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Building PM and BA Synergy

BA Professional Development Day

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- President of CVR/IT Consulting LLC, a project consulting and training organization.
- Author of numerous PM and BA courses
- Provides a unique Organizational PM Practice Assessment service
- Author of a PM Template Library with worldwide acceptance
- Released a project-based board game Project SN-AFU in 2016

Dr. Evans' career has focused on the implementation of effective Project Management and Business Process, the design and development of supporting systems, and management of change to ensure successful delivery. He has held senior positions in both commercial and not-for-profit organizations, and served on the NCPMI Board of Directors for two years. See: www.cvr-it.com



Agenda

- Define project success
- Examine project and product lifecycles
- Fundamental importance of good requirements for deliverables quality
- What PM and BA can do to promote the long term Business Value of projects
- Examples: BA and PM collaboration
- Discussion



PM – BA Collaboration

Section 1: Creating Business Value

- Defining project success
- Project and product lifecycles
- Business Value
- Projects roles
 - BA
 - PM
 - Sponsor
- What we need

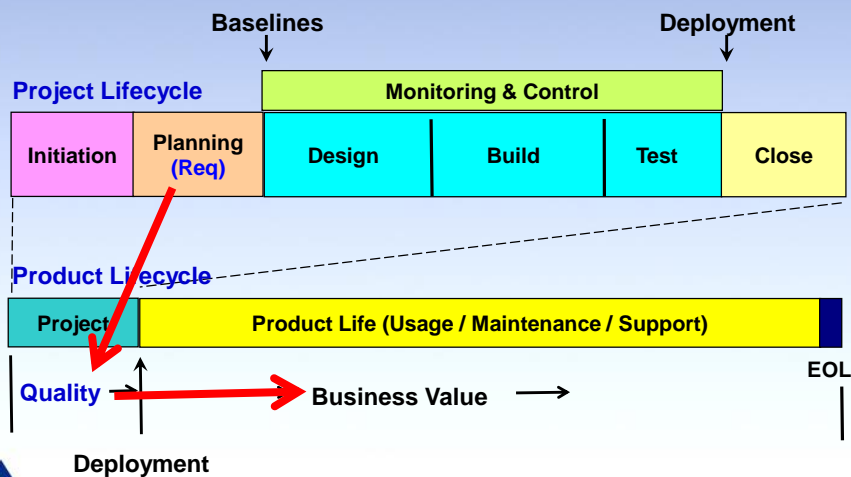


Defining Project Success

- **Project Delivery Success**
 - Project Team delivers to Project Objectives
 - Customer is happy with the delivery
- **Tactical Success**
 - Sponsor reaches a tactical goal (e.g. new capability; reduced cost)
 - Stakeholders use project deliverables to generate Business Value
- **Investment Success**
 - Tactical win was worth the time, effort and money
- **Strategic Success**
 - The project supports current Business Strategy



Project and Product Life Cycle (Waterfall)



Requirements Drive Quality

- Quality has been defined as:
 - Conformance with requirements
 - Fitness for use
- Inadequate quality in deliverables can result from:
 - * Incorrect or incomplete requirements
 - * Poorly maintained requirements
 - Failure to trace requirements to design
 - Inadequate functional testing (with focus on conformance to requirements)
- * About half of project failures are due to inadequate requirements and poorly maintained requirements (PMI® 2014)



Successful Delivery ≠ Project Success

- It is possible to deliver a project successfully (all project objectives are met) and still suffer a tactical failure. For example:
 - The project solution is completely delivered on time and within budget BUT
 - Deliverables quality is not adequate AND
 - Stakeholders are unable to effectively use deliverables, or
 - Stakeholders refuse to use the deliverables, or
 - Stakeholders can't use the deliverables
- Tactical Failure = the project may be completed but BV is delayed, diminished, or never realized at all



- **Project lifecycle** focuses on delivery as the basis for BV:
 - Sufficient quality
 - Successful handoff
- **Product lifecycle** focuses on realization of BV
 - BV is usually realized only after project delivery
 - BV depends on acceptance and usage

Business Value is the reason we do projects

It is through BV that we reach business objectives



Focus on Business Value!

