



PM-BA ROLE COLLABORATION

Created by: Ori Schibi

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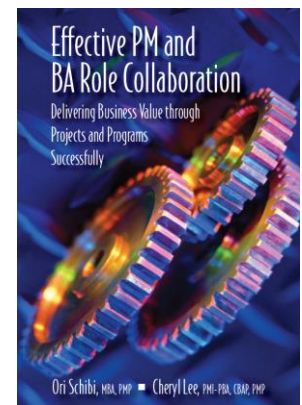
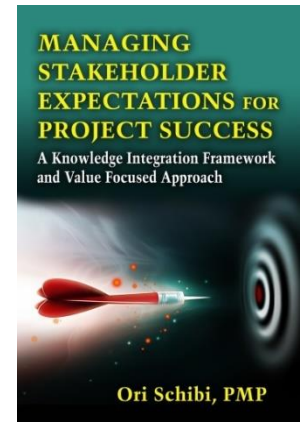
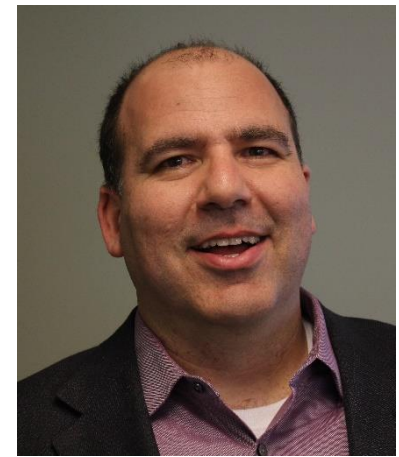
Regional Symposium, 2017

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Your Presenter: Ori Schibi

- President, PMKonnectors
- Author
 - “Managing Stakeholder Expectations for Project Success” (J. Ross, 2013)
 - Co-author “Effective PM-BA Role Collaboration” (J. Ross, 2015)
- Over 25 years’ international experience (agile and governance project recovery, org. change, business analysis)
- Visionary thought leader, offering practical and new ways of innovation, efficiencies and collaboration
- Clients: financial services, telecoms, aerospace, governments, UN, Disney



Our Lineup

1. The need for PM and BA collaboration
2. Misconceptions of the PM and BA roles
3. Friction points between the PM and BA
4. Collaboration tips
5. Eyes for Waste
6. The BA in Agile Environments
7. PM-BA relations and project governance

The need for PM and BA collaboration

According to PMI's 2014 Pulse of the Profession in depth report on Requirements Management...

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Only 46% of organizations believe there is good collaboration between their PMs and BAs

Yet 68% of organizations indicate this collaboration is essential for project success

