

The Marriage of Professions – Business Analysis & Project Management

Session 1: Discovery Exercise

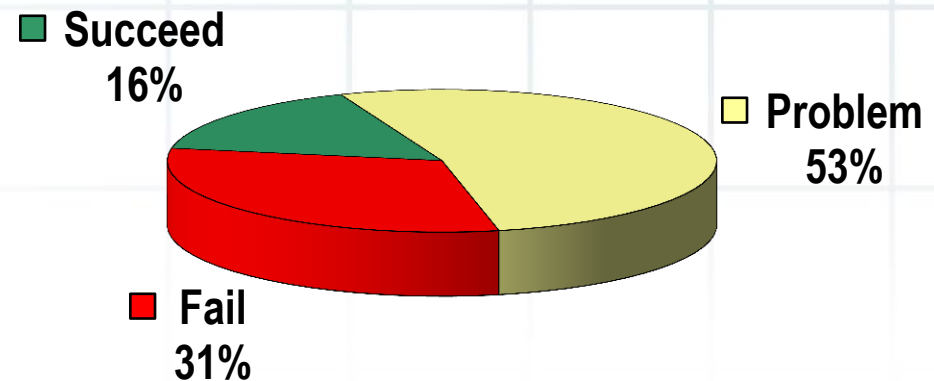
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Why Do We Care?

- Research, both primary and secondary, leads to a realization that one of the leading causes of project failure is poor, or incomplete, requirements
- Who defines the need & who defines success?
- Is the solution at our fingertips?

“Incomplete requirements, changing requirements, and unclear objectives are three of the top 10 factors contributing to challenged projects”



Source: The Standish Group. (1994). The Chaos Report.



Roles vs Skills



- A role is the customary function(s) for a specific position
- Skills are the abilities required to perform in an assigned role
- We know what we think, so what about our leaders?
 - Blend between...
 - Professional acumen
 - Business acumen
 - Interpersonal acumen



What Does This Mean to Us? ...or *Chuck's Taxonomy*

1. Knowledge & Comprehension: List & Explain
 - Understanding an intended message (the PMBOK® & BABOK® in this application)
 - Congrats, you get the letters after name!
2. Application: Apply & Act (the next step after comprehension)
 - Demonstrated ability to apply your body of knowledge to an actual project
3. Analysis: Arrange & Prioritize (pragmatic application of the BOK)
 - Understands how the individual parts are applied in isolation
 - **And** how the processes are integrated and complement each other
4. Synthesis & Evaluation: Adapt & Defend (the critically thinking PM & BA)
 - How you apply the concepts in a complex environment
 - Ability to determine which “parts” are applicable & which are not



Discovery Exercise

- Part 1
 - BAs: Describe your vision of the perfect PM
 - PMs: Describe your vision of the perfect BA
- Part 2
 - BAs: Describe your vision of the perfect BA
 - PMs: Describe your vision of the perfect PM



So...What Makes a Great PM or BA?

- 1. Soft Skills
- x. Project Management / Business Analysis Acumen
- x. Business Acumen



The Segue to Session 2

- PM & BA – Complementary Roles
- Potential Sources of Conflict & Resolution Strategy
- Shared, Complementary and Diverse Skills
- A Case Study in Practical Application



Session 2

The Marriage of Professions – Business Analysis & Project Management Can Live Happily Ever After...Together!

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Introduction

- This is both a horror story and a love story, with a theme just as intricate as any complex relationship
- The good news: The path to escape the grasp of the monster, navigate the trials and tribulations of a “marriage of professions,” and arrive at a happy ending is easy to define
- It is up to each of you to follow the path



Outline

- The Monster, the Heroine, and the Hero
- The Marriage Analogy
- PM & BA – Complementary Roles
- Potential Sources of Conflict & Resolution Strategy
- Shared, Complementary and Diverse Skills
- A Case Study in Practical Application



The Setting

- Any office that leverages technology for their work...



The Birth of a Monster

- Small, manageable, tame, helpful, wanted
- A growing appetite
- Growing dependence
- Human-like awareness
- The “monster” emerges
- Caring for the beast
- Still, there were those that defended, even loved, the monster



A Clear Need?!

