



# Business Analysis Fundamentals

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## Business Analysis Overview

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**TIP:** *If viewing in Microsoft Office, use the navigation pane. Go to the top and click the view tab → click the navigation pane box in the show section → also make sure you are in print layout view.*

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### Ship Analogy:

Every ship needs a captain and a navigator, and the world of projects is no different. Without a captain and navigator, the ship would be lost.

In most organizations, the captain is the project manager – overseeing everything on the ship at a high-level. This makes the role of the navigator very important, as the ship needs to be on the best and most prudent path to its destination.

As the business analyst (BA), you are the navigator – it is a vital role to keep the project on course.

Tools & techniques that a BA will use to keep the project on the right course:

#### 1. During Initiation Phase

- Manage Business Objectives
- Ensure Objectives are Valid

#### 2. During Planning Phase

- Manage collection of requirements
- Consult individuals
- Consider all stakeholders

#### 3. During Execution Phase

- Manage changes
  - Validate proposed changes
  - Detect when a change is needed
  - Assist with changing plans
- Product testing

#### 4. During Closing Phase

- Validate completion criteria

## Understanding What BA's Do

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When maintaining or improving a home, having a trusted handyman that can come in and help setup, fix, or improve things when you need it is invaluable.

In the world of projects, the BA is like the handyman. From the start and to the end, BA's play a critical role in the success of projects and delivering outcomes.

### **BA Role:**

#### **1. Validate objectives**

- Projects are used to create change, without proper analysis, changed to the organization can go badly.
- As a BA, seek to understand the processes strengths and weaknesses your organization uses, and then validate any improvements to be implemented by a project.

#### **2. Manage Requirements Process**

- Gain deep understanding of what is being done today, and what can be done to make it more efficient; then capture then information using the capturing tools.
- Capturing Tools:
  - Flow Charts – provide step-by-step as-is and to-be processes. Can be used to capture current state and model desired outcome.
  - User Stories – provide picture of what people in the organization want to achieve.
  - Context Diagrams – describe relationships between business areas and clients, and how they all fit together.

#### **3. Manage relevant change during the project**

- Validating changes
- Promoting change
- Manage scheduled impacts

#### **4. Manage Testing**

- Make sure products do what is in intended

#### **5. Ensure completion criteria are accomplished**

- Include completion criteria that states what needs to be completed in order for the project to be considered finished.

## Understanding the Skills BA's Use

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### Characteristics & Skills

- Curiosity
- Questioning & Listening
  - Observing
  - Hearing what is said and **not** said
  - Interviewing
- Patience
- Communication skills
- Diplomacy
- Sustained Enthusiasm
- Being Logical

Being a BA is a multifaceted role, taking different skills and characteristics.  
It is very exciting because you are in the heart of change within your organization.

## Adopting a BA Mindset

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BA's need to harness their inner-child and ask "but why?"

### BA Mindsets:

- A belief that inconsistencies exist
  - Inefficiencies are present in virtually every business
- Best place to start is "What is happening **today**?"
  - Understand as-is processes
- Enjoy the **details** and the **big picture**
  - A big-picture view of what is happening-and could happen-in the business is just as important as capturing and tracking the procedural details.
- Bridge between business and technical personnel
  - Vocabulary can be so different, and discussions can be useless.

Technical Language	Business Language
<b>Data flows</b>	Turnaround times
<b>Sequence errors</b>	Customer preferences
<b>Engineering specs</b>	Capability management

- The BA serves as a facilitator and translator from those stakeholders requesting the change to those who will deliver the change.

\*A BA should calm nerves and be a diplomat to people who often have different perspectives about a problem.

## Exploring the BA Initiation Phase

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BA role in initiation phase is very much like holiday planning. You want to compile an agenda that makes sense, work with the family to get agreement, and minimize the stress.

### Initiation Phase

- 1. Create a scope statement**
  - A high-level “trip agenda” of where you will go and not go during your trip.
  - What will be accomplished, areas that will be involved and not be involved.
- 2. Identify key stakeholders**
  - Examples: Subject matter experts (SME’s); people familiar with company processes, influential team members
- 3. Create business requirements**
  - A detailed list of what will be done to fulfill a project’s scope.
  - Achieving Objectives
    - i. Determining requirements and outcomes
    - ii. Documenting requirements
    - iii. Reviewing and confirming requirements
- 4. Identify completion criteria**
  - “Begin with the end in mind.”
  - Productivity levels
  - Cost savings or profit increases
  - Compliance with regulations
  - Efficiency
  - Percentage improvement

## Defining the Business Problem or Opportunity

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You need to “see” what is going on in order to find ways to improve.

### Problems and Opportunities:

- 1. Use multiple collection techniques:**
  - Individual and group interviews
  - Job observation
  - Documentation review
  - Systems review
  - Visiting multiple locations
- 2. Determine sponsor’s perceptions**
- 3. Find common areas for improvements**
  - Manual steps in a process
  - Swivel technology
  - Conflict of inconsistencies in process execution
  - Processes without purpose

## Defining the Business Objective

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### Establishing Objectives:

#### 1. Use common structures

- Financial elements
- Surpassing competitors
- Achieving compliance

#### 2. Establish a target for that objective

- Be specific
  - Apply a number (12% productivity improvement)
- Starting point
- Draw a “line in the sand” – understand where the journey starts and where it needs to end up
- Target Measurement Criteria
  - Parts/person?
  - Parts/hour?

#### 3. Gain agreement on steps to achieve objectives

- Schedule and allow for training
- Update marketing materials
- Put performance monitoring in place

#### 4. Examine downstream processes

- Ensure that your business can handle the results of the planned objectives
  - Do this by aligning project objectives with the company’s strategic objectives.

## Capturing Business Information

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As a BA, a large part of your role is centered on **fact finding** and **gathering information**.

### Available Information

- Company websites
- Intranet sites
- Annual reports
- Strategic objectives
- Business plans
- Annual operational plan
- Process and tools used
- This documentation will help us see the “as-is” view.

### External Information

- Industry magazines
- Blogs
- Research companies

You should do proper investigation and research in order to understand background information before speaking to a stakeholder.