Misconceptions of the PM Role

PMs are
paper
pushers

The PMs' primary
job is to be the
process and
deliverable police



PMs should
have product
expertise

PMs need to tell
the stakeholders
what they like to
hear

PMs are only
concerned with
scope, time and
cost

PMs do not
believe
planning is
important

PMs have all
the answers
and can do it
on their own

Misconceptions of the BA Role

The BA's primary job is to document and take notes



BAs are Jack and Jill's of all trades

The BA's job is to advocate for a specific solution

BAs hijack meetings to ask a ton of silly questions

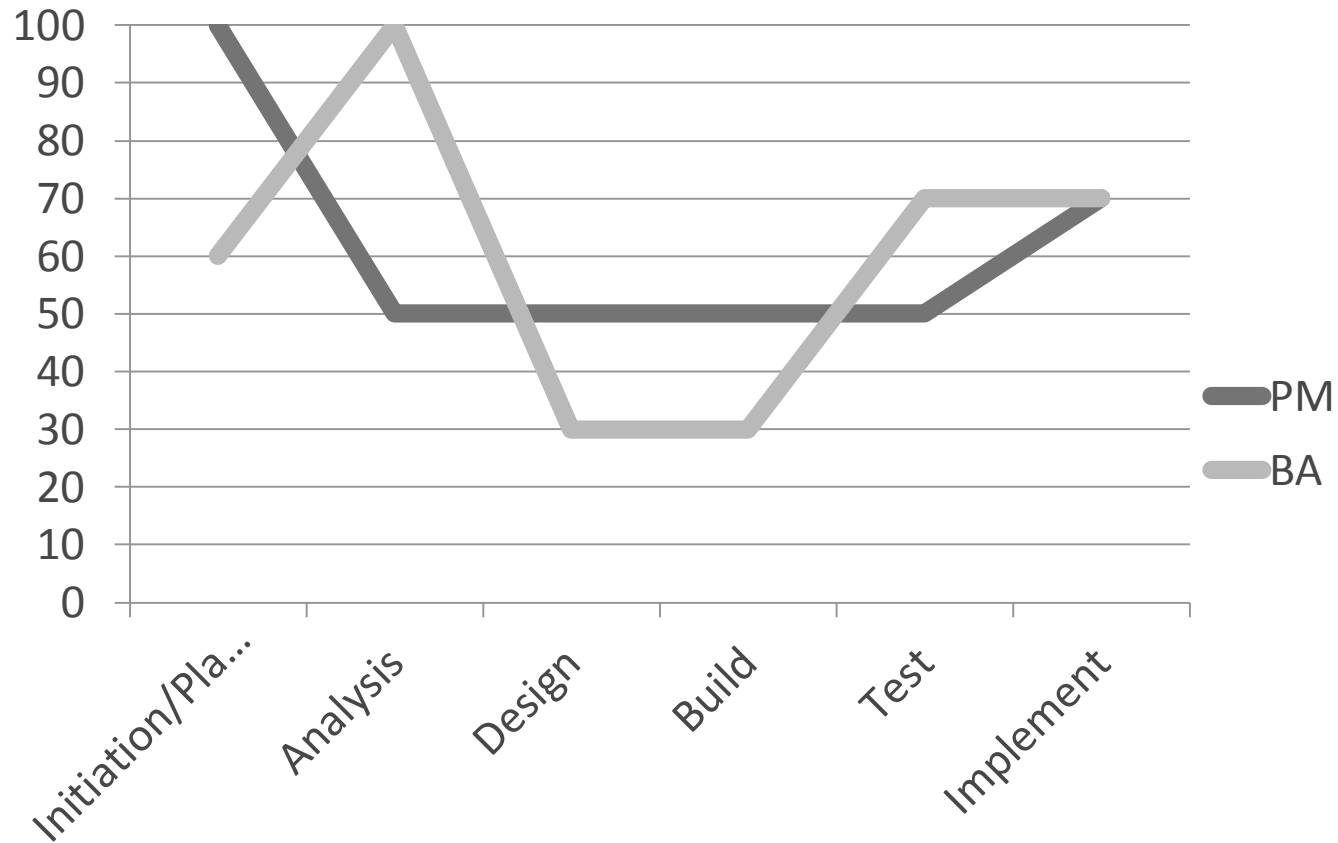
BAs should have product expertise

BAs need to have an IT background

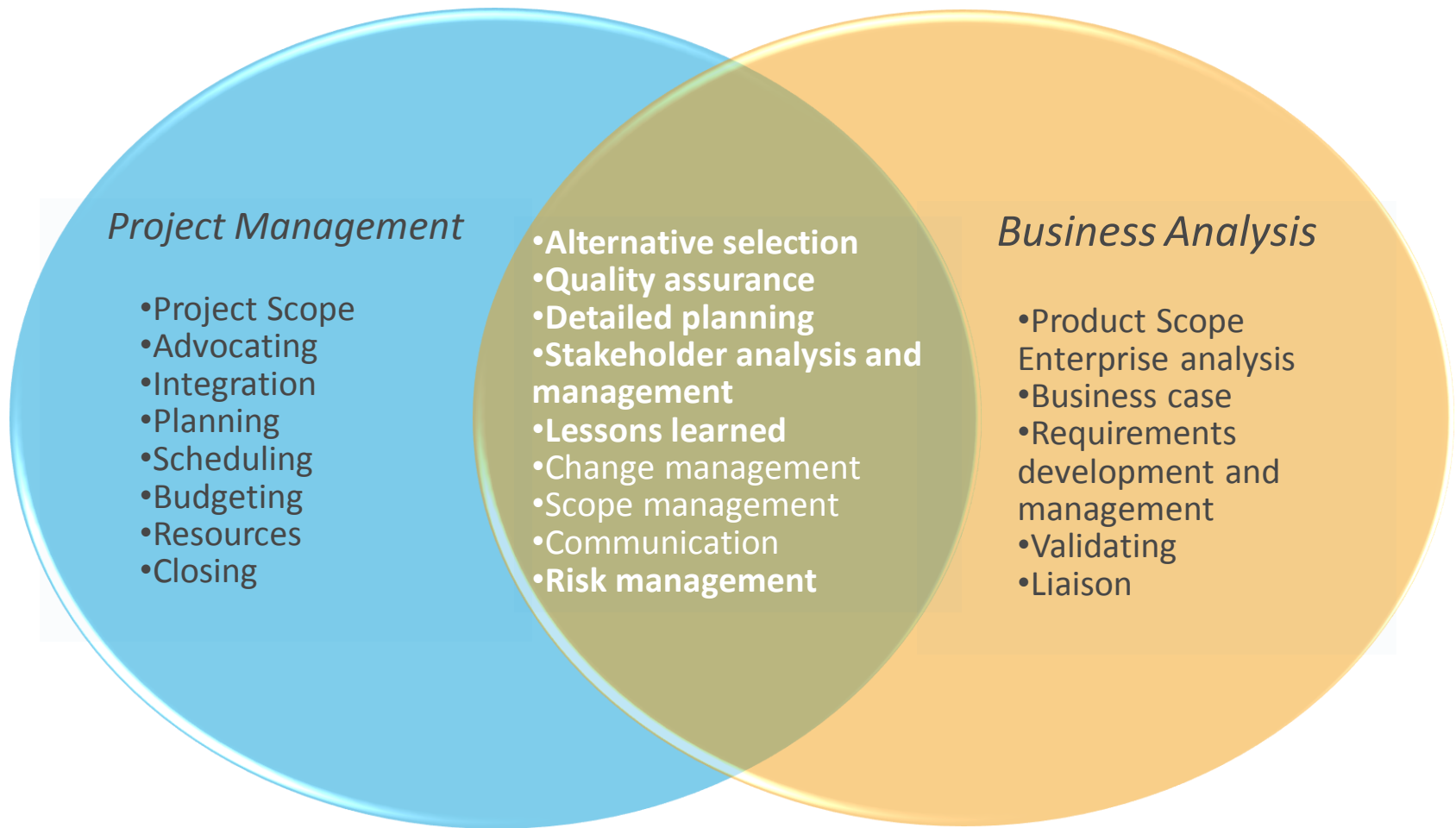
BAs are not required at the end of the project

BAs are not required for all projects

PMs' & BA's Rigor / Involvement Through Project Phases



Intersections Between the Roles



What are Your Friction points?

Based on your experience in your current and previous roles – what are the common friction points between the PM and the BA?

Friction points

Splitting the Work

- How to divvy up the many intersecting areas?
- Needs to be a joint discussion and not PMs delegating to BAs

Aligning Areas of Focus

- BA focus is on the product
- PM focus in on the work to deliver the product

Change Control

- PM resists adding features where the BA is often the driver behind the need to add features, to meet stakeholders' needs.

Quality and Cost of Quality (COQ): the Value perceptions

- Cost is often the reason that certain measures do not take place, and certain activities do not get performed to the extent required or at all.

Attention to detail

