

PM and BA collaboration

Why projects need both of them

RTP IIBA Chapter, April 17th, 2008

Facilitator: Razvan Radulian, VP of Education

BA and PM! Objectives for today

- Raise awareness & interest
 - PM and BA framework
 - Similarities and differences between the 2 roles
 - Collaboration often taken “for granted”
- Discuss aspects of the 2 roles being played:
 - By the same person
 - By different people
- Plant the seed for further dialog:
 - Here and back in your own organizations
 - Today, tomorrow, every day...

Agenda & format

- Main presentation
- Break
- Look at how 2 companies implement these roles:
 - Credit Suisse
 - Blue Cross Blue Shield of NC
- What's next?
- Q&A

Why should we care?

The Vision...

“The best way to guarantee success of any type of project is to have a strong, experienced **Project Manager** and a strong, experienced **Business Analyst.**”

- Barbara Carkenord

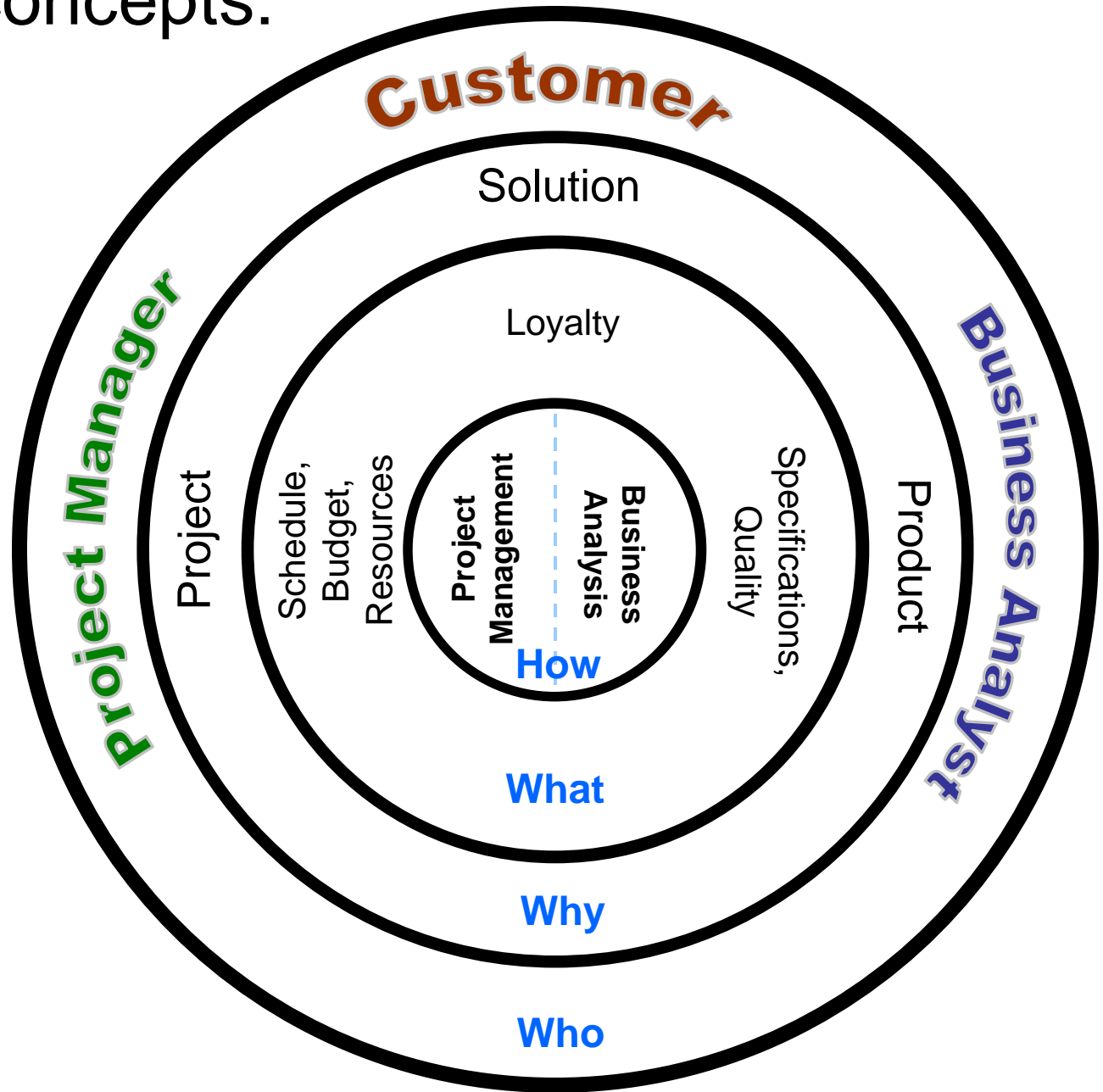
The Bridge newsletter, Fall-Winter 2005

... and the **Challenge**

Putting things in context



Some basic concepts: perspectives



Revisiting some basic terms

Product

- Business Analysis (BA)