Use high—level diagrams to help confirm perceptions and the direction of the project.

### Five Diagrams a BA should always have in their “tool box”

- **Organizational charts:** who reports to who, roles
- **Stakeholder maps:** who is responsible for what, how different things get approved
- **Context diagrams:** confirming scope and assuring you address all integration requirements
- **Business use-case diagram:** big picture of who is using what, and what they can execute.
- **Business process / Activity diagrams:** Visual picture of text describing a process

### Contributing to Success

1. **Project & Scope Definition**
2. **Planning the analysis**
3. **Procedure analysis** (use a top-down approach)
4. **Stakeholder interviews**
5. **Solution design**



## Understanding Your Stakeholders

**Stakeholder:** A person, department, or functional area, internal or external to the organization, which is directly involved with or affected by the project.

\*The stakeholder you fail to identify will usually be the one who causes you the most pain.

### Stakeholder Groups

- Clients and customers
- Governance area
  - Systems and processes that are in place for insuring proper accountability and openness in the conduct of the business: legislation, regulation, policies, procedures, business rules, and guidelines that the project must comply with.
- Service providers
  - Resources and support mechanisms to enable project delivery
- Partner stakeholders
  - Stakeholders that jointly engage in the project

\*After identifying your stakeholders, as, who is missing?

### Utilize stakeholder context diagram

- Where in the organization do we go to start work?

### Create stakeholder analysis table:

*These questions help to identify and determine how to manage the stakeholder through the life of the project.*

<b>What do they value most?</b>	Stakeholder 1
<b>How will their commitment to the project and the work be measured?</b>	Stakeholder 2
<b>What authority do they have to effect the required change?</b>	Stakeholder 3
<b>Have they clearly communicated their needs and requirements?</b>	Stakeholder 4
<b>What areas/stakeholders are in conflict?</b>	Stakeholder 5
<b>Are they willing to take ownership upon project completion?</b>	Stakeholder 6
<b>Who will have the most influence, impact on project success?</b>	Stakeholder 7
<b>How do you handle the stakeholder that gets the short end of the stick?</b>	Stakeholder 8

Group stakeholders into categories that reflect their involvement or interest in the initiative.

By understanding stakeholder influence and attitudes, and assessing positive and negative attitudes and behaviors, you will affect the overall success of the project.

## Designing Your Requirements

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\*A difficulty comes when a stakeholder asks for something, and they believe they will get their way.

As a BA, your role is to ensure you gather requirements from gather requirements from ALL stakeholders.

### Requirements Lifecycle:

#### 1. Collect Requirements

- Understand the scope
- Spend time with manager and sponsor
- Watch for out-of-scope items

#### 2. Requirements Gathering

- Interview
- Brainstorming sessions
- Observing a job or process
- Surveying
- Joint requirements sessions

#### 3. Requirement Refinement

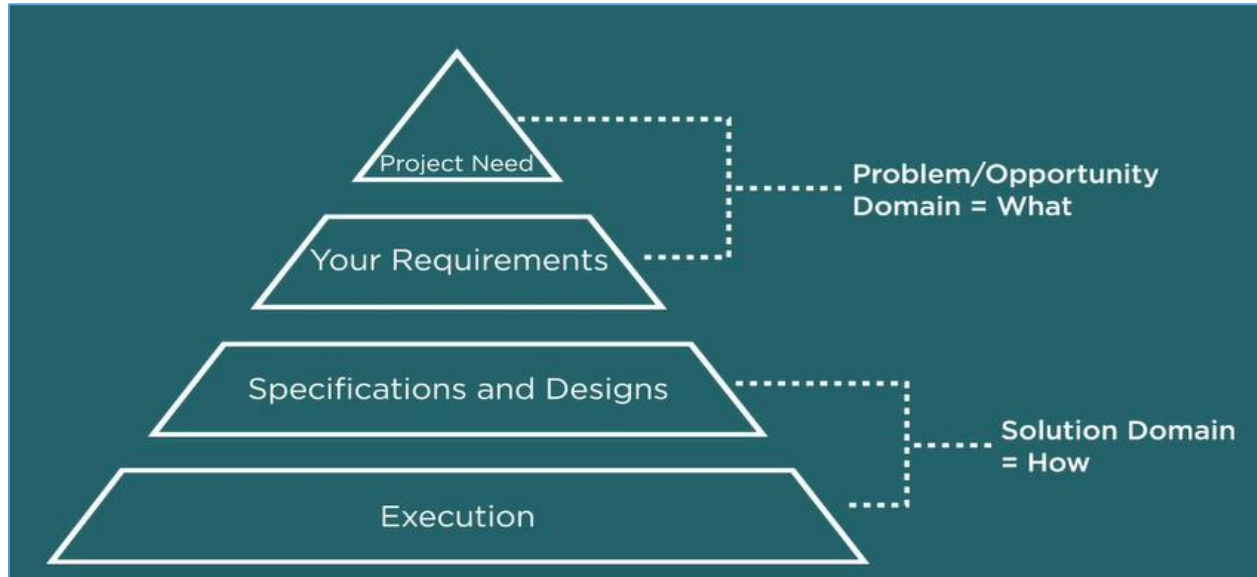
- Determine fit in overall project context
- Ensure fit with business strategies
- Classify requirements
- Refinement results:
  - Requirements are understood by **many**
  - Complexities identified and clarified
  - Requirement prioritized
  - Requirements are necessary
  - Understanding overall fit

