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BAM-3135 BA CAPSTONE PROJECT

Lambton College, School of Business

Instructor: Pete Grieve, PMP

Setting Expectations (Rules of Engagement and RACI)

3

Week 3

1. This Week:

- Today's Class: Purpose
 - A. Discussion: Rules of Engagement and RACI
 - B. Review Group Peer Evaluations

- **Review: Capstone – Part 1**

Assignment

- ❖ **Next Steps – Assignment 1 continues – due next Friday, Jan 31st @**
- ❖ **Cap Project – Part 1 Due Friday, Feb 7th**



“Setting Expectations”

- Purpose of Rules of Engagement:
 - Expectations of how the Group will effectively work together, common “rules” that the group has agreed to to ensure maximum success.
 - Particularly important for large project teams especially if involved multiple departments or internal/external collaboration.
 - Benefits include a “known understanding of expectations from Day 1”, have the ability to reference a signed doc where each team member agreed to said rules incase of need to escalate a problem. ***** Next term I would use this as the 1st assignment completed by each group].**

“Setting Expectations”

- Purpose of Rules of Engagement (Continued):
 - **Common Rule Inclusions:**
 - 1. The Group will meet weekly at [Day/time] [in-person/virtually] for project meetings.** [ensures agreeable to every team member’s known schedule balancing school, work, family, other activities].
 - 2. If a Team Member is unable to attend they will give the Group 24 hours notice to enable rescheduling/decide to proceed without that Member.** [understandable that things can happen – courtesy to allow for re-scheduling if possible].
 - 3. Every member will come to the Meeting prepared and On-time.**
 - 4. Every member’s opinions / views will be heard and respected.**

“Setting Expectations”

- Purpose of Rules of Engagement (Continued):
 - Common Rule Inclusions (included):
 5. The BA Lead will be responsible for creating the agenda or assigning to someone to complete, and sending out ahead of time, and controlling the meeting.
 6. The Meeting will end at the specified time [to allow group members to schedule other commitments and to “time box” the meeting ~ meetings tend to full up the amount of time they are scheduled for even if not warranted with the amount of content].
 7. Group members will use [tool ex. Teams/email] and are required to check it [daily] for project updates. [set expectations].

“Setting Expectations”

- Purpose of Rules of Engagement (Continued):
 - Common Rule Inclusions (included):
 8. Group member conflicts / disagreements will be escalated to BA Lead, if BA Lead unable to settle internally the matter will be escalated to Prof Pete. [lucky me].
 9. Draft Assignments will be completed [x] hours before the submission deadline. Assignment group members defined in the RACI will review/proof before submission to [Boss/Prof for grading] [ensures quality and catches mistakes before submission].
 10. Extra Nice Touch ~ Have each Group member sign the Rules of Engagement to stipulate their agreement and holding themselves to these agreed upon rules.

“Bare Bones” extra items can be found if “Google/ChatGPT” Rules of Engagement.



Discussion /
Questions

“Setting Expectations”

- Purpose of RACI:
 - Outlines the Tasks to be completed, and who is responsible for what role within that Task. [ie. Setting Expectations]
 - Again, particularly important for large project teams especially if involved multiple departments or internal/external collaboration.
 - Benefits include a “known understanding of expectations from Day 1” allowing people to plan their time and also ensures the right people are working on the right items.

"Setting Expectations"

- Sample RACI:

Step	Project Initiation	Project Executive	Project Manager	Business Analyst	Technical Architect	Application Developers
1	Task 1	C	A/R	C	I	I
2	Task 2	A	I	R	C	I
3	Task 3	A	I	R	C	I
4	Task 4	C	A	I	R	I

A = Accountable (only 1 ever. Except Individual assignments)

R = Responsible

C = Consulted (I use for Reviewers as well)

I = Informed

**** Individuals can have multiple roles.**

"Setting Expectations"

- Sample RACI:
- Can Breakdown a larger task into smaller workable items (think WBS).
- Example:

- **1.0 Lemonade Stand**

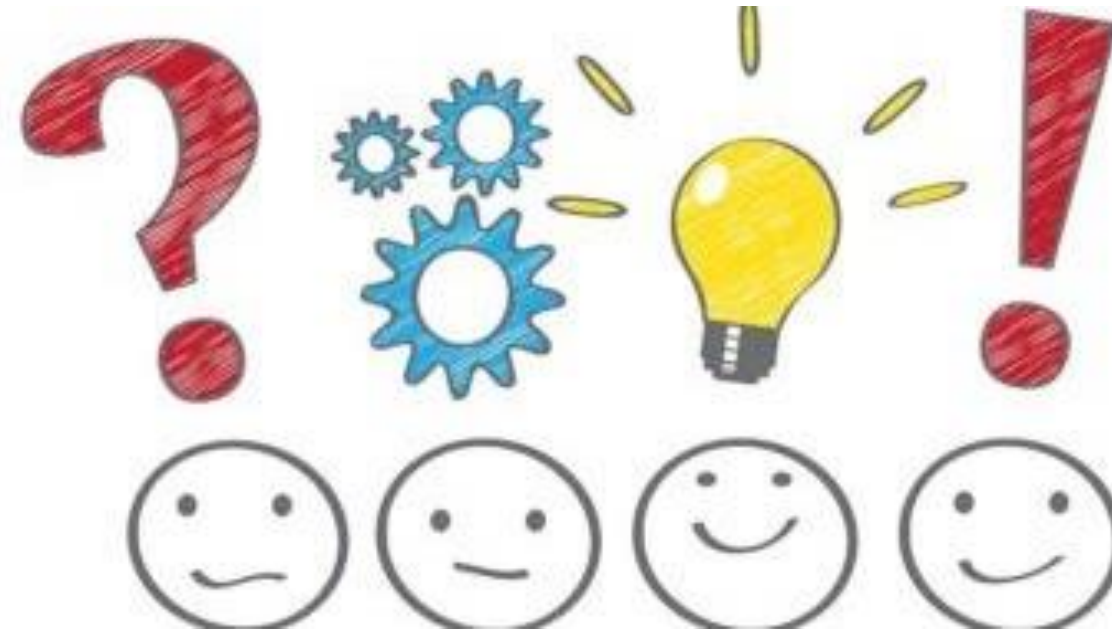
- **1.1 Build Stand**

- **1.1.1 Buy Materials**
 - **1.1.2 Build Stand**
 - **1.1.3 Paint Stand**
 - **1.1.4 Set-up Stand and Chair on Location**

Do Not recommend Doing the RACI at the Task Summary level

Implement RACI at this level as different Team members will be assigned.

"Setting Expectations"



Questions, Comments, Discussion !!!

"Setting Expectations"

**See You in 10 min –
Applying today's Class to
Capstone – Part 1
Deliverable**



Peer Group Evaluations

BAM-3135 – Capstone Course

Part 1 – Whole Team Participation

Group Participation Scoring

Below is my honest assessment of the contributions and participation of my Group Team members and myself on this Capstone Course Assignment - **<Assignment name>**.

Below is reflective of the above period of time with no past biases or other influences.

If a 4 member group ~ equal participation would be 25% each.

If a 5 member group ~ equal participation would be 20% each.

Capstone – Group #	
Team Member	% of Contribution and Participation
Group Member 1	
Group Member 2	
Group Member 3	
Group Member 4	
Group Member 5	
Total	100%

Peer Group Evaluations

Part 2 – BA Lead Effectiveness

During this Project, <Name> acted as the BA Lead. I would rank their leadership efforts as (circle one):



Scale	Description
1	Lacking leadership, did not organize or control meetings, tasks left unassigned, rush to complete and submit. Much learning and leadership skills need to be developed.
2	
3	Some Leadership but could have been stronger in organization, conflict management, tasks were not completed in a <u>paced out</u> manner. Decent effort.
4	
5	Great leadership, kept the group organized and informed, handled any disputes, calm in their approach and demeanor, submitted assignment on time, would want to work with them as BA Lead again.