Project

- Project Management (PM)

Players:

- Customer
- User
- Business Analyst
- Project Manager
- Technical team (Designer/Architect, Developers, support)
- Other Stakeholders

IIBA & PMI

International Institute of Business Analysis (IIBA)

BA Body of Knowledge (BABOK):

- Version 1.6 (current)
- Version 2.0 (under public review)

Knowledge Areas:

- Enterprise Analysis
- Planning and Management
- Requirements Elicitation
- Requirements Analysis & Documentation
- Solution Assessment and Validation
- Communication

Project Management Institute (PMI)

PM Body of Knowledge (PMBOK):

- Version 3.0 (current)
- Version 4.0 (under public review)

Process Groups:

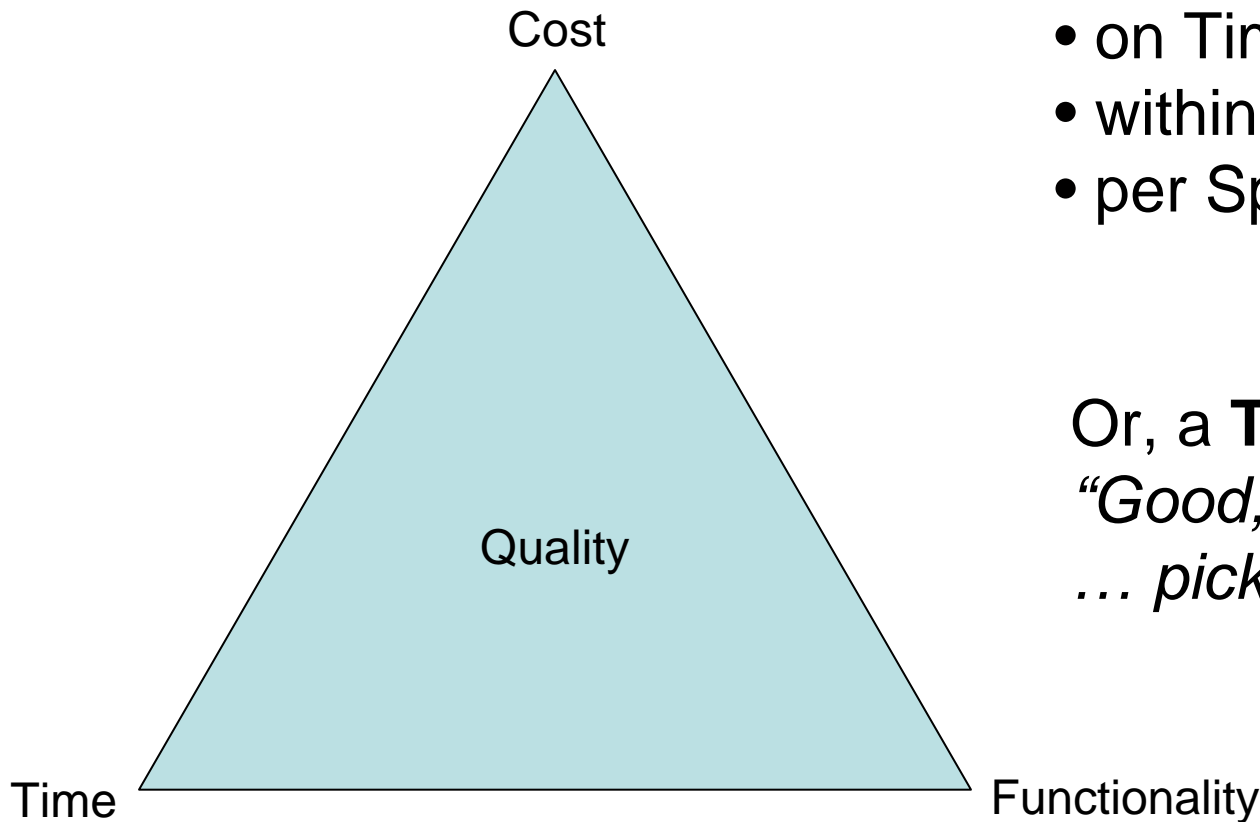
- Initiating
- Planning
- Execution
- Monitor and Control
- Closing

Knowledge Areas:

- Integration
- Scope Management
- Time Management
- Cost management
- Human Resources Mgmt
- Communication Mgmt
- Quality Management
- Risk Management
- Procurement

Let's start by looking at the
PM & BA models/frameworks...