#### 4. Requirements Verification

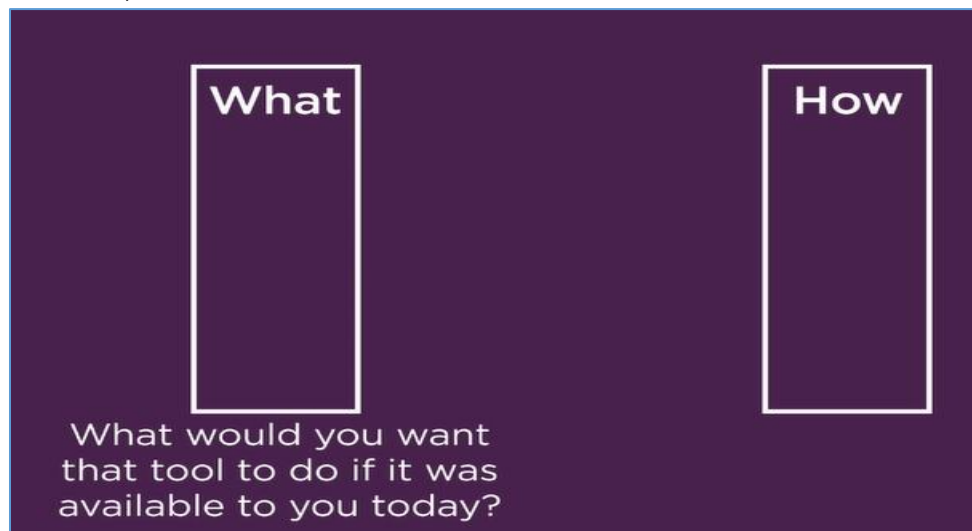
- Decide who should confirm
- Avoid “analysis paralysis”
- Use peer review or formal inspection
- Verify against process models

## Understanding the Requirements Pyramid

Imagine your project is a pyramid, the top layers describe the high-level problem and what is needed. The bottom layers represent the solution domain, and define how. Bottom half always supports the top half. Do not overlook any step in the pyramid. Be as specific as possible for the top two layers.



When collecting requirements from stakeholders, use a flipchart or notebook with two columns. One marked “what”, and the other marked “how”.



Ask questions like this: through this questioning, you are ascertaining the “what” behind the “how”. Sometimes the “how” reflects the essence of the way the stakeholder understands their requirement. Capturing it and ask further details, not only validates the stakeholders needs, but it gives you additional understanding as well.

\*Switching between high-level and detailed business-requirements can be effective.

## Exploring Requirement Types

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\*Requirements define what is needed, and not the how.

\*Reference the Requirements Breakdown Structure Diagram

### Requirement Criteria -- SMART

- **Specific** – requirement wording is clear and concise
- **Measurable** – requirement has a criteria that can be tested
- **Achievable** – requirement can be successfully obtained given project environment
- **Realistic** – requirement is appropriate to the project scope and resources
- **Traceable** – requirement can be associated with a stakeholder, process, system, model, test document.

Once requirements are detailed, split the solution requirements.

Solution Requirements:

- Functional
  - The actions and activities that are needed to deliver against the stakeholder requirement.
  - Explicit & Implied Actions
    - Make the product
    - Deliver the product
- Nonfunctional
  - Certain conditions or capabilities that need to be in place to enable actions or activities to happen.
  - Enable the functional requirements to happen, define the parameter; compliance, performance, scalability, legislation, regulation, policies, procedures, etc.
- Transition Requirements
  - What is needed to confirm acceptance of the stakeholder requirements and deliver against the higher-level business.
  - Document the successful completion criteria

## Building the Requirements Plan

Requirements plan is what brings all the requirements gathering elements together in order to create a package that is understood, and delivers the “what” and “how” that the stakeholders are requesting.

Identify people undertaking the requested changes in order to understand who you need to engage with.

### 1. Input People

- Request and influence changes
- BA will capture requirements
- Ba creates requirements project

### 2. Output People

- Turn requirements into artifacts, services, packages, or systems

### 3. Requirements Gathering TIPS

- Create a glossary of terms to help more people with understanding, continue to keep it up-to-date during the project.
- Schedule time with stakeholders; send a detailed agenda or background documentation
- Determine how you capture info; questions, probing, scribing
- Classify requirements; helps distinguish
  - Business
  - Stakeholder
  - Solution
  - Transition

\*Use consistent language throughout your requirements:

Stakeholder Requirements	Functional/ Nonfunctional
"The user requests..."	"The solution shall..." "The system shall..."

### 4. Validate Requirements

- Paraphrasing, capture supporting materials
- Ask how this requirement will fix an issue, ask how your requirement aligns to a scope item, deliverable, or objective

### 5. Make Requirements Traceable

- Capture who defined the requirements, made the request, when it was captured, who was the author/analyst, the person/team that wrote the requirement.

### 6. Generate requirements Package

### 7. Communicate the requirements

- Once sign-off is received, these become base-line requirements. Any changes from this point will need to follow the prescribed change management process.

## Gathering Requirements

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\*Relying on just once source of information gathering will increase the risk of not achieving the outcomes of the project.

### Sourcing Requirements

- **Analyzing process and use cases** (documents that detail the work being performed)
- **Inspecting artifacts** (forms, reports, screens)
- **Understanding models** (system flow charts)
- **Look at existing features**
- **Providing prototypes** (visual representation of the expected output)

\*Continue to engage stakeholders during the requirements gathering lifecycle.

### Stakeholder Interaction

- **Interviewing** – eliciting detailed information from individuals
- **Brainstorming** – group technique that provides broad spectrum of ideas and information and helps derives themes for further analysis
- **Observing a job** – assessing a role or process from a user's interaction perspective
- **Surveying** – a way to elicit information from many people in a short amount of time

### Requirement Quality Checklist

#### Is the requirement:

1. Necessary?
2. In scope?
3. Specific?
4. Measurable?
5. Achievable?
6. Realistic?
7. Traceable?
8. Grammatically correct?
9. Identified and organized?
10. Does it define the "what" and not the "how"?

## Interviewing to Gather Requirements

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\*User involvement is one of the top 3 reasons for project success.

### Interview Process

1. Prepare & Schedule
2. Capture Requirements
3. Start with open questions (who, what, when, where, why, how)
4. Use closed questions (would you prefer A or B, is this of high or low priority)
5. Ask factual questions (stats)
6. Ask emotional questions (tell me about the last time you were frustrated with the current process)
7. Listen for requirements to capture (do not be afraid of silence, ask one question at a time, observe body language)
8. Capture and validate information

### Requirements come in two forms:

1. **Explicit** – When a user is very specific about a need or suggestion.
  - a. EX: “I need to achieve a throughput of 50 widgets a minute.”
  - b. “Our service must comply with ISO standard XYZ, Section 15, clause 4.2.”
2. **Implied** – Raised as a complaint or frustration that implies the need for a requirement.
  - a. EX: “Why do I have to enter all the vendor information in again if it’s already stored elsewhere?”
    - i. Turn implied to explicit: The user (sales support) requests a customer lookup function, based on the vendor’s trading name, to retrieve vendor information already stored in the ABC system, including Name, Address, and Delivery Details, and populate these details in the Sales System for all new order.”