Peer Group Evaluations

BAM-3135 – Capstone Course

Group Participation Scoring

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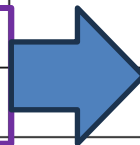
If a 5 member group ~ equal participation would be 20% each.

Pete calculates as
Follows:



Capstone – Group #	
Team Member	% of Contribution and Participa
Group Member 1	17
Group Member 2	12
Group Member 3	19
Group Member 4	23
Group Member 5	29
Total	100%

You Enter % for each Group member



Participation (equal portion on a Group of 5 = 20%, equal portion on a Group of 4 = 25%)	Group Mark Assignment example (assume 5 member Group earned 7/8)
20%	7 / 8 (range: 17 – 24% = 100% of Group Mark)
15%	5.25 / 8 (range: 13 – 16% = 75% of Group Mark)
12%	3.5 / 8 (range: below 13% = 50% of Group Mark)
32%	8.75 / 8 (range: above 25% = 125% of Group Mark)

Peer Group Evaluations

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5	Great leadership, kept the group organized and informed, handled any disputes, calm in their approach and demeanor, submitted assignment on time, would want to work with them as BA Lead again.

You do
this



Pete will note and keep track. Every Team member will have at least 2 attempts of being the BA Lead – so efforts will be averaged. End of Term adjustment.

Capstone Project – Part 1 Assignment: Rules and RACI



	Jeff	Michael	Reto	YOU	Alex	Anna	Bill	Cindy	Felix	Fred	Hans	John	Livio	Luc	Marco	Paul	Peter	Sue	Ted	Tim
Planning / Schedule	R	A	I	C					C											Q
Risk Management		I	I	Q						A								R		
Quality Management			R	C						R										A
Procurement				R		Q				R								R		A
1. Specifications Listing								A		R								R		R
2. Site Requirements		C	A	R	Q						R									
3. Call for Tenders				Q	A	R	C				R							R		
4. Budget Approval				A	Q					R							R			R
5. Contract Negotiations			A		Q	R	R											R		

* R – Responsible (works on), A – Accountable, C – Consulted, I – Informed, Q – Quality Reviewer

