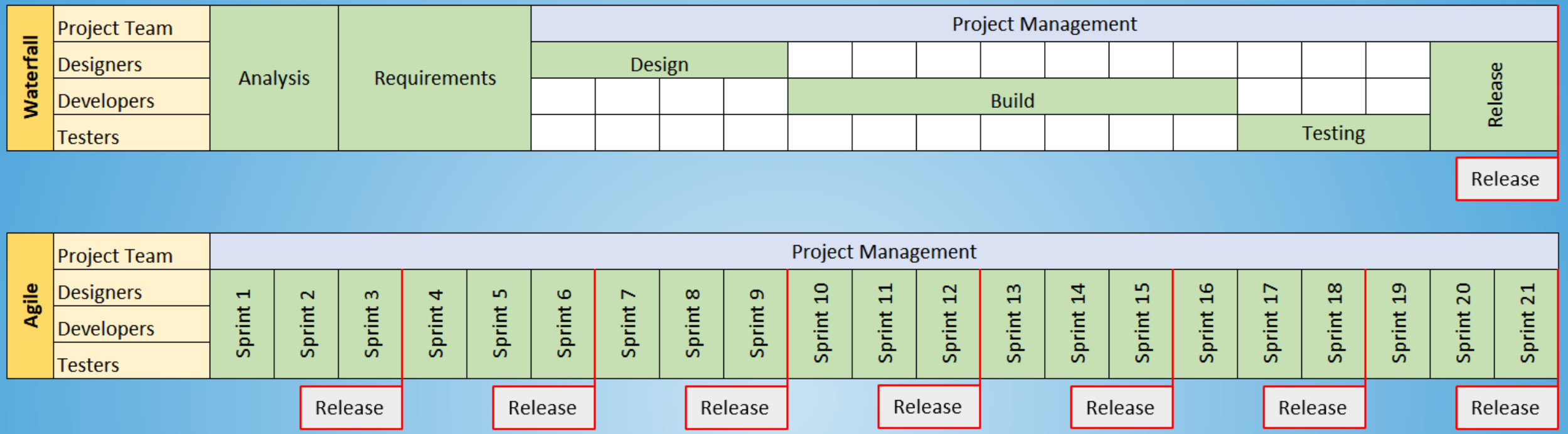
Stakeholder

 Requirements

Adaptive

vs

Predictive


Waterfall
Project Team
Designers
Developers
Testers
Analysis
Requirements
Project Management
Design
Build
Testing
Release
Release
Agile
Project Team
Designers
Developers
Testers
Project Management
Sprint 1
Sprint 2
Sprint 3
Sprint 4
Sprint 5
Sprint 6
Sprint 7
Sprint 8
Sprint 9
Sprint 10
Sprint 11
Sprint 12
Sprint 13
Sprint 14
Sprint 15
Sprint 16
Sprint 17
Sprint 18
Sprint 19
Sprint 20
Sprint 21
Release
Release
Release
Release
Release
Release

Why Plan?

"If you fail to plan, you are planning to fail."

- Benjamin Franklin

Project plans are created to guide project execution.

Case Study:

Queensland Health Payroll Project

- Utilized LATTICE
- No longer being supported

- Contracted: IBM
- Solution: SAP and Workbrain

- Budget: $6.2 million
- Timeframe: 7 months

Cost:

(Estimated) $6.2 million

(Actual) $1.24 billion

Timeframe:

(Estimated) 7 months

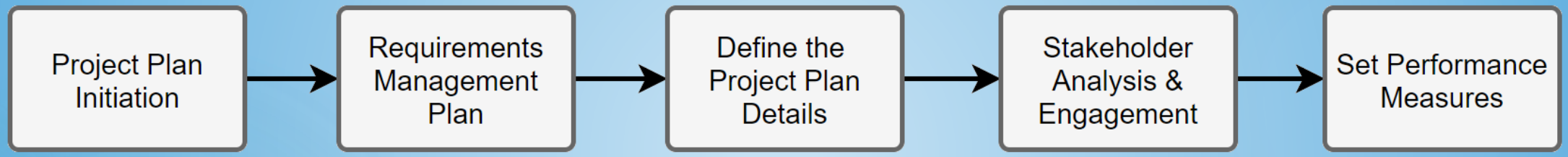
(Actual) 31 months

Queensland Health

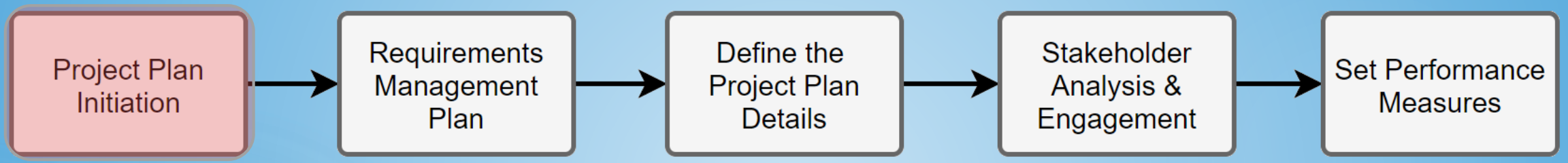
Queensland Government

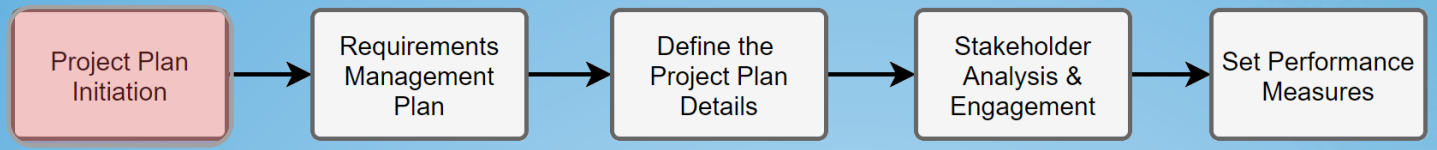
The BA Guide's

Plan the Project



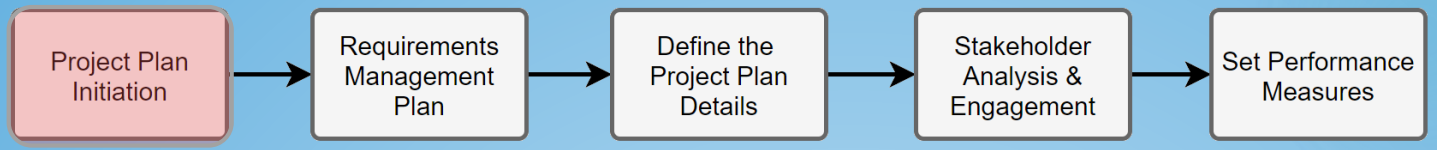
Project Plan Initiation





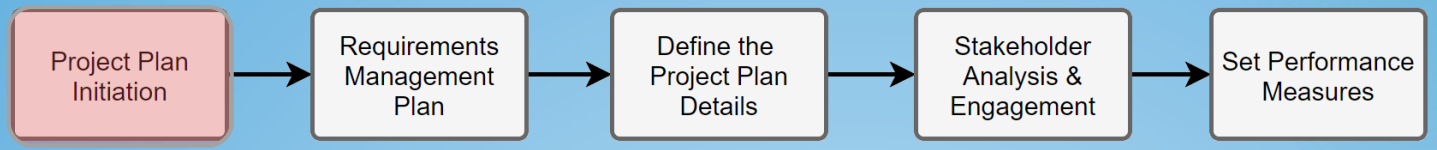
Goal:

Put together the project team, inform them about the project, and get the project officially started.



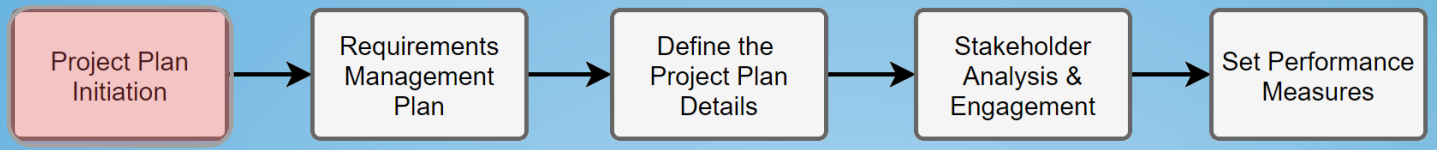
Elements within Project Plan Initiation:

- Stakeholder identification
- Create a Project Charter
- Arrange and conduct a Kickoff Meeting



Stakeholder Identification

Internal and external individuals, groups or organizations that are involved in, or are directly or indirectly affected by the project.



Stakeholder Identification

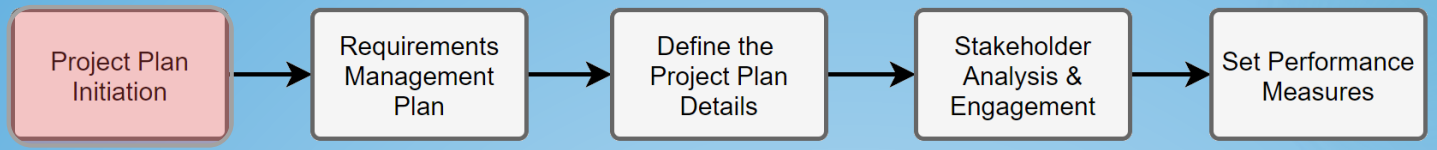
Internal and external individuals, groups or organizations that are involved in, or are directly or indirectly affected by the project.

Internal

- Project team
- Project sponsor
- Users
- Management

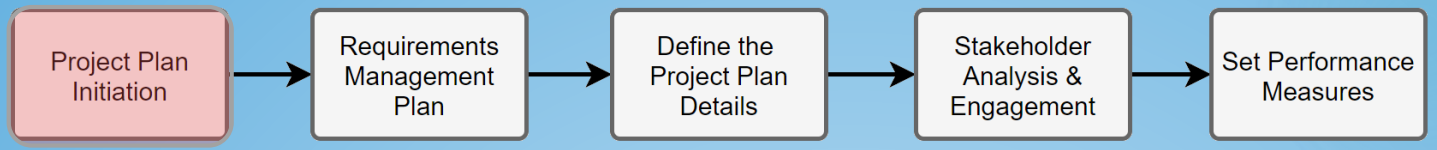
External

- Suppliers
- Competitors
- Customers
- Organizations



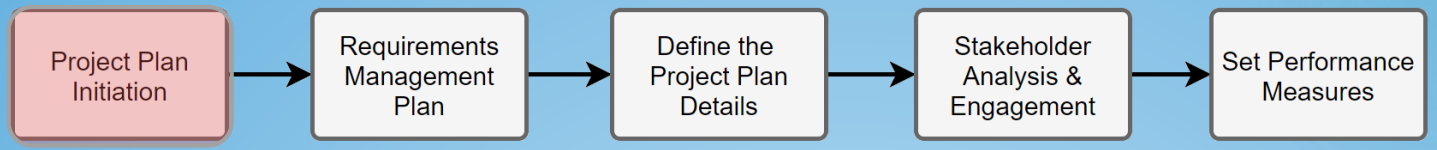
Stakeholder Identification

- Increases project success
- Additional input and ideas
- Varied perspectives
- Eases change resistance
- Increases credibility



Stakeholder Identification

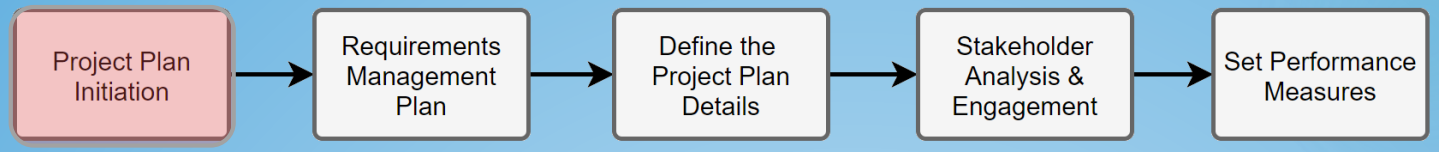
- Organizational assessment (structure, culture)
- Talk to others
- Documentation from past projects



Stakeholder Identification

Visually walk through project (solo)

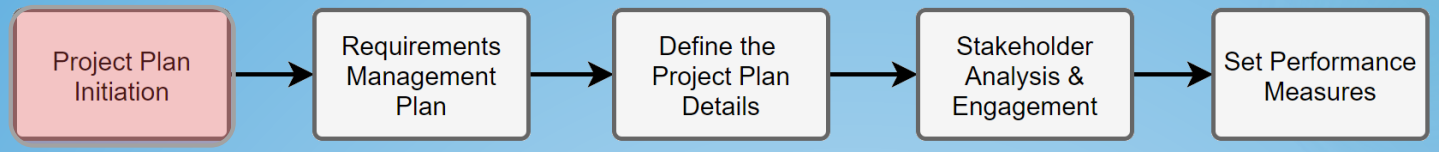
- Beneficiaries of the effort
- Job duties that may be affected
- Regulatory officials
- Influencers (of the organization)



Stakeholder Identification

Talk to identified stakeholders

- One-on-one
  - Interview
  - Email
  - Phone call
- Group
  - Brainstorm



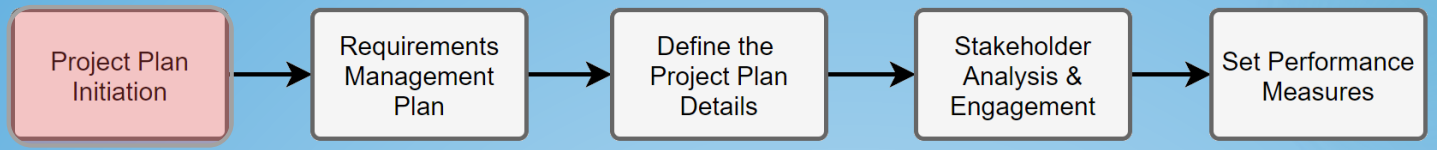
Stakeholder Identification

- Document them in Stakeholder Register

Stakeholder Register

This document is used to keep track of the stakeholders for the project

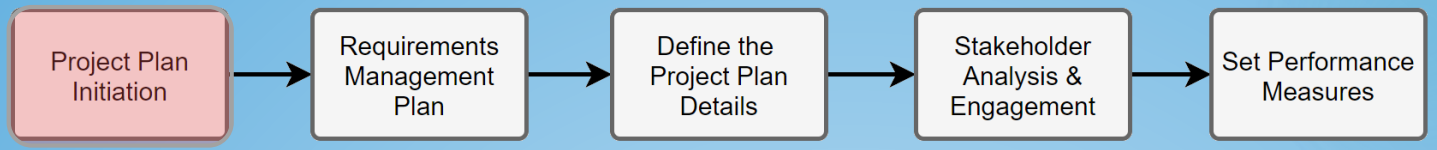
Name	Position	Internal / External	Project Role	Contact Information



Stakeholder Identification

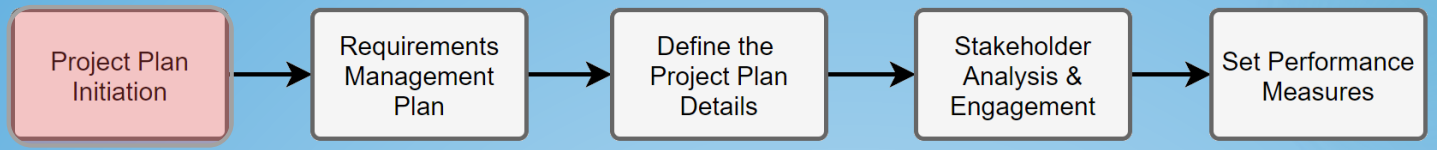
Stakeholders will change.

Keep the register up-to-date!



Create a Project Charter

- Formally records the existence of a project
- Informs the organization
- Defines project start and boundaries
- Authorizes engagement of project resources



Create a Project Charter

[Project Name]

PROJECT OVERVIEW

Project Manager: _____ **Project Sponsor:** _____

Projected Start: _____ **Projected Finish:** _____

Project Background:

Details

Project Objective:

Details

Success Criteria:

Details

PROJECT DETAILS

Approach:

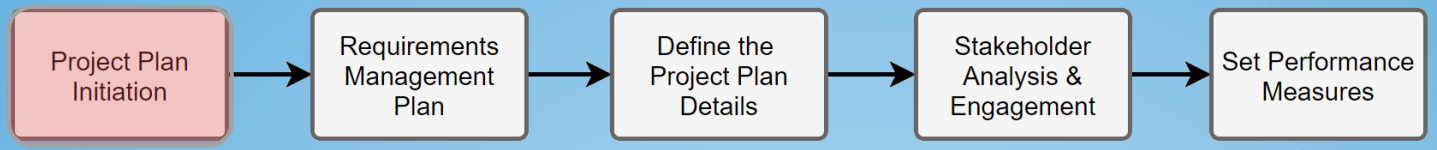
- Detail
- Detail
- Detail

Project Schedule/Milestones:

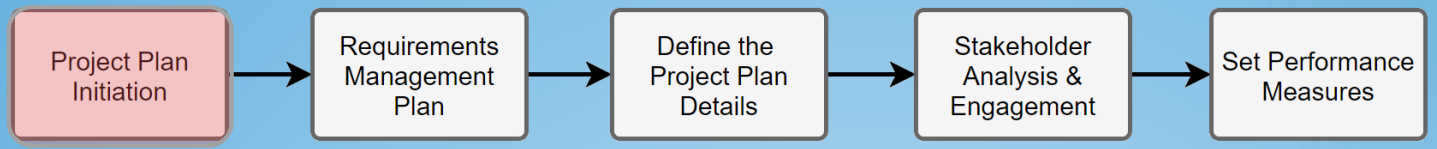
Details

Budget Information:

Details



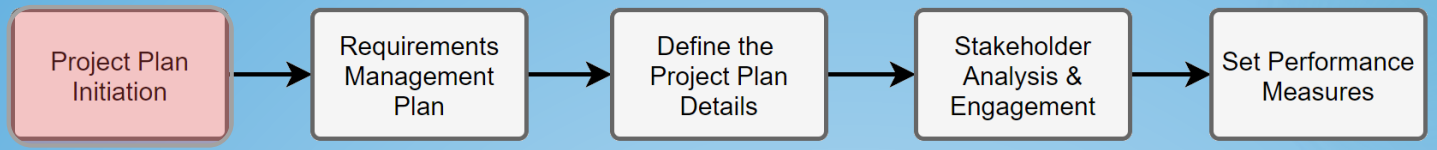
Arrange and Conduct a Kickoff Meeting



Arrange and Conduct a Kickoff Meeting

What is it?:

- First meeting with full project team
- Introduces everyone
- Details the project objectives & plan
- Gets everyone excited about the project

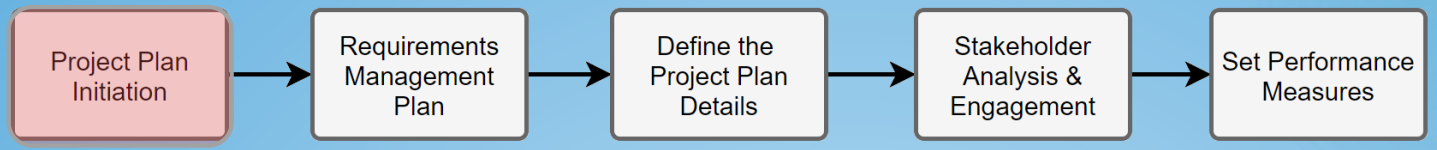


Arrange and Conduct a Kickoff Meeting

Arrange meeting:

- Schedule for one hour (best practice)
- Include all project team members
- Create a meeting agenda
- Send meeting invite, agenda, and charter
- Request everyone reviews the charter

TIP: It is important for all project team members to be able to attend.



Arrange and Conduct a Kickoff Meeting

Conduct meeting:

1. Introduce yourself – be personable
2. Review agenda
3. Attendee introductions – keep them brief
4. Discuss project purpose and goal
5. Review project schedule and budget
6. Discuss risks and assumptions – add new items
7. Ask for feedback and questions

Arrange and Conduct a Kickoff Meeting:

Kickoff Meeting Template

1 | Page

Kickoff Meeting
[Project Name]

Meeting Objective: Get the project off to an effective start by introducing key stakeholders and reviewing project goals.

Agenda:

- Introductions
- Discuss project purpose and goal
- Review project schedule and budget
- Discuss risks and assumptions
- Review action items from the meeting

Action Item	Assigned To	Due Date

Notes:

-

Arrange and Conduct a Kickoff Meeting:

Team Contract

SAMPLE TEAM CONTRACT

Project Name: Project Leader:

A. Commitments: (pg. 44)

As a project team we will:

1. Only agree to do work that we are qualified and capable of doing.
2. Be honest and realistic in planning and reporting project scope, schedule, staffing and cost.
3. Operate in a proactive manner, anticipating potential problems and working to prevent them before they happen.
4. Promptly notify our customer(s) and sponsor of any change that could affect them.
5. Keep other team members informed.
6. Keep proprietary information about our customers in strict confidence.
7. Focus on what is best for the project as a whole.
8. See the project through to completion.

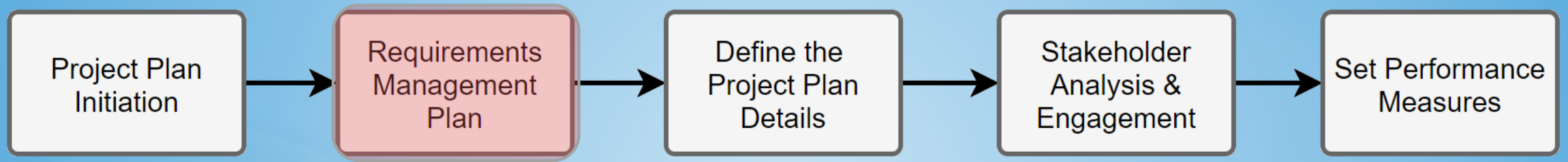
B. Team Meeting Ground Rules: Participation (pg. 45)

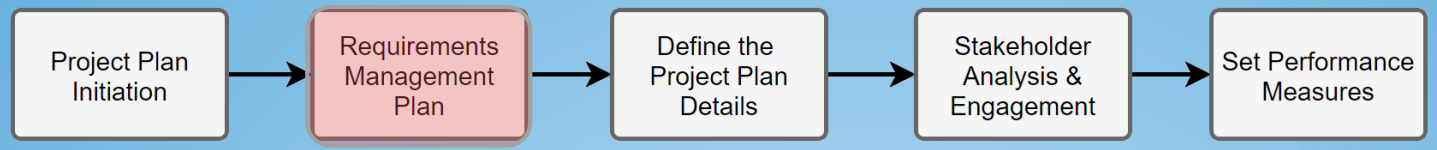
We will:

1. Keep issues that arise in meetings in confidence within the team unless otherwise indicated.

2. Be honest and open during meetings

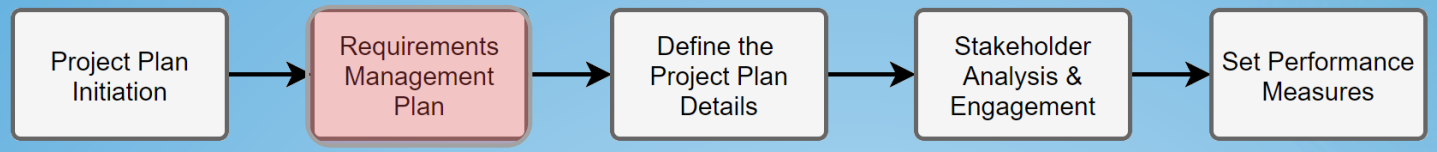
Project Plan Initiation





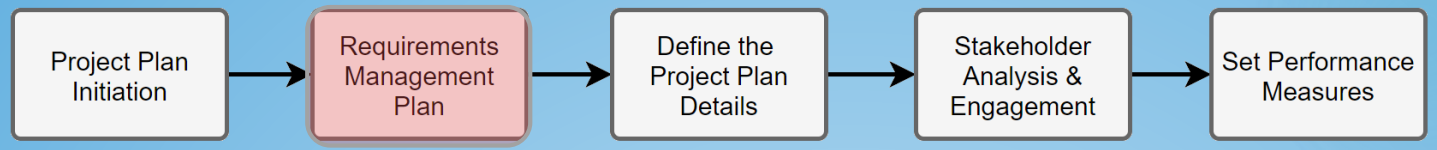
Goal:

Ensures requirements (business analysis information) is well organized and accessible to the right people.



Elements within Requirements Management Plan:

- Requirement Abstraction
- Requirements Storage and Access
- Requirement Attributes
- Requirements Reuse
- Requirement Traceability
- Requirements Change Control Process
- Requirements Approval Process

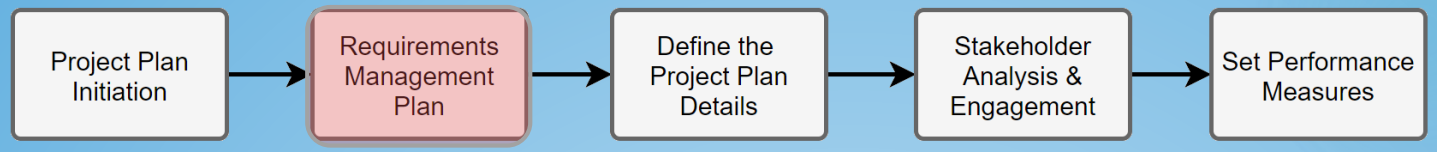


Requirement Abstraction

Level of detail that is necessary

Based upon:

- Complexity of requirement
- Importance to project
- Stakeholder needs
- Development familiarity

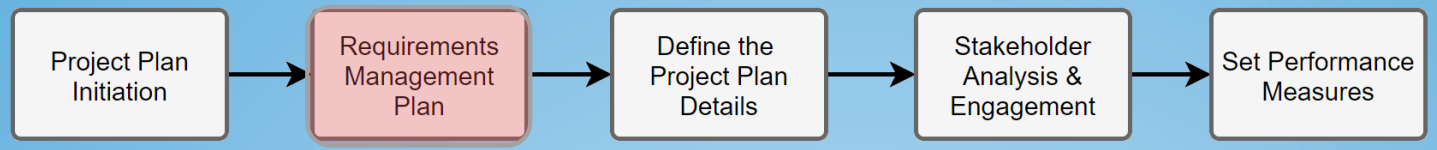


Requirement Abstraction

"Users need to be able to log into the website."

"Users need to be able to log into the website with their username and password."

"Users need to be able to access the membership only area when they log into the website with their username and password."

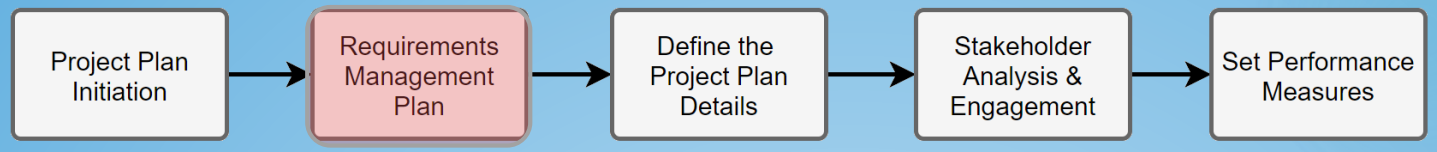


Requirement Abstraction

"The email entered must be valid."