## Brainstorming to Gather Requirements

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\*Brainstorming is used in requirements elicitation to get as many ideas as possible from a group of people.

### Brainstorming Rules

1. Clearly state objectives and deliverables
2. One person speaks at a time (no criticism, debate)
3. High volume is the goal
4. Encourage piggybacking
5. Time-box the discussion
6. Once information is gathered, reshape and combine ideas

### Managing Brainstorming

1. Set the ground rules (as above)
2. Set a time limit
3. Define a starting point
4. Shout out and write

### Sorting Ideas

1. Flag requirements
2. Categorize requirements
  - a. Mandatory
  - b. Important
  - c. Nice to have
3. Prioritize requirements (1-5)
4. Tally scores

## Observing a Job to Gather Requirements

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### Observation Techniques

- To monitor a current process
- To improve a process
- If it's hard to explain requirements
- For highly repeatable processes
- If you're questioning the validity of data

### All Processes will:

- Take inputs
- Perform activities
- Create outputs

### Observing Processes

1. Passively
  - a. Through job shadowing
2. Actively
  - a. Engaging stakeholder throughout work

\*Utilize process diagrams (swim line)

### Observation Results

- Create a list of requirements
- Begin to design requirements for the future state

### KRAC Approach

- What do we want to **Keep**?
- What do we need to **Remove**?
- What do we need to **Add**?
- What is not working and needs to **Change**?



## Surveying to Expand Project Requirements

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Scenario: 9 locations, 450 staff members, only 3 weeks to verify requirements – what do you do?

- Put out a survey

**Survey:** A method for collecting information from a selected group of people, using standardized questionnaires.

### Surveys require:

- Selecting stakeholders for inclusion
- Determine methods
- Analyze results

### Questioning is the backbone of surveys:

1. Open-Ended questions
  - a. Participants answer in own words
  - b. Written to preclude one-word responses (yes or no)
2. Closed questions
  - a. Categorical (no order)
    - i. Gender, Transportation, etc.
  - b. Scaled (progressive order)
    - i. Responded rate agreement or satisfaction

### Creating a Survey

- Begin with simple questions
- Use concise sentences
- Use understandable language
- Ask one item per questions
- Offer “n/a” or “does not apply”
- Create categories that cover all responses
- Include space for written comments
- Keep the questionnaire short
- Provide a return date

\*Use surveys to elicit, categorize, and prioritize requirements.

## Producing Business Rules and Requirements Traceability

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### Requirement Package

1. Business rules
2. Traceability matrix

### Business Rules:

- Boundary Conditions
- Decisions on processes
- Approval or ownership (ex: credit)

### Traceability Matrix

- Typically captured on a spreadsheet and provides:
- Documents the source of all requirements
- Ensures all requirements are met
- Align scope and objective
- Conducts testing and quality control (who will test, what will be tested)

## Building Requirement Traceability into the Plan

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### Requirements traceability helps you in two ways:

1. Tracks how requirements have evolved
2. Tracks how to ensure requirements are achieved and verified

### Requirements Traceability

1. Capture the intended origin of requirements and who provided them.
2. Ensure all requirements map to prioritized business objectives
3. Map the requirements to the deliverables that will satisfy those requirements
4. Tie in your project risks
5. Provide traceability from tests to the requirements

*\*Refer to traceability matrix in course files*

### Events that will trigger a review of your matrix:

- Reorganization or change in stakeholders
- Other project's impact on requirements
- Competitor announcements
- Major financial change

## Determining When You Have Enough Requirements

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**Analysis Paralysis:** The perceived need to continue to examine possibilities and options, to ensure a requirements package is accurate and complete.

**When you have collected enough requirements:**

- When individuals and groups agree
  - Understanding any differing perspectives
  - Individuals share more one-on-one
- You can describe complete process flows
- Verification yields only minor adjustments
- You can produce use cases and scenarios for testing

**Customer Perception Tests:**

- Requirements need to tie back to specific scope items and deliverables
- Business team is excited about the possibilities
- Business team has consistent elevator

## Creating a Requirements Package

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**Input**

- Project charter must set the stage for your requirements
- The providers of requirements should be conveyed clearly

**Ensure**

- Details are easy to understand
- Graphics are easy to absorb (context & flow diagrams)
- Everything is included in the requirements package
- Constraints, assumptions, and dependencies are included

## Verifying Your Requirements

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### Verification Pitfalls

- Limiting the validation to QA or testers
- Analysis paralysis
- Not taking a holistic point of view
- Making verification a one-time event

\*Deciding ahead of time who and how you should be confirming requirements should always be in the BA mindset.

### Repeating Requirements for agreement

- Paraphrasing
- Capture in a written format
- Capture agreement from stakeholder and manager

### Requirements Breakdown Structure

- Business
- Stakeholder
- Functional
- Nonfunctional

\*Ensure requirements will deliver against a scope item to create a deliverable.

### Establish Priority Requirements

- Mandatory
- Important
- Nice to have

### Ensure Requirements pass the SMART test

- Are requirements Specific, Measurable, Achievable, Realistic, and Traceable?
- Are they written in a language that can be understood by many?

### Ensuring Alignment

- Priority of the project in portfolio
- Synergies and Conflicts
- Analyze “off-task” requests for their true motivation

## Exploring Requirement-Verification Techniques

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### Peer Review Technique

- Less-formal approach
- Identify skilled resource to comment
- Circle confusing words

### Formal Inspection Technique

- Disciplined approach
- Paragraph-by-paragraph review

### Acceptance Criteria

- Are we done yet?
- How will we know?
- Criteria is Valid When:
  - Completion criteria tie back to high-level business requirements

- Requirements are quantifiable and clear
- Traceability matrix has been applied
- Completion criteria signed off by sponsor and customers

## Creating Procedure Manuals & Documentation

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**Procedure Manual:** A manual that explains how a process is intended to function.

