



Developing a Business Analysis Work Plan

3 Days | Virtual and Face-to-Face

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 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.

Learning Objectives

- Use project characteristics, people, and process to determine what business analysis tasks are needed for a project
- Create a business analysis work plan which includes tasks and time estimates for the business analysts and other stakeholders
- Determine the appropriate level and formality for a plan
- Use the business analysis work plan as a negotiation tool to get approval for business analysis work on a project

"Rowing harder doesn't help if the boat is headed in the wrong direction."

- Kenichi Ohmae, Management Consultant

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

Business analysts registering for this course must have attended [Essential Skills for Business Analysis](#), or have at least 2 years experience in requirements elicitation, analysis, and documentation using structured techniques. Contact B2T Training if you would like to pass out of these prerequisites.

Learning Topics

Topic
Introduction
<ul style="list-style-type: none">• Business analysis planning.<ul style="list-style-type: none">○ Overview of business analysis planning activities.○ Discuss the relationship of the project manager and the business analyst in planning.• Use of the BA Planning Framework™ approach to planning.<ul style="list-style-type: none">○ Project - Understanding the project characteristics.○ People - Identifying stakeholders and planning for communications.○ Process - Planning the analysis activities.• Root cause analysis and the fishbone diagram.• The business analysis work plan.
Planning for Different Types of Projects
<ul style="list-style-type: none">• Introduce the concepts of plan driven vs. change driven approaches to projects.• Planning around unique project characteristics:<ul style="list-style-type: none">○ A large development project.○ Enhancement or maintenance projects.○ A COTS (commercial off-the-shelf software) project.○ A reporting or data warehouse project.○ A process improvement or re-engineering effort.○ An infrastructure upgrade (getting a new e-mail or operating system).• Planning around methodology and process characteristics:<ul style="list-style-type: none">○ An outsourced or off-shore development project.○ Iterative style development methodology.○ Agile style development process.• Group workshop: Discuss planning considerations for case study projects.

Project - Understanding the Project Characteristics

- 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, number of business processes involved, number of business rules).
 - Importance (estimated cost, potential benefits, criticality of business area, level of key stakeholders).
 - Risk analysis (project, business, technology).
- Enterprise analysis - Understanding how this project fits into the organization's overall strategy.
- Group workshop - Assess the project and score the business impact of a sample project.

People - Stakeholder Analysis and the Communication Plan

- 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 area of concern
 - Documenting stakeholder's needs
 - Consider 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 an example project and identify the appropriate communication techniques.

Process - Planning the Analysis Activities

- Plan the analysis activities
 - Step 1 - Assess which requirements components are needed?
 - Step 2 - Determine which deliverables are needed using the Deliverable List Worksheet
 - Step 3 - Develop an approach for creating each deliverable using The Deliverable Worksheet
- Consult with organizational standards/methodologies for required deliverables.

<p>Creating the Business Analysis Work Plan</p> <ul style="list-style-type: none"> • Step one - Create the business analysis task list • Step two - Estimate analysis time <ul style="list-style-type: none"> ○ Using historical and expert data to estimate ○ Tracking actual time to estimate • Step three - Finalize the business analysis work plan • Group workshop - develop a task list of analysis and requirements activities for a sample project. • Intelligent negotiation skills. • Getting signoff on the plan. • Base lining the plan and initiating change control.
<p>Ongoing Requirements Management</p> <ul style="list-style-type: none"> • What is Requirements Management? <ul style="list-style-type: none"> ○ Using a requirements repository ○ Develop a requirements management plan ○ Reusing existing requirements ○ Reusing existing data ○ Identifying requirements attributes • Plan for requirements traceability <ul style="list-style-type: none"> ○ 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
<p>Course Summary</p> <ul style="list-style-type: none"> • Final thoughts • Planning Worksheet Map • Optional Exercises
<p>Appendix - Advanced Project Initiation Requirements</p> <ul style="list-style-type: none"> • 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.
<p>Appendix - Advanced Topics</p> <ul style="list-style-type: none"> • Developing a cost/benefit analysis for a business case • Evaluating software applications for purchase (COTS)



This class is a part of the B2T Training Business Analyst Certification Program. For more information on the program, please see our [Certification](#) page.