PM model: The “Triple” Constraints...



GOAL:

- on Time
- within Budget
- per Specifications

Or, a **TRILEMMA?**

*“Good, fast, or cheap
... pick two!”*

Why not a PM/BA Framework?

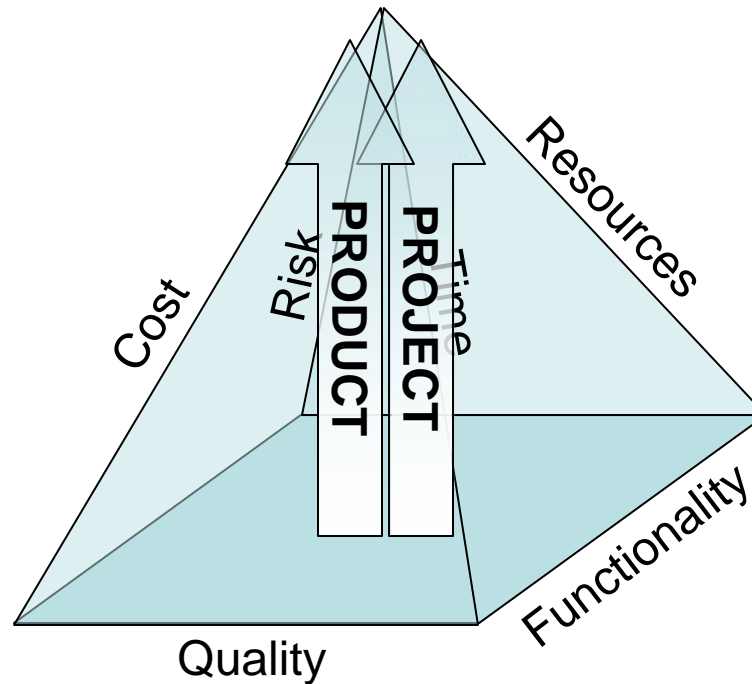
First, develop the blueprint...



Why not a PM/BA Framework?

... then, use that blueprint to build up the product.

Customer Satisfaction



So, what does this mean for
Project Managers and
Business Analysts?

Assumption

- For sake of a better argument, let's make the assumption that the 2 roles are played by different people
- Later on, we'll revisit this assumption and discuss both situations:
 - Both roles performed by same person
 - Each role performed by a different person

Project Initiation/Planning: Tasks

Common:

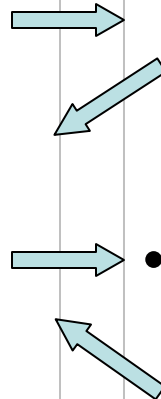
- Identify Project Stakeholders and their needs, interests, and roles/responsibilities
- Finalize, communicate, and obtain agreement on the Project Charter
- Develop, communicate, and obtain agreement on the Project Scope

PM:

- Develop Project Management Plan, including:
 - Integrate Business Analysis Management Plan
- Assemble Project team

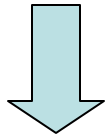
BA:

- Develop Business Analysis Management Plan
- Assemble Business Analysis team
 - Sub-team of the larger Project team