- PMs tend to focus on the big picture, while BAs tend to demonstrate more attention to detail. These views need to be integrated.

Friction points continued

Use of terminology and different lifecycles

- PMI and IIBA Terminology
- Project Management Lifecycle vs Requirements Management Lifecycle

Integrating the Requirements

- Understanding the relationship between product and project requirements.

Estimating

- Analysis is typically the culprit for schedule overruns. Provide time for a BA to do bottom up estimation via a BA Plan.

Reporting and Communication

- PM and BA both jointly have to manage expectations of stakeholders.

Attitude

- The PM leads the project and is typically more senior but the BA needs to be treated as an equal for project success.

Ideas to “play nicely” with your counterpart

What are some of the things that can (should and in some places do) take place to reduce PM-BA friction?

Especially early in the project



It Starts Early in the Project

These activities and deliverables are often overlooked and as a result may yield significant negative impact on the project

- The BA welcome package
- Project charter
- Project readiness assessment
- Project complexity assessment
- Stakeholder analysis
- Communication planning and ground rules
- Roles and responsibilities

The BA Package

- Prepared by the BA who worked on the Strategy Analysis/Enterprise Analysis – may or may not be the same resources assigned to the project team
- Summary of the analysis completed in Strategy Analysis/Enterprise Analysis to be transitioned to the project team
- Can be in a form of a Vision and Scope Document or the Business Case itself
- Doesn't need to be a formal deliverable either
 - As long as some sort of transition occurs



