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**Business Analysis for RPA**

**V4.0**

Discovery Template

# **Disovery Playbook Summary**

This document is intended to provide Business Analyst practitioners with the approach and structure needed to conduct Initiative Discovery. Initiative Discovery involves all necessary activities to establish a foundational understanding of the initiative; the context, vision, capture and organization of preliminary information, and preliminary impact analysis. The purpose of discovery is to ensure the BA, and larger project team has a common starting point when starting an initiative.

# **Section 1: Domain Analysis**

Domain models provide analysts with the means to understand the business, the context in which the needs exist, the problems to be addressed and/or the opportunities to be realized.

|  |  |  |  |
| --- | --- | --- | --- |
| Technique: |  | Date/Version: |  |
| Summary: |  | | |
|  | | | |
| Notes: |  | | |
| Questions: |  | | |
| Assumptions: |  | | |

# **Section 2: Vision**

Vision: a vivid description of the desired outcomes to be produced for the business as a result of the initiative. The vision provides a clear description of what the business will look like once the initiative is complete.

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| --- | --- |
| Vision: |  |

# **Section 3: Information Capture**

Define information perspectives, details of information, supplementary files or resources, elicitation techniques and as well as sources of information. Organize information in the table below. (e.g. Standard Operating Procedures Guide, Job Aid, existing process map, etc.). See Module 2, Section 2 for a list of Requirements Perspective Categories.

|  |  |  |  |
| --- | --- | --- | --- |
| Perspective Category | Perspective Documentation/ Details/ Notes | Files/ Attachments | Elicitation Technique(s) & Sources |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# **Section 4: Information Analysis – SIPOC Model**

A SIPOC Model provides a well-defined structure to organize understanding of a process at a high-level. The name SIPOC is an acronym of the essential elements of the model: Supplier, Input, Process, Output, and Customer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SIPOC Process Name: | |  | | |
| Suppliers | Inputs | Process (Steps) | Outputs | Customers |
|  |  | 1. |  |  |
|  |  | 2. |  |  |
|  |  | 3. |  |  |
|  |  | 4. |  |  |
|  |  | 5. |  |  |
|  |  | 6. |  |  |
|  |  | 7. |  |  |
|  |  | 8. |  |  |

# **Section 5: Impact Analysis**

Identify the impacts of the initiative on:

* **Stakeholders** – Those who may be impacted by the proposed initiative. The BA must assess their interests and potential engagement to support the initiative.
* **Processes** – Summarize the key processes impacted by the proposed initiate. The BA must conduct preliminary process impact analysis based on the vision.
* **Systems** –Summarize the technologies/systems impacted by the proposed initiate. Process, Data, and Interface analysis will support this identification.

|  |  |  |
| --- | --- | --- |
| Stakeholder(s) Name(s)/ Role(s) | Impact Summary | Level of Impact (H/M/L) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Process(es) Name | Process LOB | Level of Impact (H/M/L) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Technology/System(s) Name | Impacted Process(es) | Level of Impact (H/M/L) |
|  |  |  |
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Notes: