Business Process Definition Interview Checklist

There are certain pieces of information a business analyst should understand about each process under analysis. The table below provides an informal checklist of questions you can use to make certain you have covered the major points. The answers will help you ensure that your process models, detailed process documentation, problem assessments and potential solutions are properly defined and as thorough as possible.

**Tip:** We recommend that instead of rigidly walking through the questions with an interviewee, you use this list as a reference — as a safety net — to ensure that you don’t overlook critical information.

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| Question | Primary Interviewee |
| Process Owner/Management | Task Performer |
| What value is delivered to the business by this process? | ✓ |  |
| What are the inputs to this process and how or where do those inputs originate? | ✓ |  |
| What are the outputs of this process and how are they used? | ✓ |  |
| Which organizational units/roles are involved in the process? What about outside organizations, such as customers or vendors?  | ✓ |  |
| What are the possible risks to the business if this process/task is executed incorrectly? (For a task performer, a better question is “What problems can happen if the task is not performed correctly?”) | ✓ | ✓ |
| Are there any impending or expected changes in your organization that may affect this process?  | ✓ |  |
| How long does the process/task typically take? Is there a specified time frame?Are there ever significant variations in the time required? If yes, please explain the reasons. | ✓ | ✓ |
| How often is this process performed? Will this number change at some point or over time? If yes, please explain. | ✓ |  |
| Are you maintaining any other metrics on this process? If yes, please explain.  | ✓ |  |
| What information do you need to perform this task? |  | ✓ |
| What new information or changes to input information does this task produce?(Tip: Become familiar with the CRUD matrix for documenting how each data element is handled by the process. “CRUD” stands for create, read, update, delete.) |  | ✓ |
| How and where do you perform this task? |  | ✓ |
| Are there any particular rules that you follow when you perform this task? |  | ✓ |
| How do you know when to perform this task? |  | ✓ |
| Do you always complete this task? Or is this task ever terminated before completion? Please explain.  |  | ✓ |
| How do you know when the task is completed? |  | ✓ |
| How do you know that you have performed the task correctly? |  | ✓ |
| What are the key indicators that tell you that a problem or issue has arisen? And how do handle these specific issues?  | ✓ | ✓ |
| Is the work monitored or measured? If so, how? | ✓ | ✓ |
| Do you use any job aids to perform the task? Please identify any formal documentation, such as step-by-step manuals, as well as informal aids – e.g., mnemonic devices, “cheat sheets,” etc. (Job aids can help the analyst identify process details that a task performer may not think to explain. They can also provide insight into the difficulty of performing a task.)  |  | ✓ |
| Do you always perform this task the same way? If not, please explain. |  | ✓ |
| Do you have any ideas for improving the efficiency of this process/task?  | ✓ | ✓ |
| Do you have any ideas for improving the quality of the outputs from this process/task? | ✓ | ✓ |
| Do you know of similar processes that may provide us with insight on how to improve this process? | ✓ |  |