

Business Analysis Planning And Monitoring

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Business Analysis Planning & Monitoring

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Description: Defines the tasks used to organize and coordinate business analysis efforts.

Business Analysis Planning & Monitoring

Project: ADPA – Advanced Document Processing & Automation Framework

Version: 3.2.0

Standards: BABOK v3 Compliant

Document Owner: Business Analyst (e.g., Mike Chen)

Date: 2024-06-13

1. Introduction

Purpose:

This document defines the planning and monitoring activities for business analysis within the ADPA project, ensuring all analysis efforts are structured, traceable, and aligned with BABOK v3 best practices. It establishes a framework for coordinating business analysis tasks throughout the lifecycle of ADPA, a modular, standards-compliant automation framework for enterprise documentation and workflow automation.

Scope:

The scope covers the business analysis activities for all core ADPA features and integrations, including requirements elicitation, analysis, stakeholder engagement, solution validation, and compliance alignment (BABOK v3, PMBOK 7th Ed., DMBOK 2.0).

Key Stakeholders:

- **Executive Sponsor:** Product Owner / Portfolio Manager
 - **Project Manager:** Sarah Johnson
 - **Business Analyst:** Mike Chen (Primary)
 - **Technical Lead:** David Wilson
 - **QA Manager:** Lisa Brown
 - **Integration Partners:** Adobe, Atlassian, Microsoft
 - **Enterprise Users & Clients:** Internal and external users, Fortune 500 beta testers
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2. Planning Approach

2.1 Methodology

- **Framework:** BABOK v3-aligned iterative analysis, integrating agile and waterfall elements as appropriate.
- **Tools:**
 - ADPA CLI & Web Admin Portal
 - Microsoft Teams, Jira, Confluence, SharePoint
 - Automated document generation with AI providers (OpenAI, Google AI, GitHub Copilot, Ollama)
- **Deliverables:**
 - Business Analysis Planning & Monitoring Document
 - Requirements Documents (Functional, Non-Functional, Regulatory, Integration)
 - Stakeholder Analysis
 - Elicitation Results
 - Traceability Matrix
 - Solution Assessment Reports
 - Compliance Checklists

2.2 Roles & Responsibilities

Role	Responsibilities
Business Analyst	Lead BA planning, elicit/analyze requirements, stakeholder mgmt.
Project Manager	Approve BA plan, resource and timeline management
Technical Lead	Advise on technical feasibility, integration, architecture
QA Manager	Review testability/acceptance criteria, validation planning
Stakeholders	Provide input, review, and approve BA deliverables

Role	Responsibilities
AI Providers	Support automated content generation, context management

3. Monitoring & Reporting

3.1 Progress Tracking

- **Task Management:**
 - All BA tasks are tracked in Jira with defined milestones (Planning, Development, Testing, Deployment).
 - Status boards updated weekly; burndown charts for agile sprints.
- **Artifact Status:**
 - Document generation tracked via ADPA admin interface and CLI logs.
 - Version control via GitHub (history, change tracking).
- **Requirements Traceability:**
 - Traceability matrix maintained in Confluence and SharePoint.
 - Automated linking of requirements to test cases and implementation tickets.

3.2 Reporting Structure

- **Frequency:**
 - Weekly status updates in project meetings.
 - Monthly executive summaries for sponsors.
- **Content:**
 - Progress against BA milestones
 - Risks, issues, and change requests
 - Compliance status (Basel III, GDPR, SOX, etc.)
 - Metrics: Number of requirements elicited, accepted, implemented, and validated

- **Distribution:**
 - Automated reports published to Confluence and SharePoint
 - Ad hoc reports generated via ADPA CLI/API as needed
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4. Review & Validation

4.1 Stakeholder Review

- **Review Points:**
 - Initial BA plan review at project kickoff
 - Requirements and deliverables reviewed at the end of each phase (Planning, Development, Testing, Deployment)
 - Approval required from Project Manager, Technical Lead, QA Manager, and key business stakeholders
- **Feedback Mechanisms:**
 - Dedicated review meetings (in-person/virtual)
 - Comments and change requests tracked in Confluence/Jira
 - AI-generated document drafts reviewed and validated by human BAs

4.2 Approval Workflow

- All major BA deliverables require sign-off from the Project Manager and Executive Sponsor.
 - Final documents stored in SharePoint and version-controlled in GitHub.
 - Approval logs maintained for audit/compliance.
 - Changes to requirements or plans follow the formal change control process (Jira workflow).
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5. Revision History

Date	Author	Change Summary
2024-06-13	Mike Chen	Initial draft, tailored for ADPA project context
2024-06-14	Sarah Johnson	Added compliance/monitoring details, clarified roles
2024-06-20	David Wilson	Updated reporting and integration sections

End of Document