

the bridge

CONNECTING BUSINESS REQUIREMENTS TO TECHNOLOGY

Spring 2008

Take Control of Your Time



New Course

Developing a
Business Analysis
Work Plan

The BA in a
Service Oriented
Architecture
Environment

Elicitation
Depth
Diagram

Requirements
Planning for Agile
Development
Projects



letter from the editors

Spring is in the air! Are you as excited about the arrival of spring as we are? Spring brings with it a feeling of energy and rejuvenation. It is in this spirit that we are excited to bring you this issue of *the bridge*.

The main article of this issue continues our focus on developing your business analysis work plan by using deliverables to generate a task list and time estimate for your work. While planning your business analysis work can prove invaluable, there are always risks that may occur throughout the life of a project. *Lost in Translation* offers steps you can take to review planned tasks against two types of risks.

Business analysis work must be planned for a significant variety of projects. This issue contains several articles from business analysis professionals that focus on planning issues, challenges, and techniques for some common project types. The article on SOA (Service Oriented Architecture) by Laura Markey explores the role of the business analyst in identifying *services* – reusable software components – during planning and requirements elicitation. Dave Altman presents a technique for planning requirements elicitation, using a time/cost/value model called the EDD (Elicitation Depth Diagram). Planning for Agile projects may be done in a “stealth mode” according to Jacqueline Sanders because formal requirements deliverables are not a component of the Agile approach. We thank these individuals for sharing their experiences and recommendations with our readers.

Check out the outline for our new course, *Developing a Business Analysis Work Plan*, on page 8 and the public class schedule on our website for locations and dates of an offering near you. You don't want to miss the opportunity to attend this course. Students attending this course are provided a Business Analysis Planning Framework™ and deliverable worksheets to help develop their business analysis work plan for each project.

We encourage you to visit our website often to find new resources for your profession. If you would like to provide articles or materials that we can share with your peers, please forward them to sales@b2ttraining.com.



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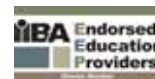


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Our training is offered nationally and on a limited international basis. Most of our classes are taught onsite and are tailored to the unique environments of each organization. Public classes are also available in various cities around the US.

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Take Control of

BY BARBARA A. CARKENORD, , CBAP, BABOK® CORE TEAM
PRESIDENT, B2T TRAINING

Planning for business analysis work and developing a business analysis work plan can help you take control of your time. After distributing our previous issue of *the bridge* with the cover story *Getting Started: Planning for Business Analysis*, a reader commented, “We are barely given enough time to gather requirements; my management will never give me time to plan my work!” So before continuing with a discussion of how to plan, consider the benefits of planning to an overworked business analyst. Here are five reasons why business analysis planning is worth the time it takes:

Planning ahead allows business analysis work to progress smoothly and efficiently. A plan provides clear direction so that the business analysis professional (BA) can move from one task to another without having to stop and make decisions about what should be done next. Planning ahead for requirements elicitation sessions enables the BA to give stakeholders a plan showing their expected participation in the process. This improves the likelihood that stakeholders will be available when needed. Having a business analysis plan also allows junior level BAs to contribute to the project more effectively.

Planning business analysis work improves the overall project plan and increases the likelihood of project success. Project plans have traditionally contained one task for business analysis work such as “Requirements Gathering – 40 hours,” with an arbitrary estimate of the number of hours needed. This estimate is rarely met and when this task falls behind schedule it delays the other tasks since all project work depends on the requirements. Building a detailed business analysis plan helps develop a more realistic estimate and enables the project manager to create a more realistic project completion schedule.

Understanding the detailed steps required to complete business analysis work provides justification for intelligent negotiation. Many BAs complain they are never given enough time to adequately elicit and analyze requirements. Often management does not understand the complexity of analysis work and does not recognize the actual time required. BAs need to take responsibility for this problem. When not given enough time to completely elicit and analyze requirements, the BA should be prepared to negotiate for more time. Intelligent negotiation requires the BA to meet with the project manager and/or project sponsor to explain, in detail, how much time is needed and why. Often substantiating the need for



business analysis tasks is enough to get approval of the increased estimate. When the project has a fixed end date that must be met, the project manager (and sometimes the BA) negotiate with the sponsor on scope reduction and/or resource increases. In project management these tradeoffs are referred to as the Triple Constraint. When business analysis work is outlined in a detailed plan, it is much easier for the sponsor and other team members to understand the risks of not allocating adequate time for requirements.

Business analysis planning helps future projects because planning skills are improved and pieces of the plan are re-used. When there is a detailed business analysis plan, the BA can track actual work against the plan and learn to better estimate future projects. The best information for estimating is past history. Also, business analysis tasks can be re-used on future project plans. Once the BA understands the tasks required to create a particular deliverable, she will be able to re-use that deliverable task list on future projects when the same type of deliverable is required.

Planning business analysis work helps to educate the entire organization about the complexity and value of the BA. Complex work always requires planning. Developing a detailed plan and following it to successful completion demonstrates professional skills and competency. The more successful the project, the more managers will recognize that the BA requires a high level of expertise and brings great value to the team.

Your Time...

Plan Your Analysis Wisely

The first article in this two-part series listed the three main components of a business analysis plan:

- Stakeholder analysis and communication planning
- Clear definition of the project scope
- A list of deliverables that will be produced and tasks to be performed by the BA

Article 1 covered stakeholder analysis and communication planning. This article discusses the remaining two components and how each deliverable can be used to generate a task list and time estimate.

Clear Definition of Project Scope

When a BA is assigned to a new project, she should first clarify the role(s) that she will play. Business analysis work may only be a part of the work that is expected from a particular team member. Often one person plays the role of project manager and BA. Sometimes one person is expected to do the business analysis work along with quality assurance. On a small project one

person may play all three roles along with being the systems analyst or system architect who designs the software change. To accurately create a plan and estimate time realistically, all of the assigned (and assumed) roles must be identified.

The next step is to assess the project. A BA may be assigned to a project at any point in its progress. It is important to determine how much work has already been done and where business analysis should begin. Regardless of when the BA is assigned he or she should conduct a project assessment to determine what work has already been done and what needs to be completed.

Think of a project assessment as a project inventory or checklist. It is a tool to determine the current status of the project and verify that the project scope has been clearly defined. The checklist includes questions such as, “Are there clearly articulated project objectives?” and “Are there interfaces to be considered?” Our course, *Developing a Business Analysis Work Plan*, is dedicated to providing BAs with tools to plan their business analysis work.

Another important step in assessing the project is assessing its priority, risk, and importance to the organization. Many organizations have specific rules for conducting projects based on their size, but size is only one of the factors that increase the risk and impact of a project. The business impact of a project indicates its relative importance to the organization. The more critical a project, the more important formal planning will be. Business impact is determined by looking at a whole list of key project factors such as number of stakeholders, business complexity, and timeframe. B2T Training has a business impact scorecard to help BAs determine if the project is a high, medium, or low impact project.

Determine Appropriate Deliverables

Once the project status and its business impact are clearly understood, the BA can choose the appropriate requirements elicitation techniques, analysis techniques, and deliverables that will move the project toward success. The initial communications

Examples of How Deliverables Differ From Project to Project

If the organization is considering purchasing a software package, the BA will typically prepare a Request for Proposal (RFP) with detailed requirements to which vendors can respond. Within the RFP individual requirements deliverables might include a data dictionary, list of business rules, and process workflow diagram.