BA Capstone Project Assignments



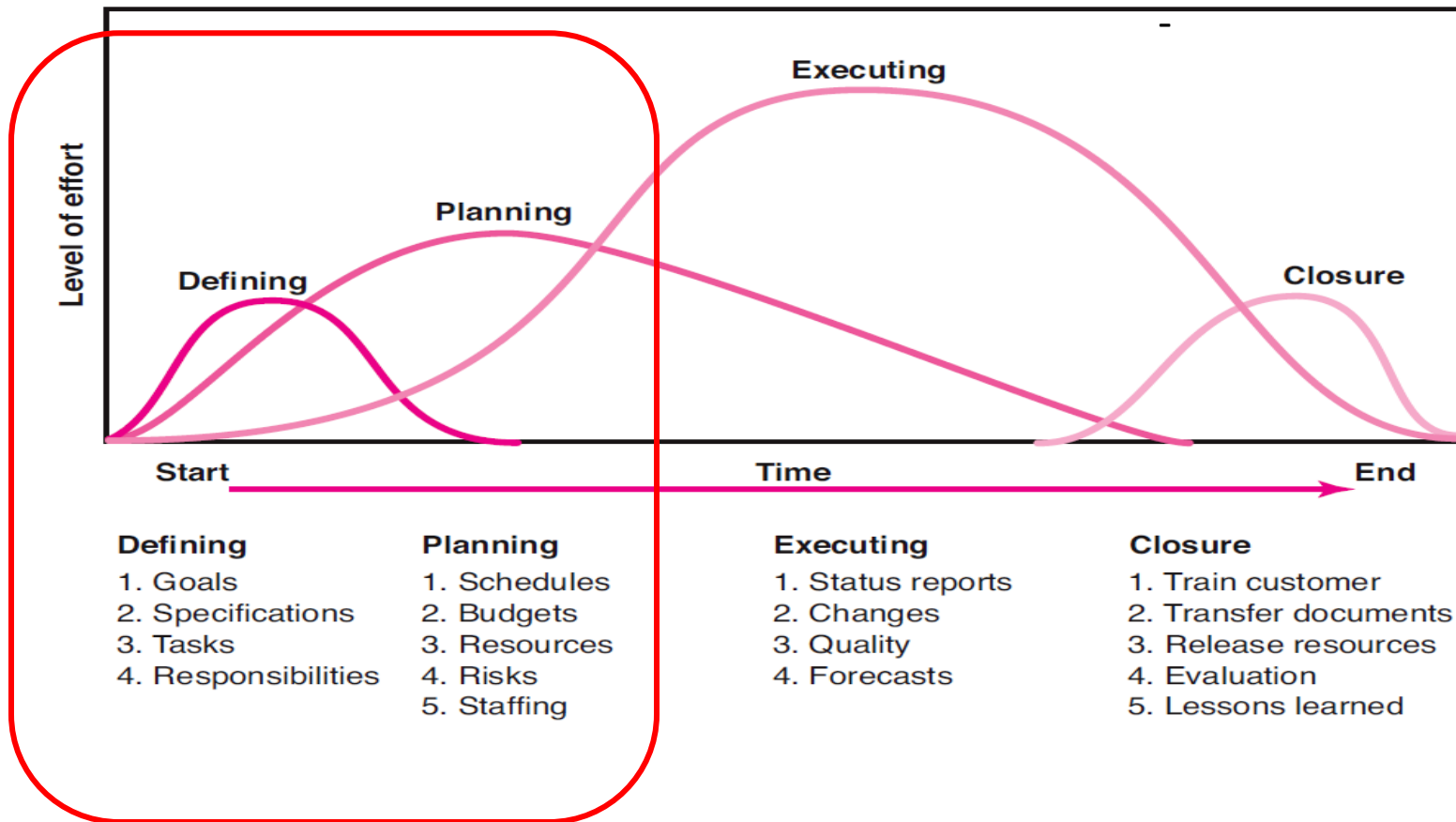
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1) Assignment 1:	14%	Week 4
a. Know Your Project (Customer/Sponsor/Organization/PM) – Informal or Formal Leadership role; & becoming the Trusted Business Partner		
2) Assignment 2:	15%	Week 6
a. Project Scope Boundaries		
b. Requirements Traceability Matrix		
3) Assignment 3:	14%	Week 8
a. Lecture: Non-Traditional BA roles sought in Organizations: BSA, Data Modeller, PM, CM, QA Tester, Tech Writer, trainer		
b. KPIs and Data Analysis for Success		
c. Project Scheduling (and PM)		
4) Assignment 4: <u>Softskills</u>	14%	Week 10
a. Effective Change Management		
b. Negotiation, Conflict Management and Mental Health Watch		
5) Assignment 5:		
a. Capstone Project Presentation - Total	27%	multiple
i. RACI and Rules of Engagement	6%	Week 9
ii. Topic and Learning Objectives	6%	Week 11
iii. Presentation (Videoed) & <u>SlideDec</u>	8% (Group) + 4% Individual	Week 13
iv. Capstone Project Presentation Self-Eval + Option Group	3% (+2% Bonus)	Week 14
6) Assignment 6:		
a. Lessons Learned & Project Closure	12%	Week 14
7) Individual Assignment 1:		
a. Project and Group Work Retrospective	<u>4%</u>	Week 14/15
Total	100%	