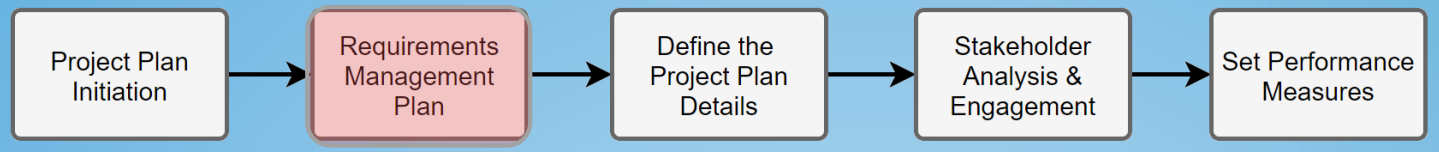
"The email entered must contain an @ symbol."

"The email entered must contain an at [@] symbol with a period [.] symbol somewhere afterwards."



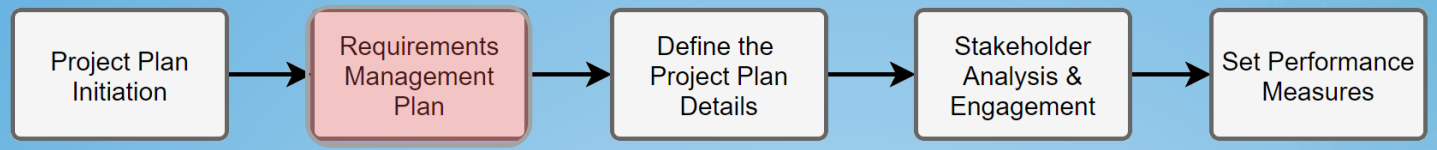
Requirement Abstraction

What level of detail is necessary for our stakeholders to understand the project requirements?



Requirements Storage and Access

Defines where the requirements will be stored and how project stakeholders will access them.



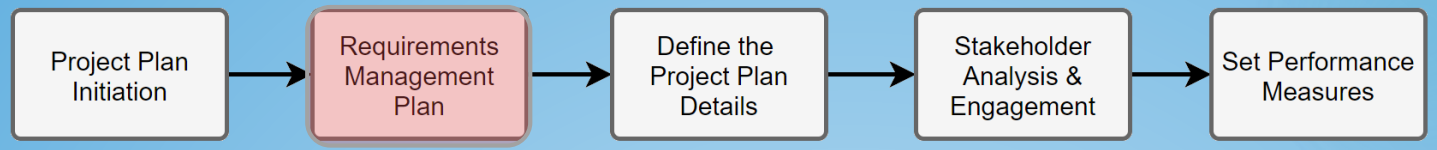
Requirements Storage and Access

Formats

- Physical (paper, post-it notes, notecards, etc.)
- Digital (text, diagrams, models, etc.)

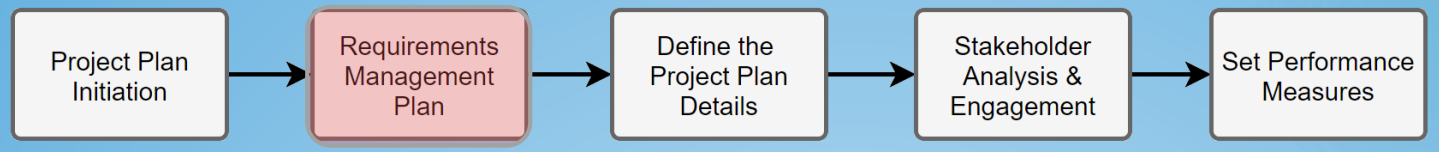
Storage

- Software (Trello, JIRA, Agile Central, VSTS, Jama, etc.)
- Cloud storage (OneDrive, Google Drive, SharePoint, etc.)
- Filing cabinet



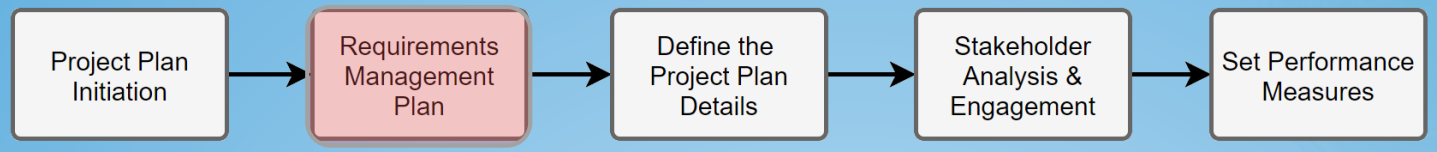
Requirements Storage and Access

- Who needs access?
- What do they need to see?
- How often do they need to see it?
- How are they gaining access?
  - Are there security considerations?
  - Are there company approved tools?



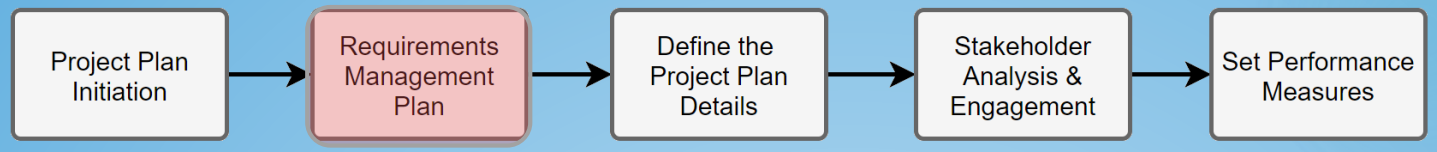
Requirements Storage and Access

What format and tool will best enable our stakeholders the access they need to the requirements?



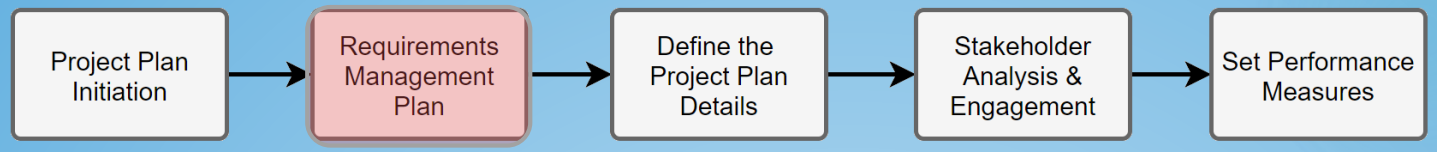
Requirement Attributes

- The requirements metadata (data about itself)
- Assists in many aspects of the project
  - Stakeholder identification
  - Project estimation
  - Requirement conflicts
  - Understand affects of changes



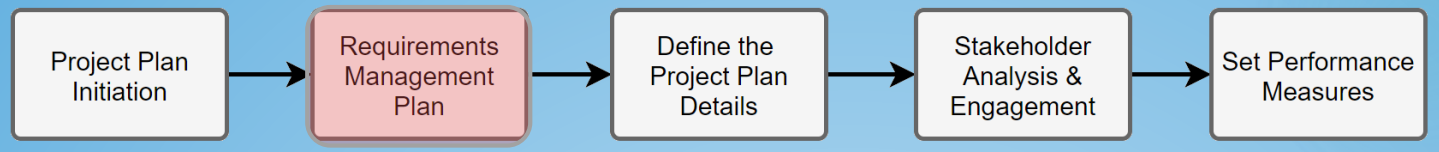
Requirement Attributes

- Adaptive
  - Unique ID
  - User Story (description & rationale)
  - Acceptance Criteria (details)
  - Estimate
  - Priority
  - Status



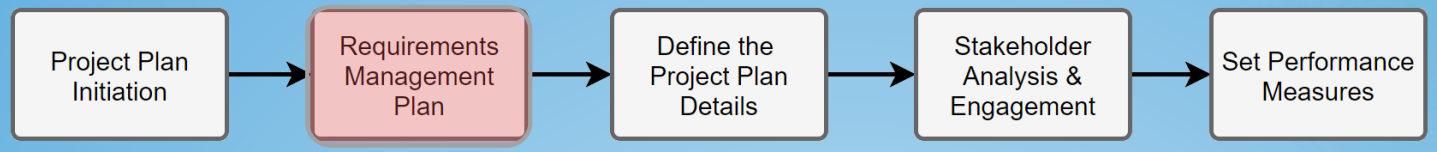
Requirement Attributes

- Predictive
  - Unique ID
  - Description
  - Rationale
  - Complexity
  - Author
  - Source
  - Priority
  - Status



Requirement Attributes

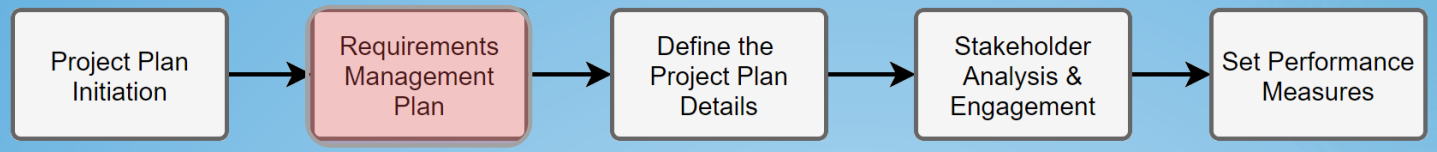
What requirement details are needed to appropriately understand the business needs?



Requirement Reuse

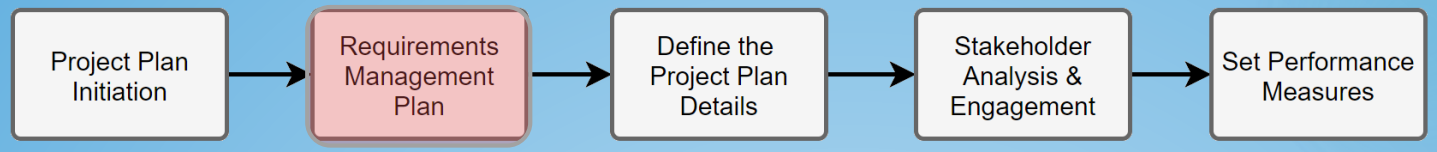
- Reutilize project requirements in multiple projects
  - Company standards (quality, SLA, etc.)
  - Regulatory requirements
  - Business rules
  - Business processes

- Putting this into perspective



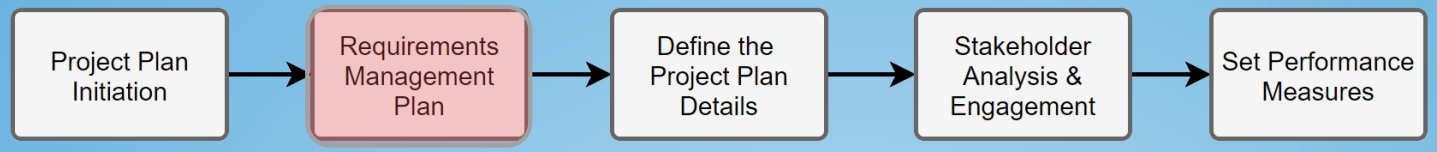
Requirement Reuse

- Why consider it?
  - Reduce elicitation and analysis effort
  - Consistency across projects & products
  - Use in training and documentation



Requirement Reuse

- Reusability modes
  - Copy and Paste
  - Copy and Link
  - Link



Requirement Reuse

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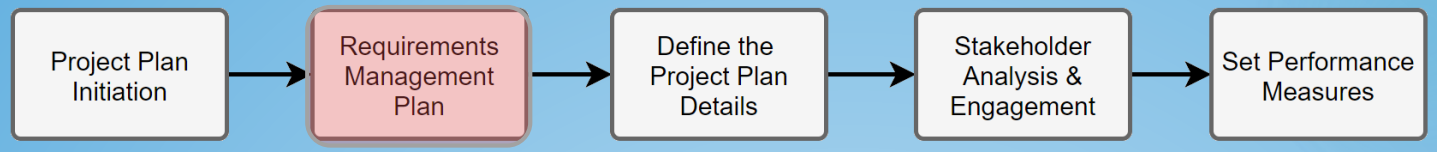
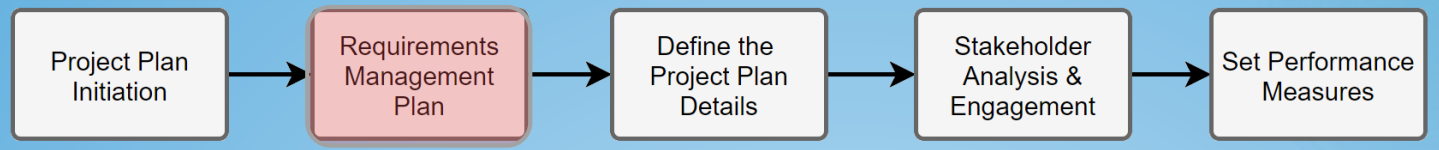


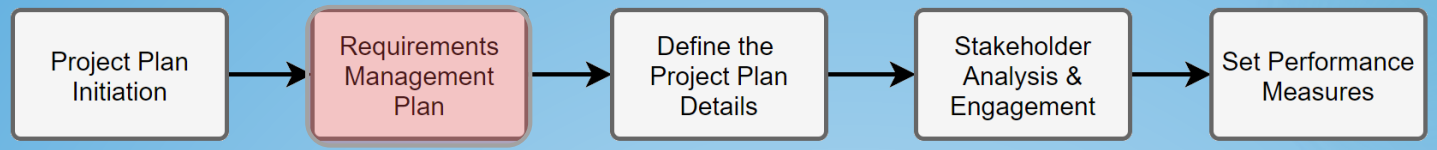
Requirement Reuse

- Need to plan ahead
  - Naming
  - Structure
  - Storage
- Adaptive vs Predictive



Requirement Reuse

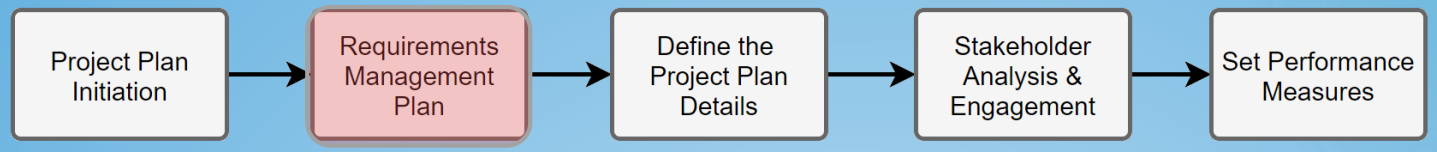
Would saving any of our project requirements assist our other projects or initiatives?



Requirement Traceability

Ability to trace a requirement from original source through deployment and support

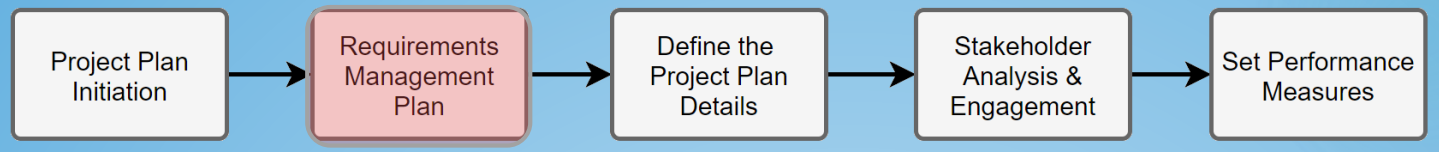
- Identifies when and why requirements changed
- Helps show what needs to be tested
- Validates the requirement is in the solution
- Assists post-implementation support



Requirement Traceability

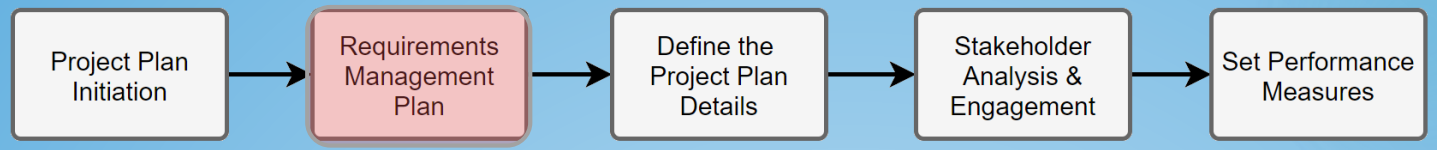
Common traceability techniques:

- Cross-reference
- Requirement Traceability Matrix (RTM)
- Software



Requirement Traceability

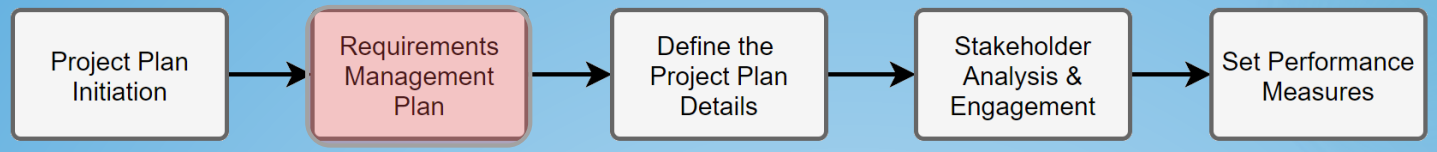
Is it critical to the project objectives that the lifecycle of requirements are traceable from the start of the project to the finish?



Requirements Change Control Process

Allows for projects to remain flexible to ever changing business needs while also understanding the impact of the requested change.

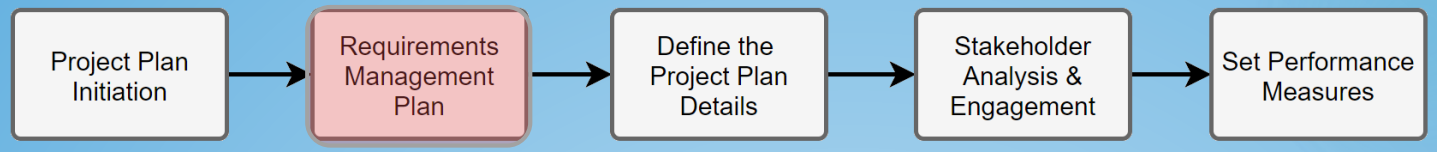
- Create a process to deal with the change



Requirements Change Control Process

Adaptive

- Identify the need for change
- Define reasoning and priority
- Document in Product Backlog



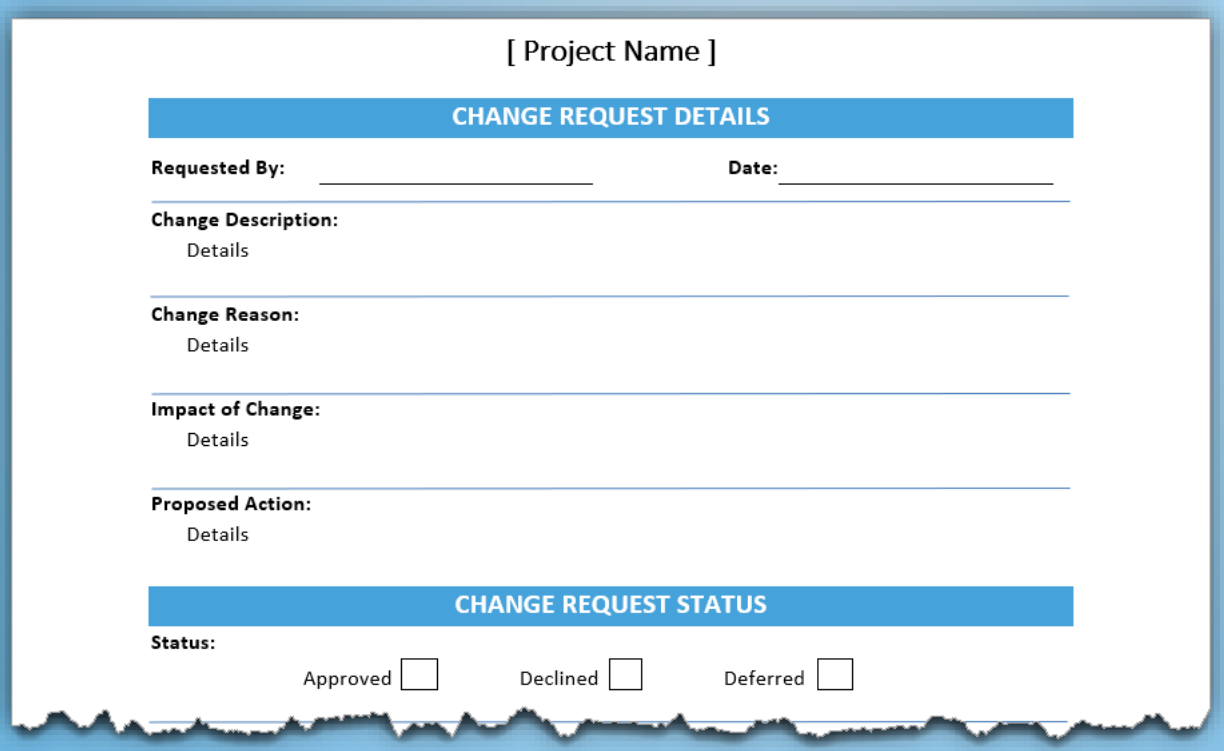
Requirements Change Control Process

Predictive

- Identify the need for change
- Define reasoning, priority, and project impact
- Present to Project Sponsor
  - Approved
  - Declined
  - Deferred
- Update the requestor and project team of status

Requirements Change Control Process

- Change Request Form



[Project Name]

CHANGE REQUEST DETAILS

Requested By: _____ **Date:** _____

Change Description:
Details

Change Reason:
Details

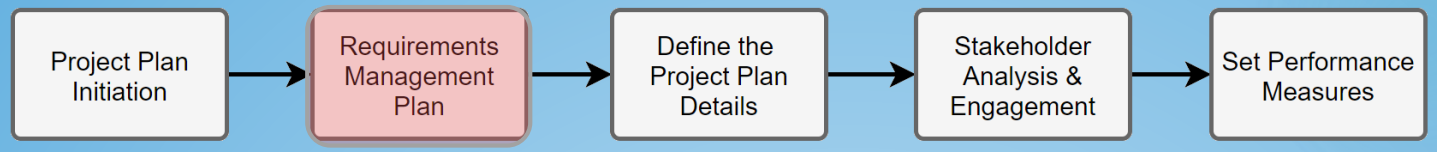
Impact of Change:
Details

Proposed Action:
Details

CHANGE REQUEST STATUS

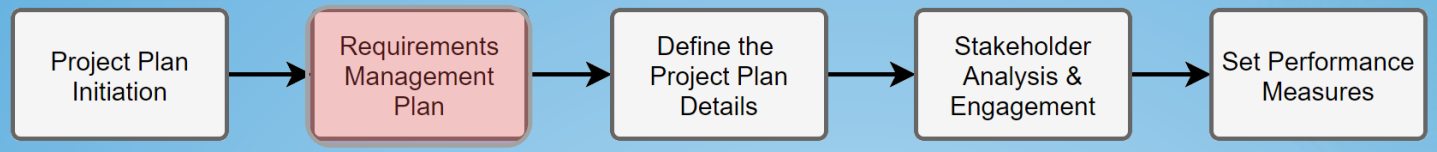
Status:

Approved ☐ Declined ☐ Deferred ☐



Requirements Change Control Process

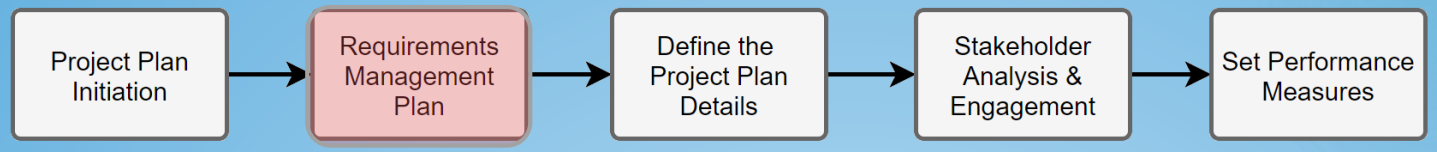
What will be our defined process when changes are identified throughout the project?



Requirements Approval Process

Define when and how requirements are approved by project stakeholders.

- Ensure requirements…
  - Have enough detail
  - Are understood and documented correctly
  - Meet a business need (create value)
  - Are up-to-date



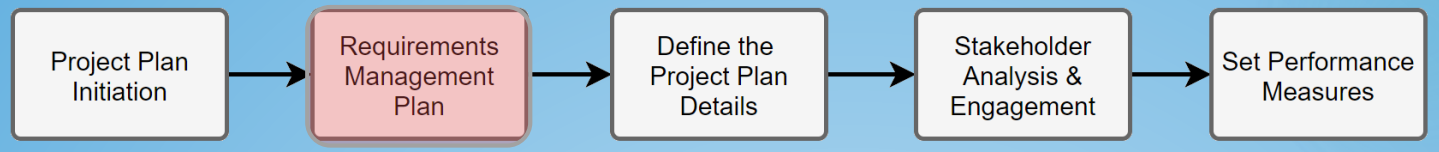
Requirements Approval Process

Adaptive

- During grooming
- Sprint planning meeting

Predictive

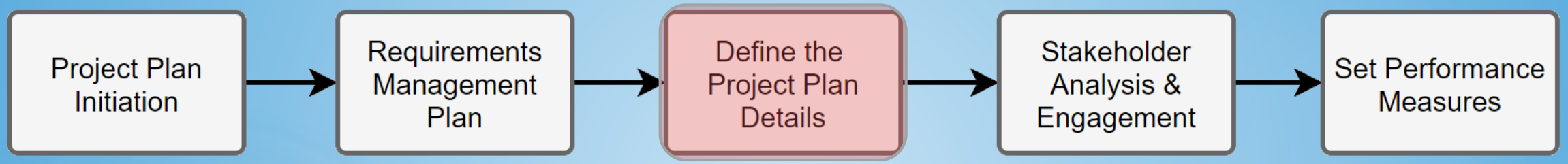
- Segment is defined
- After all requirements are documented

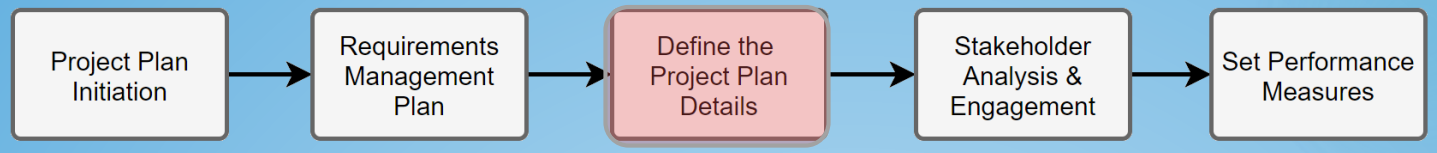


Requirements Approval Process

When should we gain stakeholder approval of our project requirements?

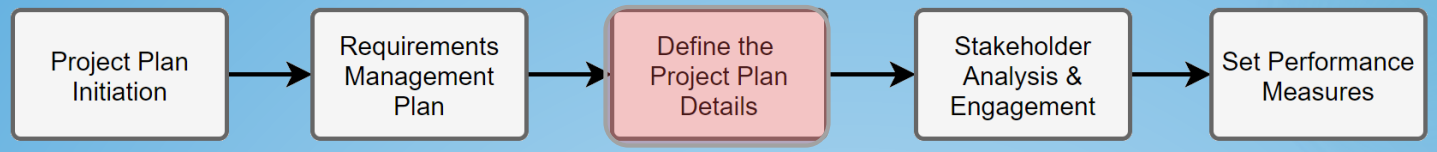
Project Plan Initiation





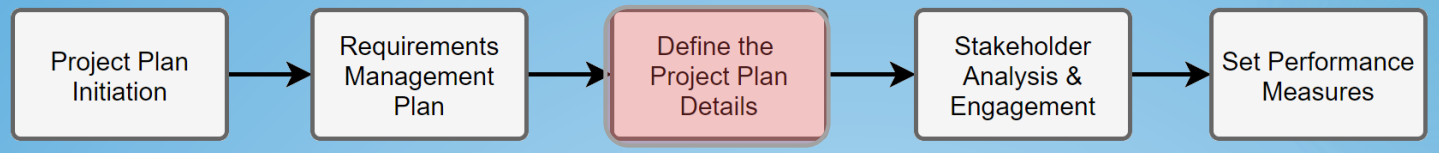
Goal:

To create plans that can be followed for a successful project execution.



