

7 Questions to Answer when you're dropped into a new project

Business Analyst Guidance Paper

For any IT Professional, the first day-to-week of a new project assignment can be critical to project success, the team's perception of your competence, and consequently, to your own immediate and longer term professional success.

The objective of this paper is to answer the question "What are the most important things I need to know, discover and do in my first week on a project?"

While my own area of expertise, and hence the focus of this paper, is on the Business Analyst role, this paper in principle is broadly applicable to any IT professional taking on a new assignment.

For those perhaps unfamiliar with the Business Analyst role, the role I am discussing is interested in modelling a business, its systems, and possibly the system's components. These models may be a study of these domains as they exist today, or as they are envisaged for the future. The goal may be to understand and improve a business process, often but not always through the application of technology solutions. The textual and/or diagrammatic models created by the Business Analyst are often employed as a method to convey business and/or system requirements to the people who must envisage and implement technical solutions in support of those requirements.

This paper aims to put into writing the approaches I currently employ, usually implicitly, and largely successfully, in an attempt to succeed in, and make a success of, the projects in which I am involved as a Business Analyst.

An Engagement Process

Imagine yourself assigned to a new project in the role of lead Business Analyst. Where do you begin? Do you look to the project manager to provide the guidance you require, with respect to approach, methodology and tools? No – their expertise is in getting the right person for the job, to deliver outcomes – in this case, that person is you.

You will need to bring to the project a kit-bag of methodologies, tools and approaches, and rapidly determine which ones should be applied to allow you to do the job that is expected of you.

And what is expected of you? Your project manager will expect you to drive requirements elicitation from the client. The client will expect you to quickly understand their business, and help them to understand how a business and/or technical solution will deliver to them the benefits they are seeking. If it is a technical project, the technical team will expect you to deliver the logical definition of the system which is to be built, in a way which will allow them to develop and deliver the technical solution which meets the client expectations.

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So, what do you need in your kit bag, and how do you determine what to take out of that kit bag for a particular engagement? The following series of steps should begin to point you in the right direction.

ID	Title	Description
1	Situational Assessment <u>Where am I?</u>	On entering a new engagement, determine the status of activity <ul style="list-style-type: none"> • Is the engagement / project definition clear? Is there a clear, well communicated project charter, vision or the like, defining engagement scope, purpose, goals, constraints? • What phase of the project lifecycle are we in? • What phase of the software development lifecycle are we in? • If project is in-flight, what methodology, if any, is being used? Is this helping or hindering? • What is the health of the project? (On time, on budget, quality, client relationship, team morale)
2	Team Assessment <u>Who are we?</u> <u>Are we all here?</u>	Are all key required roles present and filled with competent resources: <ul style="list-style-type: none"> • Project Manager • Lead Architect • Lead BA • Lead Developer • Lead Tester • QA Role. <p>A single person may hold more than one of these roles on a given project, however, a clear and distinct delineation of roles if preferable.</p>
3	Knowledge Assessment <u>What do we know?</u>	What is the existing level of defined knowledge in the three modelling domains? <ul style="list-style-type: none"> • Enterprise / business • System • Component <p>Explicitly identify what that information is, record it, and make an initial assessment of quality / usefulness.</p>
4	Role Expectation Assessment <u>What am I doing here?</u>	What are the client, engagement management and other stakeholder expectations on the role? Do expectations go beyond the boundaries of a BA-only role (eg into architecture, developer etc)? If yes, do you have the skills to operate in those

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5	<p>Method Selection</p> <p><u>What is our approach to doing this job?</u></p>	<p>domains? If not, identify this early, and escalate to engage other expertise to address those areas.</p> <p>If an engagement methodology has not been explicitly selected and implemented, make your own assessment of which methodology best suits. This may be constrained by client or management, but as the BA you should make a judgement on the best methodology to implement from your perspective and make a recommendation. This will depend on your own knowledge and expertise.</p> <p>Traditional waterfall / structured approaches are common. Agile (iterative and incremental) methods such as SCRUM and XP may or may not replace or be incorporated into / wrapped around some of the more traditional approaches.</p> <p>As a Business Analyst, you are unlikely to be accountable for the project management methodology, however, it is worthwhile confirming for yourself that adequate aspects of project management methodology have been put in place. If not, initially raise any concerns directly with your project manager.</p>
6	<p>Methodology Customisation and Tuning</p> <p><u>Are we applying the tools in the most effective manner?</u></p>	<p>The selected methodology should be customised to the specific engagement. The BA should drive selection of the work products (documents, deliverables) and approach taken in their area of responsibility, in conjunction with other stakeholders. Some generic classes of BA work products are described later in this paper.</p> <p>The minimum set of work products which deliver the stated project objectives should be determined. The correct set is one where additional work products take further time for little additional value, while fewer work products would not adequately meet project objectives.</p>
7	<p>RAID</p> <p><u>What are the biggest dangers, and how are we addressing them?</u></p>	<p>Risks, Actions, Issues, Dependencies</p> <p>Determine all of the in-flight risks, issues and dependencies which impact the project, and the actions in place to manage and address them.</p> <p>If there is no formal approach to managing these four key categories of information, raise with your project</p>

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		manager the need to implement a formal approach (and start tracking them yourself in the interim).

Business Analysis Work Products – Three Domains

Enterprise / Business Domain

This domain is technology independent. It describes the business and the roles (including human and system) which interact with it. The scope of this domain may be defined by its boundary, with Actors external to the business on the 'outside', and everything to do with the business hidden on the 'inside'.

Various modelling tools and approaches can be used in this domain

- Free form text
- Use case definitions (Business Use Cases)
- Business process models (LOVEM diagrams and similar) – various drawing and modelling specific tools area available and can be used in this area.
- Business activity, sequence, state-chart and class diagrams (UML models).
- Data flow diagrams / functional decompositions (currently not industry preferred, but still useful if applied appropriately)

The objective in modelling this domain is to understand the nature of the business within which the system must exist, the key objectives and activities the system must support.

Some high level statements may be made in this area as to which business activities the system will support.

In some cases, such as business process re-engineering, this domain may be the sole focus of the BA activity on a project – seeking to model the existing business domain, either for the purpose of simple understanding, or to identify areas for improvement (with or without the involvement of technology solutions).

More often than not a given project will combine business and systems changes, with both domains needing to document a current (as-is) and future (to-be) state.

System Domain

This domain crosses the boundary between business and system. It is not completely technology independent. It describes the system and the roles (including human and system) which interact with it. The scope of this domain may be defined by its boundary, with Actors external to the system on the 'outside', and everything to do with the system hidden on the 'inside'.

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The objective in modelling this domain is to understand the nature of the system to be implemented.

Component Domain

This domain is fully internal to the system, and describes the internal logical and/or functional components which will work together to deliver the functional requirements as specified in the system domain model.

Approaches in this domain are not outlined here at this time.