BA Capstone Project



Capstone – Part 1 Assignment

1. Generic (regardless of case selected): **Develop the Rules of Engagement for your Group.**
2. Generic (regardless of case selected): **Develop a RACI for completing the Capstone Project Assignments:**
 1. **Part 1: Rules and RACI** (Draft, review, finalize, combine, submit)
 2. **Part 2: Presentation Topic and 4-5 Learning Objectives** (Draft Business Memo, internal review, submit to Pete, Group Meet w/ Pete to discuss, Possibly Update based on Group:Pete meeting [do not have to re-submit anything]).
 3. **Part 3: Presentation/SlideDec/Group Video recording [not spoon-feeding feeding you the parts]**
 4. **Part 4: Individual Self-Assessment/Comments on our Presentation + Optional Feedback on Group Members**

***** Above combined into 1 doc submission**

Capstone – Part 1 Assignment

3. **Optional Bonus:** Attempt a RACI for your Assigned Case Study

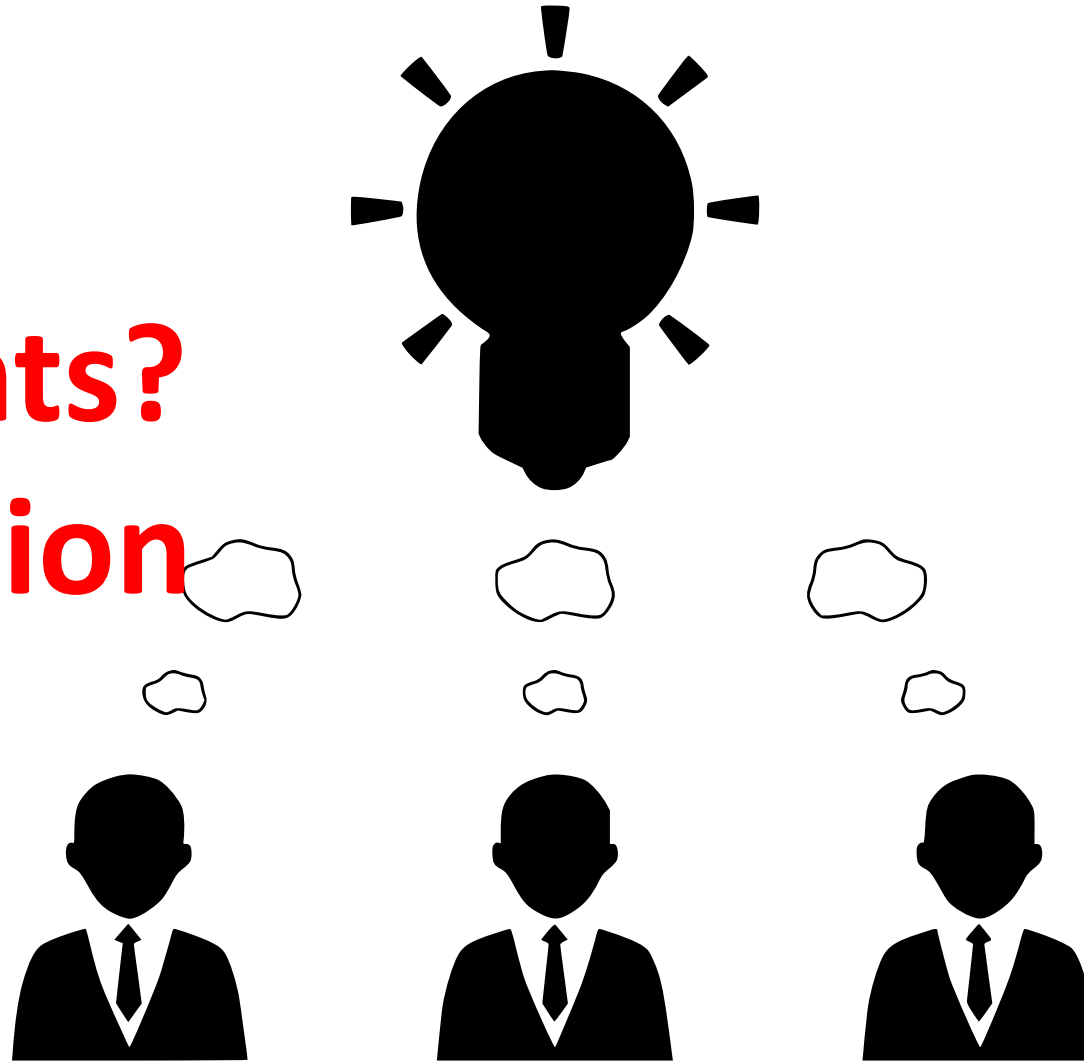
Cap – Part 1 Rubric

Area	Mark Range	Max Points
Rules of Engagement	0 (Poor), 1.5 (Ok), +3 (Perfect, Great)	+ 3
RACI for Capstone Project (parts 1 thru 4)	0-3 (similar scale to above)	+3
“Wow” Factor Bonus – Complete RACI for Case Study Assigned	-1 (Disappointing), 0 (Average, Expected), +1 (Above Avg) or +2 (Exceptional)	+ 2
Excessive Details report (Max 3 pages if Rules and Capstone RACI; or Max 5 pages if Bonus attempted (not including Title Page)– assume 11 point Calbri font.	-1 mark	- 1 mark
Late Submission (after Feb 7 th at 9 a.m.)	-1.5 marks	-1.5 marks