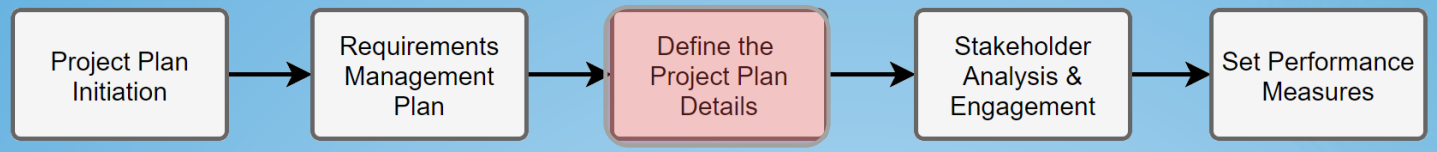
Elements within Define the Project Plan Details:

- Break Down the Project
- Set the Project Schedule
- Define a Quality Plan
- Release Planning
- Update Project Risks



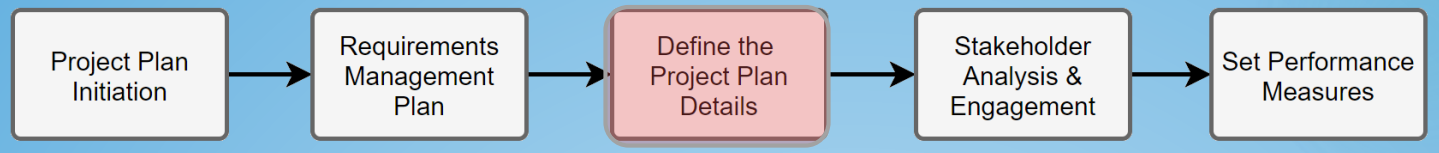
Break Down the Project

Divide the project into logical parts to define how the work will be performed.



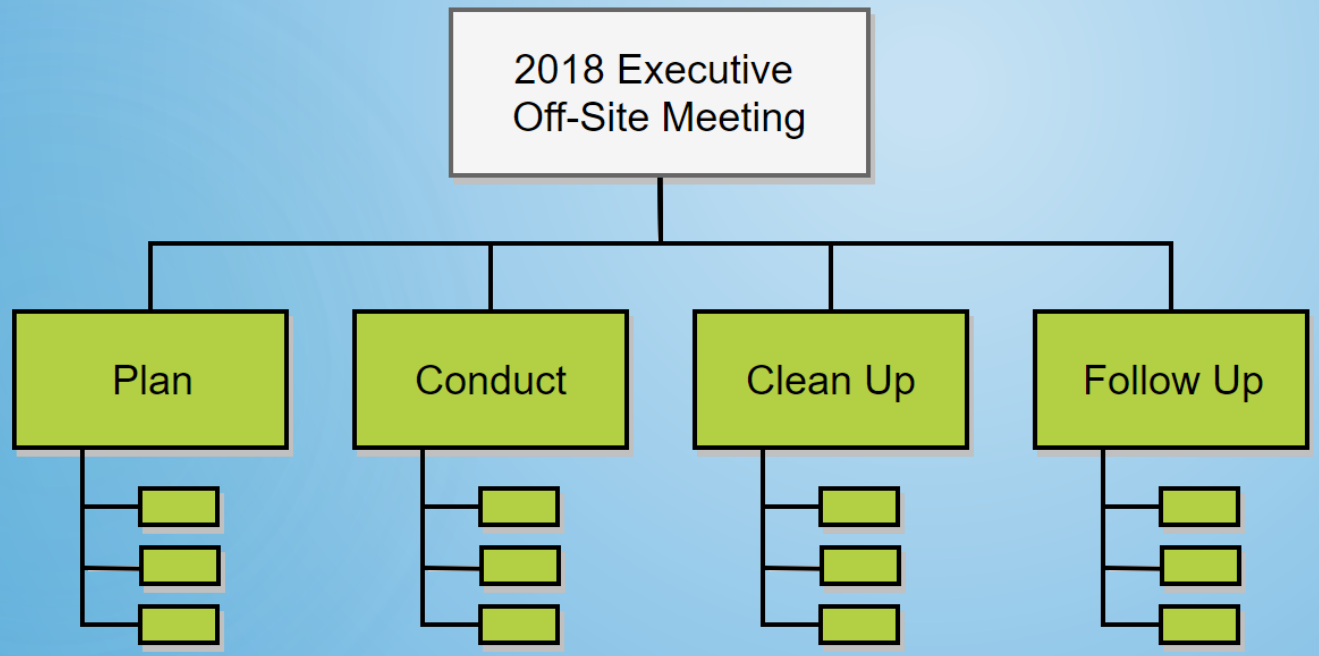
Break Down the Project

- Divide the project…



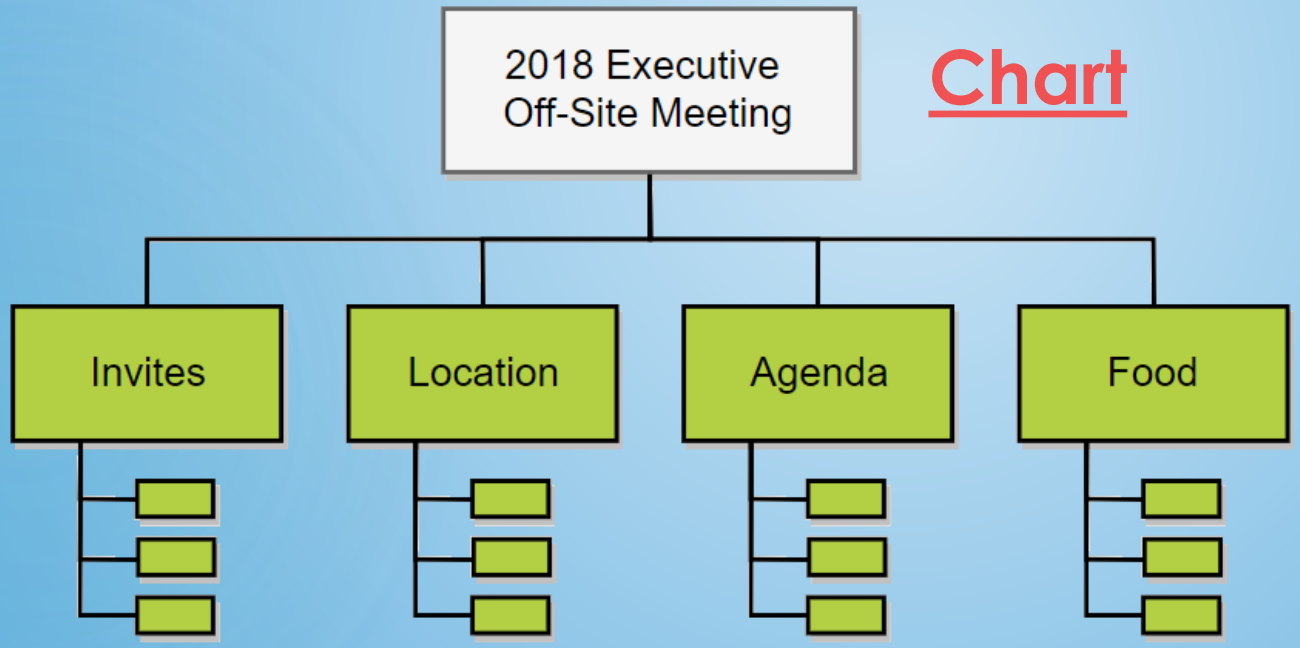
Break Down the Project

- Divide the project… into phases

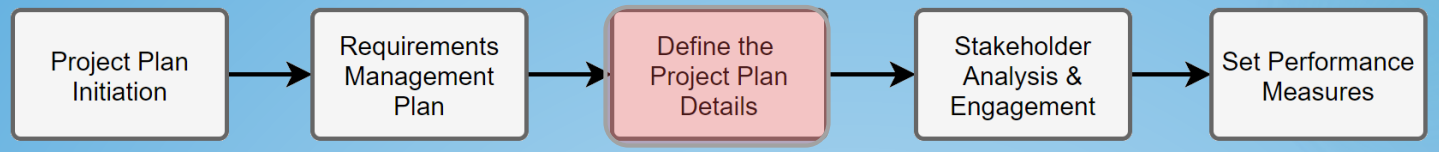


Break Down the Project

- Divide the project… into components

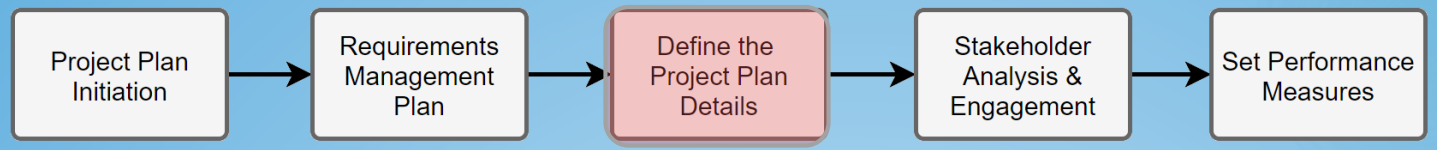


Chart



Break Down the Project

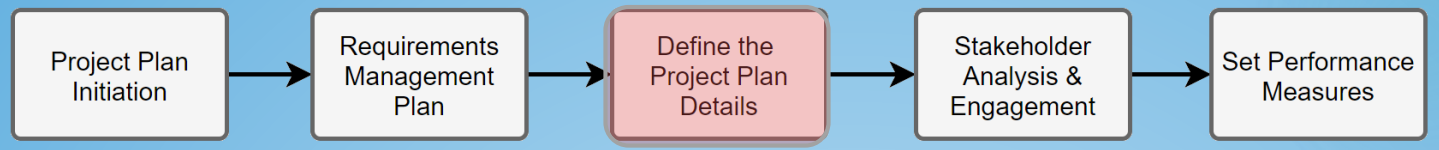
Mind Map



Break Down the Project

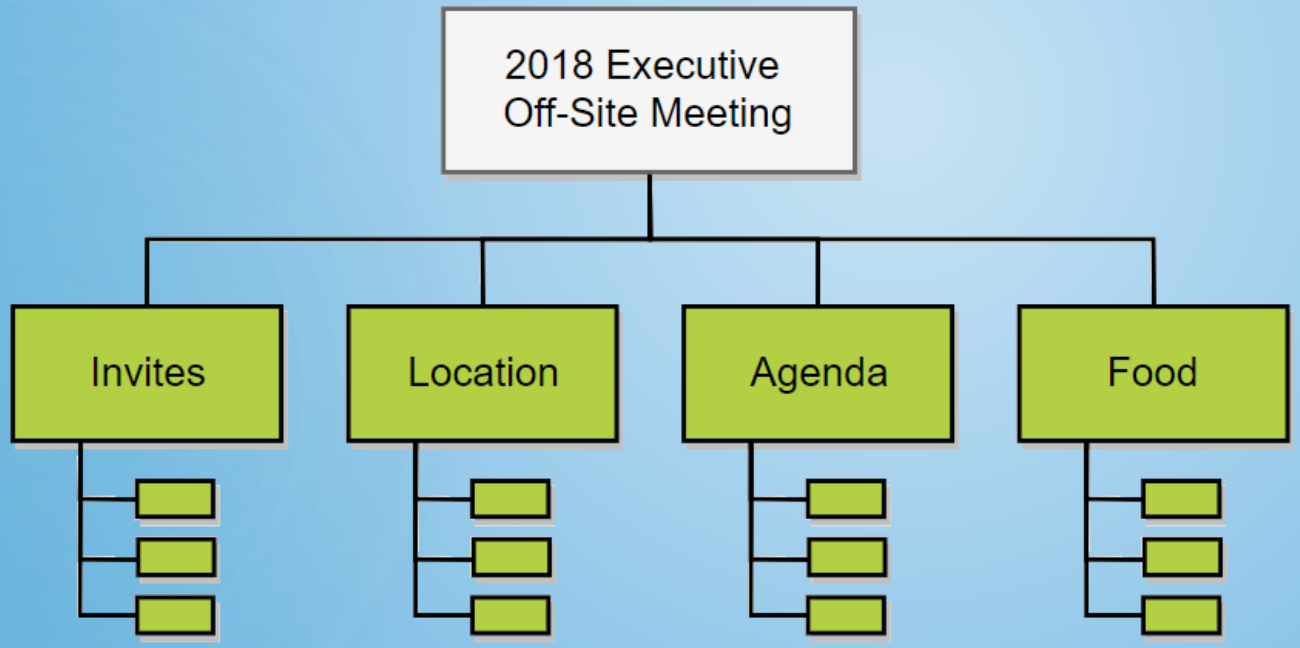
1. 2018 Executive Off-Site Meeting
    - 1.1. Invites
        - 1.1.1.
        - 1.1.2.
        - 1.1.3.
    - 1.2. Location
        - 1.2.1.
        - 1.2.2.
        - 1.2.3.
    - 1.3. Agenda
        - 1.3.1.
        - 1.3.2.
        - 1.3.3.
    - 1.4. Food
        - 1.4.1.
        - 1.4.2.
        - 1.4.3.

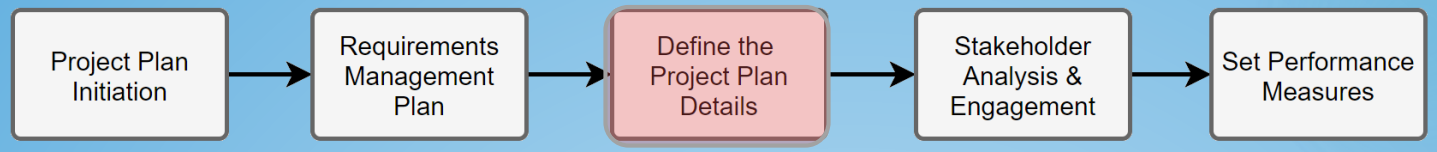
Outline / List



Break Down the Project

- My favorite: **Components + Chart**





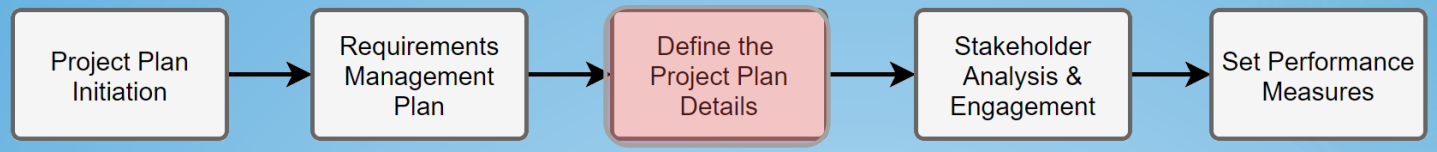
Break Down the Project

Solo:

- Determine division type (phases or components)
- Determine model (chart, mind map, outline)
- Self reflect

Project Team:

- Brainstorming session
- Workshop session



Break Down the Project

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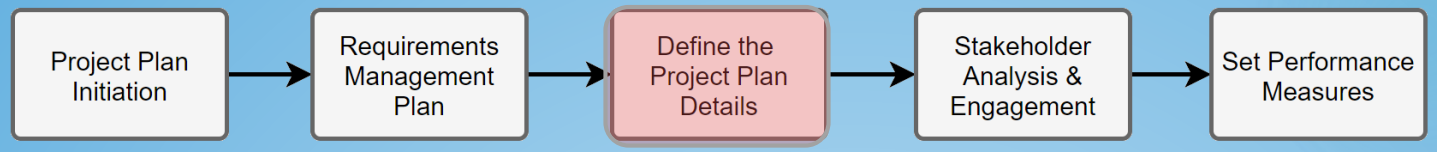
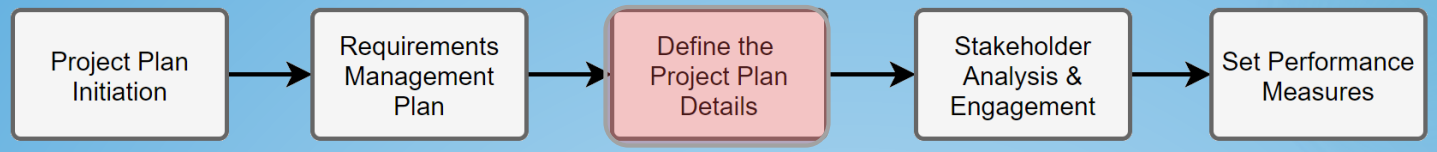
- Workshop session ← *Recommended*



Break Down the Project

- Adaptive
  - Story Map setup
  - Product Backlog setup
- Predictive
  - Work Breakdown Structure (WBS)

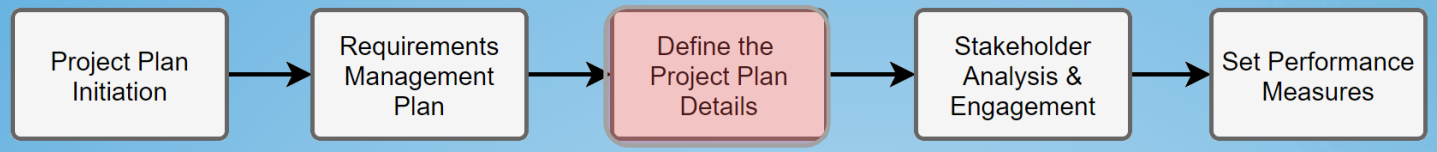


Break Down the Project

User story

- Concise description of a feature
- Told from user or customer perspective

As a <type of user>, I want <some goal>
so that <some reason>

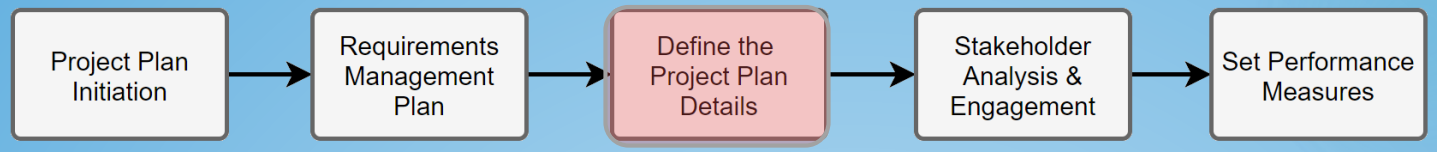


Break Down the Project

As a student, I want the ability to send and receive private messages so I can interact with the instructor directly.

As an instructor, I want to see each student's progress in the course so I can encourage and motivate to course completion.

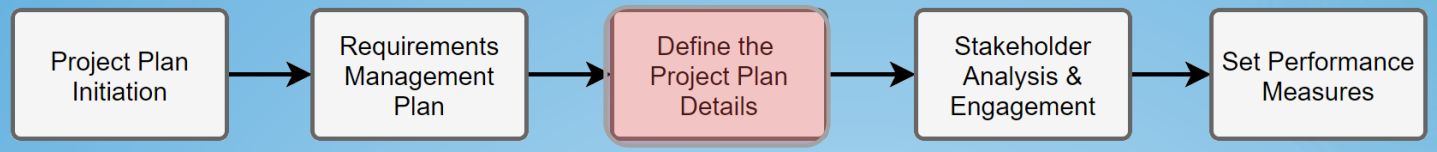
As an employee, I want to have my check direct deposited into my bank account so I don't have to keep track of a paper check.



Break Down the Project

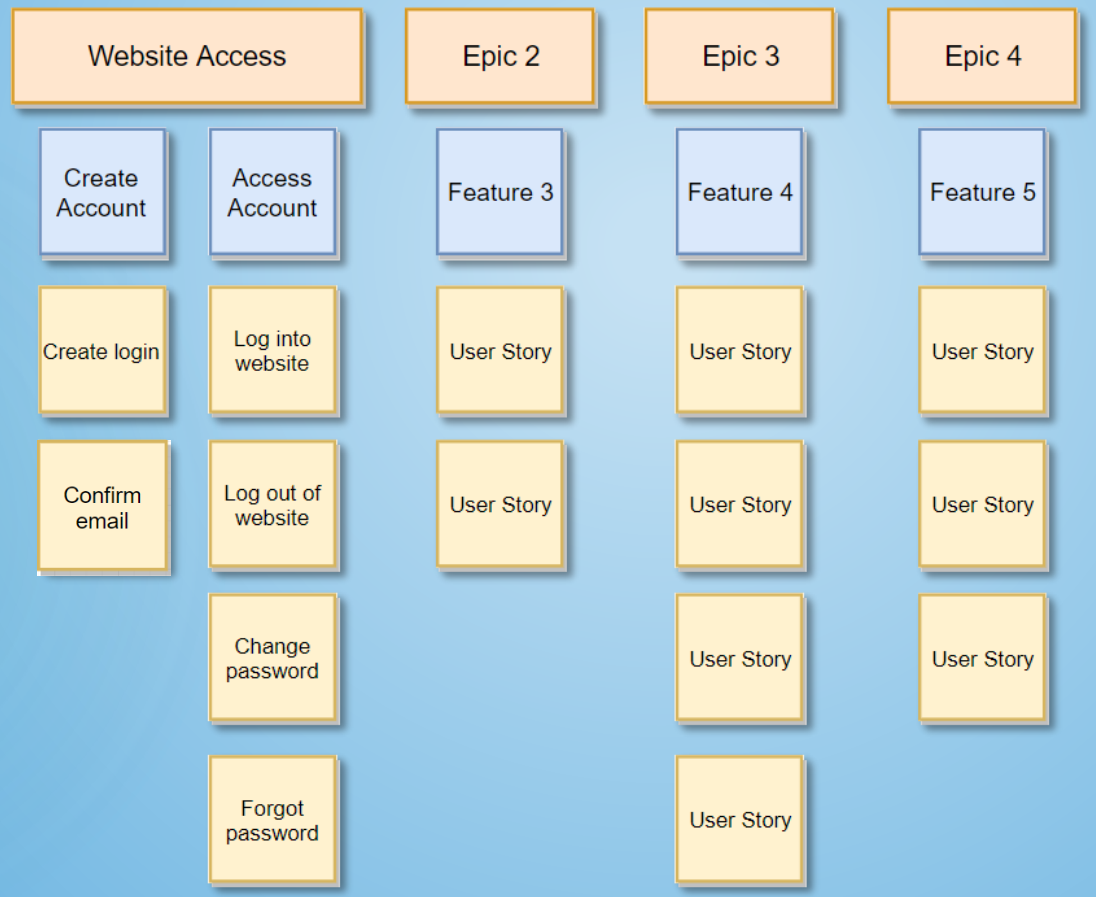
User stories can be:

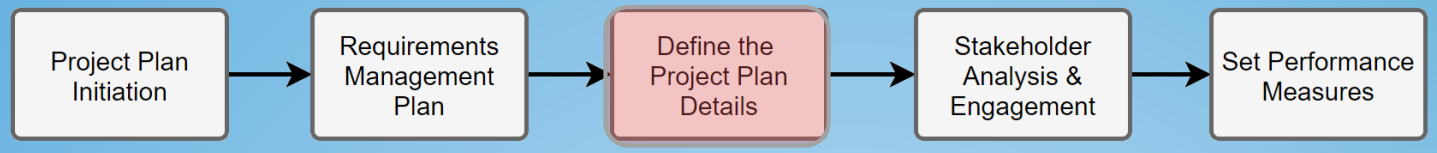
- Features
- Bugs
- Technical work
- Knowledge acquisition