- Slay the monster and replace with a pet that meets our needs
- Newer, easier to maintain, accomplish more work, more efficient, replace manual processes
- What and how?



Our Heroine & Hero

- PM
 - She knew the biggest challenge would be identifying, prioritizing and managing the staff's expectations
 - Why do projects fail?
 - Who defines real success?
- BA
 - He knows the importance of “bridging the gap”
 - Define the business need first, then develop the requirements
 - Avoid a well managed failure



The Marriage Analogy

- What makes a good marriage?
 - Mutual understanding
 - Mutual respect
 - One is not subordinate to the other
 - Submit ourselves to the skills brought by each half



PM & BA – Complementary Roles

What exactly does “complementary” mean? Here are a couple variations of the definition as provided by Merriam-Webster (2011) dictionary:

1. To fill out or complete
2. Mutually supplying each other's lack
3. Forming a satisfactory or balanced whole



PM & BA – Complementary Roles

Managing Stakeholder Expectations

- BABOK: “The business analyst is responsible for eliciting the actual needs of stakeholders, not simply their expressed desires (p. 3)” and ensuring “requirements are visible to and understood by all stakeholders (p. 5).”
- PMBOK: “An important part of a project manager’s responsibility is to manage stakeholder expectations. This can be difficult because stakeholders often have very different or conflicting objectives. Part of the project manager’s responsibility is to balance these interests... (p. 24).”



PM & BA – Complementary Roles

Managing Requirements

- PMBOK: The project initiation processes include “developing clear descriptions of the project objectives, including the reasons why a specific project is the best alternative to satisfy requirements. (p. 45).
- BABOK: “Defining the process that will be used to approve requirements and managing changes to the solution or requirements scope (p. 42).”