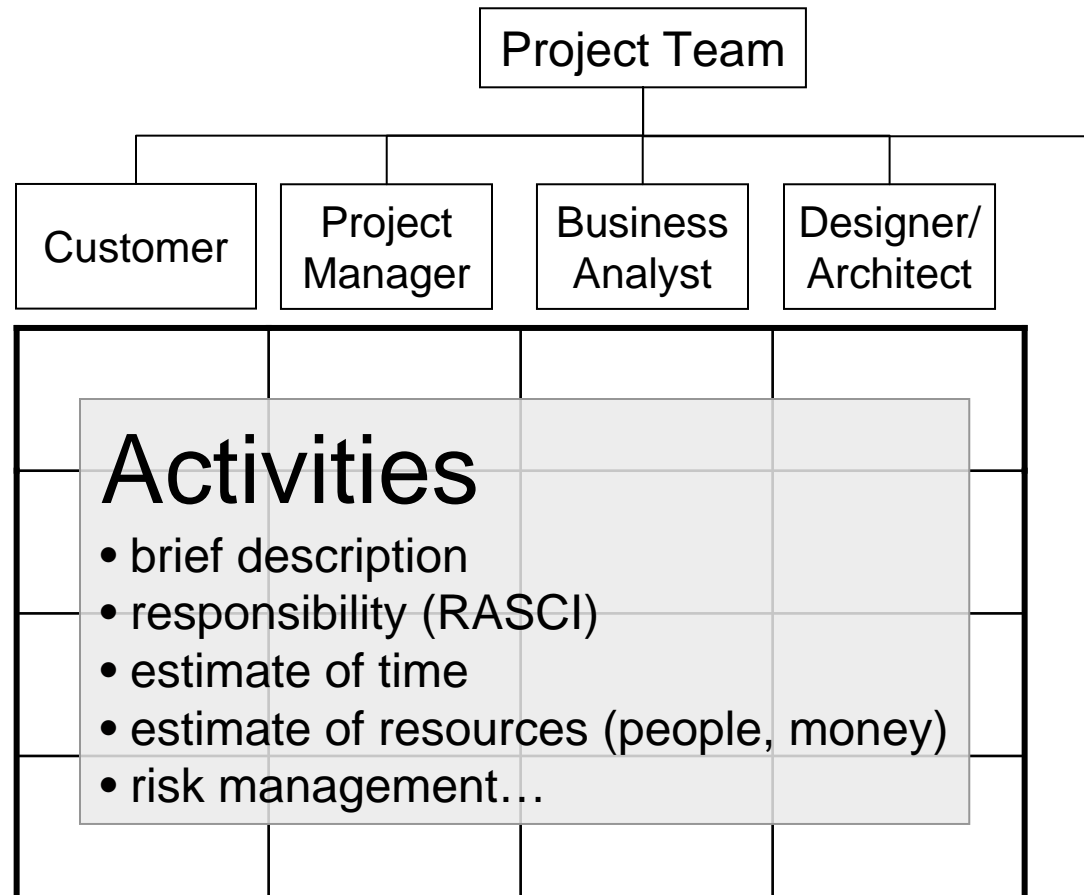
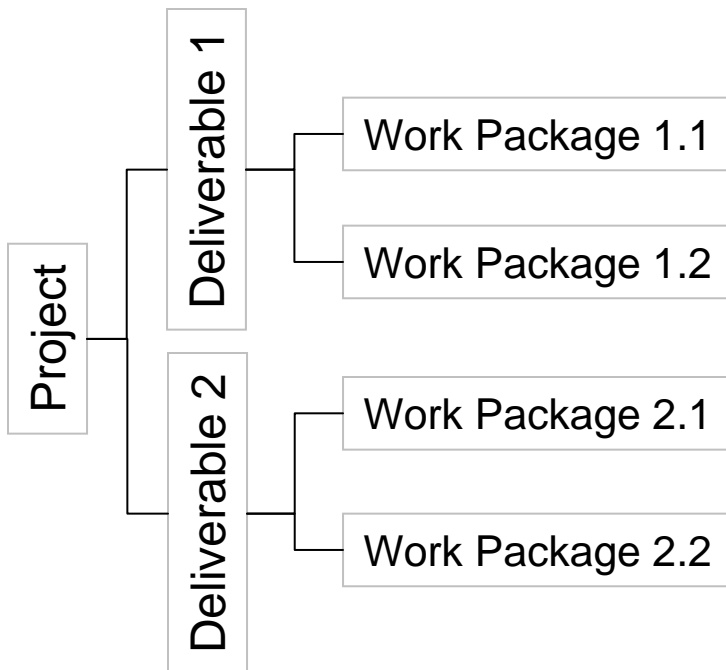
Project Initiation/Planning

Work Breakdown
Structure (WBS)



Responsibilities
Assignment Matrix
(RAM, RACI, RASCI...)

... or, better yet (in my humble opinion* ;))
Razvan's Activity Matrix (also a RAM!)



Project Execution/Monitor & Control: Tasks

Common:

- Communicate activities performance/status
- Manage plan execution, monitor and control variations

PM:

Focus on Project parameters.