**Procedure Manuals Should:**

- Be easy to read
- Provide details
- Use text and diagrams
- Provide complete information

\*Write procedure manuals generically, so they are usable for all intended users.

**Training Materials:** Materials that focus on how a user will interact with a new product.

**Training Materials Should:**

- Be easy to read
- Be engaging
- Provide enough detail and context
- Use a combination of text and diagrams
- Detail where additional support can be sourced

\*Training materials are designed to teach something new.

**Teaching Tools**

- Pop quizzes
- Role playing
- Group activities

## Measuring Verification Activities

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**Verifying Your Requirements**

- Ensure aligned understanding
- Watch for differences of opinion
- Watch for missing or invalid requirements
- Look for alignment between managers and workers
- Ensure personnel understand how your requirements will achieve project goals

## Developing Project Acceptance Criteria

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\*Acceptance criteria should be developed in conjunction with your key stakeholders.

**Viable Completion Criteria**

- They reflect the desires and expectations of your stakeholders
- They set or reinforce project priorities
- They include specifics on how they will be measured
- \*Completion criteria can change

## Testing Project Outcomes

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**Testing:** A particular process or method for trying or assessing.

**During Testing:**

- Create acceptance test cases
- Writing good test cases:
  - Be specific
  - Be easy to understand
  - Test measurable elements
  - Test all requirements
- Execute the test cases against the created solution
- Document results
  - "A report is generated", "A bill is printed", "An order has been placed"
  - Note defects or errors
- Work with solution provider until stakeholders are happy

**BA Role during Testing:**

- Writing test cases
- Ensuring test cases are executed
- Answering questions
- Verifying results
- Conductor and conduit of information for:
  - Input people: Those requiring the change
  - Output people: Those seeking the outcomes from the project

## Using Testing Techniques

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**Test Strategy Document:** A high-level document that defines the testing approach to achieve testing objectives.

- Derived from requirements package
- Static document

**Test Plan Document:** A document that describes what to test, how to test, when to test, and who will do the test.

**Test Plan Should Contain:**

- Scope and objectives
- Testing roles
- Tools and documents
- Entry and exit criteria

\*Testing is not a one-time event. Testing should be performed throughout the project life cycle.

\*Engage the business actively throughout the testing phase(s).

## Providing Implementation Support

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### Common Challenges

- People trying to make a system do what they think it should do, versus what it is designed to do.
- Trouble with a new system looking different, making users lost.
- Decisions are made with a new system, and people don't trust those decisions.
- Users cannot tie the new system to their work or how their performance will be measured.

### Change Management:

1. Listen to what clients have to say
2. Understand new processes before answering questions
3. If something is off, verify the situation quickly
4. Be appreciative of your business members

## Capturing Lessons Learned

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### Best Practices for Capturing Lessons Learned

- Not an activity for the end of your project, document lessons throughout
- Use common terminology
- Capture your own opinions and impressions
- Talk about events and outcomes, not people and roles
- Include the signal for red flags (red alert)
- Include the stage of the project

## Next Steps

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### Resources:

#### International Institute of Business Analysis

- A Guide to the Business Analysis Body of Knowledge (BABOK)

#### Bob McGannon:

- Insights from a Project Manager
- Becoming a Triple-Threat Project Manager
- Rescuing Troubled Projects
- Agile Project Management

#### Bonnie Biafore:

- Managing Small Projects
- Project Management Fundamentals

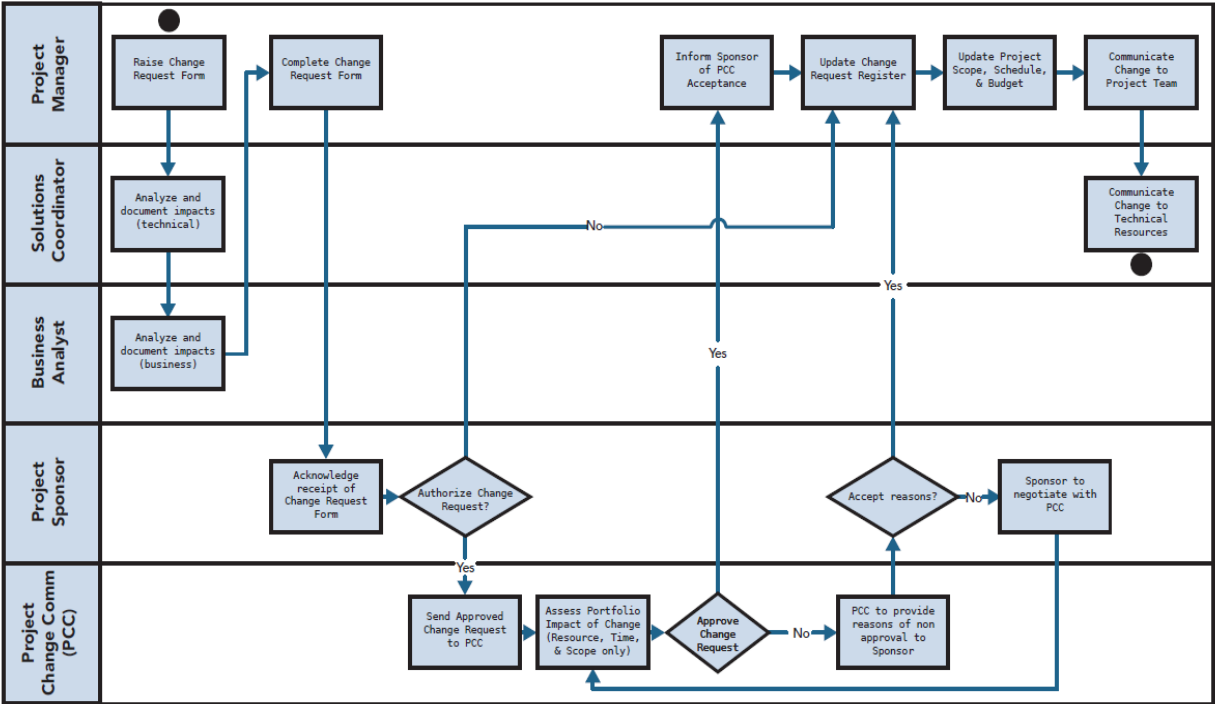
#### \*Record your hours for certification