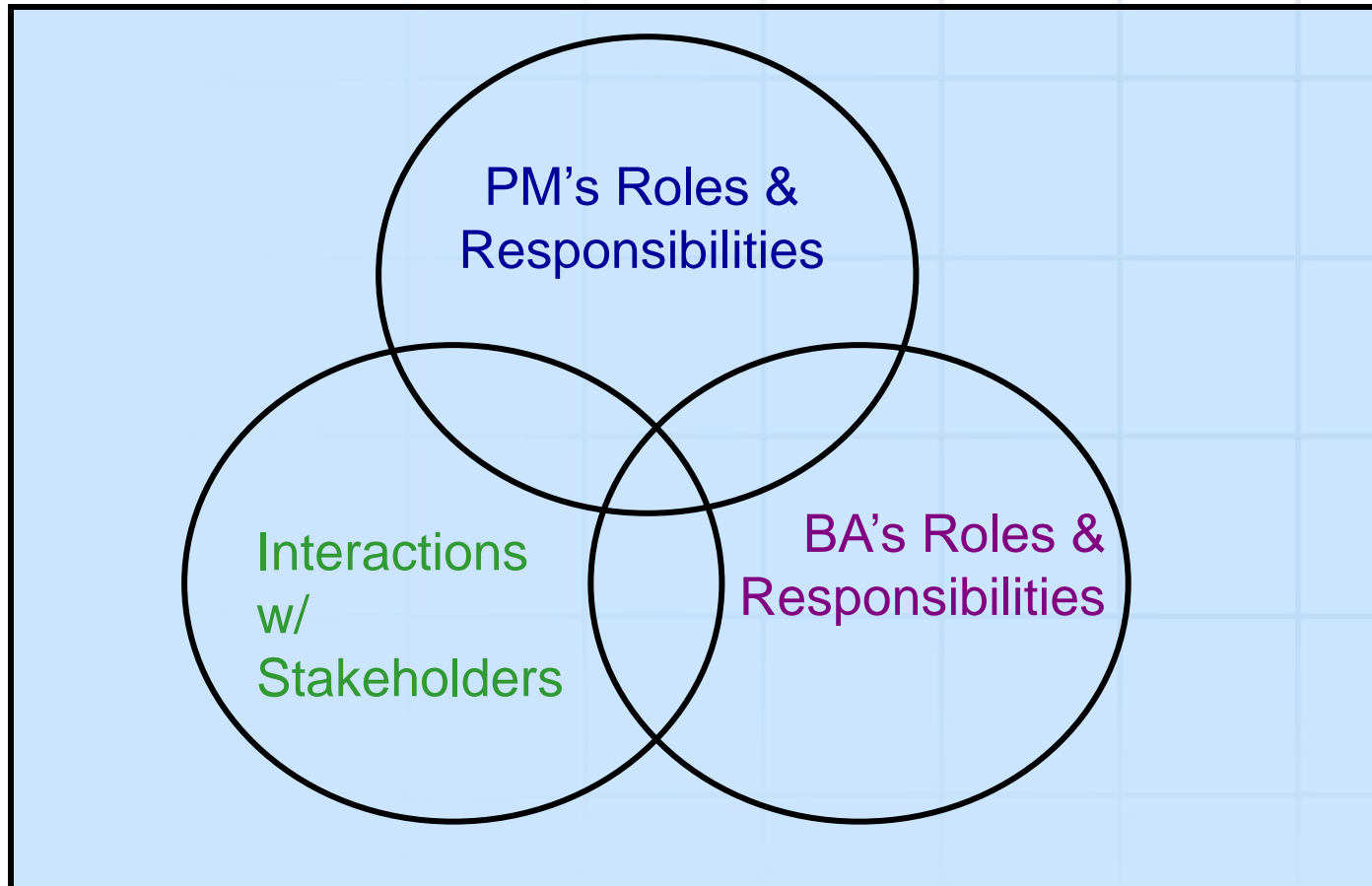


PM & BA – Complementary Roles Managing Requirements

- So, the BA works to analyze, verify and validate the requirements to ensure stakeholders' needs are accurately documented and then manages those documented requirements throughout solution delivery
- Then what is the PM's role?
- The PM manages the activities required to deliver the solution based on the agreed upon business objectives



Potential Sources of Conflict & Resolution Strategy



“Not a collision, but a strategic joining of forces”



Potential Sources of Conflict & Resolution Strategy

- Pop Quiz: “Why do marriages fail?”
 - What if we expand to include partnerships and teams?
- Surprisingly, the list of causes is short
 - Self-centeredness (ego)
 - Unresolved conflict
 - Ignorance of the fundamental distinctions between each other



Potential Sources of Conflict & Resolution Strategy

“A critical question to ask of yourself is what are your responsibilities and what do you bring to the relationship. The clearer and the more honest you are about the context of your association with potential partners, the easier it gets to be able to navigate the muddy waters of the relationship and potentially achieve things that you want to do together.”

Source: Stewart, H. (n.d.). *Effective Business Partnerships*. Retrieved on 7/9/2011 from Business Expert Webinars, Website:

<http://www.businessexpertwebinars.com/content/view/1156/29>.



Potential Sources of Conflict & Resolution Strategy

- Communicate, document and educate
 1. Learn about, and appreciate, each other's skills
 2. Document project related roles and responsibilities for each profession as necessitated by the organizational structure, culture and other influencing factors
 3. Ensure all stakeholders understand how each profession's skills contribute to meeting business objectives and project goals



Shared, Complementary & Diverse Skills

- Functions overlap? Absolutely
- Roles different? Distinctly
- PM = Concerned with the overall project, managing delivery and balancing project constraints
- BA = Focused on defining the product and ensuring the delivered solution meets the business need



Not Blasphemy, but a Reality

- Should a PM perform BA activities or vice versa?
- If a PM does not have a dedicated BA, do we simply skip requirements elicitation and management?
- If a BA does not have a dedicated PM, do we skip developing a schedule, managing constraints and holding the team accountable for delivery?
- Men, be prepared to wash dishes. Ladies, there may be times when you need to take out the garbage.
Metaphorically speaking...



Shared, Complementary & Diverse Skills

- The balanced whole
 1. Product scope: “The features and functions that characterize a product, service, or result,” which is “measured against the product requirements (PMBOK, 2008, p. 103 & 105).”
 2. Project scope: “The work that needs to be accomplished to deliver a product, service, or result with the specified features and functions (PMBOK, 2008, p. 103).”
 3. Solution scope: “The set of capabilities a solution must deliver in order to meet the business need (BABOK, 2009, p. 232).”
- **It is important to note that the BABOK includes the exact same definition for both project and product scope.**



Shared, Complementary & Diverse Skills

- A **more** balanced whole
 1. Solution scope: “The set of capabilities a solution must deliver in order to meet the business need (BABOK, 2009, p. 232).”
 2. Product scope: “The features and functions that characterize a product, service, or result,” which is “measured against the product requirements (PMBOK, 2008, p. 103 & 105).”
 3. Project scope: “The work that needs to be accomplished to deliver a product, service, or result with the specified features and functions (PMBOK, 2008, p. 103).”