	Total	8 / 6 ** +/- Based on Peer Evaluation

Capstone – Part 1 Assignment Leaders

	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7	Group 8
	Case 7 2	Case 8	Case 3	Case 4	Case 1	Case 6	Case 9	Case 5
	Michael A.	Soham R.	Srikanth V.	Bhumi P.	Adon J.	Aaron R.	Pavan P.	Manish P.
Rules	Emmanuel A.	Naman R.	Sahith K.	Ronit B.	Anandu R.	Basil T.	Anamika P.	Hamrin K.
RACI	Prabesh R.	PankajKumar K.	Keerthi C.	Bhaskar	Akshara V.	Feby V.	Maninder S.	Adarsh G.
	Amisha S.	Yatharth A.	Afreen K.	Lekshmi K.	Anandakrishna	Nesto J.	Sasidaran	Gurpreet S.
	Pramila P.	Harshil J.	Tanya D.	Nandana S.	Julia	Rhutwik J.		Raj S.

Thoughts? Discussion



Client/PM/Everything Meeting Availability – Assignment 1



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Sun	Mon	Tues	Wed	Thurs	Fri	Sat
					17	18 2 p.m. – 3:30 p.m. (3 x 20 min slots) – 1 mark
19 2 p.m. – 3:30 p.m. (3 x 20 min slots) – 1 mark	20 10 a.m. – 12 noon (4 x 20 min slots) – 1 mark	21 11:00 a.m. – 12:30 p.m. (3 x 20 min slots) – No Penalty 10:30 – 11 –Group 2	22 10:30 - 11 & 11:30 - 12:30 (3 x 20 min slots) 11-11:20 –Group 6	23 Not Available	24 8 a.m. – 8:30 (1 x 20 min slots) 8:30 – 8:50 - Group 7 9 – 9:20 - Group 1 11 – 11:20 – Group 5 11:30 – 11:50 – Group 3	25 Not Available
26 4 p.m. – 5:30 p.m. (3 x 20 min slots) – 1.5 mark	27 10 a.m. – 12 noon (4 x 20 min slots) – 1 mark	28 [changed time]: 9:30 a.m.– 11:30 a.m. (4 x 20 min slots) – No Penalty	29 10:30 – 12:30 (4 x 20 min slots)	30 10 a.m. – 12 noon (4 x 20 min slots) – 1.5 marks	31 Assignment 1 Due @ 9 a.m.	