Working on a business process reengineering project? Plan to prepare process workflow diagrams of the current process (AS IS) and diagrams of possible improvements to the process (TO BE).

When the project team is developing new software and is going to be using a specific software development approach, be

sure to review the guidelines for required deliverables. If the team is using RUP® (Rational Unified Process) the deliverables will probably include a Use Case diagram and Use Case descriptions. Build time into elicitation workshops and requirements reviews to teach business stakeholders how to interpret or validate unfamiliar deliverables.

On an Agile development project, the initial requirements or features list might be itemized in a spreadsheet in order of their priority, while the requirements for each iteration or sprint will be posted on whiteboards and flip charts kept on the walls of the project team room. User stories are often captured on 3x5 index cards.

plan (part one of this article series in *the bridge*, fall 2007) included recommendations for the ideal ways to communicate with each stakeholder. The chosen analysis techniques and deliverables reflect these recommendations along with the project needs and the organization's standards.

The result of an excellent plan is the ability to estimate the amount of time needed to complete the work.

Every project is unique and therefore dictates a unique set of deliverables. Every project does not need every deliverable. The BA must decide which techniques seem appropriate at the beginning of the project and plan for these. This does not prevent the BA from changing the plan as she learns more; it simply provides a roadmap for getting started and building time estimates.

An experienced BA will be able to quickly list the appropriate deliverables as he or she is assessing the project. Newer BAs will benefit from thinking through the requirements components (data, process, business rules, people/actors) that will be needed and reviewing available techniques that support these components.

By first looking at the necessary requirements components, then reviewing techniques, the BA logically decides on the most appropriate deliverables to cover the requirements completely. We don't want to create any more deliverables than are absolutely necessary. Think about who in the organization will be using the deliverables and how they will be used. It is beneficial to explicitly state which techniques/models will be used so that stakeholders know what to expect. Once the deliverables list is complete, time estimates can be developed by deliverable.

The Business Analysis Work Plan

The result of an excellent plan is the ability to estimate the amount of time needed to complete the work. The business analysis work plan can be thought of as a contract with business stakeholders. This is the agreement to complete the specified work in the time estimated. Each deliverable will require analysis work and this work can be broken into tasks.

Project management literature provides a lot of good information on how to develop a task list called a work breakdown structure (WBS). The business analysis tasks should be broken down into units of work that can be done in less than 40 hours. The smaller the task the easier it is to estimate and manage.

Don't forget tasks like analysis (i.e., thinking about a requirement), refining, and communicating. The business analysis task list will feed into the overall project task list or WBS that the project manager manages.

Once the tasks and deliverables are understood, estimating the time required for business analysis work will be fairly straightforward. BAs will benefit from keeping track of how much time they spend on individual tasks and using that information on future projects. Ask other BAs or project managers in the organization for help when getting started.

The most important success factor in estimating is creating a complete task list. Include all possible items. Anything that

Example of a Simple BA Task List:

Tasks for developing the data requirements	Estimate (hrs)	Stakeholders
Elicit the new data requirements	4	Mary Smith Tom Jones
Analyze and draft the data element list	5	
Meet with data administration	2	Bill Maxwell
Follow-up questions	2	Mary Smith
Refine the data element list	2	
Review and validate deliverable	2	
Get approvals	2	Mary Smith Bill Maxwell

may have to be done during the course of the project must be included in this list to make the estimate realistic. Estimate in hours (not days) to increase accuracy. Recognize that a task as simple as "Get Approvals" probably requires at least an hour for each approver because there may be a final discussion needed.

Summary

Once the business analysis work plan is complete, the project manager will approve it and incorporate it into the overall project

plan. As with any project, there may be some negotiation when the stakeholders see how much analysis work is estimated to cost and the time required. A detailed business analysis work plan provides the foundation for intelligent negotiation. As project managers well know, when the stakeholder wants to get the project done faster, the team will need more resources or a decrease in project scope. Work with the project manager and stakeholders to come to an agreement on a project scope and project plan that best satisfies the needs of the organization by delivering the highest value possible.

Once the plan is approved, work on the project will start. As the work progresses, things may change and adjustments may become necessary. These changes to the plan are expected. If there are changes to the project scope, the change control process, established by the project manager, will be used to approve the change. The project manager will manage the progress of the actual work against the plan and report progress to the executive sponsor.

Planning is a structured process and

requires a bit of imagination to "start with the end in mind." Business analysis planning is something that will become easier with more experience on different types of projects. Once a BA learns the key components of planning, practice makes perfect. Recognition that planning ensures efficiency, realistic estimates, and increased likelihood of project success makes it a very worthwhile activity for even the busiest BA! ■



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Intended Audience

This course is intended for anyone who is interested in learning a practical approach to planning the necessary business analysis tasks for their project.

Prerequisites

Students registering for this course must have attended *Essential Skills for the Business Analyst*, or have at least 2 years experience in requirements elicitation, analysis, and documentation using structured techniques. Contact B2T Training if you would like to exempt out of these prerequisites.



Developing a Business Analysis Work Plan

3 Days

Overview

Having trouble getting started with your business analysis work? Unsure about how much time to request from your project manager?

Developing a business analysis work plan will prevent major problems by ensuring that all of the appropriate stakeholders are involved and the requirements will be analyzed and presented using the most effective communication approaches. This class teaches students to consider all of the project and stakeholder characteristics before deciding on appropriate deliverables and producing a time estimate. The work plan also helps the business analyst develop realistic time estimates based on the chosen deliverables. These estimates provide detailed justification for negotiation with project managers and project sponsors. During class students are presented the Business Analysis Planning Framework™ and are given worksheets to guide their planning efforts.

Students are encouraged to bring their own project initiation documentation for a current or past project to the class. During the workshops, students will develop their business analysis work plan. If students do not have a project, a class case study is available and should be reviewed prior to the first day of class.

Regardless of when the BA joins a project or the project type, this class will guide planners to deliver an intelligent business analysis work plan to the project manager and have a detailed roadmap upon which they can immediately begin to execute. The business analysis work plan may be a single sheet of brief notes on a small project or a more formal document on larger projects. Regardless of the output produced, an excellent business analyst thinks through the plan before starting work.