Break Down the Project

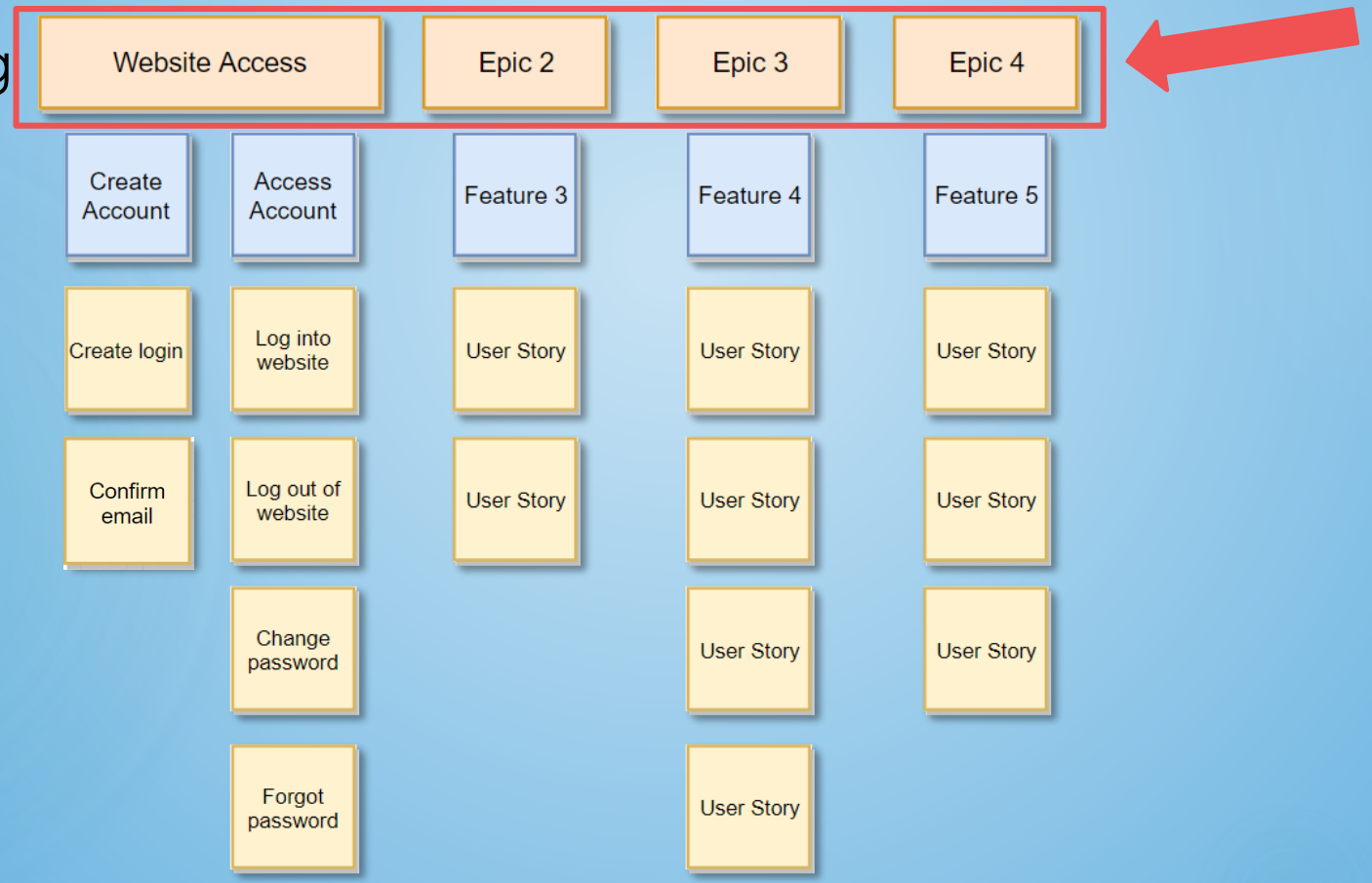
Story Mapping

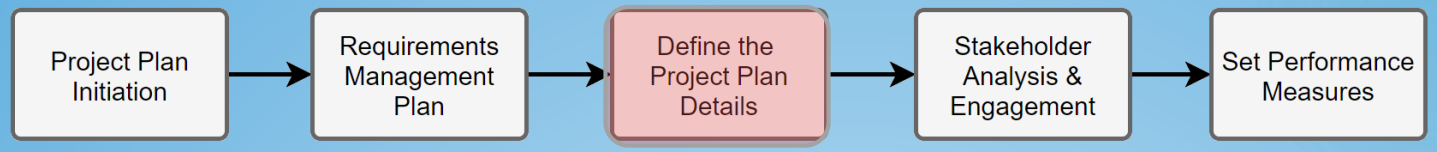




Break Down the Project

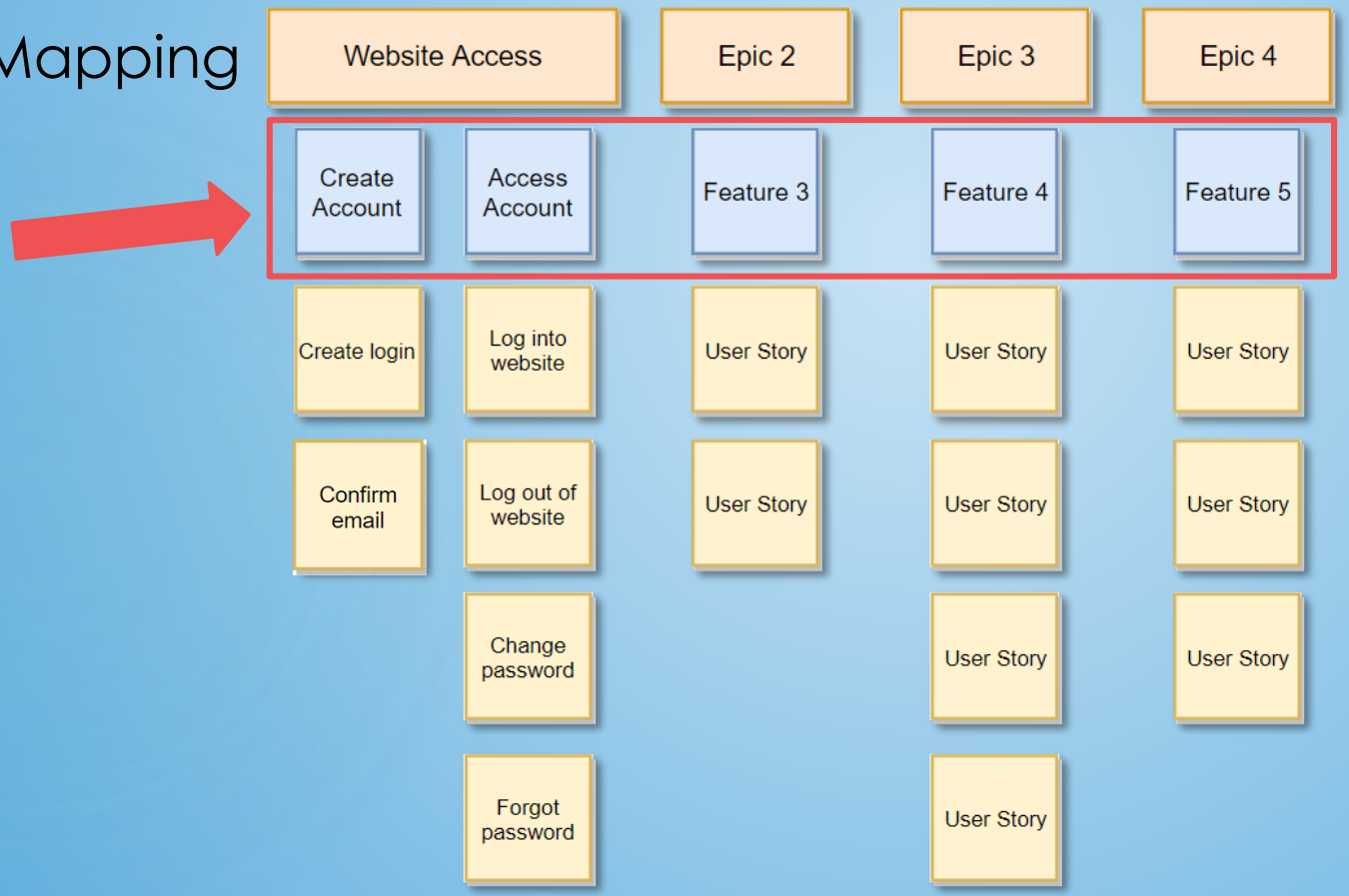
Story Mapping





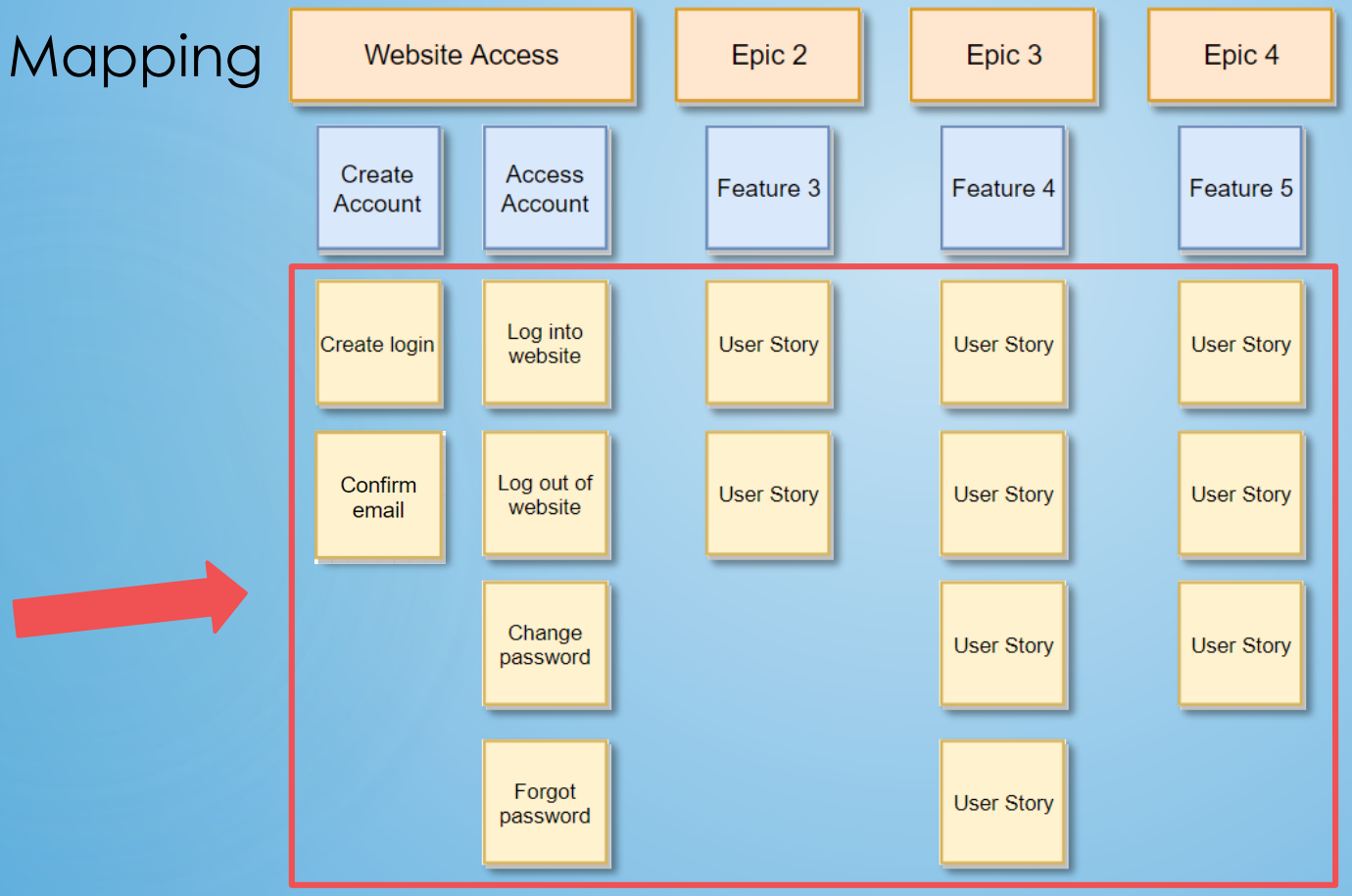
Break Down the Project

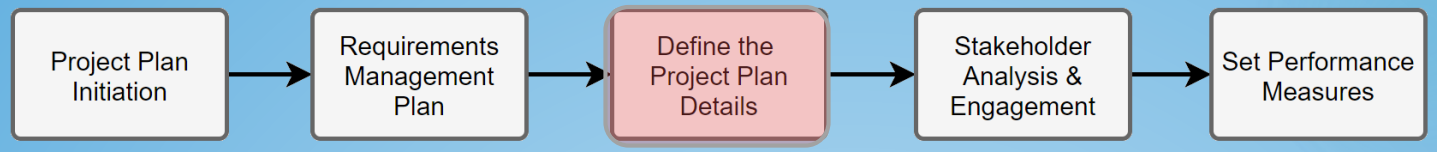
Story Mapping



Break Down the Project

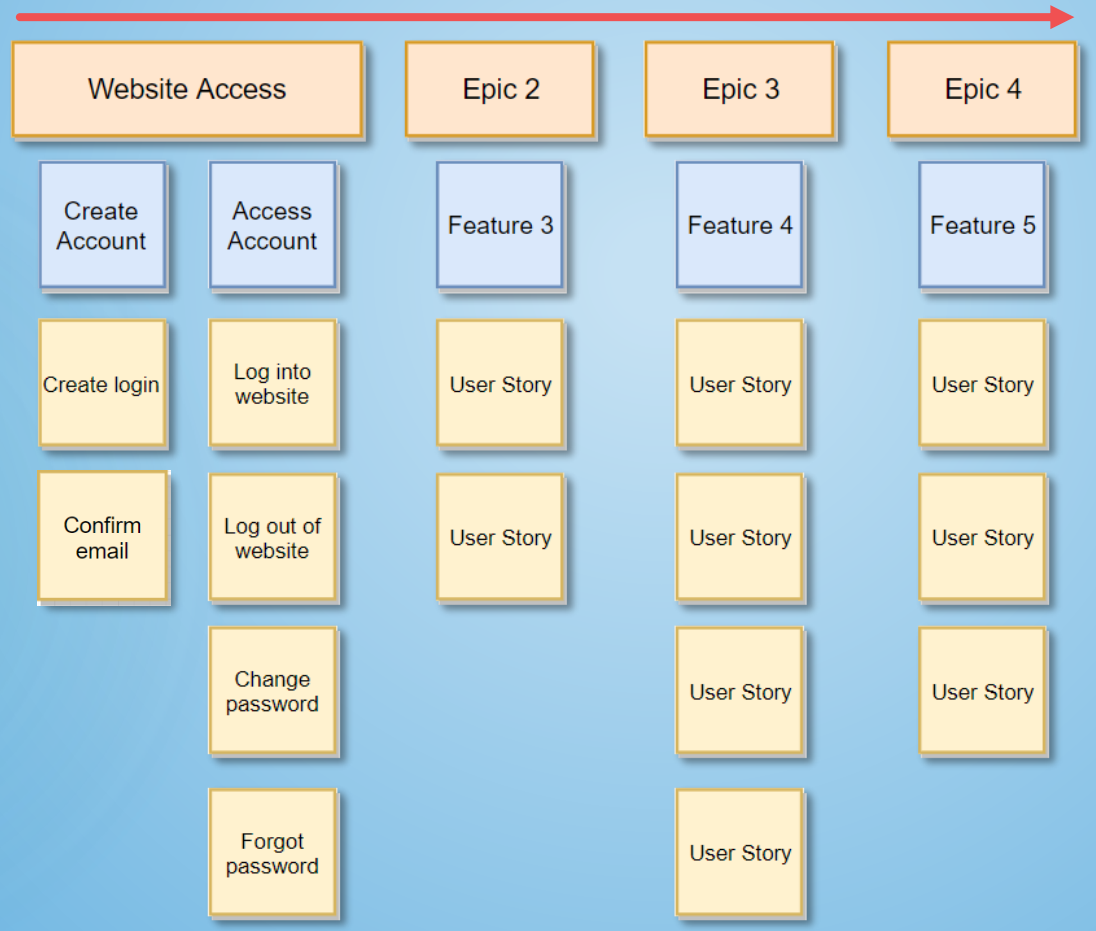
Story Mapping

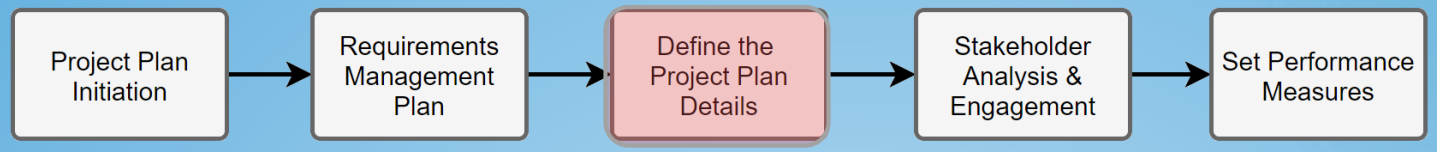




Break Down the Project

Story Mapping



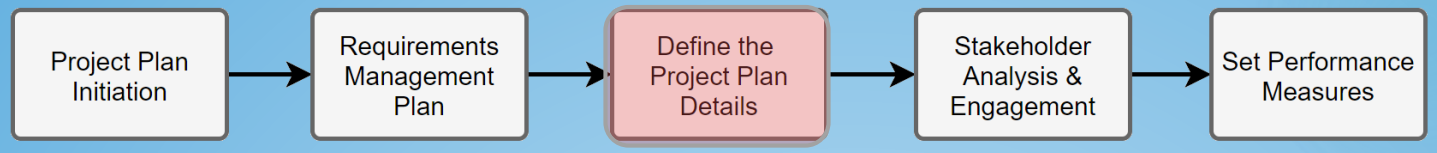


Break Down the Project

Product Backlog

- Holds user stories
- Changed and updated as needed
- Prioritized by importance

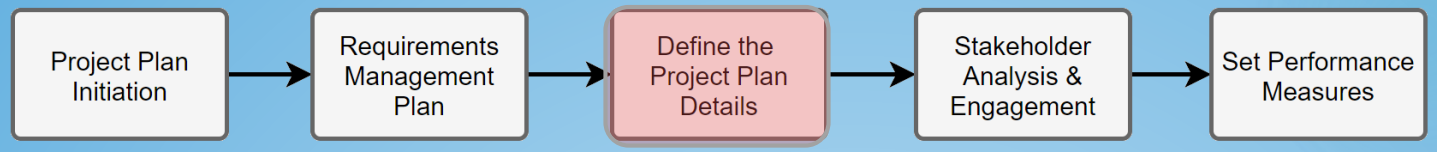
ID	Description	Priority
4	User story D	1
8	User story H	2
2	User story B	3
5	User story E	4
3	User story C	5
1	User story A	6
7	User story G	7
6	User story F	8



Break Down the Project

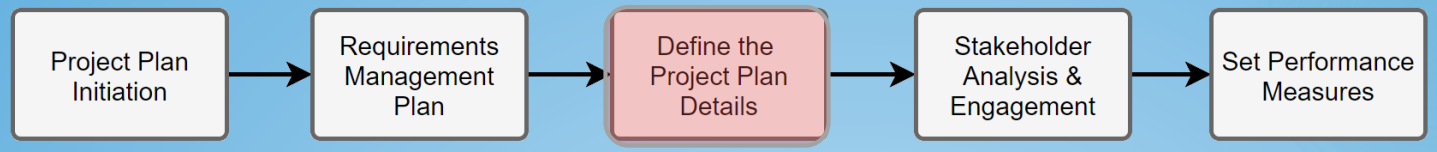
Product Backlog setup

- Initial fill of user stories
- Product team + Product Owner
- Write down everything you can think of
- Prioritize most important stories



Break Down the Project

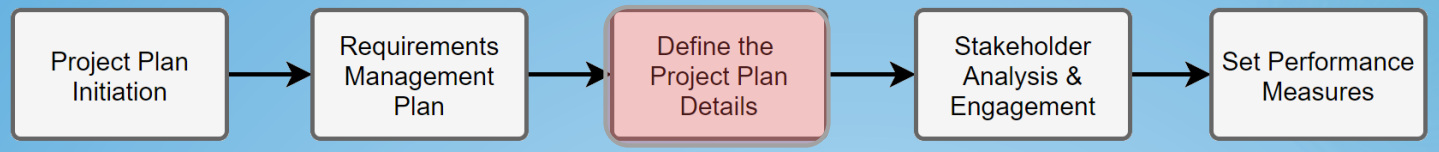
- Adaptive
  - Story Map setup
  - Product Backlog setup
- Predictive
  - Work Breakdown Structure (WBS)



Break Down the Project

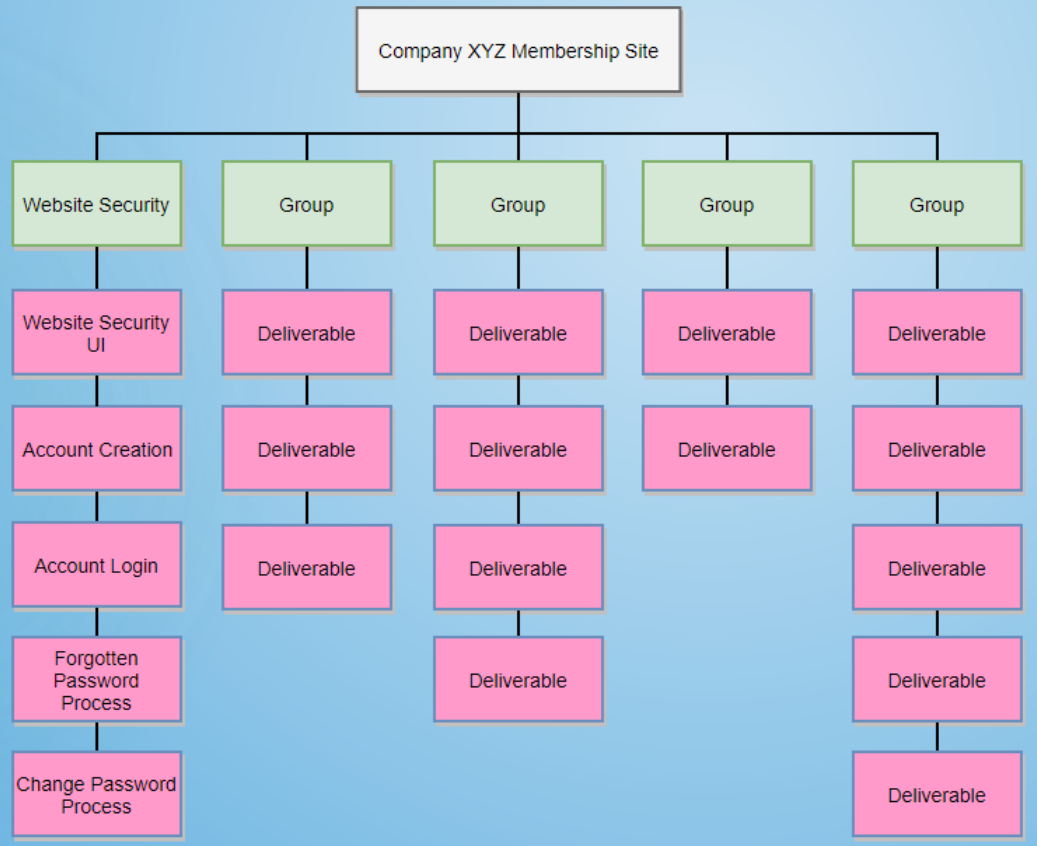
Work Breakdown Structure (WBS)

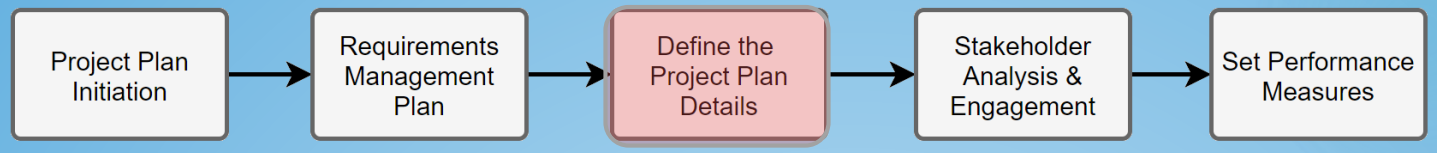
- Deliverable oriented
- Organized into groups



Break Down the Project

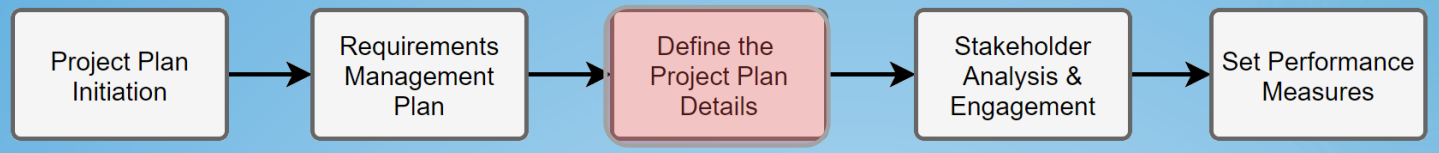
Work Breakdown Structure (WBS)





Set the Project Schedule

- Create a Milestone List
- Estimate Activity Duration
- Create Project Schedule

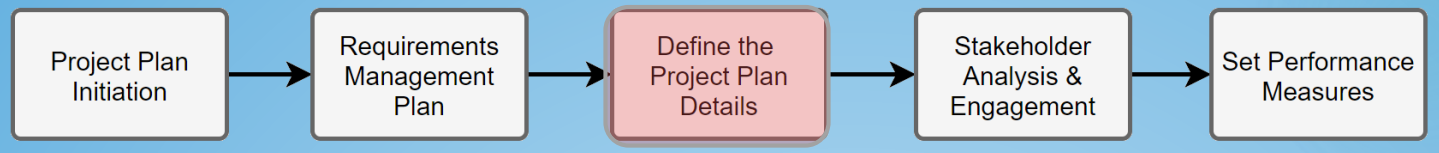


Set the Project Schedule

Create a Milestone List

Milestone = Significant event in the project

- Sets goals
- Monitors progress

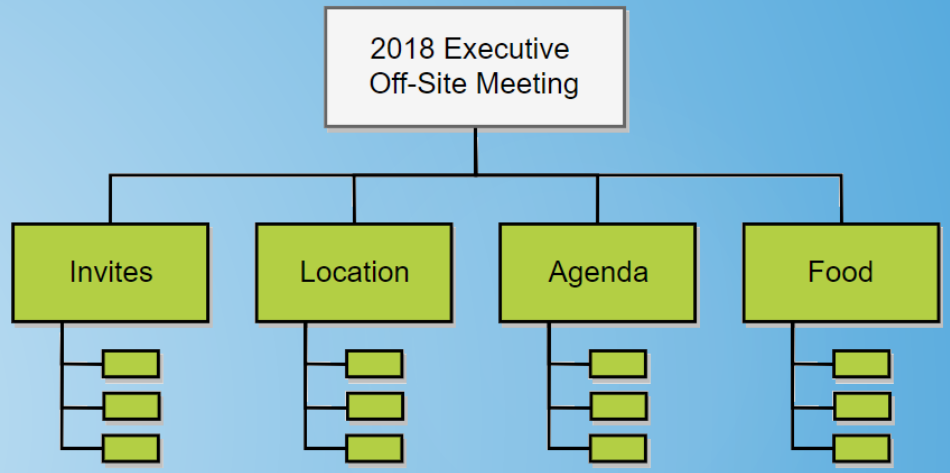


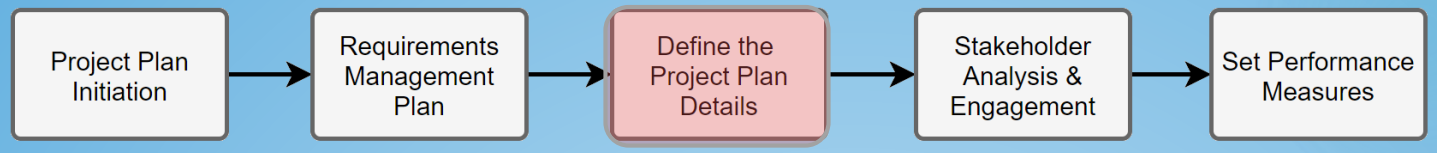
Set the Project Schedule

Create a Milestone List

Examples

- Location identified and booked
- Invitations created and sent
- Caterer identified and booked
- Agenda defined

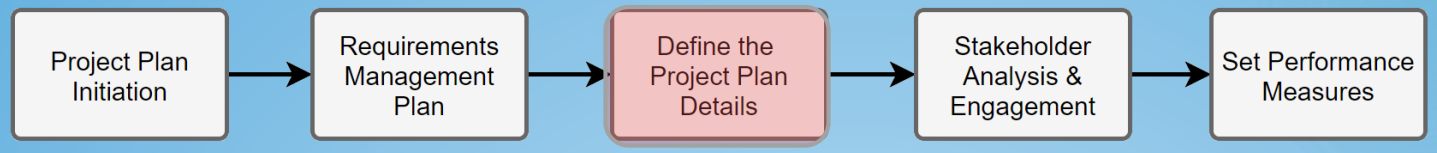




Set the Project Schedule

Create a Milestone List

- Use SMART framework
- Keep small and frequent
- Easy to identify complete or incomplete

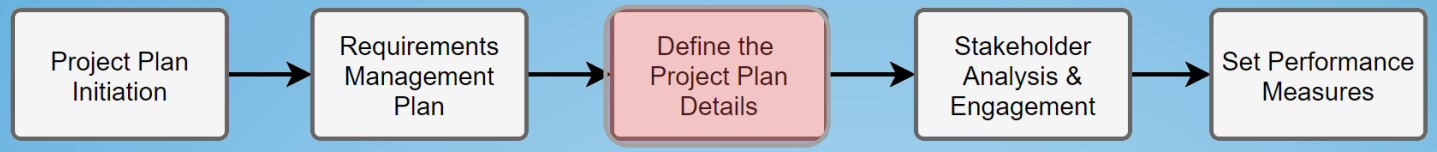


Set the Project Schedule

Estimate Activity Duration

Predicting the effort of activities

- Can be a number, a range, or buckets
- Estimates can and should be updated
- Many different estimating techniques

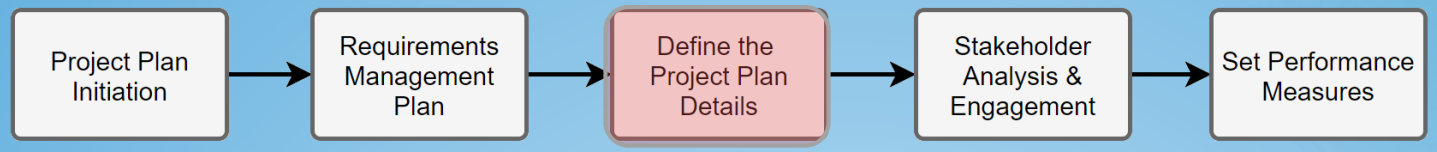


Set the Project Schedule

Estimate Activity Duration

Things to consider:

- Resources/special skills that will be needed
- Duration = elapsed time before task is done
- Duration ≠ how many hours to complete
- Based on complexity, effort, doubt



Set the Project Schedule

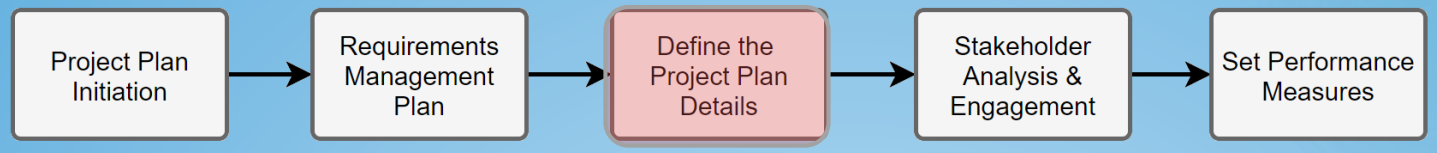
Estimate Activity Duration

Adaptive

- Relative estimate
- Placed into a bucket
- Updates usually cause minor impacts

Predictive

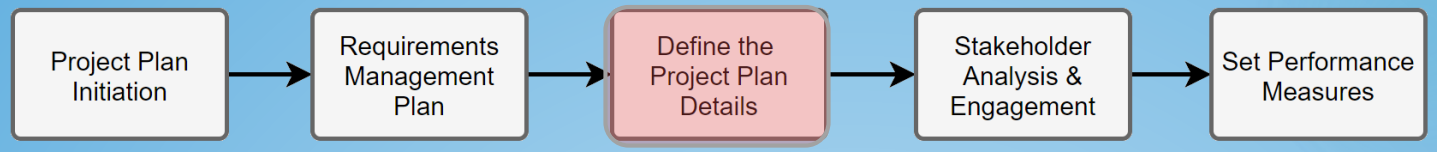
- Absolute estimate
- Measured in days
- Updates usually cause major impacts



Set the Project Schedule

Estimate Activity Duration

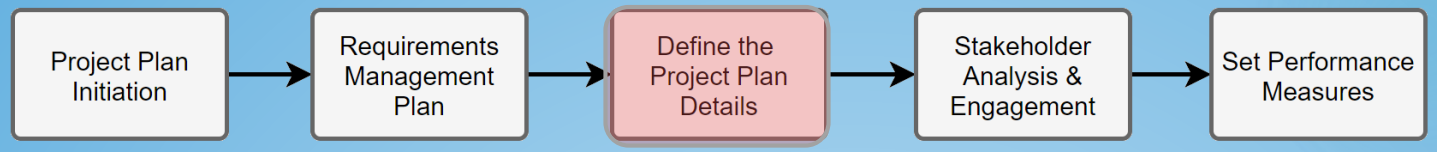
- Adaptive
  - Fibonacci sequence
  - T-Shirt sizes
  - Big/Uncertain/Small (BUS)
- Predictive
  - PERT
  - ROM / SWAG



Set the Project Schedule

Fibonacci Sequence

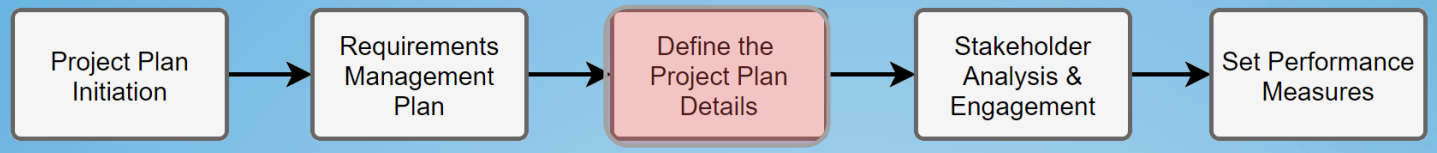
- Abstract value to represent size
  - 1, 2, 3, 5, 8, 13, 21,…
- Each user story is compared to others and assigned "Story Points"
  - Larger stories should be broken up if possible
- Number of points per sprint is the team's velocity



Set the Project Schedule

T-Shirt Sizes

- Categorized into typical t-shirt sizes
  - XS, S, M, L, XL
- Each user story is compared to others and assigned a t-shirt size
  - Larger stories should be broken up if possible

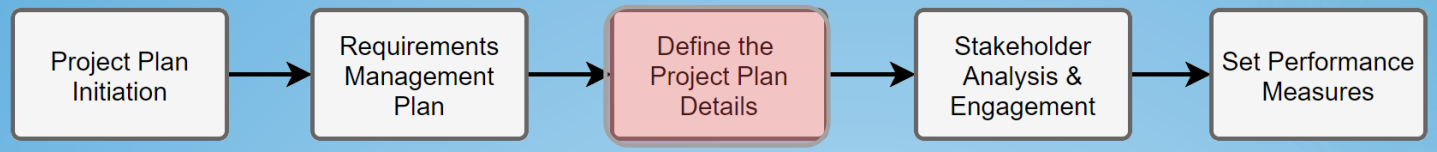


Set the Project Schedule

Big/Uncertain/Small (BUS)

- Categorized into groupings
  - Big, Uncertain, Small
- Each user story is compared to others and assigned to a group
  - 'Big' stories should be broken up if possible
  - 'Uncertain' stories need to be groomed or broken up

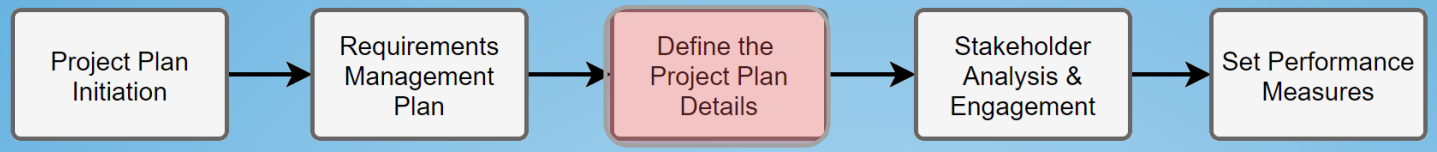
TIP: Also sometimes called TFB/NFC/1



Set the Project Schedule

During your Product Backlog setup

- Determine preferred estimation technique
- Add estimates to your defined user stories
  - At least the top user stories



Set the Project Schedule

Estimate Activity Duration

- Adaptive
  - Fibonacci sequence
  - T-Shirt sizes
  - Big/Uncertain/Small (BUS)
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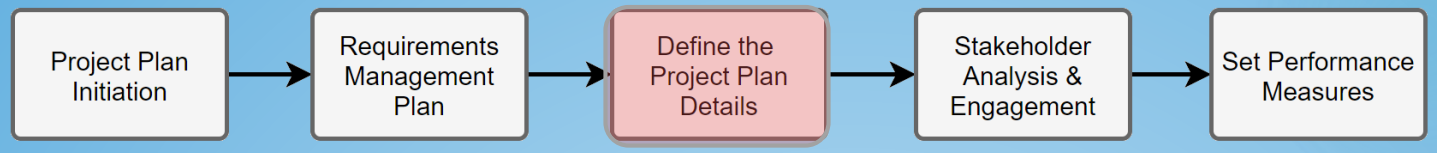
  - PERT
  - ROM / SWAG

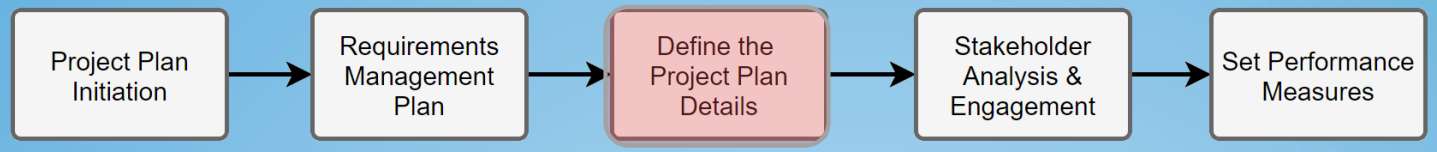


Set the Project Schedule

PERT (Program Evaluation and Review Technique)

- Create three-point estimate
  - Optimistic (best case scenario)
  - Pessimistic (worst case scenario)
  - Most Likely

$$\frac{(\text{Optimistic} + \text{Pessimistic} + (4 \times \text{Most Likely}))}{6}$$



Set the Project Schedule

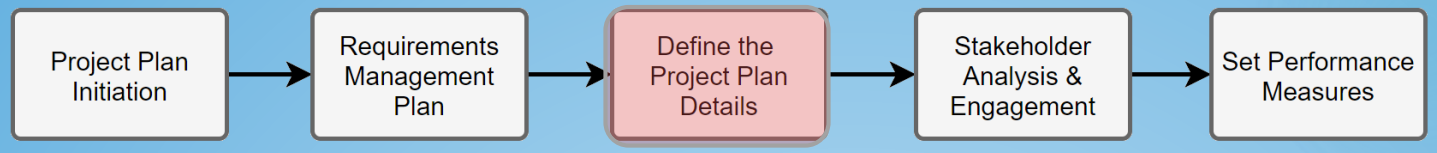
PERT (Program Evaluation and Review Technique)

- Optimistic = 4 days
- Pessimistic = 16 days
- Most Likely = 7 days

$$\frac{(\text{Optimistic} + \text{Pessimistic} + (4 \times \text{Most Likely}))}{6}$$

$$\frac{(4 + 16 + (4 * 7))}{6} = \frac{(4 + 16 + 28)}{6} = \frac{48}{6} = \text{8 days}$$

Estimate usually is +/- 10% of actual



Set the Project Schedule

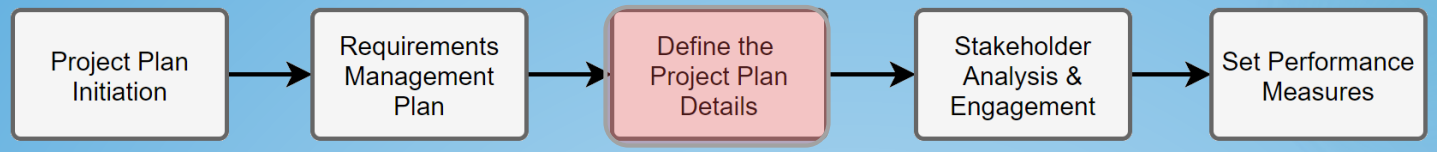
ROM (Rough Order of Magnitude)

- High level estimate
- Not a high level of confidence

"This will take about two weeks"

TIP: Also sometimes called a SWAG estimate

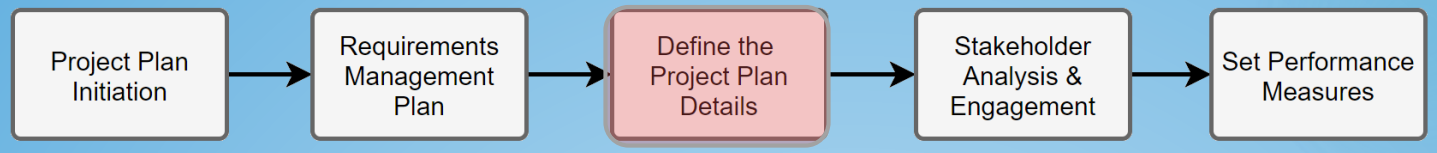
Estimate usually is +/- 50% of actual



Set the Project Schedule

During your workshop session

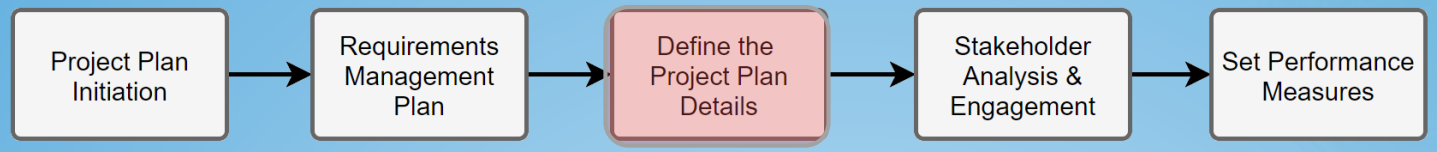
- Determine preferred estimation technique
- Add duration estimate to each piece of the project
- Identify project dependencies



Set the Project Schedule

Dependency

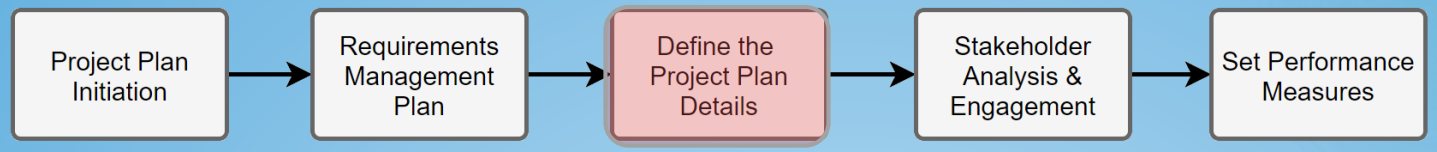
- Activity depends on another being done?
- Can they be done in parallel?
- Can they overlap?



Set the Project Schedule

Dependency

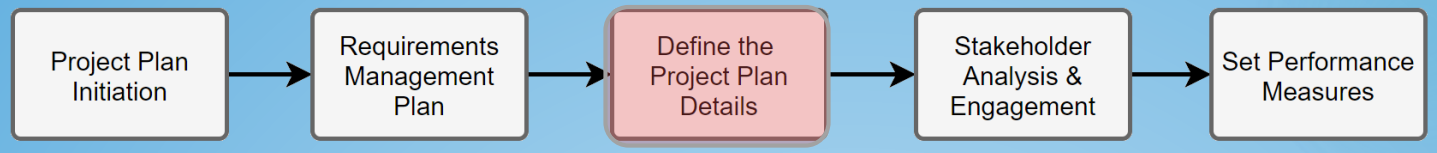
- Mandatory dependencies
- Discretionary dependencies
- External dependencies



Set the Project Schedule

Create a Project Schedule

- Defines project start and projected end dates
- Lays out the project milestone dates
- Aligns expectations of project stakeholders



Set the Project Schedule

Create a Project Schedule

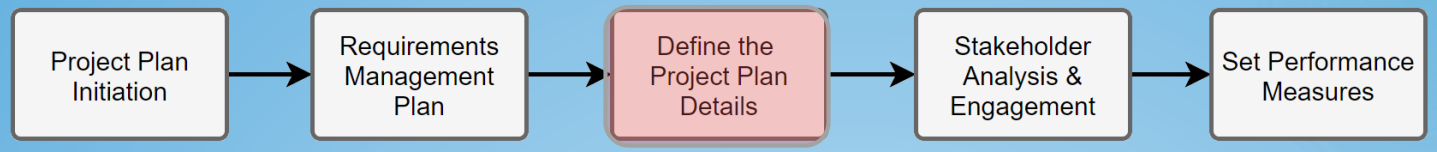
Adaptive vs Predictive

Adaptive

- Schedule based on sprint duration

Predictive

- Schedule based on activity duration



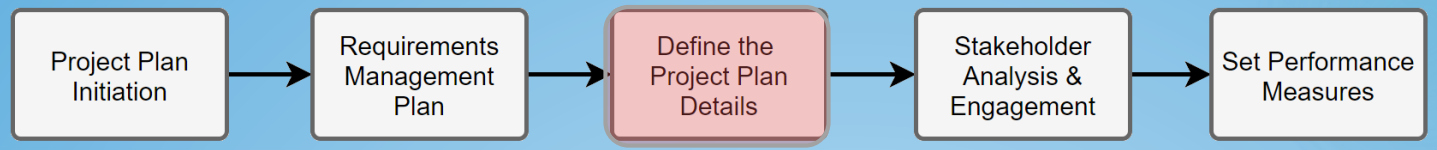
Set the Project Schedule

Create a Project Schedule: Adaptive

Project Sprint Schedule

This document is to be used to lay out the anticipated schedule for the project.

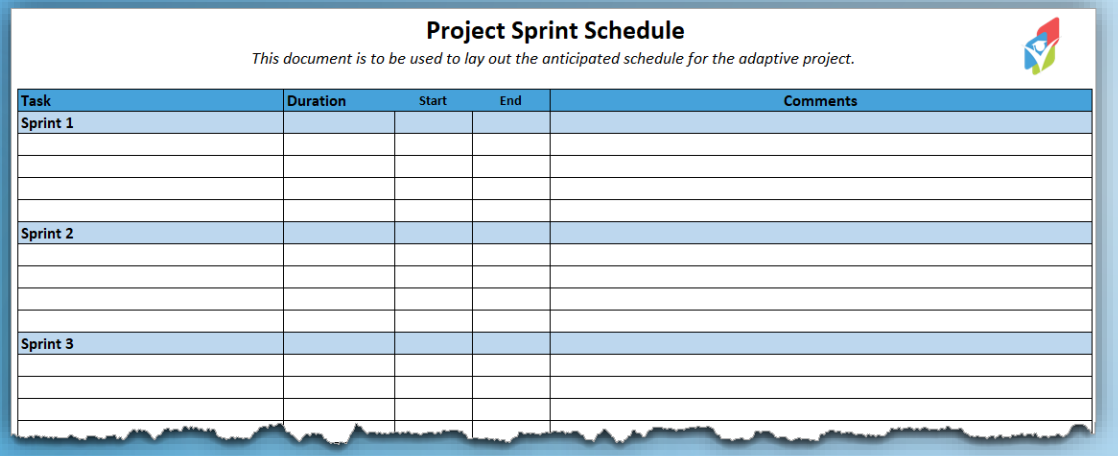
Task	Duration	Start	End	Comments
Sprint 1	**14 days**	1-Aug	14-Aug	
Sprint 1 Planning	1 day	1-Aug	1-Aug	User story commitment and task creation
Sprint 1 Development	12 days	2-Aug	13-Aug	Features created, tested, and demonstrated
Sprint 1 Feature Review	1 day	14-Aug	14-Aug	Features reviewed
Sprint 2	**14 days**	15-Aug	28-Aug	
Sprint 2 Planning and Retrospective	1 day	15-Aug	15-Aug	User story commitment, task creation, and previous sprint retrospective
Sprint 2 Development	12 days	16-Aug	27-Aug	Features created, tested, and demonstrated
Sprint 2 Feature Review	1 day	28-Aug	28-Aug	Features reviewed
Sprint 3	**14 days**	29-Aug	11-Sep	
Sprint 3 Planning and Retrospective	1 day	29-Aug	29-Aug	User story commitment, task creation, and previous sprint retrospective
Sprint 3 Development	11 days	30-Aug	9-Sep	Features created, tested, and demonstrated
Sprint 3 Feature Review	1 day	10-Sep	10-Sep	Features reviewed
Sprint 1-3 Release	1 day	11-Sep	11-Sep	Release of completed deliverables
Sprint 4	**14 days**	12-Sep	25-Sep	
Sprint 3 Planning and Retrospective	1 day	12-Sep	12-Sep	User story commitment, task creation, and previous sprint retrospective
Sprint 4 Development	12 days	13-Sep	24-Sep	Features created, tested, and demonstrated
Sprint 4 Feature Review	1 day	25-Sep	25-Sep	Features reviewed
Sprint 5	**14 days**	26-Sep	9-Oct	
Sprint 5 Planning and Retrospective	1 day	26-Sep	26-Sep	User story commitment, task creation, and previous sprint retrospective
Sprint 5 Development	12 days	27-Sep	8-Oct	Features created, tested, and demonstrated
Sprint 5 Feature Review	1 day	9-Oct	9-Oct	Features reviewed
Sprint 6	**14 days**	10-Oct	23-Oct	
Sprint 6 Planning and Retrospective	1 day	10-Oct	10-Oct	User story commitment, task creation, and previous sprint retrospective
Sprint 6 Development	11 days	11-Oct	21-Oct	Features created, tested, and demonstrated
Sprint 6 Feature Review	1 day	22-Oct	22-Oct	Features reviewed
Sprint 4-6 Release	1 day	23-Oct	23-Oct	Release of completed deliverables
Sprint 7	**14 days**	24-Oct	6-Nov	
Project Documentation	12 days	24-Oct	4-Nov	Create user manuals, support documentation, and necessary technical specs
Project Retrospective	2 days	5-Nov	6-Nov	Final review of the project and determines any necessary next steps



Weeks	Aug 01, 2018	Aug 08, 2018	Aug 15, 2018	Aug 22, 2018	Aug 29, 2018	Sep 05, 2018	Sep 12, 2018	Sep 19, 2018	Sep 26, 2018	Oct 03, 2018	Oct 10, 2018	Oct 17, 2018	Oct 24, 2018	Oct 31, 2018	
Activity	Sprint 1		Sprint 2		Sprint 3		Sprint 4		Sprint 5		Sprint 6		Sprint 7		
Project Start **Aug 1, 2018**					Release Sep 11, 2018						Release Oct 23, 2018				**Project End** **Nov 6, 2018**

Set the Project Schedule

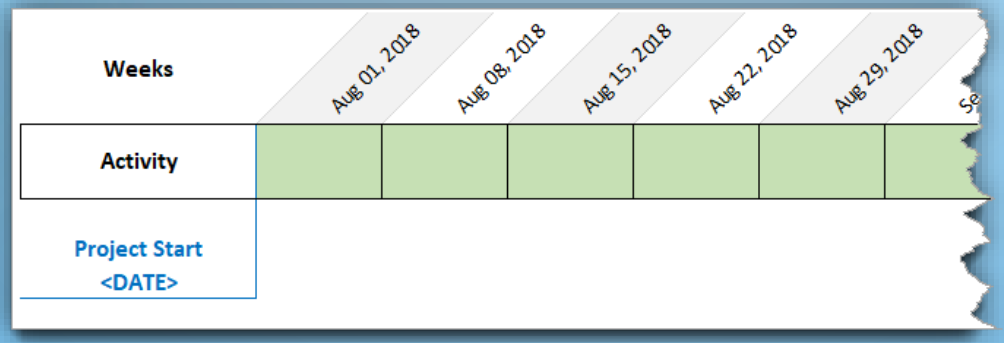
Adaptive Project Schedule Template



Project Sprint Schedule

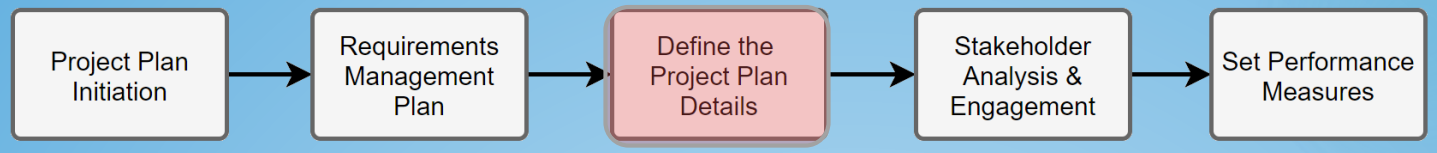
This document is to be used to lay out the anticipated schedule for the adaptive project.

Task	Duration	Start	End	Comments
Sprint 1				
Sprint 2				
Sprint 3				



Weeks	Aug 01, 2018	Aug 08, 2018	Aug 15, 2018	Aug 22, 2018	Aug 29, 2018	Se
Activity						

Project Start
<DATE>



Set the Project Schedule

Create a Project Schedule

Adaptive vs Predictive

Adaptive

- Schedule based on sprint duration

Predictive

- Schedule based on activity duration

Sample Project

Company XYZ

Jeremy Aschenbrenner

Project Start: Wed, 8/1/2018

Display Week: 1

TASK	ASSIGNED TO	EST DURATION	PROGRESS	START	END
Project Planning					
Requirements Management Plan	Name	2	0%	8/1/18	8/3/18
Define Project Details	Name	4	0%	8/6/18	8/9/18
Stakeholder Analysis	Name	2	0%	8/10/18	8/13/18
Set Performance Measures	Name	1	0%	8/10/18	8/10/18
Finalize Plan	Name	1	0%	8/14/18	8/14/18
Project Design					
Task 1	Name	2	0%	8/16/18	8/17/18
Task 2	Name	5	0%	8/20/18	8/24/18
Task 3	Name	1	0%	8/24/18	8/24/18
Task 4	Name	3	0%	8/24/18	8/28/18
Task 5	Name	4	0%	8/29/18	9/3/18
Solution Creation					
Task 1	Name	10	0%	9/5/18	9/18/18
Task 2	Name	8	0%	9/19/18	9/28/18
Task 3	Name	12	0%	9/19/18	10/4/18
Task 4	Name	14	0%	10/1/18	10/18/18
Nam					/18

Project Plan Initiation → Requirements Management Plan → **Define the Project Plan Details** → Stakeholder Analysis & Engagement → Set Performance Measures

Project Title

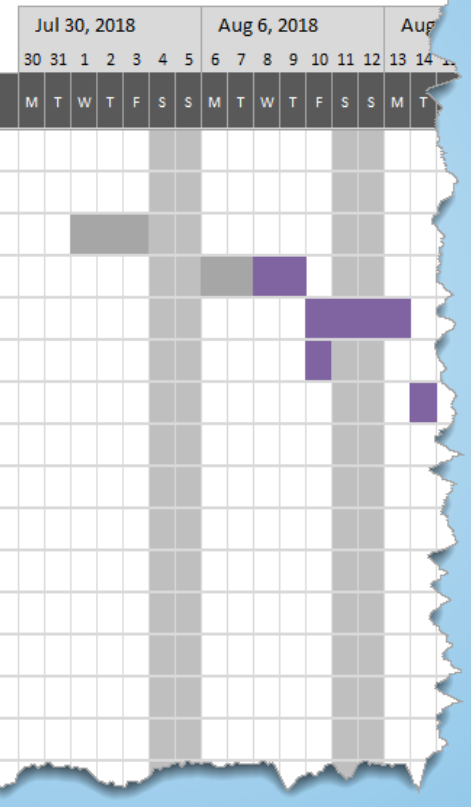
Company Name

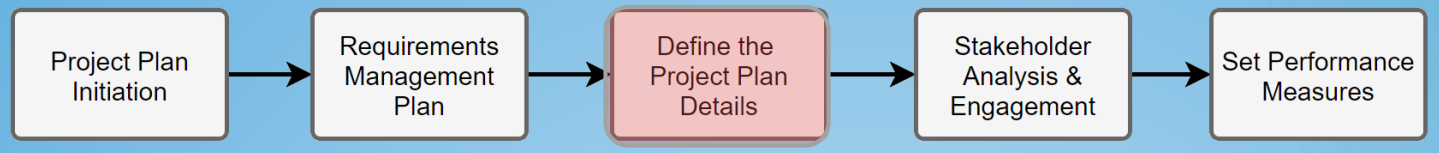
Project Lead

Project Start: Wed, 8/1/2018

Display Week: 1

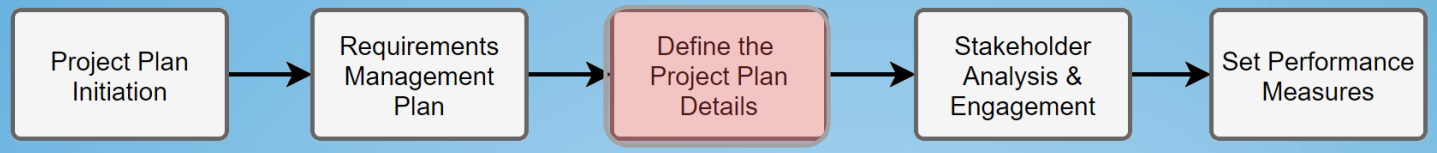
TASK	ASSIGNED TO	EST DURATION	PROGRESS	START	END
Project Planning					
Task 1	Name	2	100%	8/1/18	8/3/18
Task 2	Name	4	50%	8/6/18	8/9/18
Task 3	Name	2	0%	8/10/18	8/13/18
Task 4	Name	1	0%	8/10/18	8/10/18
Task 5	Name	1	0%	8/14/18	8/14/18
Project Design					
Task 1			0%		
Task 2			0%		
Task 3			0%		
Task 4			0%		
Task 5			0%		
Solution Creation					
Task 1			0%		