Client/PM/Everything Meeting Availability

Assignment 1: Today's meetings

Time	Revised Time	Group
8:30 – 8:50		Group 7
9:00 – 9:20		Group 1
11 – 11:20	???	Group 5
11:30 – 11:50	???	Group 3

Next Week: Capstone Project Timetable



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Week #	Topic Description / Class Time	Assignments / Quiz / Tests
1 1/10	Lecture Topic: <u>Introductions and Capstone Project Course Scope Review</u>	
2 1/17	Lecture Topic: <u>Knowing Your Project/Client (how Best to become a Trusted Business Partner):</u> <ul style="list-style-type: none"> • <u>Overall Project Importance within the Organization,</u> • <u>PM/Sponsor/Client/Organization Risk Tolerance.</u> • <u>Preferred Communication Styles;</u> • <u>Informal or formal Leadership role;</u> • <u>How Best to Structure for Success</u> 	
3 1/24	Lecture Topic: <u>Rules of Engagement and RACI (for Capstone Presentation Project)</u> Q Period: Know Your Project/Client	
4 1/31	Lecture Topic: <u>Project Scope Boundaries and Requirements Traceability Matrix</u>	Group Assignment 1: Know Your Project/Client (Due: 1/31) = 14% (+/- Peer Eval)
5 2/7	Lecture Topic: <u>Non-Traditional BA roles sought in Organizations: BSA, Data Modeller, PM, CM, QA Tester, Tech Writer</u> Q Period: Project Scope Boundaries and Requirements Traceability Matrix	Capstone Deliverable - Part 1 Rules of Engagement and RACI (Due 2/7) = 6% (+/- Peer Eval)
6 2/14	Lecture Topic: <u>KPIs and Data Analysis for Success & Project Scheduling (and PM)</u>	Group Assignment 2: Project Scope Boundaries and Requirements Traceability Matrix (Due 2/14) = 15% (+/- Peer Eval)



BA Capstone Project Timetable

Week #	Topic Description / Class Time	Assignments / Quiz / Tests
7 2/21	Lecture Topic: <u>Presentation Topic + 4-5 Learning Objectives (for Capstone Presentation Project)</u> Q Period: KPI's and Data Analysis for Success + Project Scheduling	(Note: Most mid-terms – so no Deliverables scheduled)
8 2/24- 2/28	<u>Mid-Term Break <Oct 21 - 25></u>	
9 3/7	Lecture Topic: <u>Effective Change Management</u> + Capstone Presentation Topic + 4-5 Learning Objectives: Meet with Pete	Capstone Deliverable - Part 2 Presentation Topic & Learning Objectives Business Memo + Meet with Pete (Due 3/7) = 6% (+/- Peer Eval)
10 3/14	Lecture Topic: <u>Softskills: Communication, Negotiation, Conflict Management and Mental Health Watch</u>	Group Assignment 3: Project KPI's and Data Analysis for Success + Project Scheduling (Due 3/14) = 14% (+/- Peer Eval)
11 3/21	Lecture Topic: None (Work on Capstone Project Video component) Q Period: <u>Softskills: Communications, Negotiation, Conflict Management, Mental Health Watch</u>	
12 3/28	Lecture Topic: <u>Project Closure and Lessons Learned</u>	Group Assignment 4: <u>Softskills: Communication, Negotiation, Conflict Management and Mental Health Watch</u> (Due: 3/28) = 14% (+/- Peer Eval)
13 4/4	Capstone Group Presentations Q Period: Project Closure and Lessons Learned	Capstone Deliverable 5 – Part 3 – Slide Dec & Presentation: Group mark ~ up to 8 Group marks (+/- based on Peer Eval) + 4% Individual mark.

BA Capstone Project Timetable

Week #	Topic Description / Class Time	Assignments / Quiz / Tests
14 4/11	Lecture Topic: <u>Project Retrospectives</u>	Capstone Deliverable 5 - Part 4 – Self-Observations of own Presentation style (Due: 4/8) = 3% + up to 2% Optional Marks for providing feedback to your group members. Assignment 6: Project Closure and Lessons Learned (Due: 4/11) = 10% (+/- Based on Peer Eval)
15 4/18	(Exam Week)	Individual Assignment 1: Group Retrospective analysis (Individual assignment) (Due 4/15) = 4%

BA Capstone