Complementing Each Other and Defining Boundaries

The PM	The BA
Big picture (project) / siloed view (context)	Detail oriented (product) / enterprise view (context)
Converts requirements to scope	Elicits requirements
Leadership and managerial skills	Investigative skills
Manage and control project change	Manage requirements change requests
Lead the project team	Listen to the people, stakeholders, SME's
Help the team get things done	Help SME's express how to perform tasks; rationale; helps coordinate team effort
Remove issues out of the way	Identify issues; help find solutions
Manage the WBS	Perform requirements-related tasks in the WBS
Ensure the product/service/result delivered on time/budget	Ensure product is built right according to specifications (requirements)

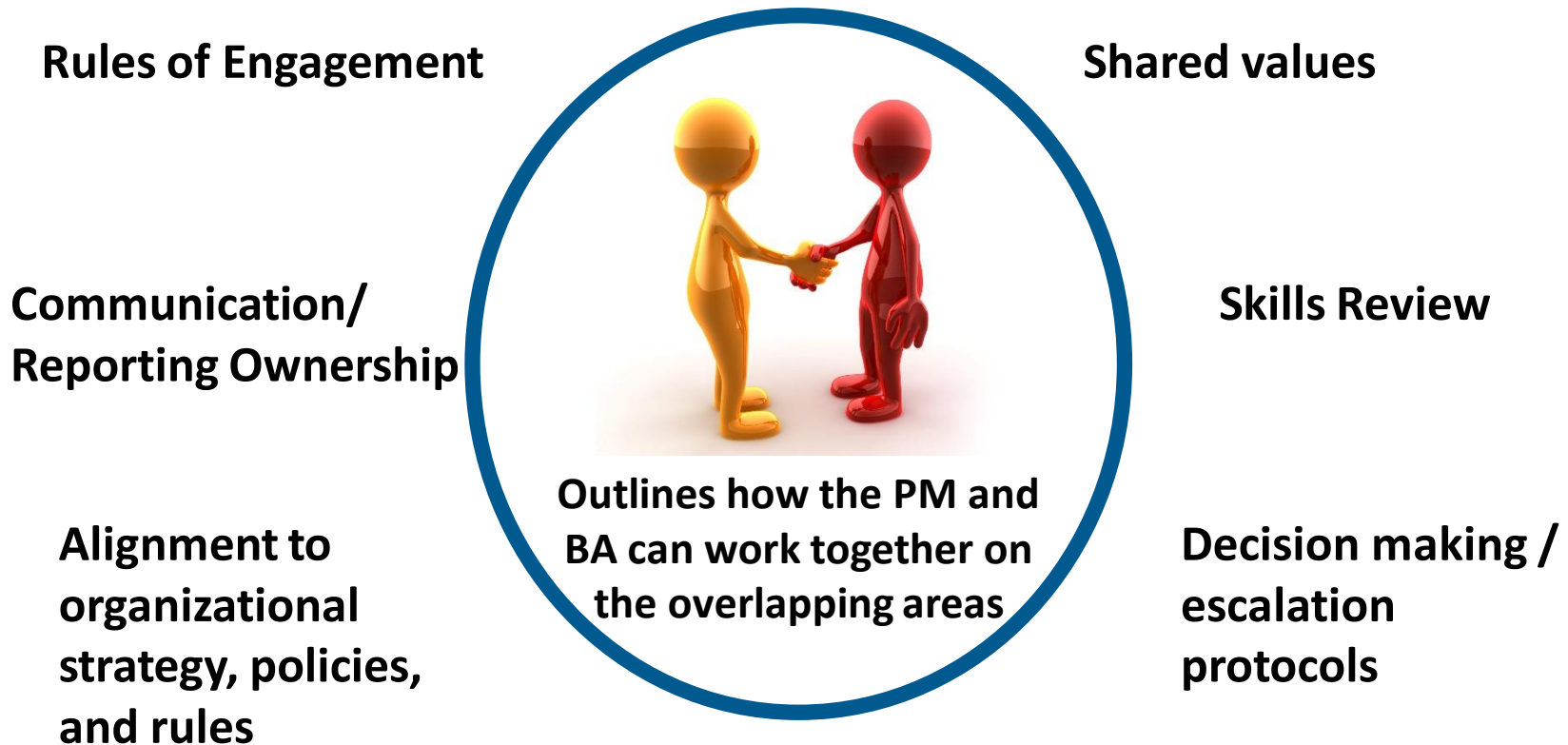
Beyond The Traditional “Scope” of the Their Respective Role – With Some Differences