- The project objective
- Phases of the project
- Knowledge areas used
- Supervisor's name

# Diagrams

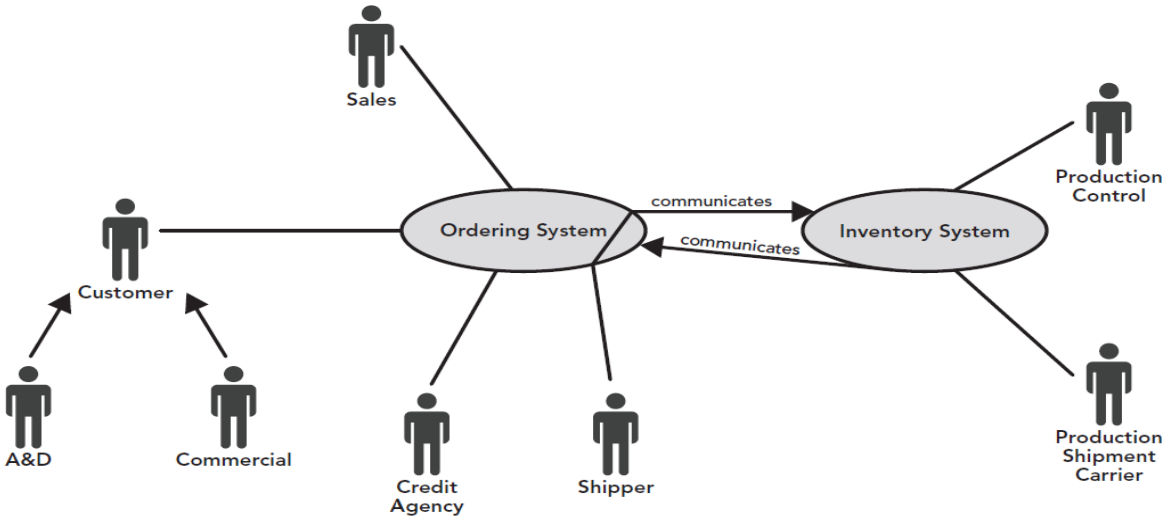
## Swim Lane

Project Change Request Process – to be completed for any major change impact to project