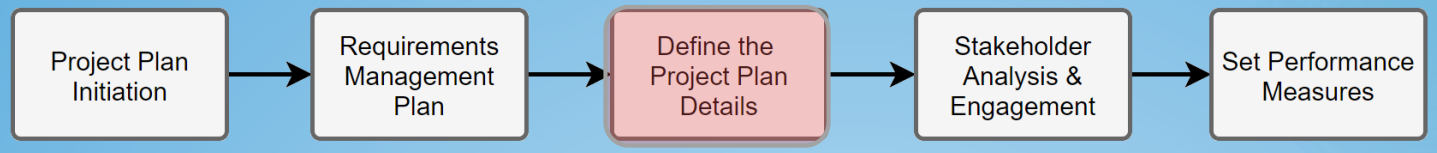
Define a Quality Plan

Outline the quality requirements, standards, and quality assurance mechanisms for a project



Define a Quality Plan

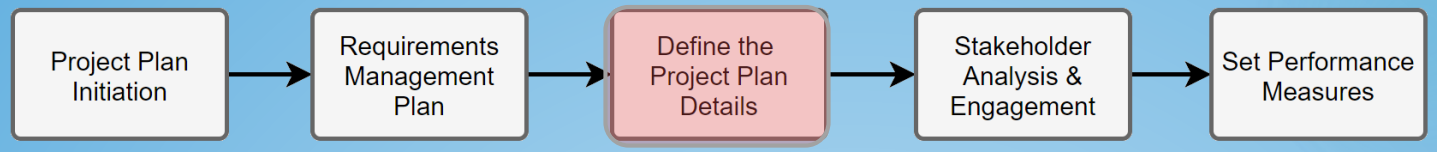
- Testing and Quality Assurance
- Defect Management
- Training Requirements



Define a Quality Plan

Testing and Quality Assurance

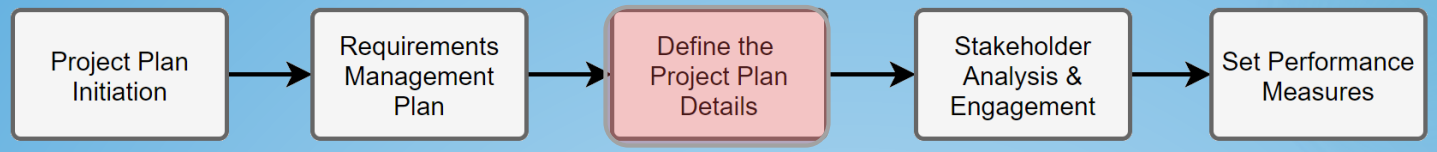
- Define who is responsible for testing
- Identify quality objectives for the solution
- Determine quality approach



Define a Quality Plan

Defect Management

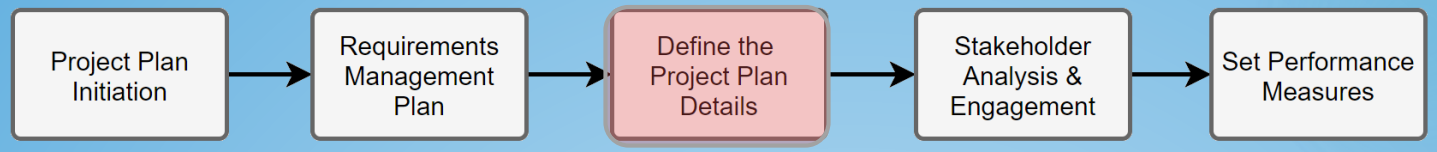
- Guidelines for what is considered a defect
- Details on where to document
- Define how reported issues will be managed



Define a Quality Plan

Training Requirements

- Identify project team skill gaps to create the solution
- Understand user training needs to utilize the solution
- Define steps to get the users trained



Define a Quality Plan

Training Requirements

- Identify project team skill gaps to create the solution
- Understand user training needs to utilize the solution
- Define steps to get the users trained

Define a Quality Plan

Quality Plan

This document is to be used to outline the quality requirements, standards, and quality assurance mechanisms for the project

[Project Name]

Created By: _____ **Date:** _____

TESTING AND QUALITY ASSURANCE

Responsible for Testing:

Details

Quality Objectives:

- Objective 1
- Objective 2
- Objective 3

Quality Approach Description:

Details

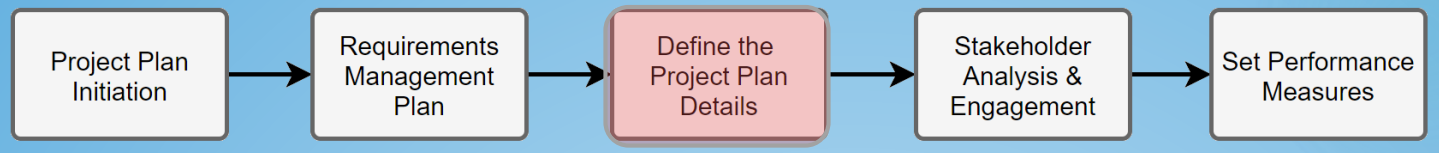
DEFECT MANAGEMENT

Defect / Issue Description:

Describe what a defect is for this project

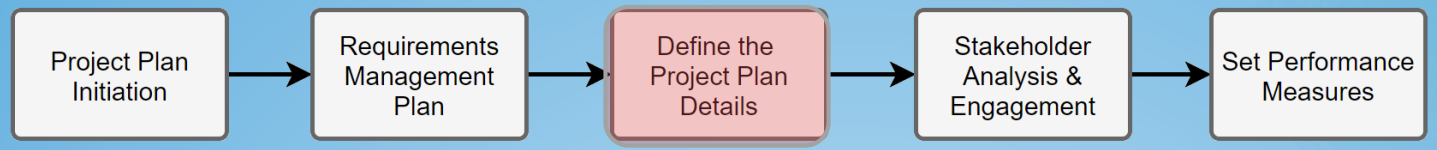
Defect Documentation Location:

Details



Release Planning

Formulate a plan to begin using project deliverables in a production environment.

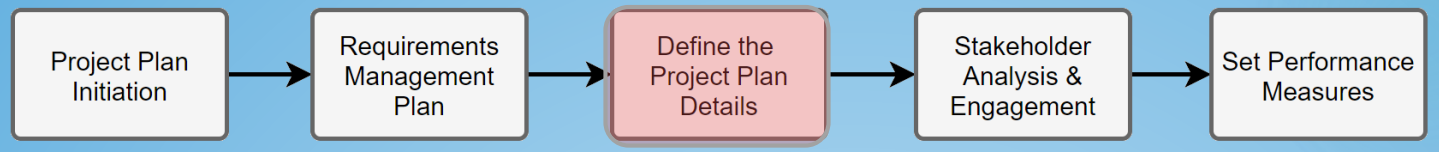


Release Planning

Adaptive

Weeks	Aug 01, 2018	Aug 08, 2018	Aug 15, 2018	Aug 22, 2018	Aug 29, 2018	Sep 05, 2018	Sep 12, 2018	Sep 19, 2018	Sep 26, 2018	Oct 03, 2018	Oct 10, 2018	Oct 17, 2018	Oct 24, 2018	Oct 31, 2018	
Activity	Sprint 1		Sprint 2		Sprint 3		Sprint 4		Sprint 5		Sprint 6		Sprint 7		
Project Start Aug 1, 2018					Release Sep 11, 2018						Release Oct 23, 2018				**Project End Nov 6, 2018**

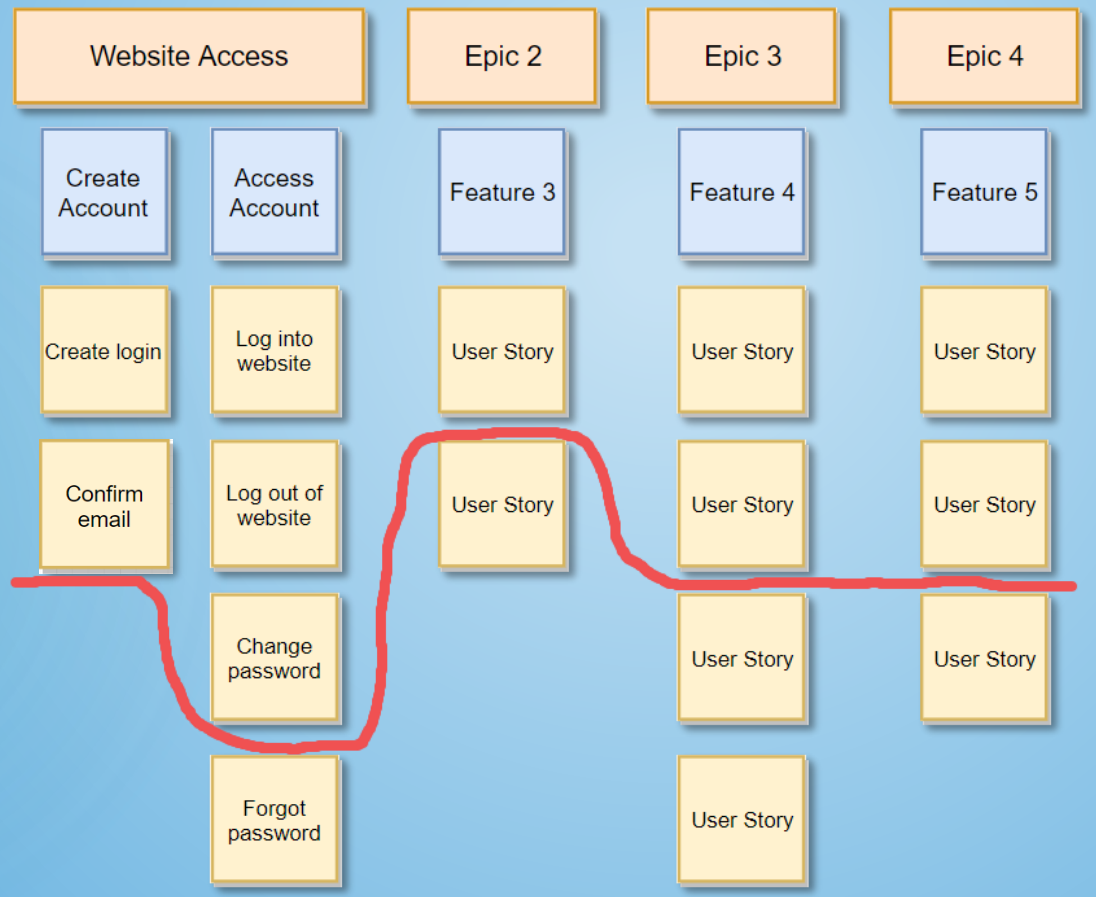
- How often will we release?
- What will be included in the next release?

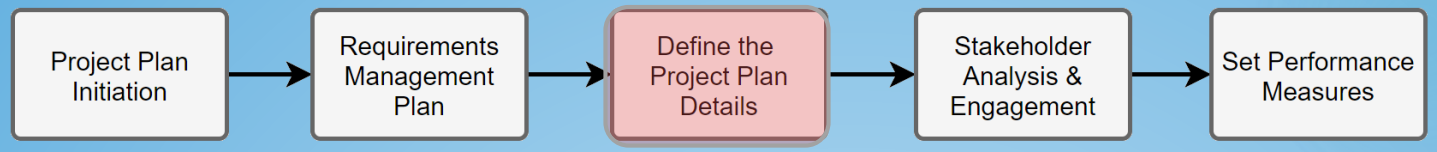


Release Planning

Story Mapping

Release #1



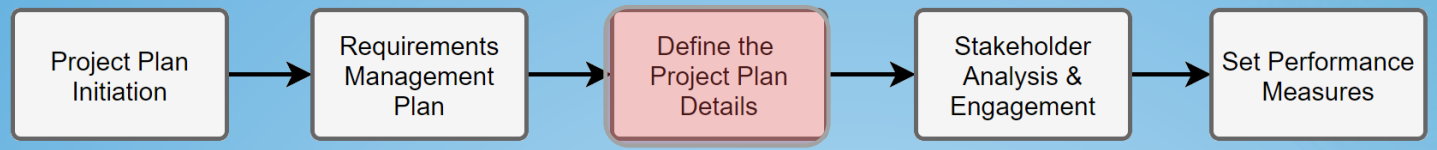


Release Planning

Adaptive

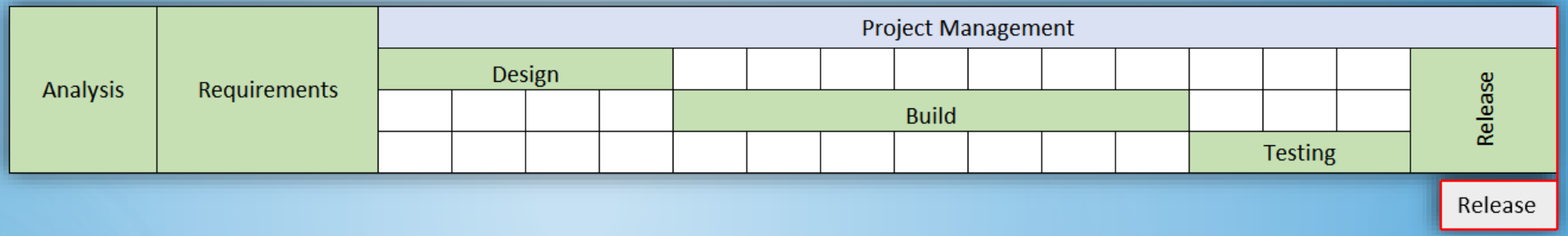
Weeks	Aug 01, 2018	Aug 08, 2018	Aug 15, 2018	Aug 22, 2018	Aug 29, 2018	Sep 05, 2018	Sep 12, 2018	Sep 19, 2018	Sep 26, 2018	Oct 03, 2018	Oct 10, 2018	Oct 17, 2018	Oct 24, 2018	Oct 31, 2018	
Activity	Sprint 1		Sprint 2		Sprint 3		Sprint 4		Sprint 5		Sprint 6		Sprint 7		
Project Start Aug 1, 2018					Release Sep 11, 2018						Release Oct 23, 2018				Project End Nov 6, 2018

- Done for each release
- Determine and engage resources needed for the release



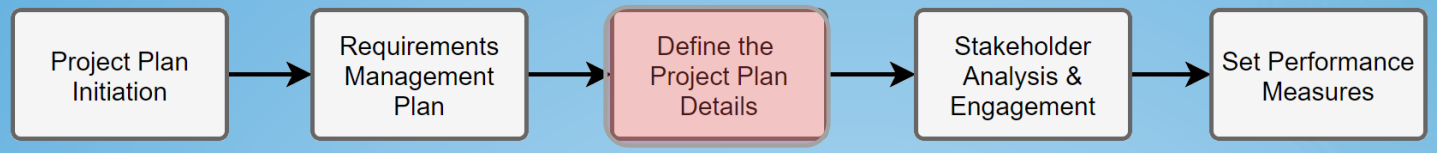
Release Planning

Predictive



Plan how…

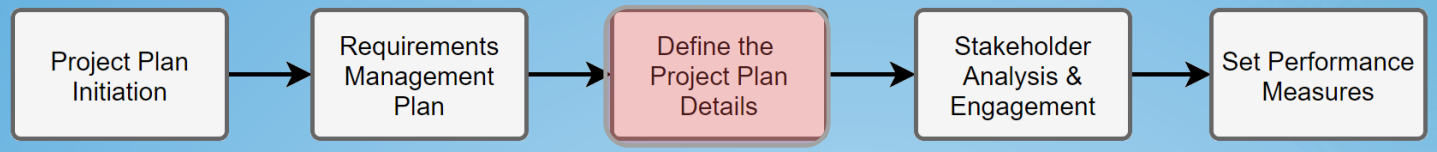
1. The solution will be rolled out to users
2. The users will be supported during the release window
3. The solution will be turned over to support



Release Planning

Predictive: Solution rollout

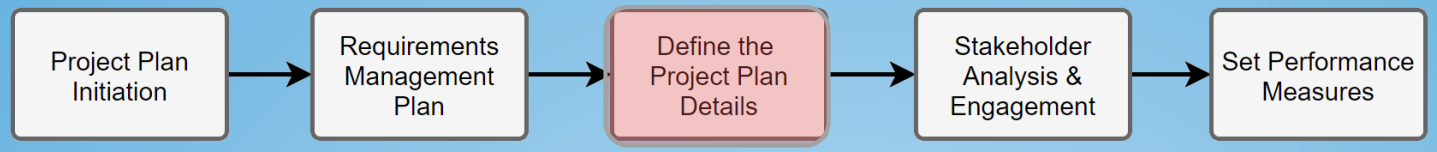
- All at once - All users utilize the full solution on day 1
- Phased - All users utilize pieces of the solution in staggered phases
- Pilot - A subset of users use the full solution on day 1, while other users use the full solution at a future date



Release Planning

Predictive: Support at release

- **Release resources** – Identify resources available to support the release
- **Reference materials** – Documentation users can reference for self-support during release
- **Issue reporting** – Determine process for reporting or alerting to any defects or issues
- **Meet with users** – Schedule reoccurring meeting to discuss any issues found and answer questions



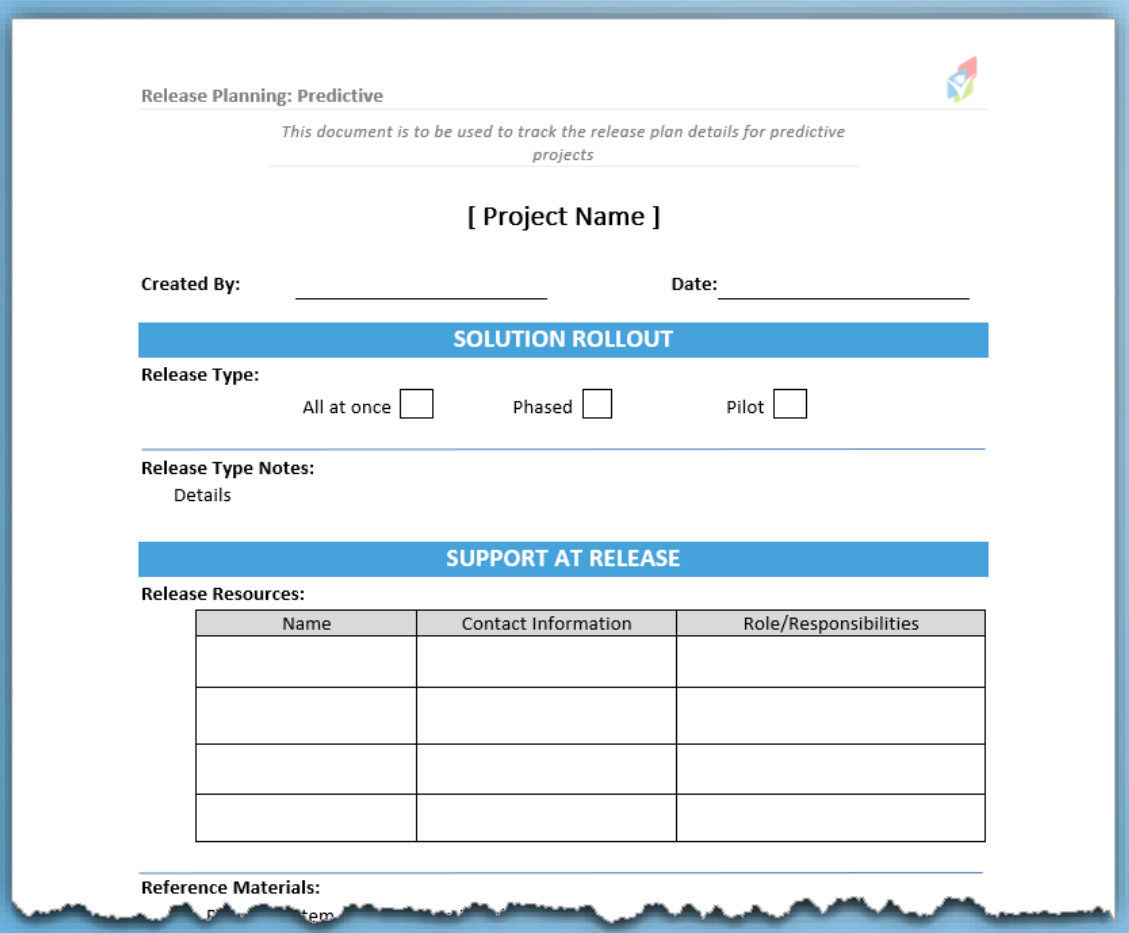
Release Planning

Predictive: Turn over to support

- **Identify support** – Determine who will be supporting the solution after the release window
- **Documentation** – Plan documentation that will need to be turned over to support (procedure manual, design documentation, troubleshooting common issues, etc.)
- **Escalation contacts** – Determine who will be the escalation contact should support be unable to resolve a critical issue

Release Planning

Predictive



Release Planning: Predictive

This document is to be used to track the release plan details for predictive projects

[Project Name]

Created By: _____ **Date:** _____

SOLUTION ROLLOUT

Release Type:

All at once ☐ Phased ☐ Pilot ☐

Release Type Notes:

Details

SUPPORT AT RELEASE

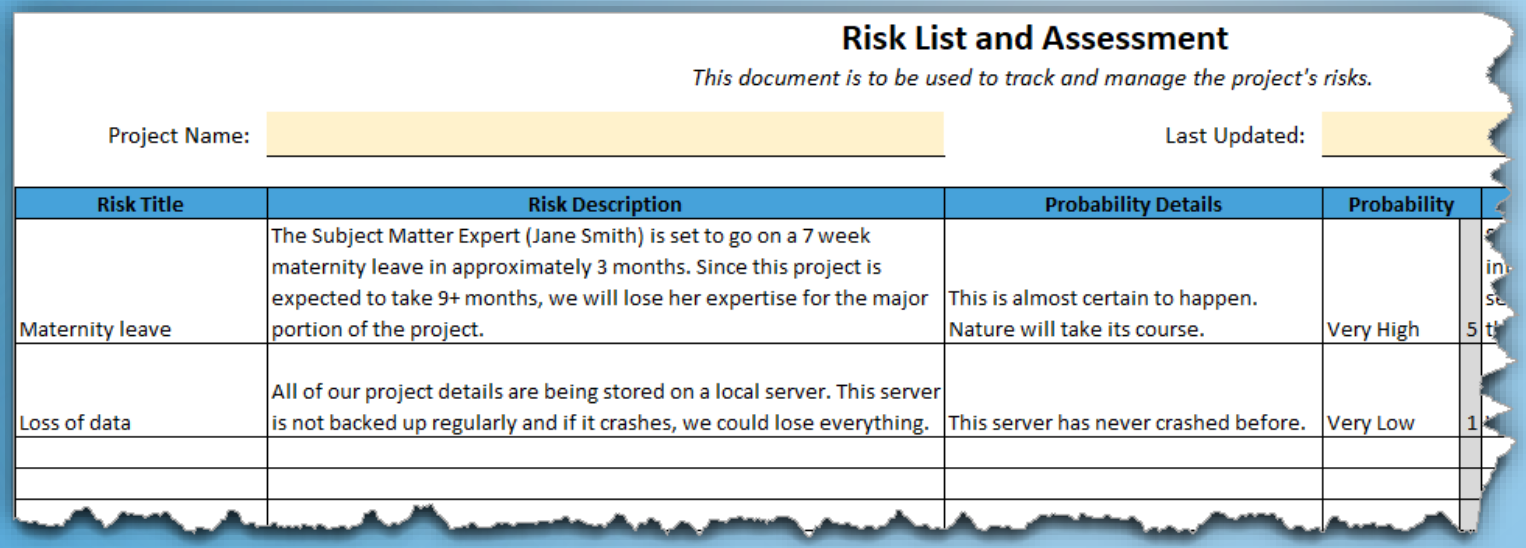
Release Resources:

Name	Contact Information	Role/Responsibilities

Reference Materials:

Update Project Risks

- Update risks in Risk List and Assessment document
  (document explained in Conduct a Strategy Analysis course)



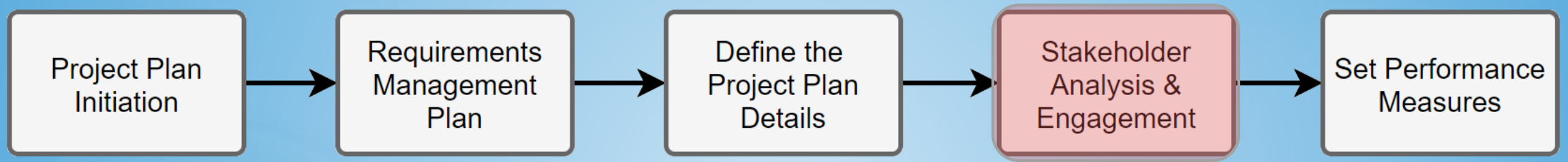
Risk List and Assessment

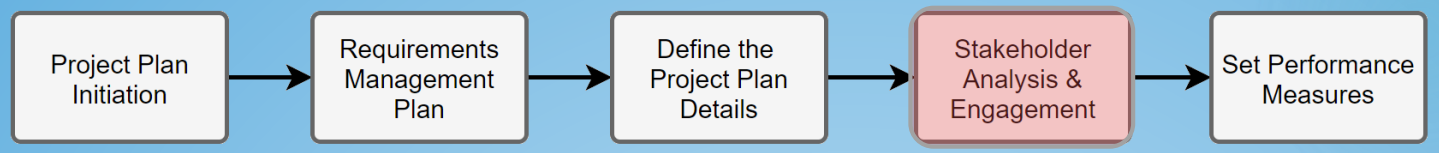
This document is to be used to track and manage the project's risks.

Project Name: Last Updated:

Risk Title	Risk Description	Probability Details	Probability	
Maternity leave	The Subject Matter Expert (Jane Smith) is set to go on a 7 week maternity leave in approximately 3 months. Since this project is expected to take 9+ months, we will lose her expertise for the major portion of the project.	This is almost certain to happen. Nature will take its course.	Very High	5
Loss of data	All of our project details are being stored on a local server. This server is not backed up regularly and if it crashes, we could lose everything.	This server has never crashed before.	Very Low	1

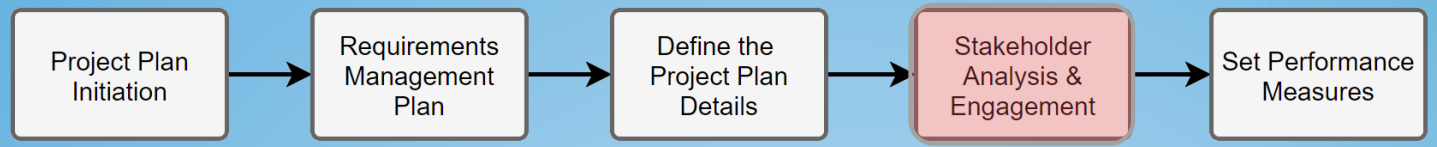
Project Plan Initiation





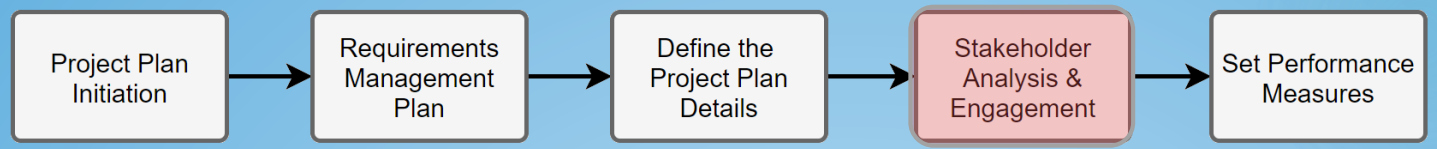
Goal:

To appropriately plan for stakeholder engagement and communication.