>> Keep your eye on the prize <<

A clear understanding of intended BV gives us guidance both during the project and throughout the lifespan of the product.



Foundation of Business Value

Business Value requires:

- Deliverables with sufficient **quality** so that stakeholders can use them effectively
- Stakeholders who are ready, willing and able to use deliverables
 - Accepted project-induced change
 - Fully trained
 - Environment supports them
- Effective rollout of deliverables to ongoing operations
- Maintenance and support that can support ongoing BV realization

Business Value is optimized when the BA and PM work together



Ultimate Goal of the BA

The solution satisfies stakeholders and can meet the business need

- BAs should be champions of value
- BV realization fundamentally depends on adequate deliverables quality
- Deliverables quality rests on good requirements, appropriate design and adequate functional testing
- The BA is positioned to support all of these success factors

- The BA role is **critical** to long term project value



Ultimate Goal of the PM

Deploy deliverables that create the foundation for Business Value realization

- The PM is accountable for:
 - A solution that is effective at solving the identified business need
 - Deliverables with adequate quality to satisfy stakeholders and support the realization of intended business value
- PM and BA roles are linked
 - The BA defines the business need
 - The BA documents requirements that are the basis for quality
 - The PM is completely dependent on these for success



The Role of Sponsor

The Sponsor is accountable for the realization of Business Value

- The Sponsor should ensure that:
 - A Business Value Realization Plan is available and resources have been assigned to implement it
 - The project team has adequate resources and time to deliver what is needed
 - Stakeholders are prepared and willing to use the deliverables
 - Roadblocks to adoption of change have been removed
 - As needed, organizational structures exist that can support and maintain the deliverables
 - Plans are in place to optimize Business Value over time



What Every Project Needs

We need effective collaboration among all of the major players, Sponsor, PM and BA!

In an ideal world:

- The PM and BA understand their respective roles
- The PM has adequate resources and time to deliver what is needed
- The BA is empowered to keep the project aligned with customer need
- The BA has adequate time and resources to provide correct, complete requirements
- The BA and PM have full support of the Sponsor
- Everyone has a clear understanding of the problem to be solved and the intended Business Value



Summary

- Every project is done to create value
- The Project Sponsor is accountable for Business Value realization
- The PM is accountable for:
 - A solution that is effective at solving the identified business need
 - Deliverables with adequate quality to satisfy stakeholders and support the realization of intended business value
- The BA is responsible for:
 - Defining the business problem
 - Requirements that drive quality
 - Ensuring the solution will meet the need
- Collaboration is key





PM – BA Collaboration

Section 2: Working Together

- What the PM can do
- What the BA can do
- Examples of effective collaboration
- Discussion



PM Can Promote Collaboration

- Focus on value from the start
- Fully support requirements work
 - Provide the BA with adequate time and resources
 - Be mindful of the Triple Constraint (e.g. timebox)
- Share critical information with the BA
 - Stakeholder analysis
- Make full use of BA analytical and people skills
 - Project Charter (i.e. Vision and Scope Doc) development
 - Scope definition (WBS)
 - Procurement (alternatives evaluation)
 - Stakeholder expectations management
- Adopt BA standards
 - Expect and use transition requirements



BA Can Promote Collaboration

- Share critical information with the PM
 - Stakeholder analysis
 - Schedule, resource and risk information related to requirements
 - Share insights into general project risk
- The BA is well suited to participate in:
 - Initiation
 - Problem definition; Vision statement; Cost/Benefit analysis
 - Business Requirements
 - WBS development
 - Evaluation of change requests
 - Expectations management / Organizational adoption
 - Design verification
 - Acceptance testing
 - Solution assessment



Stakeholder Analysis

Stakeholder Analysis provides us with a good example of how BA – PM collaboration can work

- What is Stakeholder Analysis?
 - The identification of key stakeholders in the project
 - Analysis of important stakeholder attributes
- Why does the BA do this?
- Why does the PM do this?