## Business Use-Case Model

# Business Use-Case Model





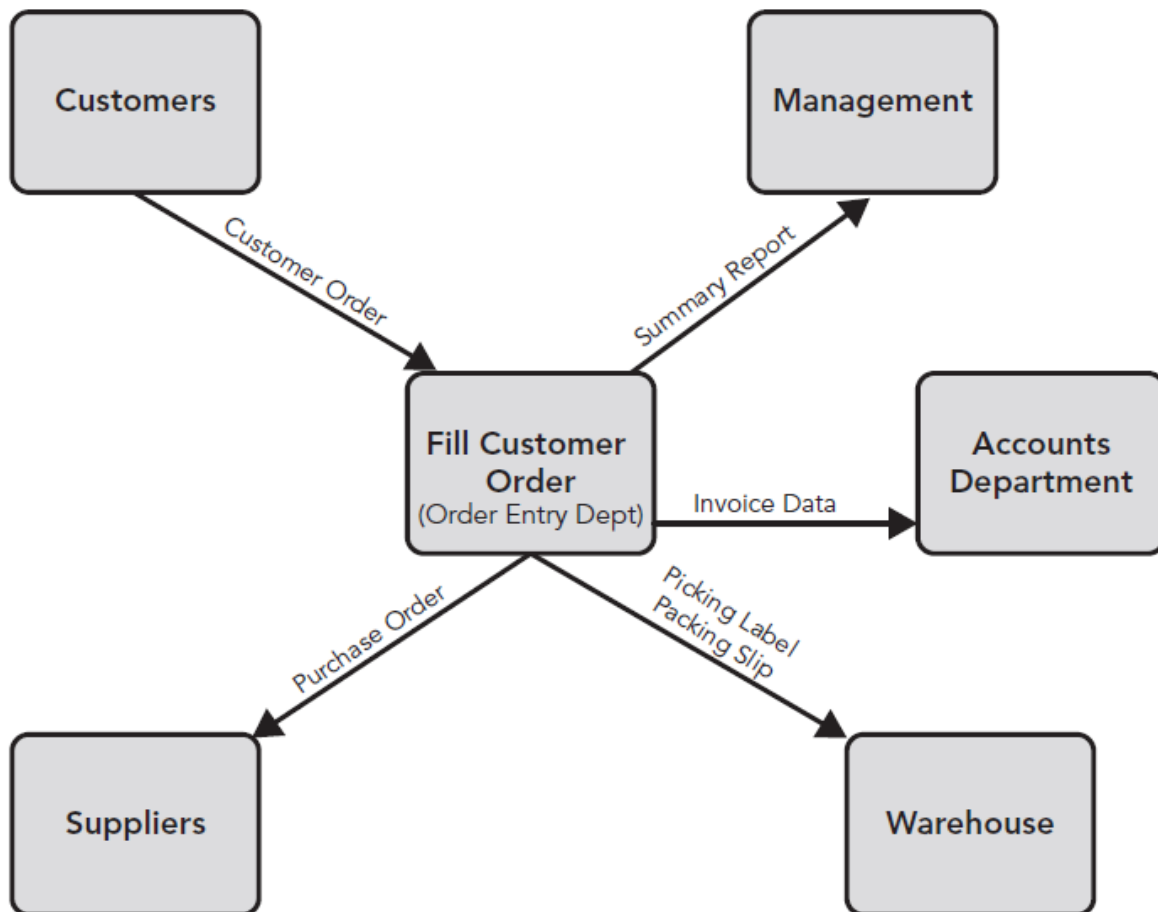
## Context Diagrams

### Context Diagram

#### Exercise: Context Diagrams

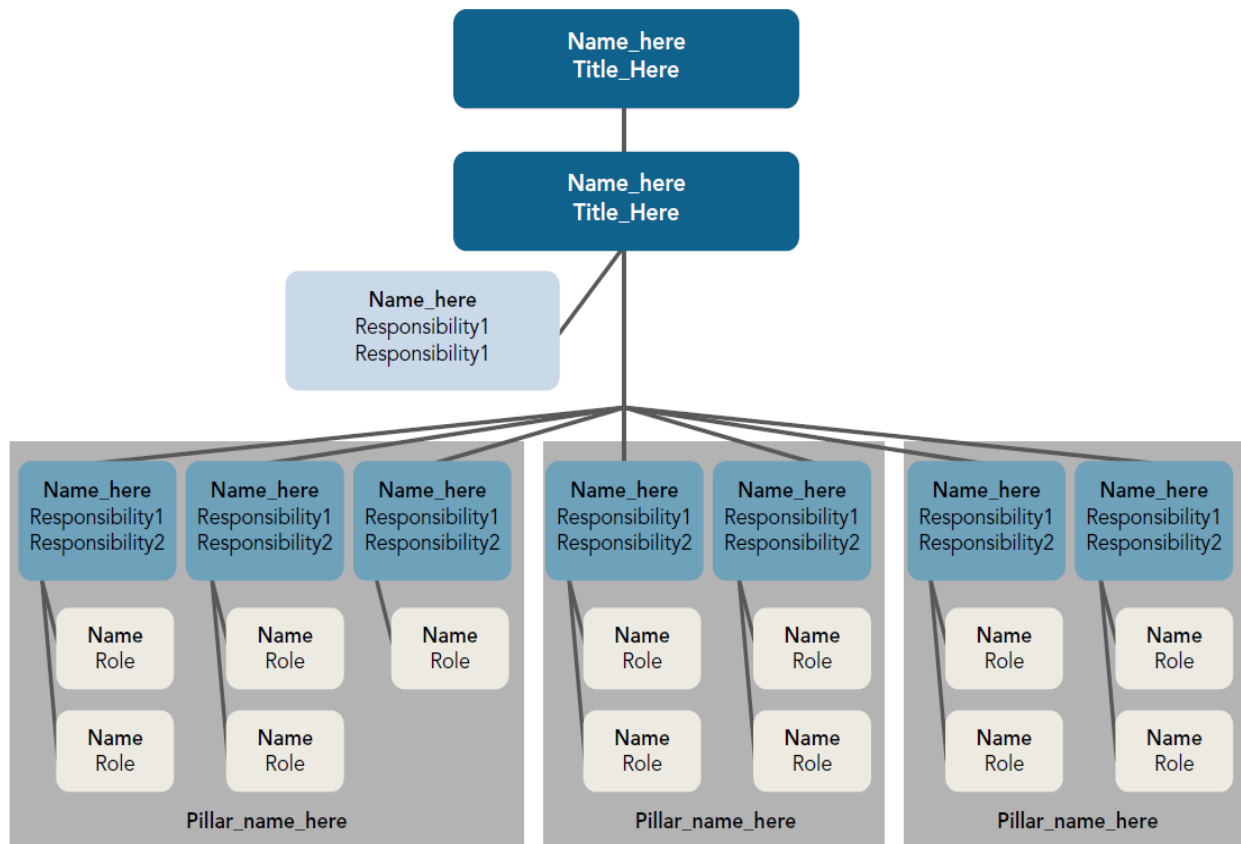
An order entry department has the task of filling customer orders. It receives the customer orders, produces picking labels and packing slips for the warehouse, and invoice data for the accounts department. In addition, the department provides summary reports for management, and places purchase orders for stock on suppliers when stock falls below pre-determined levels.

Using the information above, draw a context diagram for the department.