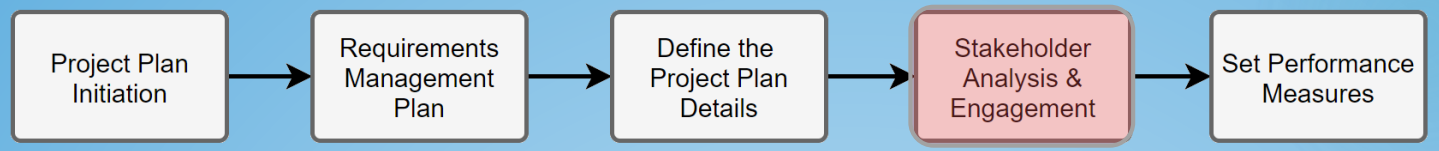
Elements within Stakeholder Analysis & Engagement:

- Conduct Stakeholder Power Interest Analysis
- Create a RACI Matrix
- Create a Responsibility Assignment Matrix
- Define a Collaboration and Communication Plan



Conduct Stakeholder Power Interest Analysis:

Utilize a stakeholder's interest and influence to appropriately involve them in the project.



Conduct Stakeholder Power Interest Analysis:

Identify each stakeholder's

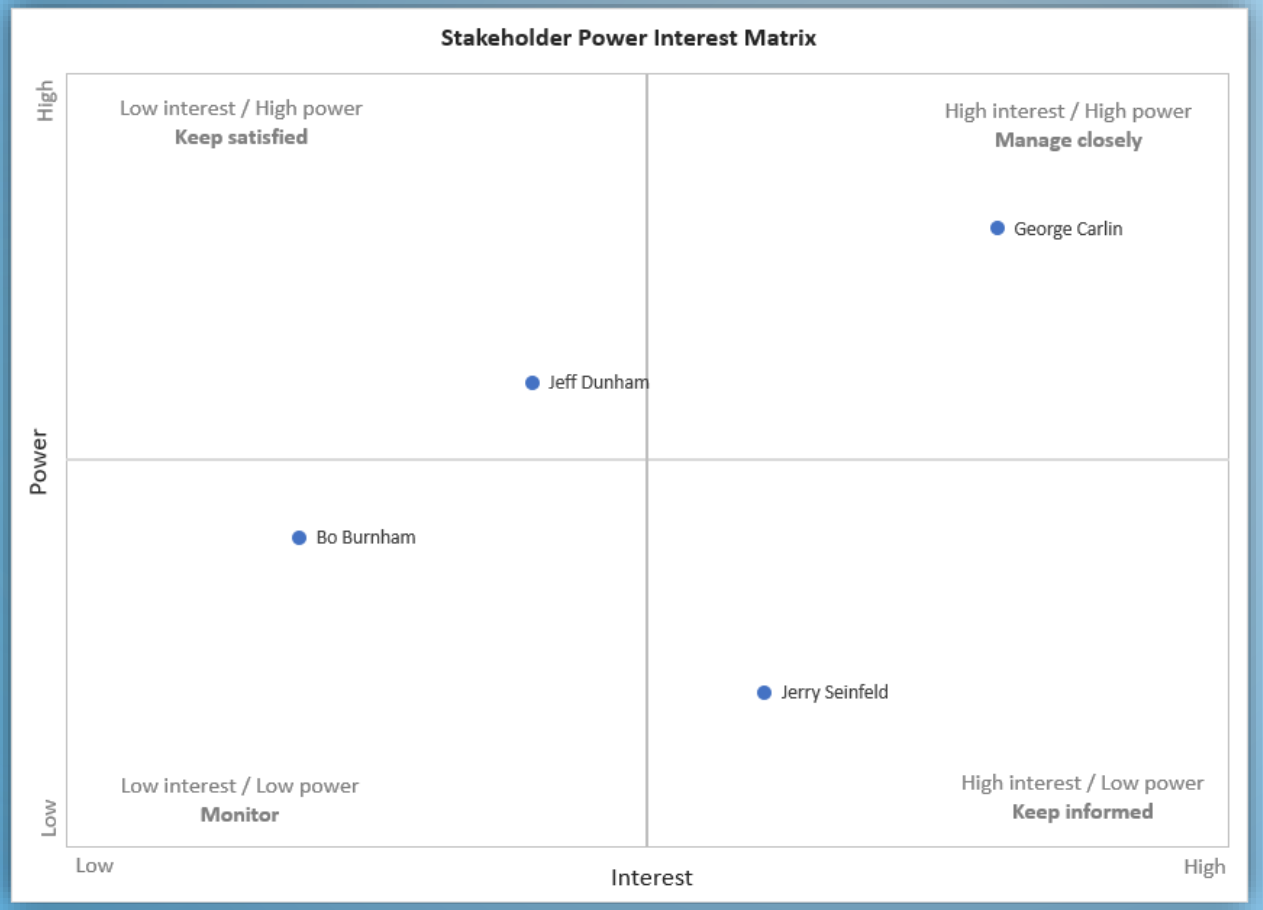
- Interest level (concern)
- Power level (authority)
- Project engagement

Very High
High
Low
Very Low

Unaware
Resistant
Neutral
Supportive
Leading

Conduct Stakeholder Power Interest Analysis:

Name	Interest		Power		Project Engagement
Bo Burnham	1	Very Low	2	Low	Neutral
Jerry Seinfeld	3	High	1	Very Low	Unaware
George Carlin	4	Very High	4	Very High	Supportive
Jeff Dunham	2	Low	3	High	Resistant

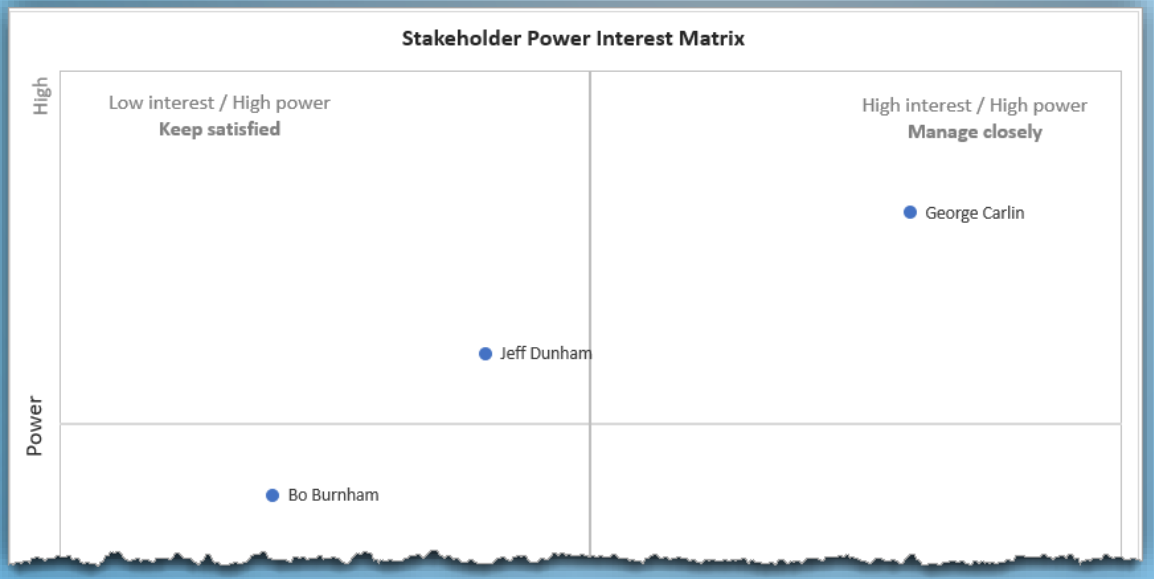


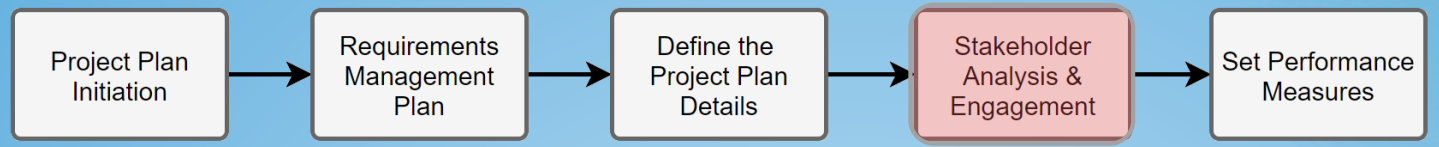
Conduct Stakeholder Power Interest Analysis:

Stakeholder Power Interest Analysis

This document is used to keep track of the stakeholders for the project

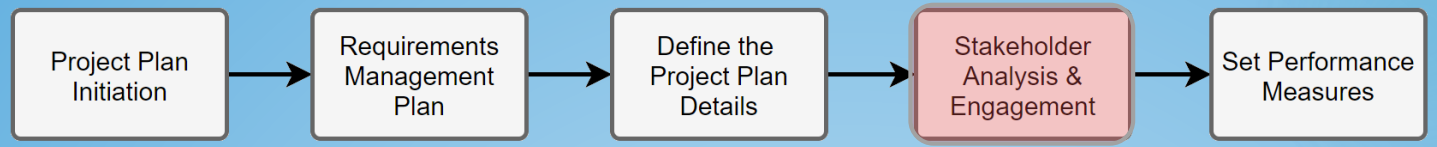
Name	Interest		Power		Project Engagement
Bo Burnham	1	Very Low	2	Low	Neutral
Jerry Seinfeld	3	High	1	Very Low	Unaware
George Carlin	4	Very High	4	Very High	Supportive
Jeff Dunham	2	Low	3	High	Resistant





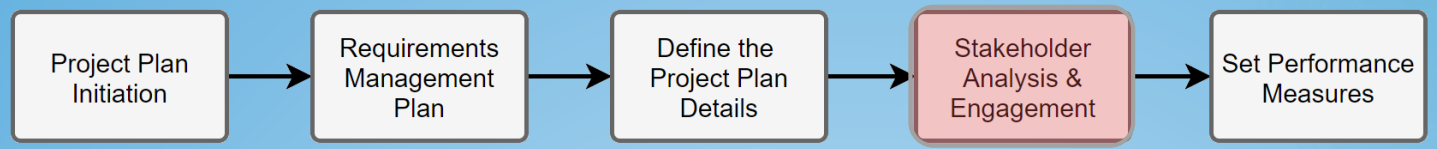
Create a RACI Matrix:

Aligns the responsibilities of stakeholders to project tasks



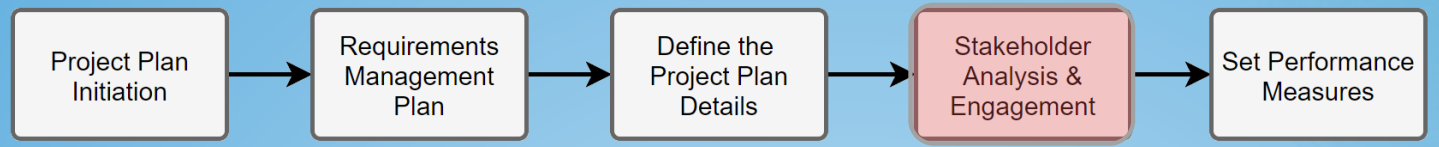
Create a RACI Matrix:

- Eliminates confusion
- Alleviates power struggles
- Removes lack of ownership



Create a RACI Matrix:

Responsible Accountable Consulted Informed	Business Analyst	Field Rep	Sales Administrator	Sales Manager	IT Manager	CRM Software Developer	Website Developer	Company Executives
Project Planning	R,A			C	C			I
Elicit/Analyze Requirements	R,A	C	C	C				I
Solution Design	R,A				I	C	C	
Solution Design Approval	C	C	C	R,A	I	C	C	I
CRM Changes	I				A	R		
Website Changes	I				A		R	
Test Solution	R,A	C	C	C	I	I	I	I
Final Solution Approval	I	C	C	R,A				I



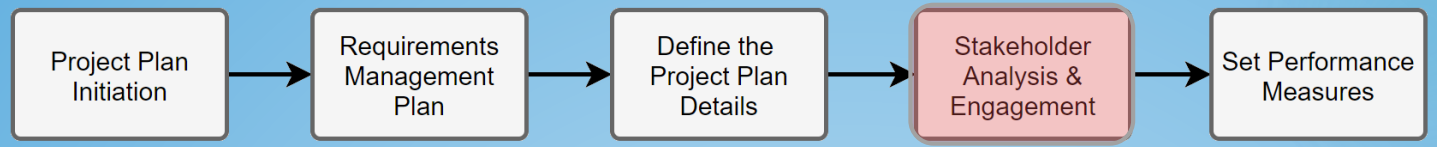
Create a RACI Matrix:

Responsible

Accountable

Consulted

Informed



Create a RACI Matrix:

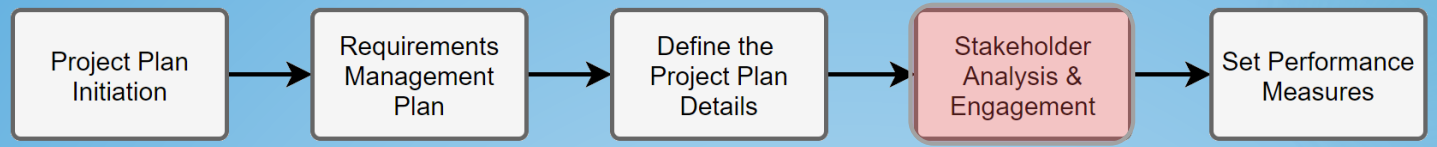
Responsible

Accountable

Consulted

Informed

- Who will be doing this task?
- Who is assigned to work on this task?



Create a RACI Matrix:

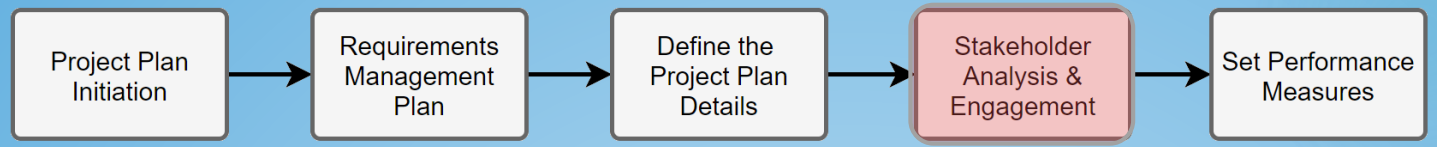
Responsible

Accountable

Consulted

Informed

- Who signs off on the task?
- Who has authority for the task?



Create a RACI Matrix:

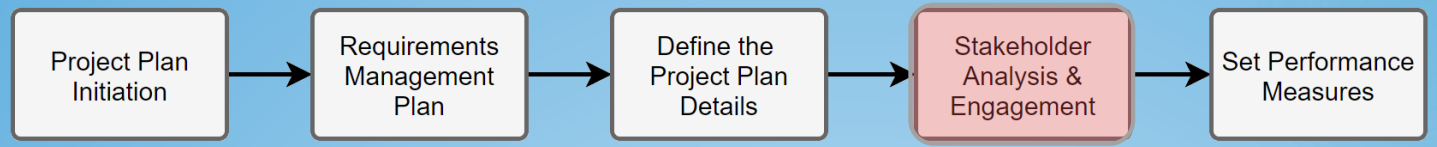
Responsible

Accountable

Consulted

Informed

- Who has information about this task?
- Who is the Subject Matter Expert?



Create a RACI Matrix:

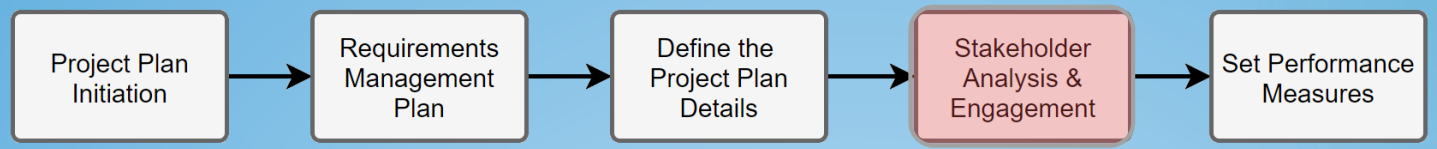
Responsible

Accountable

Consulted

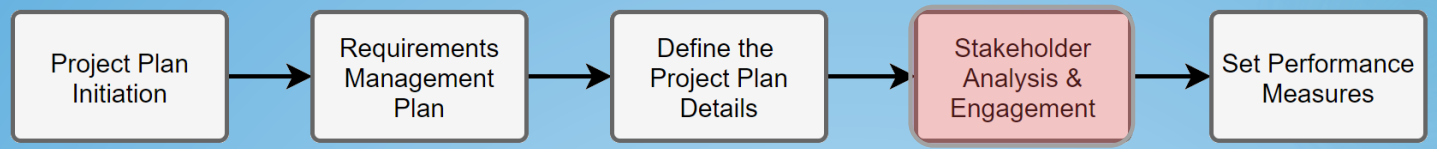
Informed

- Who needs to be notified of the task status?
- Who needs to be provided the task results?



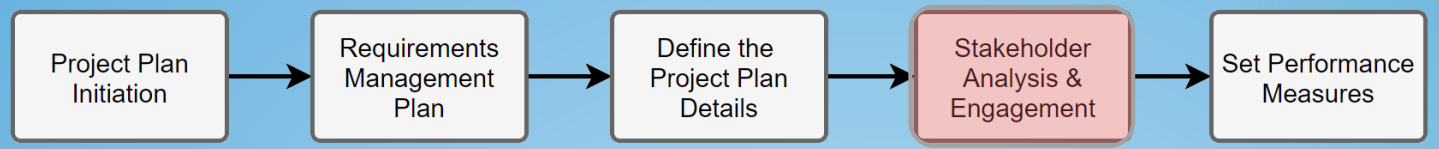
Create a RACI Matrix:

Responsible Accountable Consulted Informed	Project Roles					



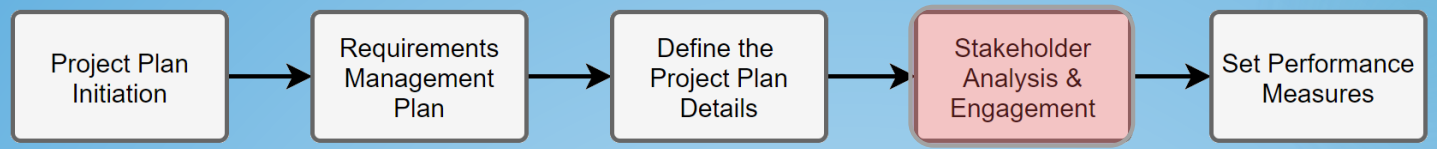
Create a RACI Matrix:

Responsible Accountable Consulted Informed						
Actions / Tasks						



Create a RACI Matrix:

Responsible Accountable Consulted Informed						
	Responsibility Grid					



Create a RACI Matrix:

Responsible Accountable Consulted Informed	Business Analyst	Field Rep	Sales Administrator	Sales Manager	IT Manager	CRM Software Developer	Website Developer	Company Executives
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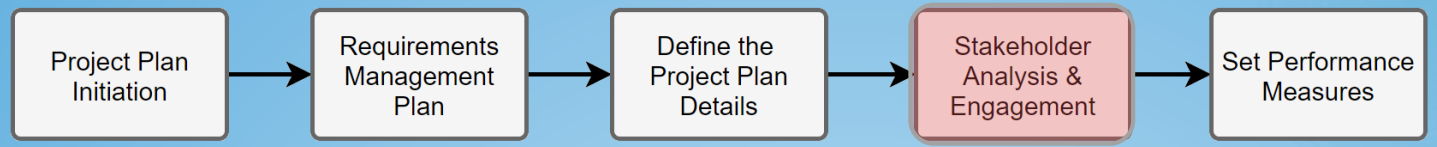
Elicit/Analyze Requirements	R,A	C	C	C				I
Solution Design	R,A				I	C	C	
Solution Design Approval	C	C	C	R,A	I	C	C	I
CRM Changes	I				A	R		
Website Changes	I				A		R	
Test Solution	R,A	C	C	C	I	I	I	I
Final Solution Approval	I	C	C	R,A				I



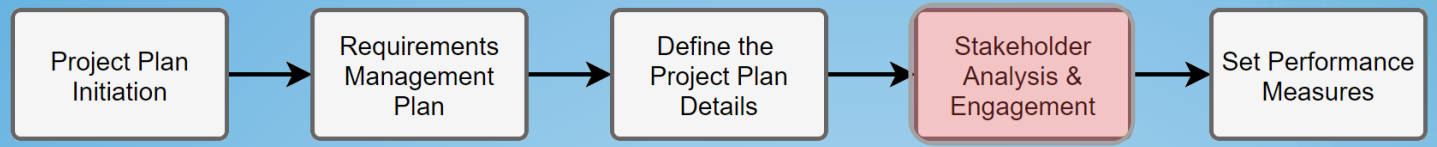
Create a RACI Matrix:

Solo:

- Determine actions/tasks
- Identify roles or stakeholder names
- Complete what is known

Project Team:

- Workshop session

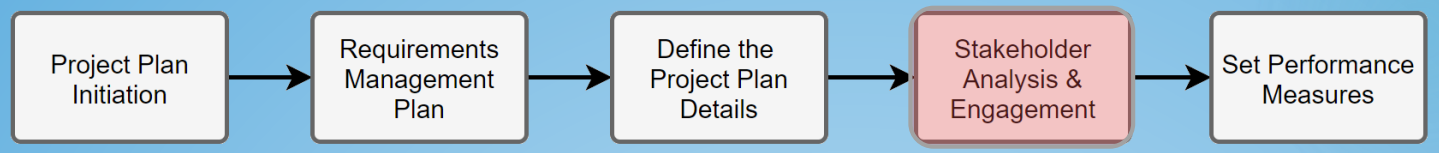


Create a RACI Matrix:

Validation:

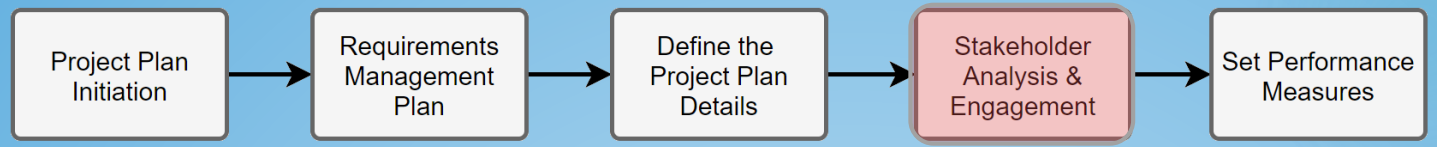
- At least one person is Responsible (R) per task
- At least one person is Accountable (A) per task

TIP: Best practice is to have only one person responsible for each task



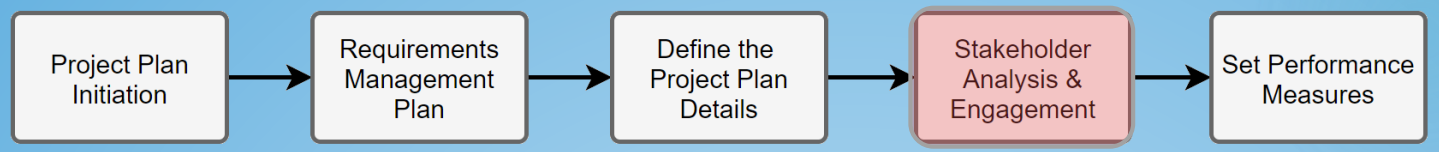
Create a RACI Matrix:

Actions / Tasks	Stakeholders / Project Roles									



Create a Responsibility Assignment Matrix:

Aligns the responsibilities of stakeholders to project activities



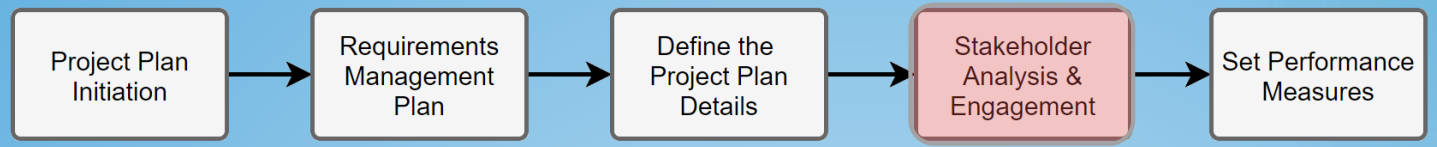
Create a Responsibility Assignment Matrix:

Primary Responsibility Secondary Responsibility Approval	Stakeholders / Project Roles					
Activities	Project Manager	Business Analyst	Business Lead	Architect	Developer	Project Sponsor
Website Security UI Requirements		P	S, A			A
Website Security UI Design	A	S, A	A	P	S	A
Website Security UI Creation	A	A	A	S, A	P	A

Primary Responsibility

Secondary Responsibility

Approval



Create a Responsibility Assignment Matrix:

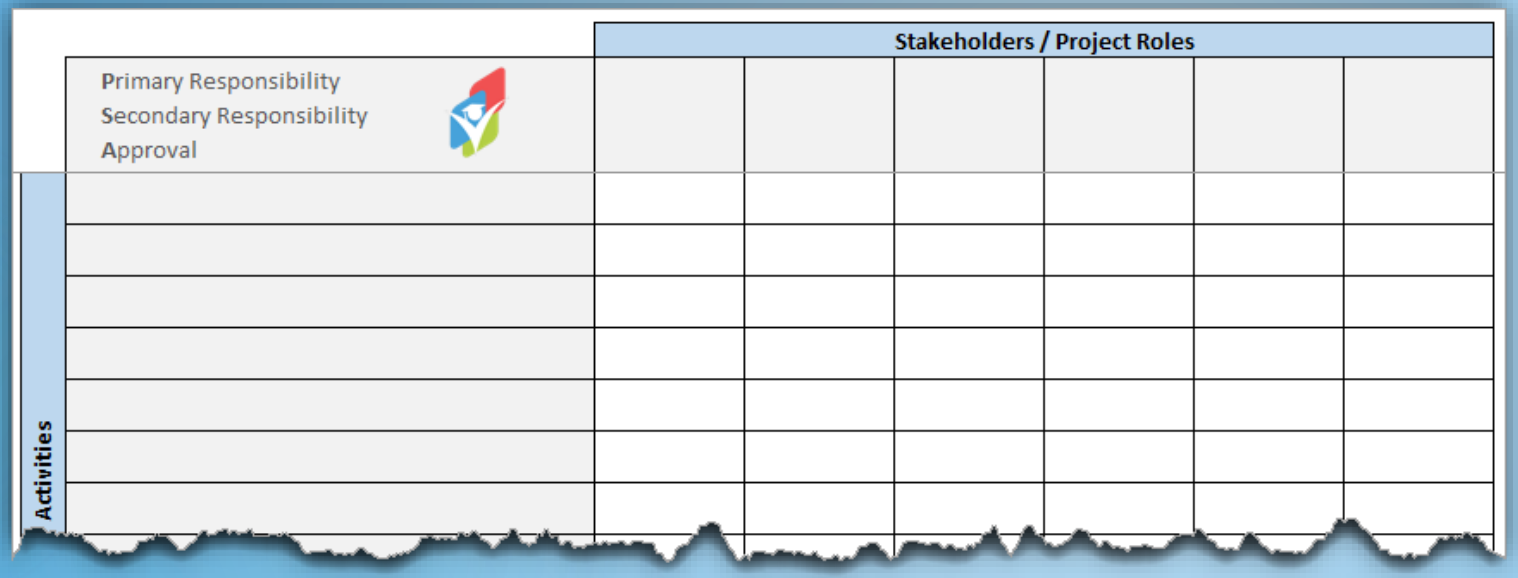
Solo:

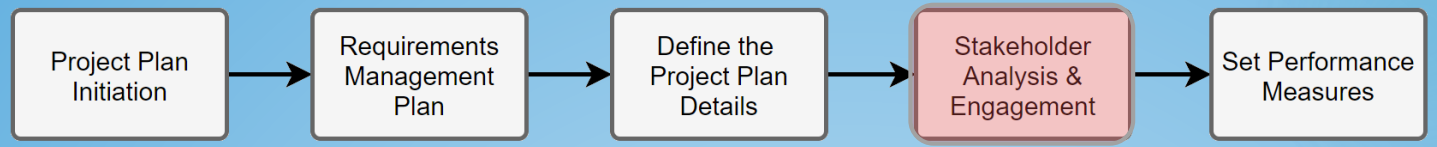
- Translate WBS activities to RAM
- Identify roles or stakeholder names
- Complete what is known

Project Team:

- Workshop session

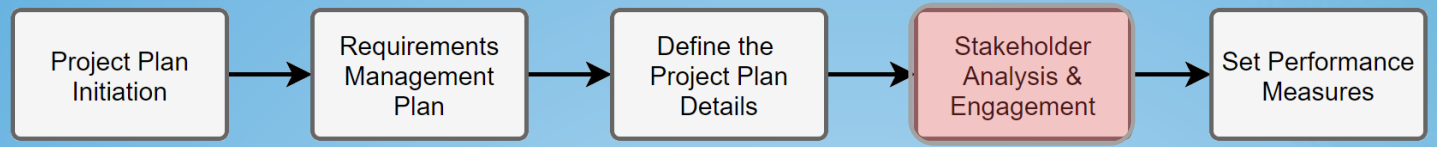
Create a Responsibility Assignment Matrix:





Define a Collaboration and Communication Plan:

Provides guidance on the communication needs for the project



Define a Collaboration and Communication Plan:

- Increases knowledge about the project
- Gains acceptance among stakeholders
- Provides opportunity for feedback

Define a Collaboration and Communication Plan:

Kickoff Meeting

Project Status Reports

Project Status Report

PROJECT INFORMATION

KEY TASKS AND MILESTONES

Status	Name	Duration	Start	Finish	Percent Complete
	Determine sales objectives	1 day	8/28/2009	8/28/2009	100%
	Identify channel partners	1 day	8/27/2009	8/28/2009	80%
	Identify budget requirements	1 day	8/28/2009	8/31/2009	100%
	Planning COMPLETE	1 day	9/1/2009	9/2/2009	0%
	Obtain approval for updated plans and budgets	1 day	9/8/2009	9/10/2009	0%
	Update launch plan based on forecast	1 day	9/14/2009	9/15/2009	0%
	Hire and train product support personnel	1 day	9/16/2009	9/17/2009	0%
	Launch Product	0 days	9/21/2009	9/21/2009	0%

TASKS COMPLETED THIS TRACKING PERIOD

Status	Name	Duration	Start	Finish	Percent Complete
	Identify budget requirements	1 day	8/28/2009	8/31/2009	100%

TASKS SCHEDULED TO BE COMPLETED, BUT DID NOT

Status	Name	Duration	Start	Finish	Percent Complete

Meeting Notes

Meeting Agenda Template

Meeting Agenda

[Date]
[Time]
[Location]

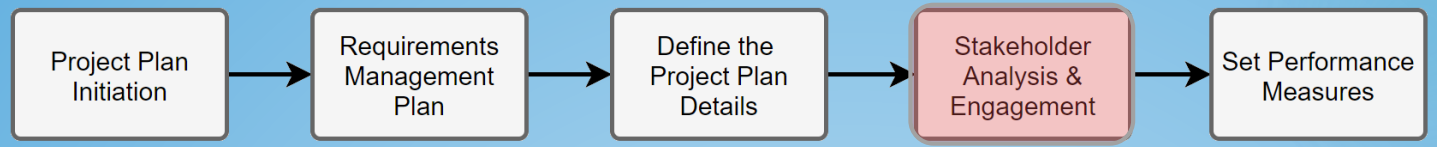
Meeting called by: Type of meeting:
Facilitator:
Timekeeper:
Note taker:
Attendees:
Please read:
Please bring:

Agenda Items

Topic	Presenter	Time allotted

Misc. Information

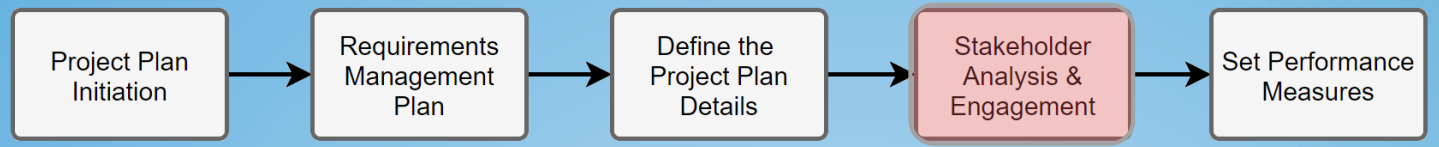
Observers:
Resources:
Special notes:



Define a Collaboration and Communication Plan:

Details to include…

- Communication type
- Delivery method
- Frequency
- Audience
- Responsible

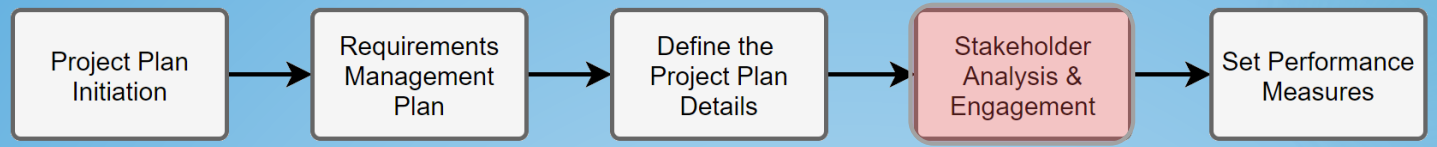


Define a Collaboration and Communication Plan:

Communication Plan

This document is used to guide project communication

	Audience	Information	Method	Frequency	Who Responsible
Kickoff Meeting	Full project team	Collaboration	Meeting	Once	Betty Boop, Jeremy Aschenbrenner
Project Status Reports	Full project team	Detailed project status	Email	Weekly	Betty Boop
Meeting Notes	Meeting attendees, Project lead	Collaboration	Email	Per Meeting	Jeremy Aschenbrenner



Define a Collaboration and Communication Plan:

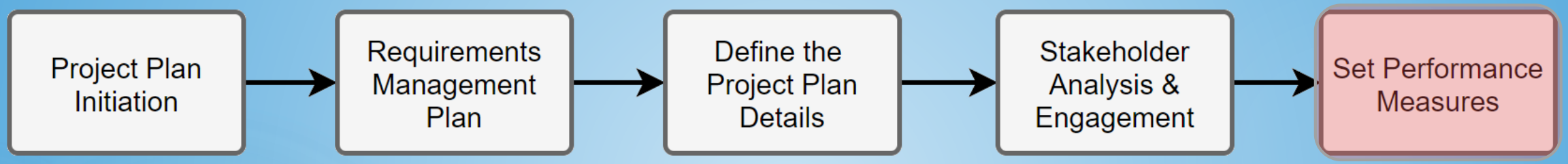
Communication Plan

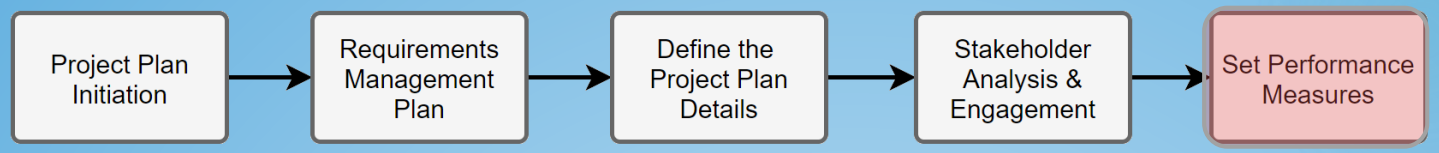
This document is used to guide project communication

	Audience	Information	Method	Frequency	Who Responsible
Kickoff Meeting	Full project team	Collaboration	Meeting	Once	
Project Status Reports	Full project team	Detailed project status	Email	Weekly	
Meeting Notes	Meeting attendees, Project lead	Collaboration	Email	Per Meeting	

Template provided courtesy of The BA Guide
www.TheBAGuide.com

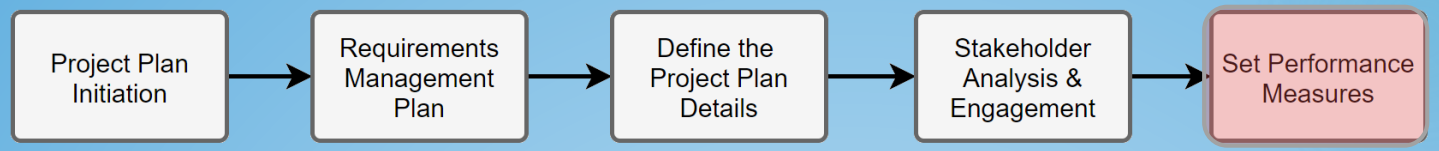
Project Plan Initiation





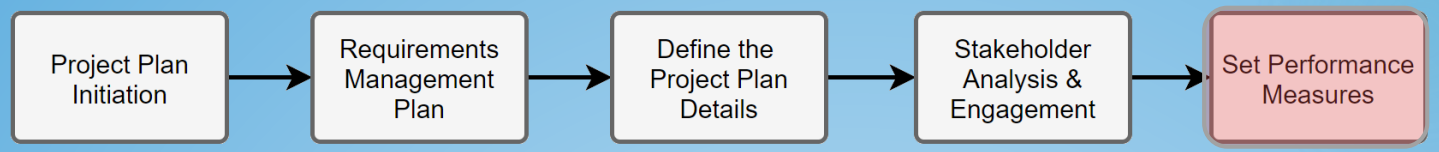
Goal:

Establish performance measures in order to identify necessary actions to enable future success.



Elements within Set Performance Measures:

- Project Performance Measures
- Business Analysis Performance Measures



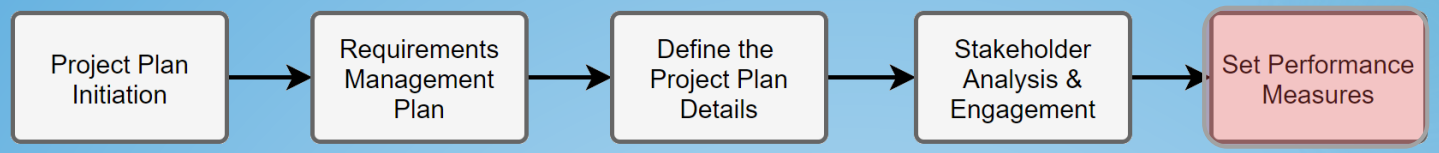
Project Performance Measures:

- Review project goals

  Increase number of teenage (ages 13-19) customers who rate us *very satisfied* by 25% within 20 weeks

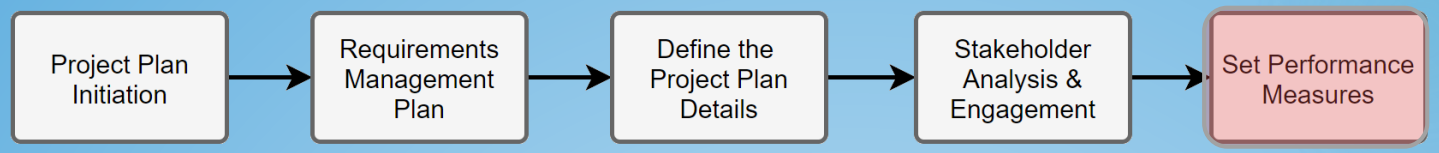
- Identify metrics
  - Schedule adherence
  - Customer satisfaction
  - Quality assurance
  - Cost variance
  - Resource utilization
  - Return on investment
  - Missed milestones

  etc.



Business Analysis Performance Measures:

- Identifies areas of improvement
- Provides actionable feedback
- Acknowledges and rewards achievement



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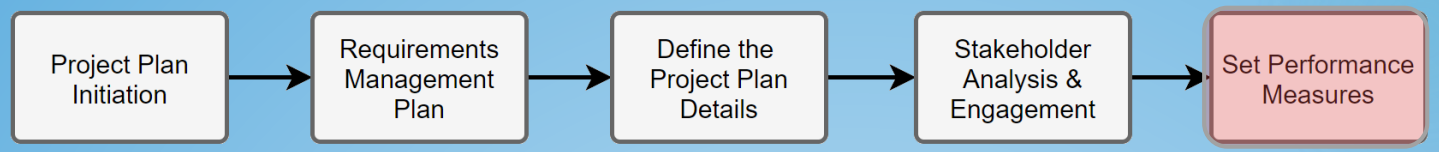
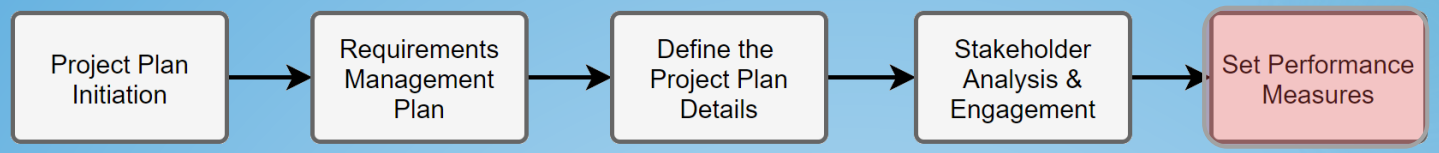


Business Analysis Performance Measures:

1. Identify the metrics
2. Set the goals
3. Analyze results

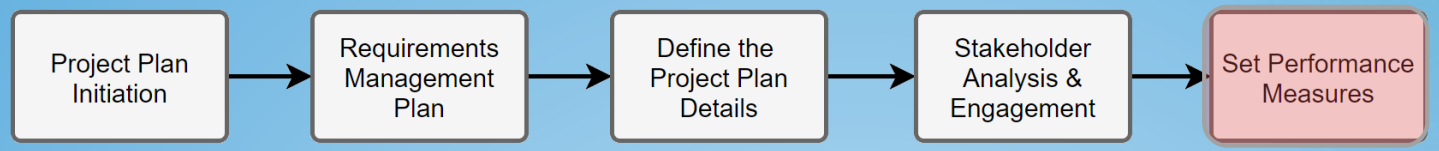
KPI = Key Performance Indicator



Business Analysis Performance Measures:

Identify the metrics

- Accuracy and completeness
- Knowledge
- Effectiveness
- Organizational support
- Significance
- Strategic
- Timeliness



Business Analysis Performance Measures:

Set the goal

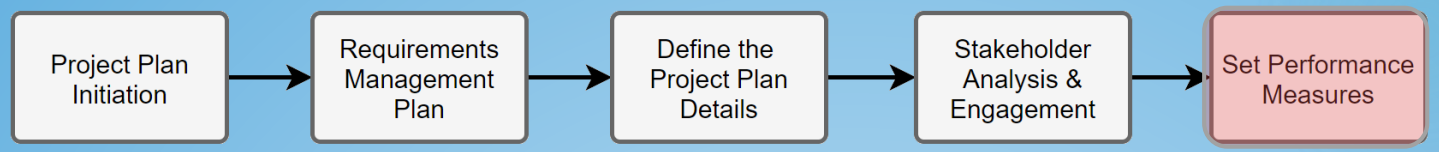
Specific – observable outcome

Measurable – track and measure the outcome

Achievable – feasible, can be done

Relevant – aligns with the project goals

Time-bounded – expected completion date identified



Business Analysis Performance Measures:

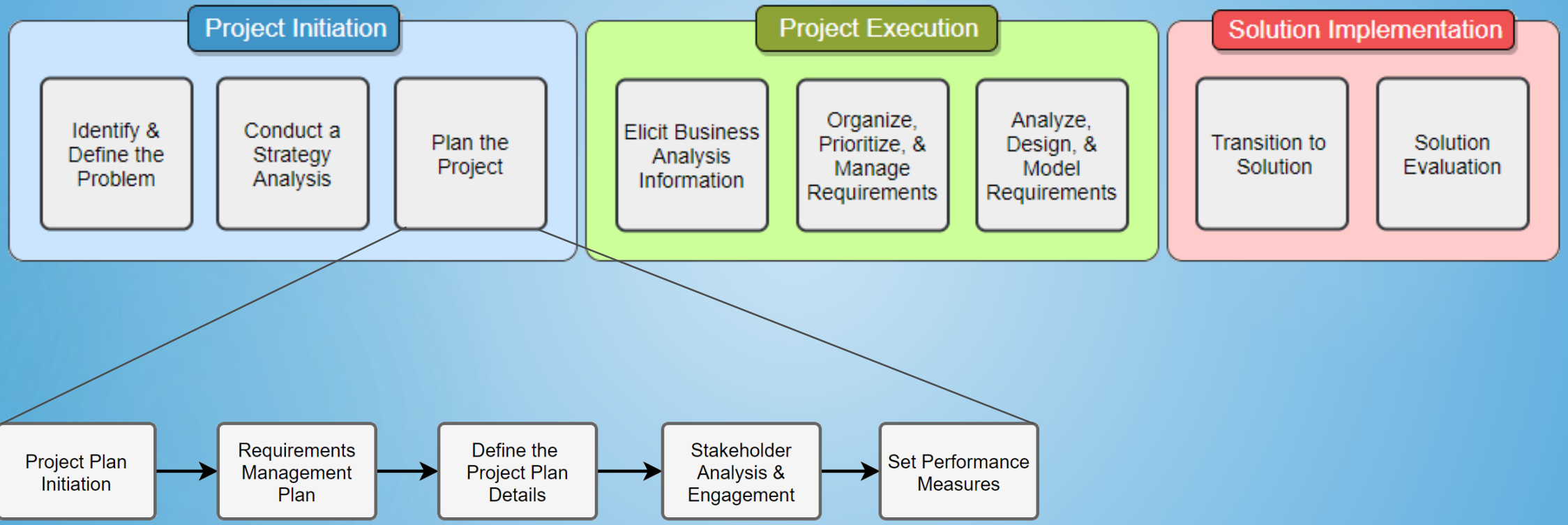
Analyze the results

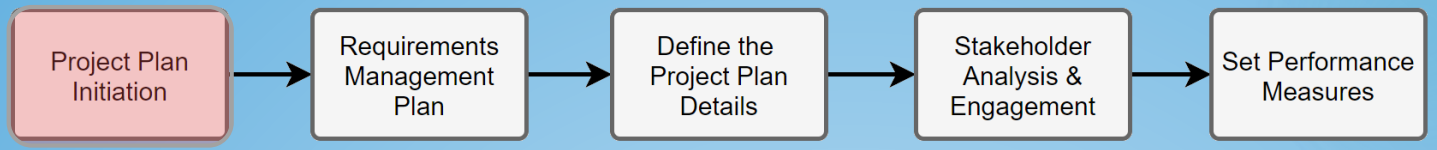
- Send surveys, review project deliverables, etc.
- Compare results against defined measures
  - Process
  - Resources
  - Deliverables

TIP: Utilize results to improve, not to compare between projects.

The BA Guide's

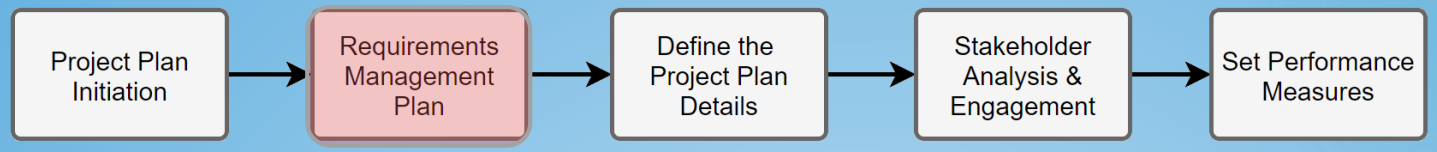
Business Analysis Process





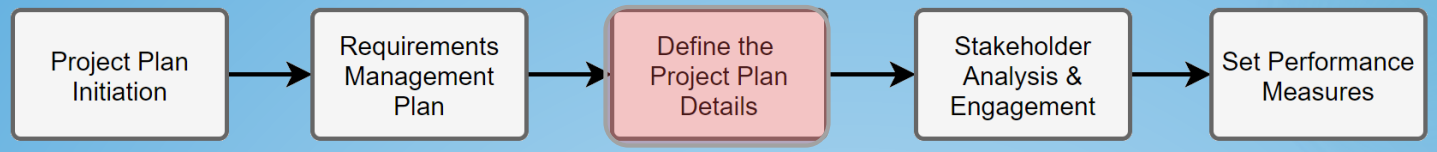
Project Plan Initiation:

- Stakeholder identification
- Create a Project Charter
- Arrange and conduct a Kickoff Meeting



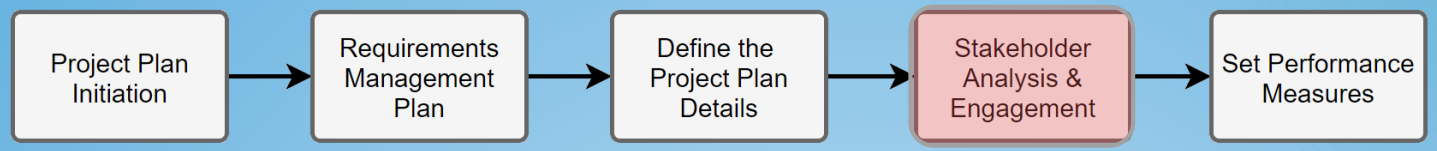
Requirements Management Plan:

- Requirement Abstraction
- Requirements Storage and Access
- Requirement Attributes
- Requirements Reuse
- Requirement Traceability
- Requirements Change Control Process
- Requirements Approval Process



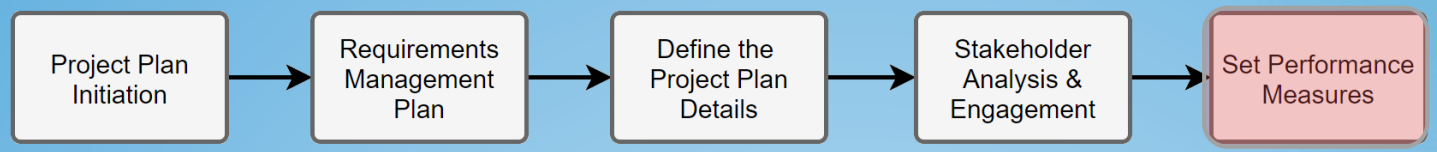
Define the Project Plan Details:

- Break Down the Project
- Set the Project Schedule
- Define a Quality Plan
- Release Planning
- Update Project Risks



Stakeholder Analysis & Engagement:

- Conduct Stakeholder Power Interest Analysis
- Create a RACI Matrix
- Create a Responsibility Assignment Matrix
- Define a Collaboration and Communication Plan

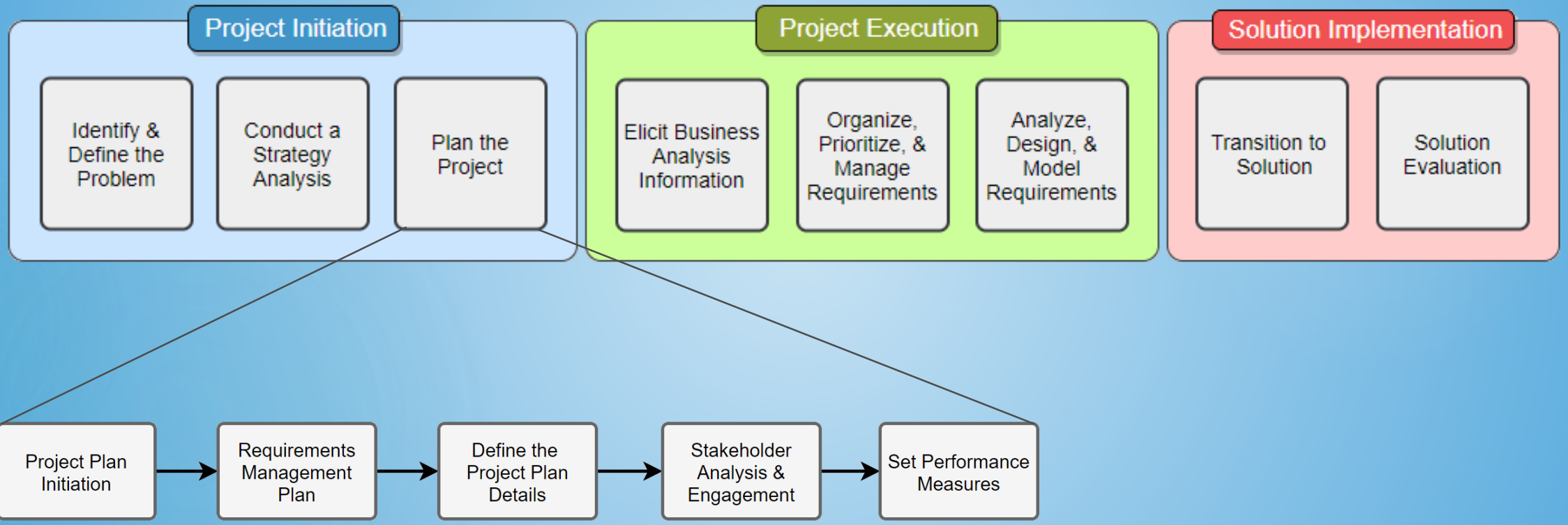


Set Performance Measures:

- Set Project Performance Measures
- Set Business Analysis Performance Measures

The BA Guide's

Business Analysis Process



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Provide outsourcing services

- IB/OB Sales
- IB/OB Customer Service
- Marketing

Company details

- Located in Florida
- Founded in 2014
- 55 employees
- 8 contractors/consultants

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University of Wisconsin - Madison

- Public university
- Founded in 1848
- ~43,000 students
- Centron client since July 2017

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Current State:

- Culture
- Organizational Chart
- Capabilities
- Project Proposal
- Processes
- Technology

Future State:

- Solution Scope
- Business Case
- Risk List
- Gap Analysis

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Methodology:

- Iterative (waterfall)

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Requirements Approval