

Scenario Notes

Fundamentals of Business Analysis

Interview with Solomon Alffson

- Sees beverage sales reporting process as broken
 - Compilation of data takes too long
 - Compilation of data takes too much of Product Analyst's time (about 1 week, per Solomon)
 - Product Manager (Theo Barton) has complained about the process of creating spreadsheets
 - Product Manager (Delia Clemens) is sometimes late with sending her spreadsheet to the Product Analyst
- Process
 1. Product Managers prepare spreadsheets
 2. Product Managers send them to Product Analyst at end of each month
 3. Product Analyst compiles them into report
 4. Product Analyst sends report to Product Line Manager
- Priorities: (1) timeliness and (2) efficiency

ID	Requirement	Rationale	Source
BR-1	Solution will ensure that final reports are available to Product Line Manager at beginning of first day of each month.	Key project driver. Important to have at beginning of month to accelerate decision-making.	Solomon Alffson, Product Line Manager
BR-2	Solution will significantly reduce level of manual work performed by Product Analyst.	Free up analyst's time to handle other work.	Solomon Alffson, Product Line Manager

- Stakeholders
 - Solomon Alffson, Product Line Manager (Sponsor)
 - Martha Warren, Product Analyst
 - Theo Barton, Product Manager
 - Delia Clemens, Product Manager
 - [Other Product Managers]

Interview with Martha Warren

- Agrees with Solomon's stated problems. Thinks that biggest problem is report generation taking up lots of her time, different from Solomon
- Process
 1. At the beginning of each month, all the Product Managers prepare their PSRs and send them to the Product Analyst.
 2. The Product Analyst reviews them for completeness, and if there are any issues, sends them back to the Product Managers for correction.
 3. The Product Analyst adds the PSR data to the PSLR.
 4. The Product Analyst adds additional details from the cheat-sheet, thereby completing the PSLR.
 5. The Product Analyst sends the completed PSLR to the Product Line Manager.
- Issues
 - Some people are a day or two late sending their reports
 - She has to chase some people regularly for their reports
 - Product Manager errors:
 - Forgetting to enter the Transaction Currencies
 - Forgetting to enter the Ship Dates
- The actual data in the report:
 - [Table of data] from PSR
 - Product, from PSR
 - Product Code, from PSR
 - Product Manager Name, from PSR
 - Product Manager Employee ID, from her cheat-sheet
- She prepares lots of custom reports for Solomon, and those take a lot of time. Examples:
 - How each product is doing from month to month
 - All transactions for a PM
 - All transactions for a single customer for a given time range
- Stakeholders
 - Vanessa Reyes, Product Manager
 - Darius Huber, Product Manager