- Manage Project performance:
 - Time/schedule
 - Cost/budget
 - People and other resources
- Manage Project Scope:
 - Corrective actions
 - Preventive actions
- Manage Project Risks

BA:

Focus on Product parameters.

- Manage Product performance:
 - Functionality/features
 - Quality
 - Fit for purpose
- Manage Product Scope:
 - Change Requests
 - Defect fixes
- Manage Product Risks

Project Closure: Tasks

Common:

- Communicate/report activities status
- Lessons-learned

PM:

- Validate Project completion (WBS as reference) and obtain Project Acceptance
- Transition Project to Operations
- Close Project

BA:

- Validate Product completion and obtain Product Acceptance
- Transition Product development to Product Support
- Close Business Analysis activities

Knowledge, Skills, Abilities...

Common*:

- Strong communication skills
- Understanding of the SDLC
- Negotiation/consensus building
- Strong interpersonal and client management skills

PM*:

- Ability to see the “big picture” for the project
- Helps people (project team) get things done
- Removes issue barriers
- Possesses management skills

- Standards/best practices: PMBOK (PMI)
- Certification: PMP (PMI)

BA*:

- Detail-oriented
- Listens to people (SMEs)
- Helps SMEs describe how and why they perform tasks
- Identifies business issues
- Possesses investigative skills

- Standards/best practices: BABOK (IIBA)
- Certifications: CBAP (IIBA), BA Certified (B2T Training, ESI, etc.)

* Source: Barbara Carkenord, The Bridge newsletter (Winter-Fall 2005)

“Follow the instructions” game

- Materials:
 - Sheet of paper
 - Ears & a pair of hands
- Rules:
 - Under a tight timeline, no time to ask questions
 - Just follow the instructions, they are very simple
- Instructions

“Follow the instructions” game



Let's review...

- Instructions were simple
- Tasks were simple

Then...

- Why such different outcomes?

Conclusion...

- (static) Communication is not enough!

Lesson

- From Lack of Communication (much too often the case)
- To Communication (PMBOK, BABOK)
- To Dialog
- To Collaboration

Organizational Environment

- Vision, Mission, Strategy, Operations
- Policies & Rules
- Standards and Best Practices
 - PMO
 - BAO(?)
- Culture
 - Shared values
 - Respect, Integrity
 - Accountability, Ownership
 - Perseverance, Commitment
 - Partnership and Collaboration
 - Personal values

Now, let's revisit our assumption

- Reality call!
Have you searched Google for info on “BA and PM”?
- Let's now discuss both situations:
 - Performed by same person
 - Performed by different people

Advantages & Disadvantages

1 person, 2 hats:

- ☺ “Quick communication”
- ☺ Seeing the Whole Picture
- ☺ Can be very efficient if the person has strong experience in both roles
- ☺ Can be very efficient for agile projects

- ☹ “Lack of communication”
- ☹ Only one point of view
- ☹ Unbalanced experience leads to biased behavior
- ☹ Less efficient in managing accountability
- ☹ Often, hard to switch hats

2 people, 1 hat (each):

- ☺ Better role definition and focus
- ☺ Explicit communication
- ☺ A bigger pool of ideas/opinions, perspectives
- ☺ Better resource allocation and role back-up
- ☺ Allows fast-tracking a project
- ☺ If done right, can enhance team performance

- ☹ Slower communication
- ☹ If not done well, can lead to conflict and confrontation
- ☹ Unbalanced experience can lead to unbalanced role performance
- ☹ May slow down assembling the team

Conclusions, Some Take-aways...

- Know and understand the similarities and differences between the 2 roles
- Set clear expectations – everybody on the same page!
- Unbalanced experience most likely will lead to unbalanced/biased preferences: pay close attention!
- Also, if you have to play both roles, pay very close attention to your own preferences!
- Never a good idea to wear 2 hats at one time; if you have to wear both of them, do so one at a time
- Organization/team environment and culture have a significant influence on how the 2 roles are being played: is there anything you can do to improve that environment?
- ...

Showcase

- Credit Suisse

- Blue Cross Blue Shield of NC

What's next?

- Your role
- My role
- Continued dialog

Q&A

Contact, more options..

- Razvan.Radulian@raleigh.theiiba.org
- Education committee
 - Special Interest Group
 - Study Group
 - CBAP-Prep class
- Chapter website
 - e.g. blog/dialog, references, articles, etc.
- Future RTP IIBA chapter meetings

- NC PMI Chapter