	PM	BA
Leadership	Motivation, give direction, role model, empower, take responsibility	Work with the team; coaching
Time management / Prioritization	Set priorities, schedule management, help facilitate team members' time, ground rules (meetings, emails), efficiencies)	Facilitate estimating process, prioritize work packages and within WPs, deliver on time
Critical thinking	Control change, manage scope, integration management, impact assessment	Effectively translate data into relevant information
Problem solving	Clear, roadblocks, address issues, assumption management	Process improvement, articulate conditions, facilitate root cause analysis

... And Some More Differences (2)

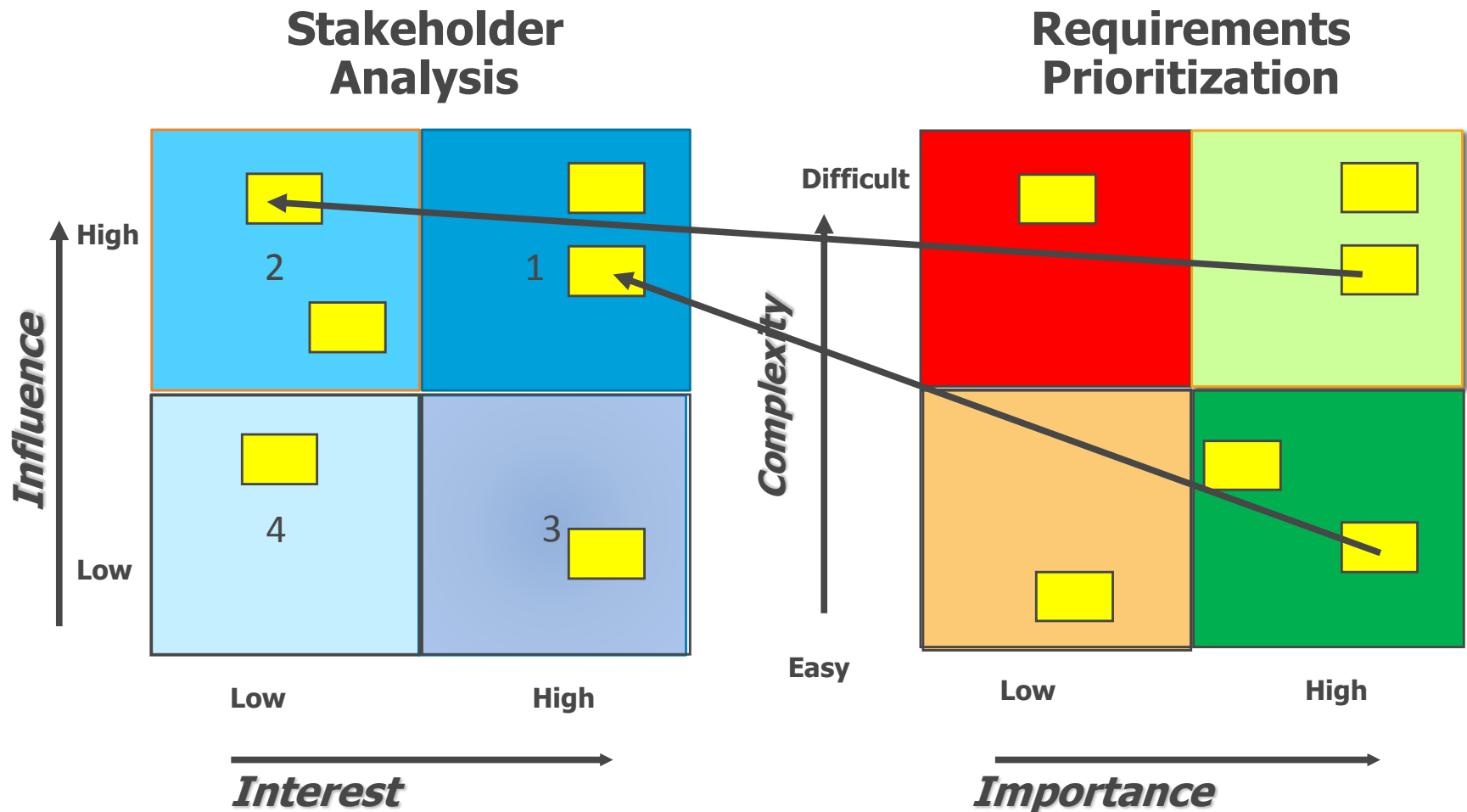
	PM	BA
Decision making	Decision making process, urgency assessment, Manage approval & sign off, Resource Management , Priorities and Schedule conflicts	Decisions impact analysis, ID trends and propose improvements
Context	Consider project integration issues, consider risks and project tradeoffs in relation to business objectives	Consider strategic considerations through product and process level, industry, product and organizational knowledge
Influencing and Motivating	Manage expectations, build rapport with team, customers and management	Manage expectations, analyze and manage Variance, influences root causes and gain buy-in
Comm. and Conflict Resolution	Escalation procedures, stakeholder communication, manage upward, presentation skills, high level status reporting	Report writing skills, customize communication to team and customer needs, facilitation skills, detailed reporting