Shared, Complementary & Diverse Skills

- Project Manager
 1. Big picture, overall project
 2. Leads the project team
 3. Manages to schedule & budget
 4. Project scope & changes
 5. Creates & manages the WBS
- Business Analyst
 1. Focused on solution detail
 2. Interfaces with business process owners
 3. Manages product as related to business need
 4. Requirements scope & changes
 5. May be assigned to requirements tasks



Shared, Complementary & Diverse Skills

- The whole is greater than the sum of the parts
- Can the parts exist in isolation?
- Can a PM meet expectations without a BA focused on requirements and solution scope?
- Can a BA successfully lead the effort required to deliver a product without a PM?
- Do you want your professional credibility resting on “could happen?” Your call...



The Practical Application

- Our biggest challenges included:
 1. Complete dependence upon an antiquated system
 2. A complete lack of process documentation
 3. A diverse set of stakeholders with competing priorities
 4. A lack of understanding of the differences between needs and wants
 5. A history of failed attempts to replace the legacy system
 6. Fear of change, even though there was shared understanding of the inefficiencies and risks to the business



Keep in Mind...

This presentation is not implying this is a waterfall process that must be completed in the order presented or by the roles identified; however, an understanding of the intersection and interdependencies of the skills and tasks is critical to ensuring project success



The Practical Application

- From business need to product and project scope
 - The business case (business analysis)
 - Business need
 - Business goals
 - Business benefit
 - The project charter (project management & business analysis)
 - Business need decomposed into project business objectives
 - Must tie back to, and satisfy, the need from the business case
 - Sets the foundation for applying resources to work required to deliver the solution
 - Iterative decomposition process (project management & business analysis)
 - Requirements elicitation and solution assessment/validation
 - WBS development – captures the full scope of work (project) required to deliver the solution



Did You Know...

The term “Business Analysis” does not appear in the PMBOK 4th edition, even though “Collect Requirements” was added as a major process in Scope Management

(Project Management, the methodology, appears in the BABOK 18 times)

The role “Business Analyst” only appears once in the PMBOK 4th edition, and then only as a sample project role that could be included in the Human Resource Management Plan

(Project Manager appears in the BABOK 59 times)

Does this imply, although not explicitly stated, that the PM owns requirements traceability. Really?



The Practical Application

- Requirements traceability and management
 - What is Requirements Traceability?
 - PMBOK: “Defining & documenting needs to meet project objectives”
 - BABOK: “the ability to identify & document the linkage of each requirement, its allocation, and its relationship to other requirements & demonstrates traceability between requirements and the associated project work components”
 - BABOK: “purposed to create and maintain relationships between business objectives, requirements, and solution components”
 - PM owns management of requirements traceability effort
 - PMBOK: Requirements management is limited to the planning processes and “how requirements will be analyzed, documented, and managed”
 - The who, although not plainly stated, is the BA
 - BA assigned to the requirements related WBS tasks (and ultimate owner of requirements traceability)



The Practical Application or “What Are We Really Here For?”

- Measuring project success
 - How is success defined?
 - On time and within budget
 - Exactly according to documented scope
 - Success is determined by meeting business objectives or solving problems
 - In other words, neither the PM nor the BA get to declare a project a success



Closing Thoughts

- 17 years ago, our communities learned the lack of stakeholder involvement, coupled with incomplete or mismanaged requirements, comprised almost half of the factors leader to failed projects.
- Project success is a perception that must be proactively defined and managed throughout the project and solution implementation
- The PM and BA are perfectly coupled for the task
- A marriage of professions designed to slay the monster, overcome the most common barriers to project success and deliver real business results



MBA + MPM + PMP + PgMP + CBAP + CSSBB +
CMQ/OE + CSQE + MHP + itSM +

\$4.29 =



Knowledge is only potential...
Proficiency is power!