BA Use of Stakeholder Analysis

Optimize stakeholder collaboration

- Identify SMEs, what they know, when they are available
- Determine the best elicitation method for each stakeholder or group
- Employ stakeholder analysis skills
 - Can / will stakeholders contribute to the analysis?
 - Do they understand analysis models?
- Learn which stakeholders can / will participate in V&V
- Determine the best documentation method(s)
 - Is a special requirements package needed for executives?



PM Use of Stakeholder Analysis

Expectations management; project participation

- Identify stakeholder roles in project
 - Learn enough to create a Responsibility Assignment Matrix
- Stakeholder risk assessment
 - Which stakeholders are a threat
 - Identify project supporters
- Identify which stakeholders will engage in project activities
 - WBS development
 - Risk assessment
- Stakeholder management strategy
- Communication plan
- Expectations management
- Determine if Organizational Adoption is needed



Example: PM – BA Coordination

Initiation: BA writes the Vision and Scope Doc (a.k.a. Project Charter) and...

- Includes key stakeholders in the work
- Contributes to expectations management
 - Obtains stakeholder consensus on project goals and approach
 - Puts stakeholder expectations in alignment with project goals
- Performs a stakeholder risk assessment
 - Identifies stakeholders that may be a threat
 - Identifies project supporters
- Determines if Organizational Adoption is needed
 - Is there resistance to change?

Planning: PM joins the project

- BA passes stakeholder information to the PM
- PM gets off to a strong start



BA Can Support the PM

During Planning and Execution:

- Scheduling
 - Provide a Business Analysis Plan that includes detail on resources and time required to complete requirements
- Scope control
 - Forward and backward tracing to ensure integrity among business requirements, solution requirements and design
- Change Control
 - Lead the team during assessment of change requests
- Testing
 - Ensure that test coverage follows requirements priority
 - Verify that tests accurately reflect requirements
 - Work with stakeholders in UAT
 - Sanity check test results
- Transition
 - Make transition requirements part of an effective transition plan



More BA Project Contributions

The BA can provide additional support to the PM:

- Work with the design team in solution selection
 - Ensure that the solution is consistent with stakeholder needs, preferences and concerns
- Assist with BV and TCO forecasts
 - The BA created these forecasts in the Business Case
- Provide intel on stakeholders on an ongoing basis
 - The BA works closely with stakeholders throughout the project
- Assist with Organizational Adoption
 - Help develop the OA Plan
 - Promote acceptance of change
- Work with stakeholders to ensure a smooth transition
 - Monitor deliverables usage during the warranty period and manage problems as they arise



PM Can Support the BA

The PM can support the BA

- Remove roadblocks to effective requirements development
- Provide tools and other resources that promote high quality requirements
- Implement effective change control
- Encourage full stakeholder participation in requirements work
- Act on BA concerns about the solution, e.g.
 - Alignment with the business problem
 - Readiness for deployment
 - Level of organizational acceptance
- Empower the BA to be the resident champion of value to the customer



Take Away...

- PM and BA should meet early in the project
- Work out the tasks where BA and PM can most profitably collaborate
- Design a workflow that makes best use of both skill sets
- Include it in the project plan
- Execute it
- Build what works into the next project



Summary

- The BA is positioned to contribute significantly to project quality, and therefore to Business Value
- There are many project activities where PM and BA can collaborate more fully
- The PM can gain by taking full advantage of the expanding BA role
- The end result of effective PM – BA collaboration is optimized Business Value



About CVR/IT Consulting LLC

CVR/IT Consulting, established in 2002, provides professional consultation, training and tools in all matters related to Project Management and Business Analysis, including:

- **Portfolio Management** - Implementation of essential governance structures and processes
- **Project Management Office** - Establishment of a PMO that exists for the success of its customers
- **PM and BA Methodologies and tools**
- **Assessment of organizational practice** in project, program, and portfolio management , and business analysis
- **Training** (or re-training) of the project workforce
- **Organizational Change Management** – A systematic approach to the Organizational Adoption of necessary change

For more information, see www.cvr-it.com



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