The PM and BA Contract



What are your strengths and weaknesses and how can we complement each other?

Requirements Prioritization through Collaboration



Task Breakdown by Project Stage

The need for PM and BA collaboration and their joint effort in working with project stakeholders - throughout the entire project lifecycle

- Pre-project
- Initiation/Planning
- Execution/Control
- Closure

Pre-Project

Deal with business stakeholders to identify the business needs

Issue a Project Initiation document / Business Case

- Outline the business need
- Address the impact of current state
- Define desired target state
- Review project readiness and complexity
- High level estimated of project duration, costs and expected benefits
- Project briefing document

Project Initiation / Planning

Define scope and refine business need, expected outcome (deliverables) and acceptance criteria

PM

- Putting together a project plan

BA

- BA plan – including BA deliverables, communication with stakeholders, requirements management approach and estimation of BA related efforts

Joint Effort

- Refining BA plan and integrating into project plan
- RACI – to be developed in 3 steps

BA

- Work with stakeholders; clarify business need, high level business requirements, leading aspects of stakeholder analysis, identifying risks, assumptions and constraints, discussing solution details
- The BA leads efforts to determine solution scope, high level requirements, and solution approach,

Joint Effort

- Align solution scope with project scope.
- Report back to PM on findings, issues, assumptions, constraints and risks – to be incorporated into project plan

PM

- Maintains risk register and leads the effort to develop mitigation strategies

Joint Effort

- Develop a WBS; leading to resource, schedule and budget planning

Project Execution / Control

The need for collaboration increases

Requirements prioritization and validation (workshops)

Interactions with vendors

Change control and integration across the project components

PM

- Leading change control and reporting to senior stakeholders

BA

- Consolidating progress reporting

Joint

- Communication with technical stakeholders
- Ensuring solution acceptance criteria aligns with project success criteria
- Communication, facilitation, conflict resolution (leverage each other)

BA

- Leading and facilitating solution implementation to ensure a smooth transition to post project

Project Closure

PM

- Closing the project

BA

- Leading lessons learned efforts
- PIR - how well the solution met the business requirements
- Hand over BA artifacts (business / functional / non-functional requirements, use cases, solution and technical specs – so they serve as documentation on how to use the project solution)