Course Outline

Introduction – 1 hr

- Business analysis planning
 - Overview of business analysis planning activities
 - Discuss the relationship of the project manager and the BA in planning
- Use of the Business Analysis Planning Framework™ approach to planning
 - Project - Understanding the project characteristics
 - People - Identifying stakeholders and planning for communications
 - Process - Planning the analysis activities
- The business analysis work plan

Planning for Different Types of Projects – 4 hrs

- Planning for a large development project
- Planning for enhancement or maintenance projects
- Planning for a COTS project
- Planning for an outsourced or off-shore development project
- Planning for a project using a RUP style/iterative style development methodology
- Planning for an agile style development process

- Planning for a reporting or data warehouse project
- Planning for a process improvement effort
- Planning for an infrastructure upgrade
- Group workshop: Discuss planning considerations for case study projects

Project - Understanding the Project Characteristics – 4 hrs

- Let's get started - A checklist to assess the current state of the project and to help get started
- The Project Overview Worksheet - Is the project clearly defined?
 - Business objectives
 - Problems/opportunities
 - Requirements scope
 - High-level business processes
- The Business Impact Worksheet - What is the relative importance of the project to the organization?
 - Size (number of stakeholders, business processes involved, business rules)
 - Importance (estimated cost, potential benefits, criticality of business area, level of key stakeholders)
 - Risk (project, business, technology)

Course Outline (continued)

- Enterprise analysis - Understanding how this project fits into the organization's overall strategy
- Group workshop: Assess a project and score the business impact

People - Stakeholder Analysis and the Communication Plan – 4 hrs

- Why plan for stakeholder interactions?
- Assess the project sponsor
- Identify both primary and secondary stakeholders:
 - Searching for all stakeholders, not just the obvious ones
 - Understanding each stakeholder's concerns
 - Documenting each stakeholder's needs
 - Considering the characteristics of each stakeholder group
- Determine effective communication practices for each stakeholder group:
 - Is this group providing requirements, using requirements, or supporting the project work?
 - Which elicitation technique(s) will be most effective?
 - What requirement presentation format will be most comfortable for this group?
- The Stakeholder Analysis Worksheet
 - When and where will communications with each stakeholder be most effective?
 - What are the best communication techniques for each stakeholder?
- Group workshop: Identify and analyze the stakeholder groups for project and identify the appropriate communication techniques

Process - Planning the Analysis Activities – 4 hrs

- Plan the analysis activities
 - Step one - Assess which requirements components are needed
 - Step two - Determine which deliverables are needed using the Deliverable List Worksheet
 - Step three - Develop an approach for creating each deliverable using the Deliverable Worksheet
- Consult with organizational standards/methodologies for required deliverables

Creating the Business Analysis Work Plan – 4 hrs

- Step one - Create the business analysis task list
- Step two - Estimate analysis time
 - Using historical data to estimate
 - Tracking actual time to estimates

- Step three - Finalize the business analysis work plan
- Group workshop: Develop a task list of analysis and requirements activities for a project
- Intelligent negotiation skills
- Getting signoff on the plan
- Base lining the plan and initiating change control

Appendix - Ongoing Requirements Management – 1 hr

- What is Requirements Management?
 - Using a requirements repository
 - Developing a requirements management plan
 - Reusing existing requirements
 - Reusing existing data
 - Identifying requirements attributes
- Plan for requirements traceability
 - Learn about traceability matrices and requirements links
 - Understand the purpose of forward and backward traceability
 - Determine which requirements should be "traced"
 - Determine the appropriate approach for managing traceability
 - Exercise: Perform impact analysis using traceability

Appendix - Enterprise Analysis and Advanced Project Initiation – 1 hr

- Overview of project planning - For business analysts who have never taken a project management course, this appendix gives an overview of the project planning process to aid in understanding how the business analysis work plan fits into the project plan
- Learn to use root cause analysis
- Learn to use SWOT analysis
- Learn to create a high-level Six Sigma SIPOC process map
- Advanced project initiation requirements:
 - Learn techniques to identify strong project objectives
 - Learn a technique to help subject matter experts scope a project with unclear boundaries
 - Group workshop: Scope an unclear project
- Gap Analysis

► For more information on this course visit www.b2ttraining.com.

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San Francisco Sheraton Palo Alto Hotel	October 13 – 16, 2008
Boston Renaissance Boston Waterfront Hotel	October 27 – 30, 2008
Vancouver Vancouver Convention Centre	November 5 – 8, 2008
Chicago Location being determined	November 10 – 13, 2008

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lost in translation

Risky Business

Tips on planning for risks

BY ANGIE PERRIS, , CBAP, PMP, VICE PRESIDENT, B2T TRAINING



We don't want bad things to happen on our projects, especially due to lack of forethought. We try to preempt characteristics of catastrophes by considering the unique project, stakeholders, tasks, and deliverables. We consider risks while creating our business analysis work plan. One reason we build a business analysis work plan is to avoid getting caught off guard with an impossible problem.

Project managers are experienced in identifying and managing different risks on projects. Identifying and managing risks, however, is important to anyone who is involved in planning. As a business analysis professional who develops business analysis work plans on significant projects, I find it helpful to review planned tasks against two types of risks: project and business risks.

Business risks are threats to the business that may occur when the project is complete or if the project is cancelled or delayed. **Project Risks** are barriers to completing the project tasks you have planned and scheduled. Risks can be opportunities, but the focus in this article

is on adverse events.

Conducting an initial risk assessment work session at the beginning of a project is time well spent. During this session team members and subject matter experts brainstorm to create a list of potential business and project risks. See Figure 1 for an example initial risk assessment. Some risks will be easy to identify at the beginning and others will become apparent as the business analysis work plan details unfold.

Eight Steps to Conduct an Initial Risk Assessment Work Session:

1. Brainstorm a risk list until the team feels confident that all important risks have surfaced. (Use sticky notes to allow easy movement and reorganization).
2. Categorize and organize Risk Type as either business or project. (Write B or P on sticky note to represent business or project).
3. Subjectively score risk Probability and Impact. Ask "How likely is it that this risk will occur?" Ask for expert opinions in the group, and think about lessons

learned. If the risk is very likely the group ranks Probability as high (H), if it is moderately probable, we rank it as medium (M), and if it seems extremely unlikely, we score it as low (L). Then discuss "What happens if the risk occurs? What damage would it cause to the business or to the project?" Again score impact as high, medium or low. (I write H, M, or L, using a blue marker for Probability and red for Impact). Business risks will generally have higher impact than project risks.

4. Number the risks by the priority of most critical risks that require more details.
5. Plan risks responses for your highest risks. Look for those with highest impact and highest probability. If there is a high in either column you should consider a risk response. Write this on a separate sticky note with the same number.

Post Work Session Tips:

6. Transfer risk information into an easy-to-read risk template, like the example shown in Figure 1.
7. Incorporate appropriate response actions into your business analysis work plan.
8. Ensure the project manager receives all risk information identified by the group.

Figure 1

Risk Type	Risk Event	Probability	Response	Impact
Business	Users do not want to use the new software due to poor usability	Low	Plan multiple requirements elicitation sessions using prototypes with users to define usability requirements	High
Business	E-channel sales reduces brick and mortar retail store traffic and some may close	High	Recommend website features be deployed incrementally to give sales channel time box to plan retail sales strategy	High
Project	Primary SME is new and does not know business area details nor has ability to make requirements decisions affecting quality and schedule	High	Schedule meeting with PM and Sponsor to get additional SMEs time allocated to project. Bring work plan tasks and schedule as justification	High
Project	5 BAs assigned to project are new and may not be able to work efficiently, and may unwittingly introduce defects	High	Schedule business analysis training with B2T Training as soon as possible for entire BA team	High

For more granularity ratings you can use critical/almost certain, high, medium high, medium, low and extremely low/rare. I have also used percentages and numeric ratings (1-10) with 10 being highest and then multiplied the rated columns for a risk score. Hopefully you can use these tools and tips to plan effectively and not allow your project and business risks to get "lost in translation." ■

The BA in a *Service Oriented Architecture* Environment

BY LAURA MARKEY, DIR. APPLICATION DEVELOPMENT, IT ENTERPRISE SOLUTIONS, SERVICE MASTER

Service Oriented Architecture (SOA) is talked about as one of the most important technology initiatives of business today. Attend any IT conference and SOA is a topic on everyone's lips. What is SOA and how does the BA fit into this new world? According to IBM, the short answer is that, "SOA is a new approach to building IT systems that allows business to leverage existing assets and easily enable the inevitable changes required to support the business." The promise of SOA according to an IBM white paper, "you can turn your software applications into 'building blocks' that you can infinitely rearrange, and usually at great speed."

SOA allows connection or re-usability between processes and systems. Data and code are no longer proprietary or

customized to one operating system. Instead, common language is used to enable interoperability and efficiency gains. Many of today's organizations consider SOA instrumental to their technology strategy. The great news is that business analysts can play a leading role in SOA strategy.

The BA role is crucial in helping to identify and gather requirements supporting SOA. Some of the components that make up an SOA landscape include data and lines of code that can be combined into web services. According to Wikipedia, web services, "in common usage refers to clients and servers that communicate using XML messages." The XML standard provides the interoperability required for SOA. The developer is responsible for knowing the language and coding specifics for SOA. A

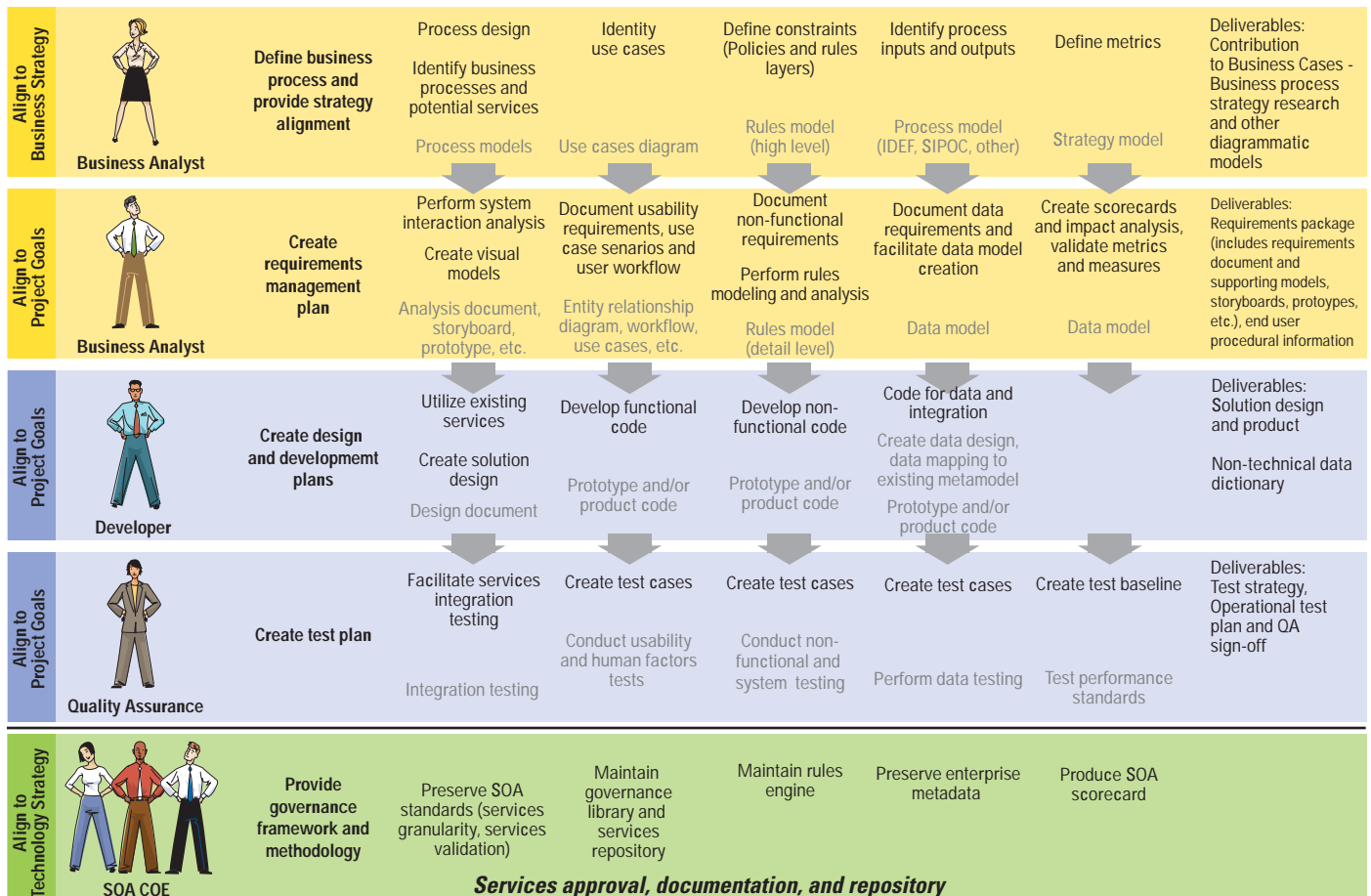
BA doesn't have to be familiar with coding standards but should capture SOA components as shared services, business rules, and process documentation.

Business analysis methods and hand-offs supporting SOA project development are illustrated in Figure 1.

When working in an SOA environment, the BA is compelled to think beyond the project and understand dependencies, impacts, and integration points across business units and systems. *As a result, SOA requires increased emphasis on strategy, enterprise analysis, business rules management and modeling skills.*

Each activity and artifact employed by the BA becomes critical in the design, development, and deployment of the solution as well as the SOA footprint. *The compilation*

Figure 1: Business Analysis Methods and Hand-Offs Supporting SOA (Project Development)



of these artifacts becomes the requirements package. The requirements package for a project will not only tell the story for the product solution but should also relay the integration points and alignment for SOA supporting business and technical strategy.

A key BA contribution supporting SOA goals is in the area of business **strategy or enterprise analysis**. The traditional BA thinks tactically; however, systems interaction analysis is vital for SOA projects. To identify re-usable services and data, the BA must be able to link external sources, dependencies, and interactions. They must use their strategy skills to align activities and deliverables across systems and processes. Traditionally, the BA is relied on as a business subject matter expert and advocate for a project. The SOA mindset requires the BA to approach the project more strategically by thinking across business functions and processes.

Figure 2

- Add customer preferences (in existing customer account)
- Change customer preferences (in existing customer account)

While diagramming the workflow, the BA uncovered some repetitive system tasks:

get customer account data and **verify customer account data**

Business rules management is another core SOA component. The BA is responsible for elicitation, documentation, and creation of the rules framework and hierarchies. Rules can be either operational (if/then decisions in workflow) or constraints and policies for the business. The requirements management plan (i.e., work plan) should include elicitation time to gather these business rules.

The BA uses **modeling skills** and tools such as Entity Relationship Diagrams (ERD) to help identify integration dependencies and impacts. Modeling the objects for actors, systems, and processes in an ERD (or class diagram) clarifies relationships. Use case diagrams (high level

categories of user activities) can be created from the ERD and later developed in more detail as use case scenarios (documentation of the actual steps a user must follow). These use cases aid in creating requirements for development of the functional code. The use case scenarios can then be translated into test cases for quality assurance.

Another effective diagrammatic method uses process models and workflow to uncover areas for web services utilization.

For example, a shoe retailer wanted to enhance a self-service website and add customer preferences as part of a CRM initiative. The BA drafted a work plan and decided to create an ERD to capture all data and system interdependencies. Additional requirements package deliverables outlined in the work plan included two use cases (see Figure 2).

The savvy BA realized that these tasks already existed for other customer account

workflows in production. Therefore, these system tasks could be considered for service creation (if they did not already exist) and re-usability across several processes.

Partnering with the SOA governance team aids in establishing the optimal level of services granularity. Services granularity refers to the composition of the service and more specifically the number of operations or tasks contained within a service. The capitalization on combined service tasks (composite services) is one of the benchmarks of quality SOA; however, there is a diminishing return if service complexity is such that it prevents re-usability across processes.

The BA is uniquely skilled to identify the level of granularity to best suit integration and dependency needs. The BA will be able to show service task combinations and optimal re-usability through process models,

ERDs, and workflow diagrams produced at the project and/or portfolio level. This is exhibited in the Shoe Retailer CRM initiative example. By combining the two fine grain tasks, an SOA development team creates a composite level service that can be used by multiple processes (see Figure 3). A developer without insight into other

Figure 3

get and validate customer account data

Re-usability potential –

- Use case 1.0: Change customer address
- Use case 2.0: Make customer payment
- Use case 3.0: Add customer preferences
- Use case 4.0: Change customer preferences

Etc.

entity relationships might add a third task, reduce the rate of re-usability, and limit the number of processes it can be applied to. Therefore, in this case, the most effective composite service includes 2 tasks.

The BA capitalizes on soft skill strengths in partnership, teamwork, and organization to support work with other SOA roles. The BA will often partner with information architects and developers in a governance team.

Governance, like the other fundamentals of SOA, relies on and is enhanced by deliverables from BAs. Information gathered from project requirements and enterprise analysis work help to drive SOA activities and standards. Further BA contributions include information for the corporate metadata, definitions, and knowledge repository. You can see that SOA is reliant on business analysis skills to enable flexibility and increased rate of change for the business.

While technologies may change, one thing is certain; the BA role and skill set continues to evolve and enhance any application development standard or solution. ■

References:

1. *Service Oriented Architecture for Dummies/IBM Limited Edition – Judith Hurwitz, Robin Bloor, Carol Baroudi – Wiley Publishing, Inc. 2006.*
2. *IBM Whitepaper: Service Oriented Architecture: A Practical Guide to Measuring Return on that Investment. – Jay DiMare.*
3. *IIBA: <http://www.theiiba.org/>*

Enhance Your Business Analyst Tool Box with an Elicitation Depth Diagram

BY DAVID ALTMAN, OWNER, RqMD CONSULTING

Business analysts are always looking for tools that facilitate the requirements elicitation process, especially tools that help us overcome a lack of organizational understanding of, or the will to follow, sound elicitation practices. Key among the many ways that requirements elicitation may be short-changed is the early onset of the “we don’t have time to do that elicitation stuff” mentality, which roughly translates to “we don’t understand it, so it will probably slow us down.” One tool that is helpful in overcoming this negative mindset and gaining political support for rigorous requirements elicitation is the Elicitation Depth Diagram (EDD). This article introduces the EDD, its value and use, and explains how to create an EDD.

What is an EDD?

The EDD is an excellent tool for gaining consensus among project stakeholders on the need for rigorous requirements elicitation. If done well, the EDD provides the BA with a simple means for communicating to stakeholders how much has to be done—think time and money—in order to gather valuable findings. The EDD gives stakeholders the ability to see the relative cost and value of elicitation activities. It balances this relative cost and value against other project constraints.

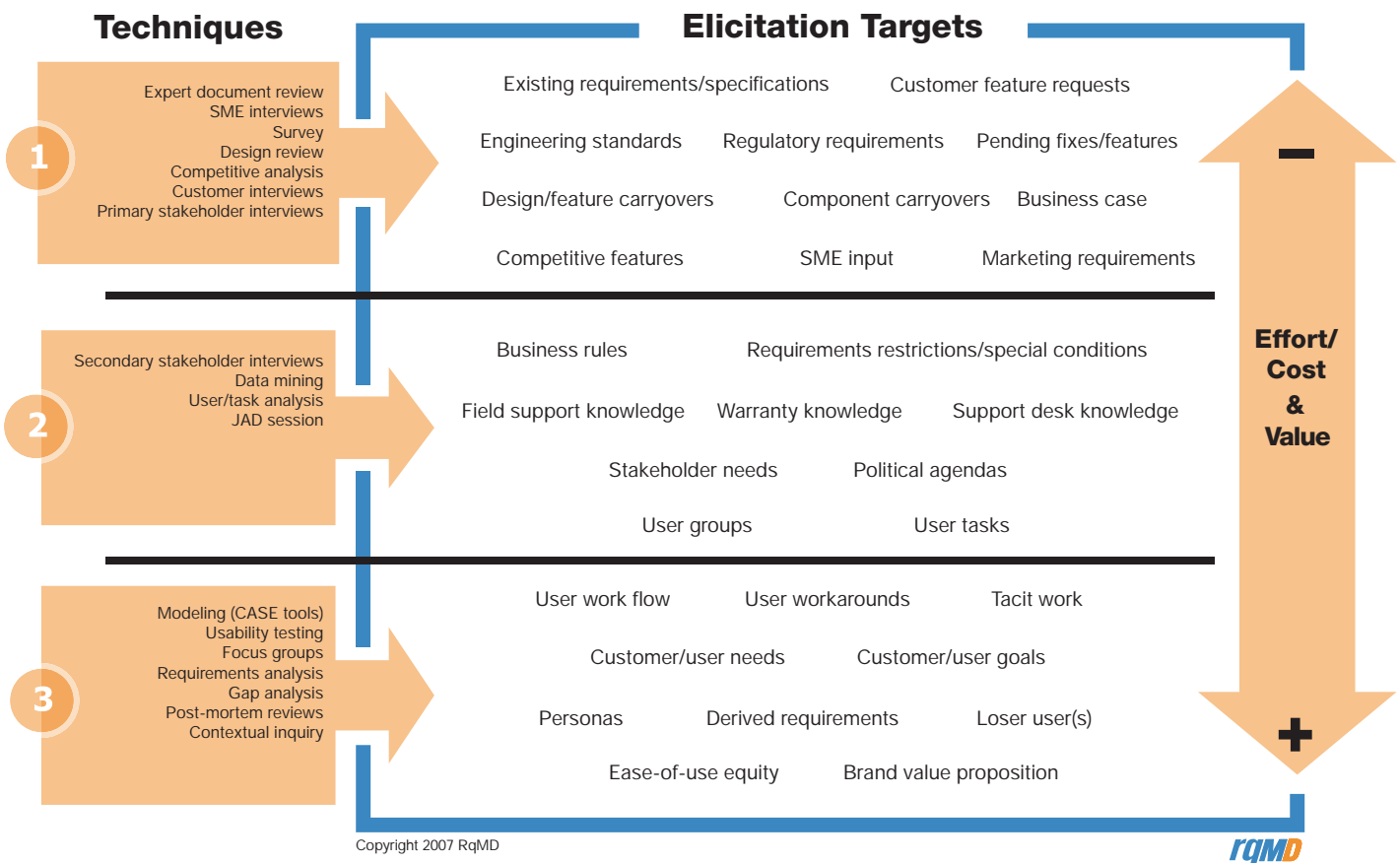
Look at the components of an EDD (Figure 1). This example was created to support elicitation in an industrial hardware domain. The EDD is comprised of three elements: Elicitation Targets, Techniques, and Differing Levels.

Elicitation Targets: Domain-specific internal and customer individuals, organizations, databases, business intelligence, and pockets of tacit knowledge from which findings can be elicited. For example, emails exchanged between a product line manager and a customer in which system features are discussed might contain “Customer Feature Requests” as shown in Level 1 of Figure 1.

Techniques: Domain-specific best practices that are used to elicit findings from a given elicitation target. In the previous example, findings related to customer feature requests might be extracted from the emails exchanged between the product line manager and the customer by way of an “expert document review,” which would be completed by the trained eye of the BA.

Figure 1

Elicitation Depth Diagram



Levels 1, 2, and 3: A visual metric that reflects the relative effort/cost of an elicitation technique vs. value of an elicitation target from least (top) to greatest (bottom). In a domain-specific EDD, achievement of greater elicitation “depth” is realized by eliciting from targets in Levels 2 and 3. Eliciting from targets in Level 1 is essentially the “status quo,” and creates the risk of requirements errors. Greater depth generally means greater resources and time are required to conduct the elicitation, but higher value findings will always be collected.

When do I use the EDD?

The EDD is a helpful tool for planning elicitation; however, its real value is political in nature. If you have ever attended a project meeting during the early stages of a development project and the stakeholders were excitedly presupposing all of the system requirements, you probably wanted to yell “What about doing some elicitation?” The EDD may be exactly what you need.

The EDD works because it is domain-specific. People will relate to the elicitation targets that the EDD contains—especially if specific targets have historically been ignored, resulting in rework. For example, if your organization typically uses SMEs (subject matter experts) as surrogates for actual users and this practice has historically led to rework, using the EDD can help you make a case for greater elicitation “depth.” By pointing out how a historical requirements error can be traced back to overdependence on SME input, the EDD will visually help you suggest that

An Example of Applying the EDD

A change history log review reveals that a design change was made because of an incorrect requirement. Further investigation reveals that the incorrect requirement was in fact cut-and-pasted from another requirements document. You note that several of the projects reviewed suffer from the same requirements error. You also note that carrying over requirements from one requirements document to another is a common practice, and generally seen as useful because of project-to-project similarities.

Referring to Figure 1, you see that the target “Existing requirements/specifications” and its enabling technique “Expert document review” appear high in the EDD (i.e., low effort/cost and value). Based on your review you agree with the positioning of this target and technique.

Figure 2

EDD Level	Technique Effort/Cost	Effort/Cost vs. Value	Target Value
1	Phone calls, email, short meetings with less than three people, and limited budgeted expense to support elicitation		Findings generally elicited from second parties/second hand information, are subject to interpretation and bias, and require extensive validation/analysis before acceptance as requirements
2	The activities of Level 1 plus formal meetings with more than three attendees, and significant budgeted expense to support elicitation		[A balance between Level 1 and Level 3 values]
3	The activities of Levels 1 and 2 plus expense due to travel to formal meetings by multiple people, field investigation, and lab work		Findings are gathered or derived first hand, in context to the work, from carefully selected user groups/users

rather than relying on SME input, a Level 1 target, the elicitation effort should target “user tasks,” a Level 2 target.

How do I create an EDD?

There are several approaches to creating the EDD. The most expedient method, described below, is a post-mortem review of historical projects. Note that there is a wide berth for subjectivity in creating an EDD. You will find that it will evolve with use.

1. Conduct a facilitated post-mortem review of:
 - Three projects viewed as successful with regard to on-time release, on budget, and that underwent relatively little unplanned rework after release.
 - Three projects viewed as problem projects because they were late, over budget, or underwent significant rework after release.
2. For each successful project, identify the elicitation targets and associated elicitation technique(s) that provided the findings that ultimately were used to create the final requirements set. Use Figure 1 as a guide to describe the elicitation techniques and targets.
3. For each problem project, review the requirements and identify requirements errors that contributed to the problem. A requirements error is any missing, incomplete, incorrect, or ambiguous requirement. An excellent starting point for this review is the change history log for each project.
4. Identify the following for each suspect requirement:
 - Elicitation targets that were not addressed, and which may have yielded valuable findings.
 - Elicitation targets that were addressed but were of less value than originally anticipated.
 - Elicitation techniques that were not used, but in hindsight would have yielded useful findings.
 - Elicitation techniques that were used but were of less value than originally anticipated.
5. Using Figure 2 as a guide, order the techniques that you identified for successful projects into the three levels of the EDD according to the technique’s

relative effort/cost. Attempt to sub-order the techniques.

6. Place the targets that you identified for successful projects into the three EDD levels aligning them horizontally with the primary technique used for targeted elicitation.
7. Based on the assessment you completed in step 4, order your existing elicitation targets and new elicitation targets into the EDD according to the target value metric described in Figure 2.
8. Based on the assessment you completed in step 4, add new elicitation techniques to the EDD, ordering them into the three levels according to the relative effort/cost metric described in Figure 2.
9. Review your draft EDD and reconcile any differences in technique effort/cost vs. target value.

If you find that the majority of your techniques are low effort/cost, yet most of

your elicitation targets are of high value, then you probably don't need to be using an EDD—your organization is mature with regard to requirements elicitation. Congratulations!

Conclusion

An EDD can be extremely helpful in overcoming organizational resistance to rigorous requirements elicitation. When creating an EDD recall that it is domain-specific; it reflects the competency of your organization to execute value-added elicitation. Armed with a domain-specific EDD, your next requirements planning meeting could go very differently. ■

David Altman is the owner of RqMD, a consultancy that specializes in requirements elicitation and RM process improvement. If you have any questions or comments please contact the author at reqmgmtdr@gmail.com.

What else can I use the EDD for?

- Creating and briefing an elicitation plan
- Making a case for requirements management in an organization that has no formalized requirements management capability
- Conducting project requirements post-mortem reviews
- Gaining support for increased spending on more rigorous elicitation techniques
- Helping management understand where policy changes, recruitment, and targeted expenditures can improve the development process

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ask the experts

Agile Manifesto

Question: *I keep hearing a lot about Agile. What spawned the Agile development movement and where can I learn more about it?*

Answer: The principles behind Agile are attributed to the Agile Manifesto. In 2001 a group of 17 representatives from Extreme Programming, SCRUM, DSDM, Adaptive Software Development, Crystal, Feature-Driven Development, Pragmatic Programming, and others created the Agile Manifesto. These individuals were looking for a “light-weight software development methodology” that is more people/ developer centric.