## Organizational Chart

# Organizational Chart

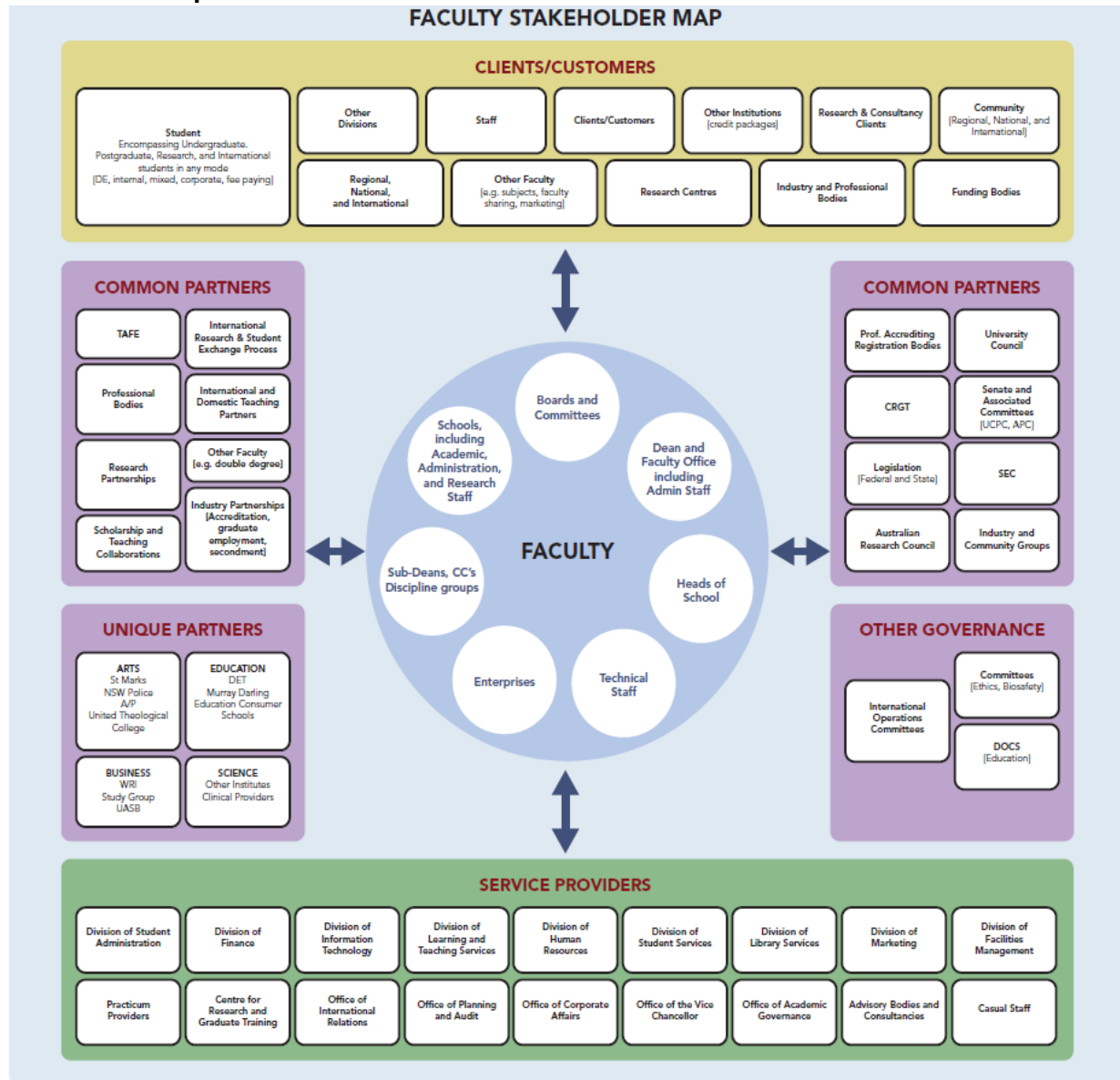


## Traceability Matrix

User Requirement	Functional Requirement	Test Case
UR-013: Maintain Customer Information	FN-37: Add a customer	TC-049: National Customer
		TC-050: International Customer
	FN-38: Edit a customer	TC-051: Edit basic profile
		TC-052: Edit credit-card information
		TC-053: Edit SSN
	FN-39: Delete Customer	TC-054: Delete Customer
		TC-054: Transfer to Archive

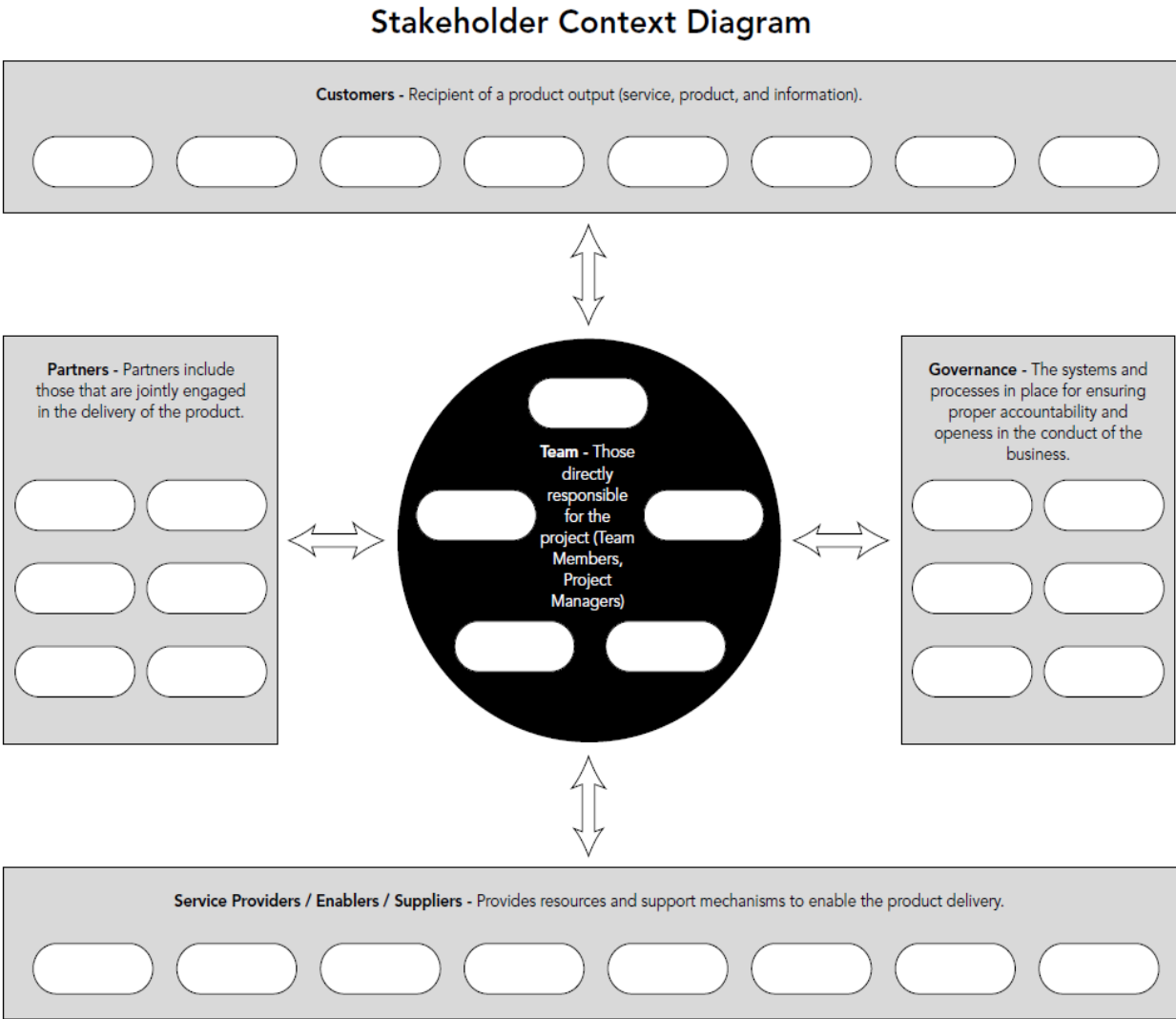
## Stakeholder Map

### Stakeholder Map



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Stakeholder Context Diagram



## Requirement Breakdown Structure

### Requirement Breakdown Structure