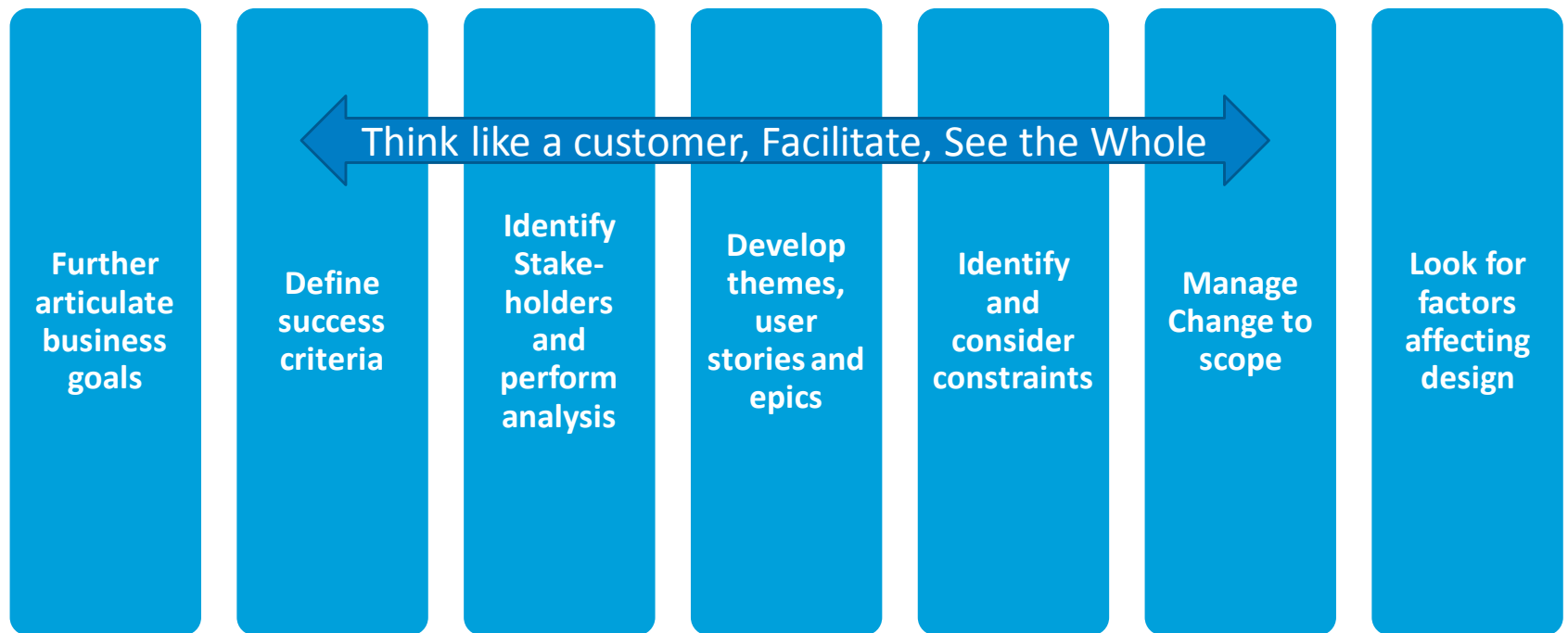
Joint Effort

- Consolidating lessons learned

The Agile BA

Agile	Classical
<p>Eyes and ears of the Product Owner Backlog maintenance, escalation, troubleshooting, reporting, validation, clarifications</p>	<p>The little communication between the business development teams - exclusively through BA</p>
<ul style="list-style-type: none">• The Facilitator – a critical need in the high degree of collaboration and interaction;• Making sure that critical areas are being covered and that the latest information is making it to everyone• Managing ambiguity, prepping for demos, applying lessons, velocity management, backlog grooming	<ul style="list-style-type: none">• The Translator – documenting and translating business needs to the developers and testers• Assumptions: programmers / testers are too socially awkward to actually talk to the business• The business: primarily viewed as unable to tell programmers / testers what they need
<p>The Historian – documentation skill come in handy in capturing significant information that often gets lost in a team of purely technical people</p>	<p>The Gatekeeper for requirements – somewhat unfair, since the BA rarely has the authority to prevent business or technology changes That is as change always happens</p>

The BA in Iteration Zero



Efficiencies: Priority vs. Urgency

Deadlines

- How close is the deadline of an activity or deliverable?

Dependency

- Is there anything (project, operations, stakeholders, customers, or initiatives) that depend on the outcome of the of the matter or on the resources performing it?

Impact and Visibility

- What the impact would be on the project and the organization if the matter under consideration fails and how severe will the impact be on the organization / customers?

Other Considerations

- This section, if needed, can include the resulting crisis level, the potential team problems and the seniority of the stakeholders involved.

An Eye for Waste and Warning Signs

The BA's role in identifying, dealing with, addressing and fixing problems, challenges and performance issues

Look for warning signs, symptoms, impact and remedies

Three types of issues:

1. Problems with Team Engagement
2. Process Adherence Problems
3. Performance Problems

The PM-BA Relations and Project Governance

- Having a BA and allowing healthy collaboration between the PM and the BA is a function of project governance
- The PM and the BA must find ways to do the following
 - Work together
 - Work effectively with the team
 - Cross project collaboration (resources)
 - Work with the sponsor, stakeholders and governance bodies
- Similar to Agile – there is a need to understand the organizational constraints and work around them
- Consider organizational change aspects
- The PM-BA relations are a symptom of the leadership and governance style

Trending Questions

- The need to get PMs and BAs more familiar with each other's role
- PMI (PBA) vs. IIBA (BABOK)
- Hybrid PM/BA
- Anything Agile
- Organizational Change Management

SUMMARY

Recap

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Thank you

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