Some of the principles behind the Agile Manifesto are:

- Customer satisfaction by rapid, continuous delivery of useful software
- Working software is delivered frequently (weeks rather than months)

- Working software is the principal measure of progress
- Even late changes in requirements are welcomed
- Close, daily cooperation between business people and developers
- Face-to-face conversation is the best form of communication
- Projects are built around motivated individuals, who should be trusted
- Continuous attention to technical excellence and good design
- Self-organizing teams
- Regular adaptation to changing circumstances
- Simplicity

The publishing of the manifesto spawned a movement in the software industry that is becoming popular, intriguing, and controversial all at the same time. Part of the controversy is due to the fact that the Agile development was not meant to be a plan driven, prescriptive, or

structured methodology, like its earlier counterparts (i.e., Waterfall, IE, RUP). However, there are many books and training courses that dictate very specific ways Agile should be implemented. Agile is meant to be an adaptive and a relatively unplanned approach that values collaboration with face-to-face communication, and working software more than comprehensive requirements documentation. Agile experts will quickly correct the misunderstanding that Agile development means no documentation. They want the team to decide what deliverables are needed based on the project needs.

Visit www.agilemanifesto.org for a detailed explanation of Agile development. You may also want to read *Agile and Iterative Development, A Manager's Guide* by Craig Larman, Addison Wesley, New York, ©2004, Pearson Education, Inc. ■

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Requirements Planning for Agile Development Projects

BY JACQUELINE K. SANDERS, , CBAP, PMP

What are the requirements planning activities performed during a project that uses Agile development? This might seem like a trick question. Aren't requirements communicated verbally? If so there is no need to plan for requirements activities, right? With several years experience as a business analyst (BA) on Agile projects, I will share with you when and how BAs perform requirements planning and how they adapt their business analysis skills, techniques, and experience to benefit Agile projects.

I will start by describing a few common Agile characteristics. In this article Agile development is referred to as a framework for software development that encompasses building and deploying in short iterations throughout the life-cycle of the project. See Ask the Experts on page 17 for more information about the Agile Manifesto. There are many permutations of Agile development methods. Iterations typically range from one to four weeks, each containing planning, requirements analysis, design, coding, testing, and deployment. The project team is typically co-located with developers, testers, a subject matter expert, an iteration manager, and someone who is responsible for the requirements (i.e., the BA). The caveat is that the person who performs the BA role may not necessarily possess the title of "business analyst." She may even play multiple roles in which requirements engineering is not her primary role. In some Agile implementations, the project team members are all considered "generalists" with no specific titles. In this article, the role that manages requirements on an Agile project is referred to as the BA.

Since Agile development is not driven by a plan, you would think this will be a short article, but there's actually a lot more to it.

This article gives an insider's perspective based on real-world implementations not just an academic point of view. The focus is on two of the most controversial components around Agile—planning and requirements. This begs the question, "Can planning and requirements fit into the informal Agile world and still be effective?" Some BAs, like me, who have successfully adapted to Agile, will say "yes."

The biggest thing that traditional BAs may resist about Agile is the lack of prescribed deliverables and techniques. BAs on Agile projects should be prepared to let go of formal requirements documents and move toward informal delivery methods. The requirements blueprint may be scribbled informally on an erasable, portable white board.

BAs working on Agile projects are ultimately responsible for ensuring that core requirements components are defined. The BA must still perform due diligence on the requirements yet with Agile this is often in a covert or stealth mode that begins *prior* to Iteration 1. In a less publicized iteration, Iteration 0, we quietly plan. The BA accepts that once Iteration 1 kicks off, on a daily basis she will have to adapt to the ever changing demands of the Agile development environment. Iteration 0 is the only time a BA will be proactive and not be distracted by the day-to-day adaptive nature of Agile. During subsequent iterations, the BA needs to think on her feet and react to the daily circumstances.

The rest of this article focuses on the planning and requirements tasks that are a part of Iteration 0 listed in Figure 1. *The bridge* will feature subsequent articles focusing on additional iterations.

Iteration 0 planning proved vital for me on new development projects. New development projects contain many features and functions spread across many Agile

iterations. Iteration 0 planning ensures that these pieces create an integrated end product with little to no rework.

One project I worked on took place in 28 weekly iterations over a 7 month period. The three months prior to the first iteration were used to scope and plan. The five tasks below describe the requirements planning work done in Iteration 0.

1. Stakeholder Analysis

Even though Agile is known for having customers assigned to work on the project team, the reality is that often there are multiple stakeholders affected by a project in different degrees. Not every stakeholder should be assigned full-time to the project but they do need to be consulted as needed. The BA should do a full assessment of anyone who might be impacted. The information gathered during stakeholder analysis helps the BA know when to involve or consult a particular stakeholder in the future iterations. The primary, assigned stakeholder may be able to make the majority of decisions but it is up to the BA to represent or gain consensus in areas that impact several stakeholders. In Iteration 0 the BA tries to preplan stakeholder involvement, so when there are impromptu meetings during the development iterations, the BA will readily know who to contact.

2. Scope Definition

The BA is initially provided a high-level scope statement. The scope is refined and finalized in Iteration 0. Part of finalizing the

scope is validating the purpose of the project, finalizing quantifiable objectives, and defining the problem to be solved or the opportunity being pursued. Also during scoping, consensus on the project approach is reached. In my project, there were several different approaches, information was gathered on the pros and cons for each. There were several facilitated sessions, stakeholder meetings, and presentations focused on scope in Iteration 0. A well-defined scope is very significant on an Agile project because there is a great deal of flexibility and many interpretations that come about as the requirements evolve throughout the project. As informal requirements discussions take place, the BA needs to ensure the end product will still meet the objectives of the project sponsor. The scope provides the boundary that ensures discussions and decisions made during the development iterations are kept in context and are on target.

3. Solution Decomposition

As soon as the BA defines the scope of the solution, she works with the software designers and/or architects to draw an outline of the design. On Agile projects the requirements and design tasks are often blended together. As the BA reveals scope, the designers are up on a white board creating a framework of ideas for the solution.

The design framework must be a flexible overview of the solution since the detailed requirements are yet to be defined. It's necessary to create an overview of the

solution so that there is a “big picture” of the end product. The “big picture” helps the BA work with the project team to plan for breaking the work into components that fit into the iteration timeframe. The output of each of those iterations must fit back together at the end of the development iterations in a cohesive manner. Making sure those pieces fit together and avoiding rework justifies the purpose of the planning effort that takes place in Iteration 0.

Breaking the overall solution into small pieces requires a lot of negotiation, justification, and sometimes frustration. The BA spends a lot of time with the design and system architect identifying design risk, priorities, and consequences during Solution Decomposition. Because these discussions are usually very technical, the customers do not participate.

4. Informal Models

On this Agile project where new development was occurring, changes were required in the data, processes, business rules, and user interfaces. Although Agile revolves around verbal communications, we often validate our words with pictures. Starting in Iteration 0, the complex verbal discussions were typically supplemented by drawings on a white board. One person might start by illustrating what they were trying to communicate, then another person would add to the initial drawing and before you knew it everyone was standing at the white board with a different color marker adding and modifying the drawing.

Figure 1: How the BA Role Supports Agile Iterations

Iteration 0	Iteration 1	Iteration 2	Final Iteration
Includes: <ul style="list-style-type: none"> • Stakeholder Analysis • Scope Definition • Solution Decomposition • Informal Models • Reference Models 	Includes: <ul style="list-style-type: none"> • Prioritize Requirements • Develop User Stories • Informal Modeling • Design/Development Collaboration • Acceptance Testing Support • Deployment Support • Operations Support 	Includes: <ul style="list-style-type: none"> • Manage Change Request • (Re)Prioritize Requirements • Develop User Stories • Informal Modeling • Design/Development Collaboration • Acceptance Testing Support • Deployment Support • Operations Support 	Includes: <ul style="list-style-type: none"> • Manage Change Request • (Re)Prioritize Requirements • Develop User Stories • Informal Modeling • Design/Development Collaboration • Acceptance Testing Support • Deployment Support • Operations Support

A BA recognizes that these drawings were informal variations on workflow diagrams, logic maps, data relationship models, and decomposition diagrams. The collaborative drawing often remains on the white board in the co-located area throughout the development iterations as a reference. In later iterations, there were new discussions that would result in revisiting and changing the drawing. This is part of the flexibility in using the white board and is consistent with Agile principles.

The BA adds value to the many impromptu discussions because of her knowledge and experience on facilitation and effective communication techniques. In Iteration 0 the BA can identify high-risk

and high-impact issues that will benefit from an informal facilitated discussion in a later iteration.

5. Reference Models

During Iteration 0 the BAs create various formal models but use them as reference material and as auxiliary documentation. Some BAs may be reluctant to admit this, but the models serve the purpose of identifying gaps as well as overlap in the functions. In this scenario the models are tools and are not intended to be presented or to be part of a documentation package. When developers ask an impromptu question, the BA refers to these models and diagrams to ensure the answer leads the

developers to a cohesive end product. Traditional models help the BA anticipate various questions she will be asked and the answers she will be expected to provide.

Conclusion

Although Agile development is not driven by a plan, the BA can organize her work during Iteration 0 and establish a “big picture” view of the project. During this time the BA may use the five steps outlined in this article to define and scope the business analysis effort that coincides with each subsequent iteration. This effort allows the BA to adapt her daily plan and stay on track in the fast-paced Agile development environment. ■



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Jason Questor, chief learning officer for Achieveblue, says, “We are very excited to represent B2T Training in Canada. Their comprehensive business analysis curriculum is a key component

within our Business Analysis Professional Development Program.” He positions business analysis within the Achieveblue corporate mandate this way, “The most common issue raised by business analysts whom I have worked with, on projects and in class, is that organizational politics, bureaucracy, and inertia almost always stifle the effectiveness of their work, or even their ability to do their jobs at any level. Achieveblue understands that to be an effective business analyst you need to be part of an organization that fosters and champions the discipline across the enterprise. The simple fact is that business success depends on effective business solutions. Solutions development depends on effective business analysis at strategic, tactical, and operational levels.”

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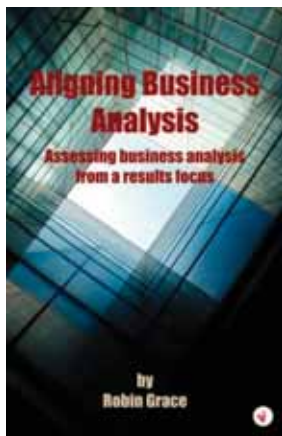
Aligning Business Analysis: Assessing Business Analysis from a Realistic Focus by Robin Grace

BY BARBARA A. CARKENORD, , CBAP, BABOK® CORE TEAM
PRESIDENT, B2T TRAINING


From our training partner in South Africa, IndigoCube, comes a new book on business analysis. Robin Grace has worked in the business analysis field for many years and has studied many methodologies and approaches. He currently conducts business analysis training sessions and provides consulting services, specializing in organizational business analysis assessments. This book contains his perspective on the formalization of the business analyst role and a description of the important goals that a business analyst must pursue.

One of Robin's key messages to the business analyst is to make sure that business needs are accurately reflected in software code. He acknowledges that there are an infinite number of ways that this can be done, but that it is the most important job of the business analyst. If the software does not reflect the true business need,

nothing else matters. Robin developed a process diagram that may be used from the beginning of business analysis through software design. He uses this diagram to relate critical requirements components of business rules and data to each business process. He also suggests a great approach for knowing how low to break down business processes by asking, "Is there someone in this organization I can walk up to and say *do this?*"




The book contains a lot of great quotes and references that will be useful to business analysis professionals and its style reflects Robin's witty and entertaining personality. Robin and I have spent time together both in the US and in South Africa to discuss our ideas and aspirations for the business analysis profession. We share a vision of a highly-valued profession that brings wisdom and efficiency to every organization. ■



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We are pleased to highlight the latest individuals who have earned the recognition of BA Certified since the last issue of *the bridge*. To date, we have more than 4,500 people in our program, with over 280 who have completed and received certification. We have an additional 400 candidates who have passed the three proficiency exams and are in the final stage of the certification process. Individuals who are BA Certified have demonstrated knowledge and application of business analysis and we congratulate them on their success.

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B2T Training Course Alignment with the BABOK®

The IIBA will be releasing Version 2.0 of the BABOK later in 2008. This version includes updated knowledge areas and associated tasks. We have provided the table below for our students to show how the courses you have taken align with the latest structure of the BABOK.

BABOK Version 2.0 Framework Tasks	CORE COURSES			ADVANCED COURSES				Mentoring and Coaching
	Ess Skills	Data	Process	Requirements Validation	Facilitating	Developing a BA Work Plan	Agile	
BA Planning and Monitoring								
Conduct stakeholder analysis	✓					✓		
Plan business analysis activities	✓					✓		
Plan business analysis communication	✓					✓		
Plan requirements management process	✓	✓	✓			✓		✓
Plan, monitor, and report on business analysis performance				✓		✓		✓
Enterprise Analysis								
Identify business need	✓					✓		
Determine solution approach		✓	✓					
Define solution scope	✓		✓					
Develop the business case	✓					✓		
Elicitation								
Prepare for elicitation	✓	✓	✓		✓		✓	
Conduct elicitation	✓	✓	✓		✓		✓	
Document elicitation results	✓	✓	✓		✓			
Confirm elicitation results	✓	✓	✓				✓	
Requirements Analysis								
Organize requirements	✓	✓	✓					
Prioritize requirements	✓	✓	✓				✓	
Specify and model requirements	✓	✓	✓					
Determine assumptions and constraints	✓							
Verify requirements	✓			✓			✓	
Validate requirements	✓			✓			✓	
Solution Assessment and Validation								
Assess requirements coverage	✓		✓	✓		✓	✓	
Allocate requirements			✓			✓	✓	
Determine organizational readiness						✓		
Validate solution				✓			✓	
Evaluate solution				✓			✓	
Requirements Management and Communication								
Manage solution and requirements scope	✓		✓					
Manage requirement traceability			✓			✓		
Maintain requirements for re-use						✓		
Prepare requirements package	✓	✓	✓					
Communicate requirements	✓	✓	✓	✓	✓	✓	✓	✓
Fundamentals								
Software development methodologies	✓					✓	✓	✓
Negotiation						✓		✓
Consensus building					✓			✓
Leadership								✓
Quality Assurance	✓			✓				✓
Presentation skills	✓				✓			✓
Project Management	✓					✓		✓
Networking/relationship building								✓
Consulting skills								✓
Business knowledge								
Technical knowledge								

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