

# Business Analyst Training and Certification





# Agenda

**01**

Business Analysis:  
Planning & Monitoring

**02**

Planning the Business  
Analysis Approach

**03**

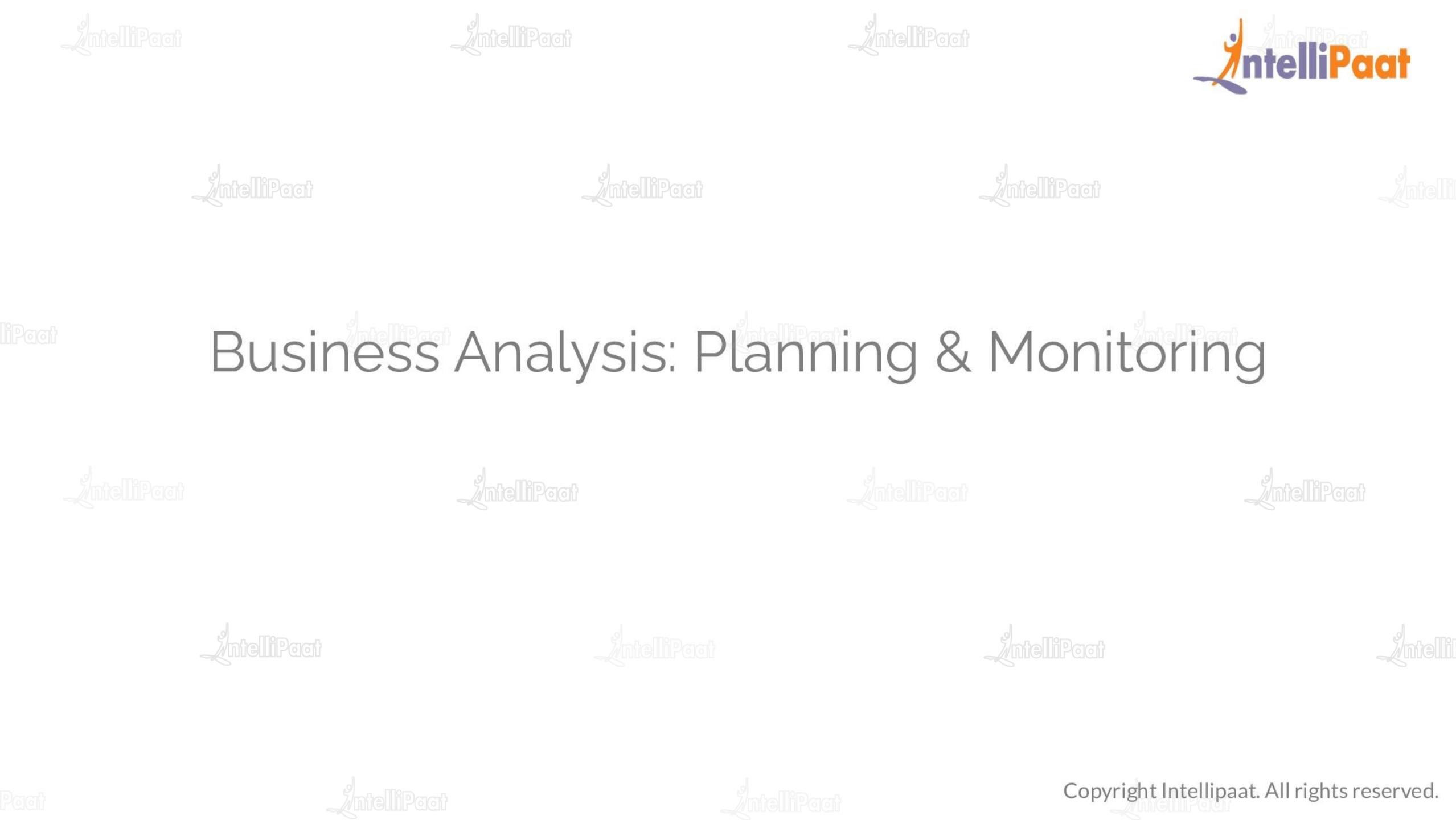
Planning Governance &  
Information Management

**04**

Business Analysis  
Performance Improvements

**05**

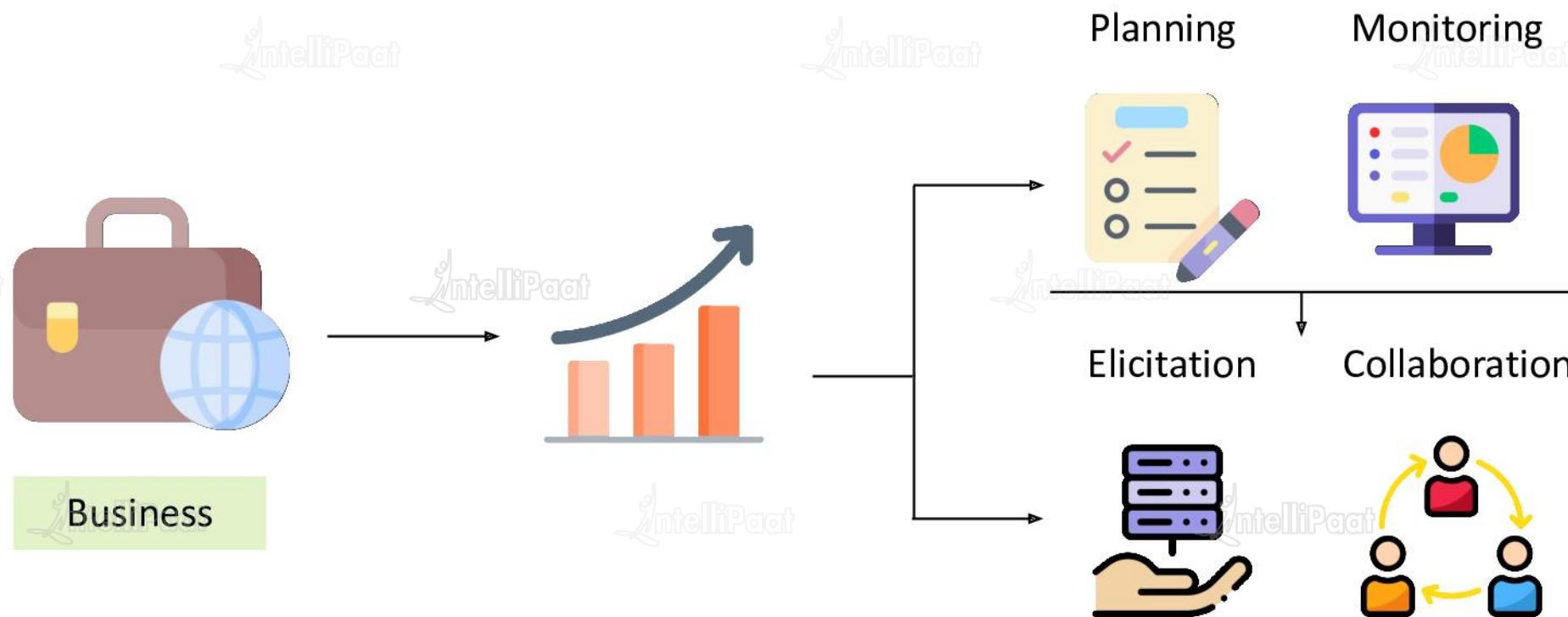
Elicitation & Collaboration



# Business Analysis: Planning & Monitoring

# What is Planning & Monitoring?

The **Business Analysis Planning & Monitoring** knowledge area describes the process of how a **Business Analyst** determines which activities will be needed to complete the **business analysis** effort



# Steps Involved in Planning & Monitoring

## Plan the Business Analysis Approach



It describes the planning of the business analysis work from the creation or selection of a methodology to planning individual activities, tasks, and deliverables

## Plan Stakeholder Engagement



## Plan Business Analysis Governance



## Plan Business Analysis Information Management



## Identify Business Analysis Performance Improvements



# Steps Involved in Planning & Monitoring



## Plan the Business Analysis Approach

## Plan Stakeholder Engagement



It describes understanding the stakeholders, what Business Analysts need from them, what they need from Business Analysts, and the best way to collaborate

## Plan Business Analysis Governance

## Plan Business Analysis Information Management

## Identify Business Analysis Performance Improvements

# Steps Involved in Planning & Monitoring



**Plan the Business Analysis Approach**



**Plan Stakeholder Engagement**



**Plan Business Analysis Governance**



It defines the components used by a Business Analyst to support the governance function of his/her organization

**Plan Business Analysis Information Management**



**Identify Business Analysis Performance Improvements**



# Steps Involved in Planning & Monitoring



**Plan the Business Analysis Approach**

**Plan Stakeholder Engagement**

**Plan Business Analysis Governance**

**Plan Business Analysis Information Management**

**Identify Business Analysis Performance Improvements**

It defines how the information/insights developed by Business Analysts are captured, stored, and integrated with other information for long-term use

# Steps Involved in Planning & Monitoring



**Plan the Business Analysis Approach**



**Plan Stakeholder Engagement**



**Plan Business Analysis Governance**



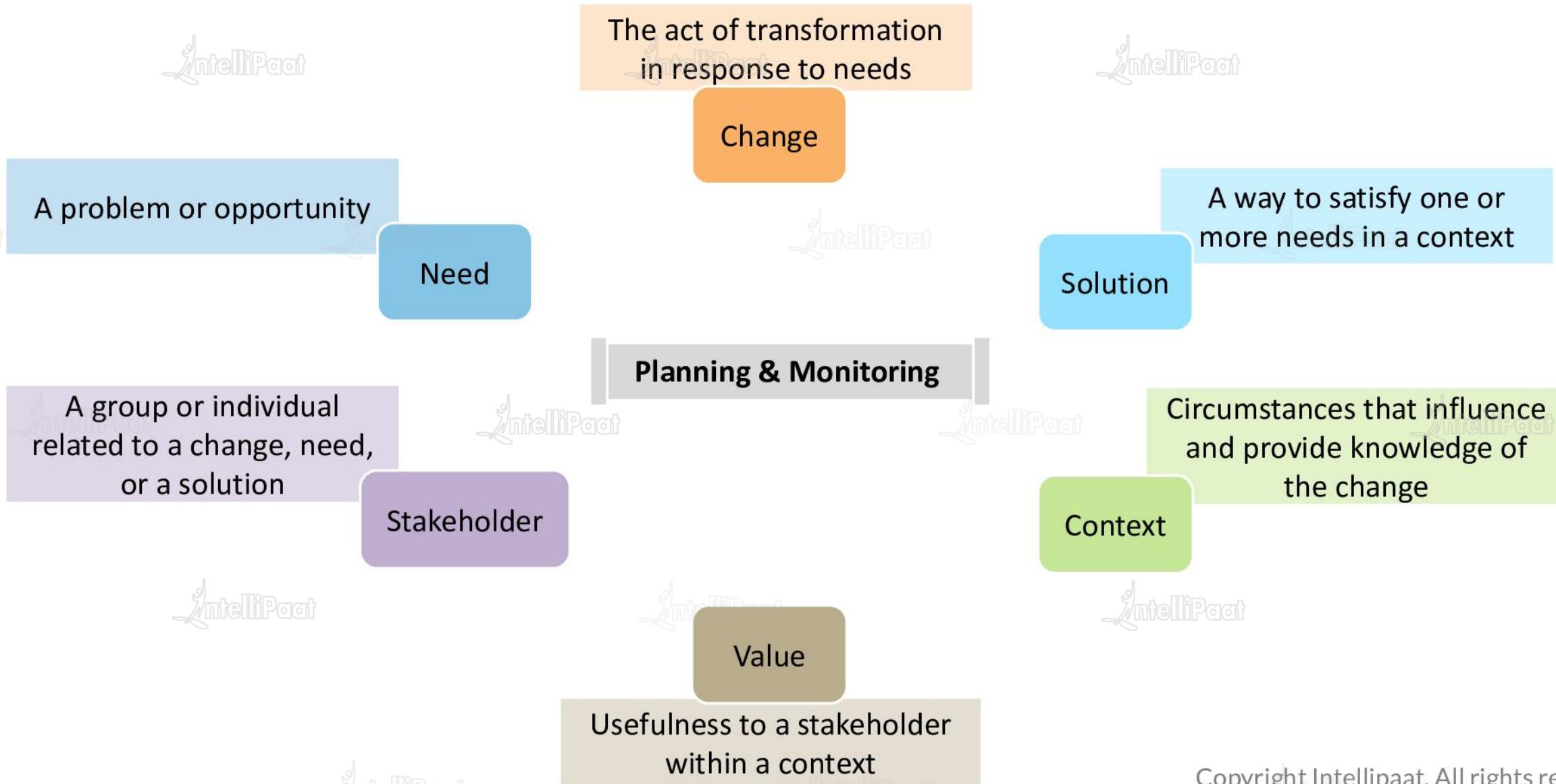
**Plan Business Analysis Information Management**



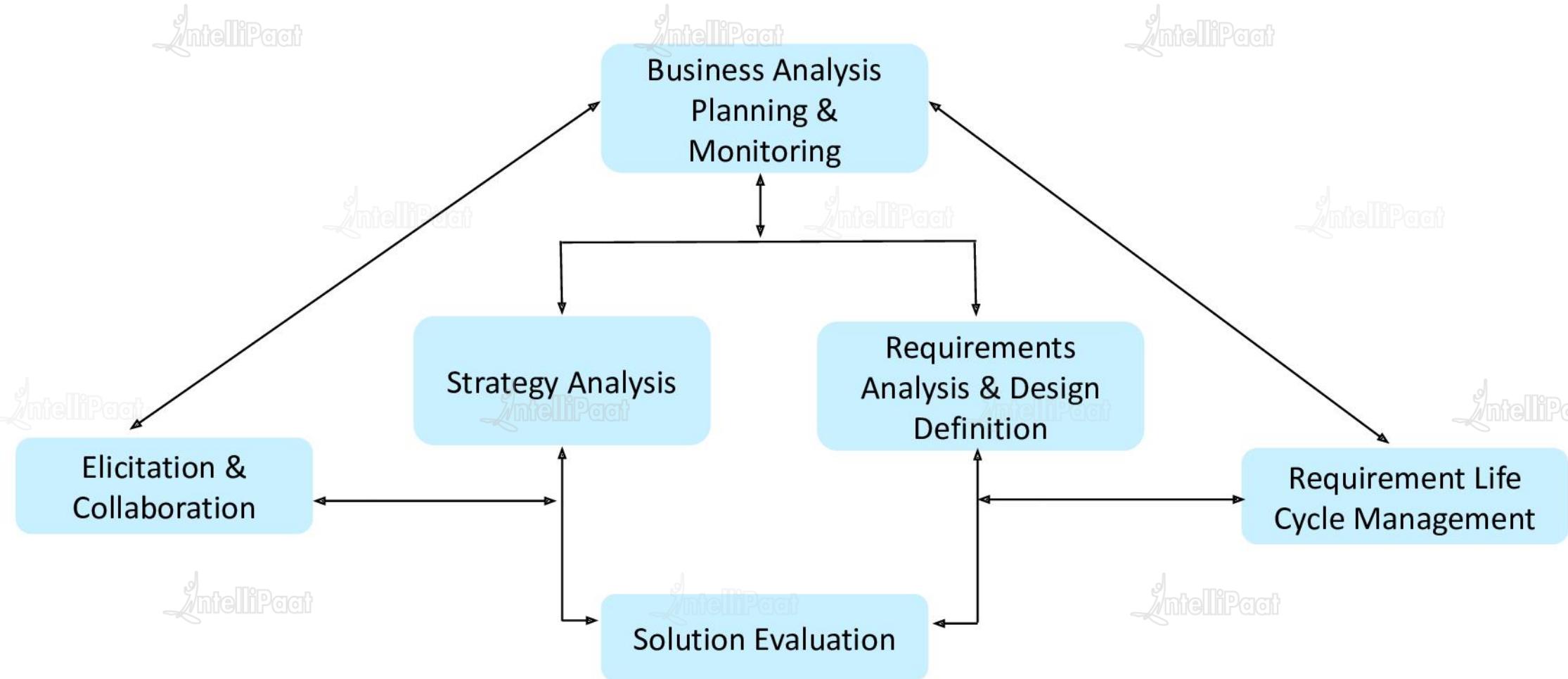
**Identify Business Analysis Performance Improvements**



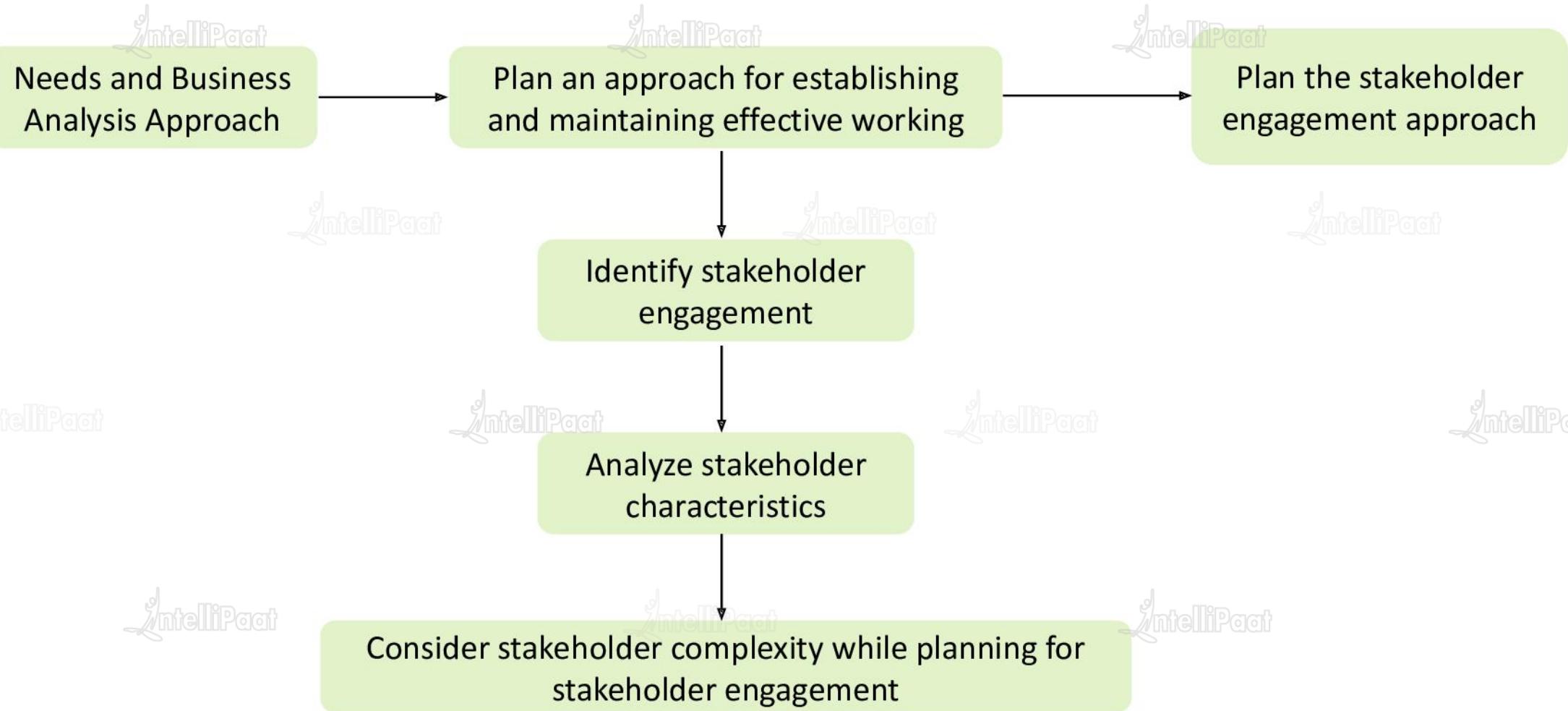
It is the managing and monitoring of how the Business Analysis work is performed to ensure that commitments are met and continuous learning and improvement opportunities are realized



# Relationship Between Knowledge Areas



# Planning Stakeholder Engagement



# Tasks to Accomplish

While planning, monitoring, and performing elicitation and collaboration, there are certain tasks that need to be defined, and they are:

Purpose

The reason to perform a task

Description

What is a task? Why to perform it, and what are the results?

Input

Information and preconditions necessary for a task to begin

Elements

Key concepts needed to understand on how to perform a task

# Tasks to Accomplish

While planning, monitoring, and performing elicitation and collaboration, there are certain tasks that need to be defined, and they are:

## Guidelines & Tools

Guidelines and tools used to perform business activities

## Techniques

Techniques specific to the performance of a single task or those that are relevant for a large number of tasks

## Stakeholder

Those who will be affected by the task

## Output

The result of the work described in the task, deliverable, or its part



# Planning the Business Analysis Approach

# What is the Business Analysis Approach?

It describes the planning of the Business Analysis work from the creation or selection of a methodology to planning individual activities, tasks, and deliverables

**Purpose:** Planning the Business Analysis approach is done to define an appropriate method to conduct Business Analysis activities

**Description:** A Business Analysis approach describes the following:

- The overall method that will be followed when performing the Business Analysis work on a given initiative
- How and when tasks will be performed and what deliverables will be produced



## Inputs

**Needs:** The Business Analysis approach is shaped by the problem or opportunity faced by the organization

## Elements

- Planning the approach
- Formality and level of detail of Business Analysis deliverables
- Business Analysis activities
- Timing of the Business Analysis work
- Complexity and risk acceptance

## Guidelines & Tools

- Business Analysis performance assessment
- Business policies
- Expert judgment
- Methodologies and frameworks
- Stakeholder engagement approach

# Techniques, Stakeholders, & Outputs

## Techniques

- Brainstorming
- Business cases
- Document analysis
- Estimation and Financial analysis
- Functional decomposition
- Interviews
- Item tracking
- Lessons learned
- Process modeling
- Reviews
- Risk analysis and management
- Scope modeling
- Survey or questionnaire
- Workshops

## Stakeholders

- Sponsor
- Regulator
- Domain SME
- Project Manager

## Outputs

**Business Analysis approach:** It identifies the Business Analysis approach and activities that will be performed across an initiative including:

- Who will perform the activities?
- The time required for the work
- The deliverables that will be produced
- The Business Analysis techniques that will be used



# Planning the Stakeholder Approach

# What is the Stakeholder Approach?

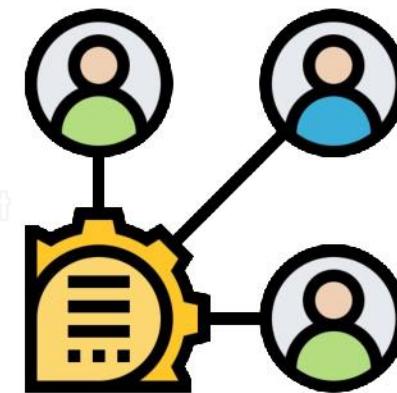
It is all about understanding stakeholders, what Business Analysts need from them, what they need from Business Analysts, and the best way to collaborate

- **Purpose:**

The purpose of planning stakeholder engagement is to plan an approach for establishing and maintaining effective working relationships with the stakeholders

- **Description:**

Planning stakeholder engagement involves conducting a thorough stakeholder analysis to identify all of the involved stakeholders and analyze their characteristics



## Inputs

- **Needs:**

Understanding the business need and the parts of the enterprise that it might affect helps in the identification of stakeholders

- **Business Analysis approach:**

Incorporating the overall business analysis approach into stakeholder analysis, collaboration, and communication approaches is necessary to ensure consistency

## Elements

- Types of organizational models: functionally-oriented model, market-oriented model, and matrix model
- Roles
- Interfaces
- Organizational charts
- Influencers

## Guidelines & Tools

- Business Analysis performance assessment
- Change strategy
- Current state description

# Techniques, Stakeholders, & Outputs

## Techniques

- Brainstorming
- Business rules analysis
- Document analysis
- Interviews
- Lessons learned
- Mind mapping
- Organizational modeling
- Process modeling
- Risk analysis and management
- Scope modeling
- Stakeholder list, map, or personas
- Survey or questionnaire
- Workshops

## Stakeholders

- Customer
- End user
- Supplier
- Regulator
- Sponsor
- Project Manager
- Domain SME

## Outputs

### **Stakeholder engagement approach:**

- It contains a list of the stakeholders
- A list of their characteristics that are analyzed
- A list of the roles and responsibilities for the change



# Planning Governance & Information Management

# What is Business Analysis Governance?



It defines the components used by a Business Analyst to support the governance function of his/her organization

- **Purpose:** The purpose of planning Business Analysis governance is to define how decisions are made about requirements and designs, including reviews, change controls, approvals, and prioritization
- **Description:** Business Analysts ensure that a governance process is in place and clarify any ambiguities within it. A governance process identifies decision makers and the process and information required for decisions to be made



# Inputs, Elements, Guidelines, & Tools

## Inputs

- Business Analysis approach
- Stakeholder engagement approach

## Elements

- Decision-making
- Change control process
- Planning the prioritization approach
- Planning for approvals

## Guidelines & Tools

- Business Analysis performance assessment
- Business policies
- Current state description
- Legal/regulatory information

# Techniques, Stakeholders, & Outputs

## Techniques

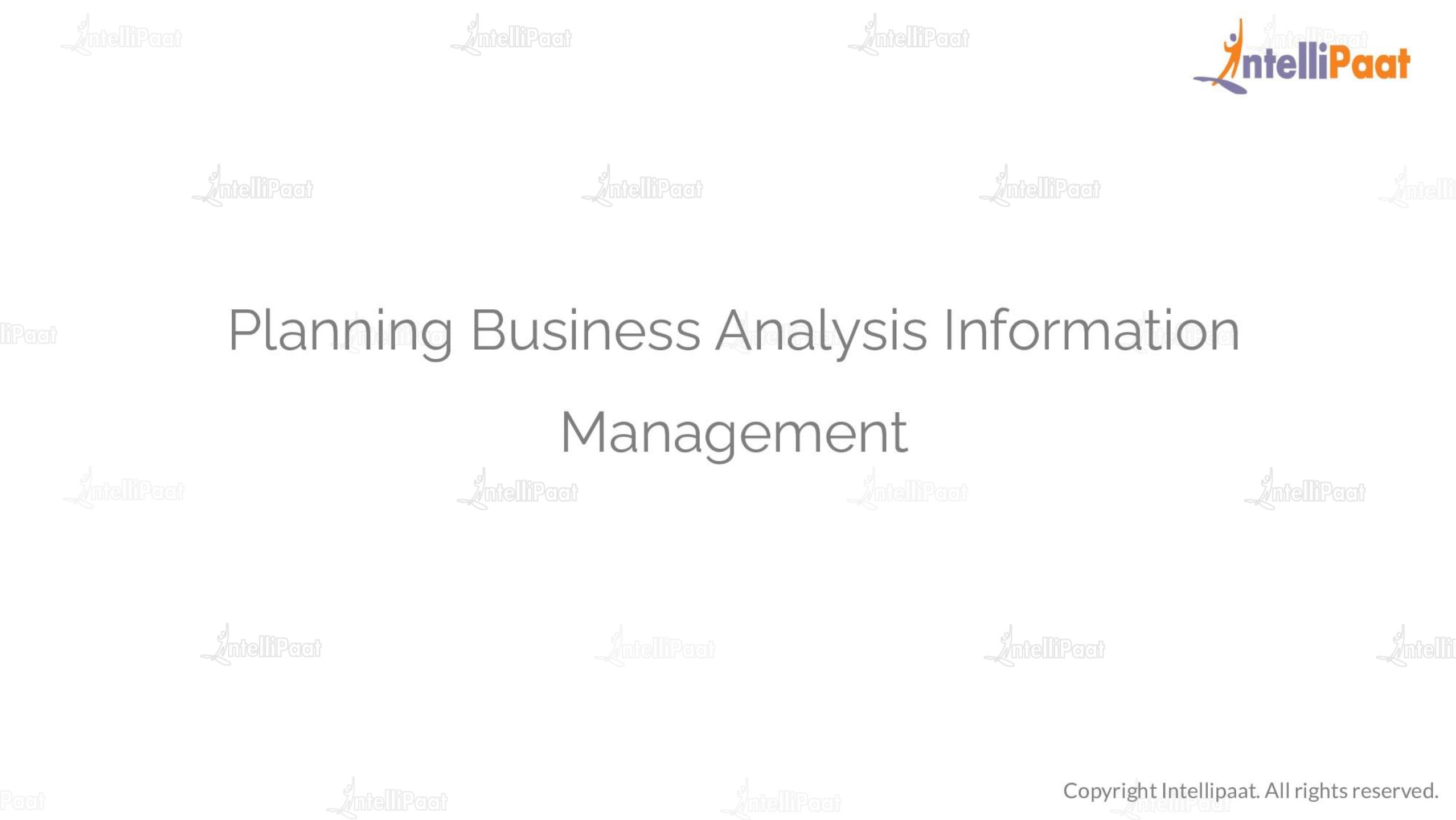
- Brainstorming
- Document analysis
- Interviews
- Item tracking
- Lessons learned
- Organizational modeling
- Process modeling
- Reviews
- Survey or questionnaire
- Workshops

## Stakeholders

- Domain subject matter expert
- Project Manager
- Regulator
- Sponsor

## Outputs

- Governance approach:** It identifies the stakeholders who will have the responsibility and authority to make decisions about the Business Analysis work, including:
- Who will be responsible for setting priorities
  - Who will approve the changes to Business Analysis information



# Planning Business Analysis Information Management

# Business Analysis Information Management

It defines how the information/insights developed by Business Analysts are captured, stored, and integrated with other information for long-term use

**Purpose:** The purpose of planning Business Analysis information management is to develop an approach for how the Business Analysis information will be stored and accessed

## Description:

- Business Analysis information is comprised of all the information Business Analysts elicit, create, compile, and disseminate in the course of performing Business Analysis
- Information management helps ensure that Business Analysis information:
  - Is organized in a functional and useful manner
  - Is easily accessible to appropriate personnel
  - Is stored for the necessary length of time



## Inputs

- Business Analysis approach
- Governance approach
- Stakeholder engagement approach

## Elements

- Organization of Business Analysis information
- Level of abstraction
- Plan the traceability approach
- Plan for requirements reuse
- Storage and access
- Requirements attributes

## Guidelines & Tools

- Business Analysis performance assessment
- Business policies
- Information management tools
- Legal/regulatory information

# Techniques, Stakeholders, & Outputs

## Techniques

- Brainstorming
- Interviews
- Item tracking
- Lessons learned
- Mind mapping
- Process modeling
- Survey or questionnaire
- Workshops

## Stakeholders

- Regulator
- Sponsor
- Domain SME

## Outputs

**Information management approach:** It includes the defined approach for how Business Analysis information will be stored, accessed, and utilized during the change and after the change is complete



# Business Analysis Performance Improvements

It describes managing and monitoring how the Business Analysis work is performed to ensure that commitments are met and continuous learning and improvement opportunities are realized

## Purpose:

The purpose of identifying Business Analysis performance improvements is to assess the Business Analysis work and to plan to improve the processes required

## Description:

To monitor and improve performance, it is necessary to establish some performance measures, conduct the performance analysis, report on the results of the analysis, and identify any necessary preventive, corrective, or developmental actions



## Inputs

- Business Analysis approach
- Performance objectives

## Elements

- Performance analysis
- Assessment measures
- Analyzing results
- Recommending actions for improvement

## Guidelines & Tools

- Organizational performance standards

# Techniques, Stakeholders, & Outputs

## Techniques

- Brainstorming
- Interviews
- Item tracking
- Lessons learned
- Metrics and KPIs
- Observation
- Process modeling
- Reviews
- Risk analysis and management
- Root cause analysis
- Survey or questionnaire
- Workshops

## Stakeholders

- Domain subject matter expert
- Project Manager
- Sponsor

## Outputs

- Business Analysis performance assessment



# Elicitation & Collaboration

# What is Elicitation & Collaboration?

**Elicitation and collaboration** describes the tasks that Business Analysts perform to prepare for and conduct elicitation activities and to confirm the results obtained



Company



Requirement and Information Gathering



Outputs Strategy

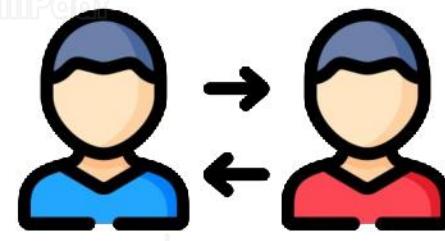
# Steps Involved in Elicitation & Collaboration



Prepare and Conduct  
Elicitation



Confirm Elicitation Results



Communicate Business  
Analysis Information

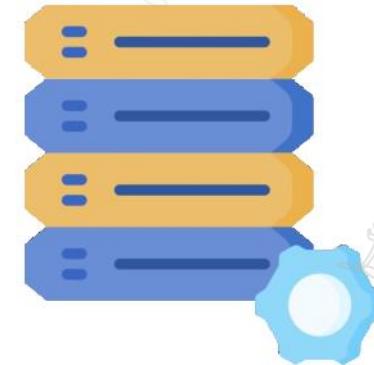


Manage Stakeholder  
Collaboration

# 1. Prepare for Elicitation

It involves ensuring that the stakeholders have the information they need to provide and they understand the nature of the activities they are going to perform

- **Purpose:** The purpose of preparing for elicitation is to understand the scope of the elicitation activity, select appropriate techniques, and plan for (or procure) appropriate supporting materials and resources
- **Description:** Business Analysts prepare for elicitation by defining the desired outcomes of the activity and considering the stakeholders involved and the goals of the initiative



## Inputs

- Needs
- Stakeholder engagement approach

## Elements

- Understand the scope of elicitation
- Select elicitation techniques
- Set up logistics
- Secure supporting material
- Prepare stakeholders

## Guidelines & Tools

- Business Analysis approach
- Business objectives
- Existing Business Analysis information
- Potential value

## Techniques

- Brainstorming
- Data mining
- Document analysis
- Estimation
- Interviews
- Mind mapping
- Risk analysis and management
- Stakeholder list, map, or personas

## Stakeholders

- Business Analyst
- Project Manager
- Sponsor
- Domain SME

## Outputs

**Elicitation activity plan:** It includes:

- Logistics
- Scope of the elicitation activity
- Selected techniques
- Supporting materials

# Conduct Elicitation

It describes the work performed to understand stakeholder needs and identify potential solutions that are capable of meeting those needs

- **Purpose:** The purpose of conducting elicitation is to draw out, explore, and identify information that is relevant to the change
  - **Description:** There are three common types of elicitation:
    - Collaborative
    - Research
    - Experiments



## Input

- Elicitation activity plan

## Elements

- Guide the elicitation activity
- Capture elicitation outcomes

## Guidelines & Tools

- Business Analysis approach
- Existing Business Analysis information
- Stakeholder engagement approach
- Supporting materials

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
4. Collaborative games
5. Workshops
6. Survey and questionnaire
7. Interface analysis
8. Interviews

## Elements

- Preparation
- Document review and analysis
- Record findings

## Techniques

1. Document analysis
2. **Observation**
3. Brainstorming
4. Collaborative games
5. Workshops
6. Survey and questionnaire
7. Interface analysis
8. Interviews

## Elements

- Observation objectives
- Prepare for observation
- Conduct the observation session
- Confirm and present observation results

## Techniques

1. Document analysis
2. Observation
3. **Brainstorming**
4. Collaborative games
5. Workshops
6. Survey and questionnaire
7. Interface analysis
8. Interviews

## Elements

- Preparation
- Session
- Wrap-up

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
- 4. Collaborative games**
5. Workshops
6. Survey and questionnaire
7. Interface analysis
8. Interviews

## Elements

- Game purpose
- Process
- Outcome
- Examples of collaborative games
  - Vision box
  - Feature tree
  - Sail boat

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
4. Collaborative games
- 5. Workshops**
6. Survey and questionnaire
7. Interface analysis
8. Interviews

## Elements

- Prepare for the workshop
- Workshop roles: Sponsor, facilitator, scribe, time keeper, participants, etc.
- Conduct the workshop
- Post workshop wrap-up

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
4. Collaborative games
5. Workshops
6. **Survey and questionnaire**
7. Interface analysis
8. Interviews

## Elements

- Prepare
- Distribute the survey or questionnaire
- Document the results

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
4. Collaborative games
5. Workshops
6. Survey and questionnaire
- 7. Interface analysis**
8. Interviews

## Elements

- Prepare for identification
- Conduct interface identification needed in the future state for each stakeholder who interacts with the system
- Define interfaces: Coverage of the interface, exchange method, message format, and exchange frequencies

## Techniques

1. Document analysis
2. Observation
3. Brainstorming
4. Collaborative games
5. Workshops
6. Survey and questionnaire
7. Interface analysis
- 8. Interviews**

## Elements

- Interview goal
- Potential interviewees
- Interview questions
- Interview logistics
- Interview flow
- Interview follow up
- Interview type
  - Structured
  - Unstructured

# Stakeholders & Outputs

## Stakeholders

- Sponsor
- End user
- Customer
- Domain SME
- Implementation SME
- Other stakeholders

## Outputs

- **Elicitation results (unconfirmed):** It captures information in a format that is specific to the elicitation activity

## 2. Confirm Elicitation Results

It involves ensuring that stakeholders have a shared understanding of the outcomes of the elicitation, elicited information is recorded appropriately, and that the Business Analyst has the information sought from an elicitation activity

- **Purpose:** The purpose of confirming elicitation results is to check the information gathered during an elicitation session for accuracy and consistency with other information

- **Description:** Elicited information is confirmed to identify any problems and resolve them before resources are committed to using the information. This review may discover errors, omissions, conflicts, and ambiguity



## Input

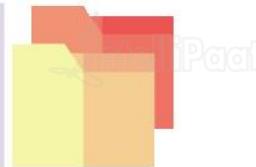
- Elicitation results (unconfirmed)

## Elements



Confirmed  
Elicitation Results

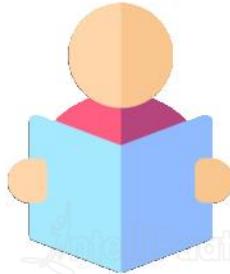
Against source  
information



With other  
elicitation results



# Guidelines & Tools



Elicitation of the Activity Plan



Collect information for creating a business plan



Existing Business Analysis



Check the existing business plan

# Techniques



Document Analysis



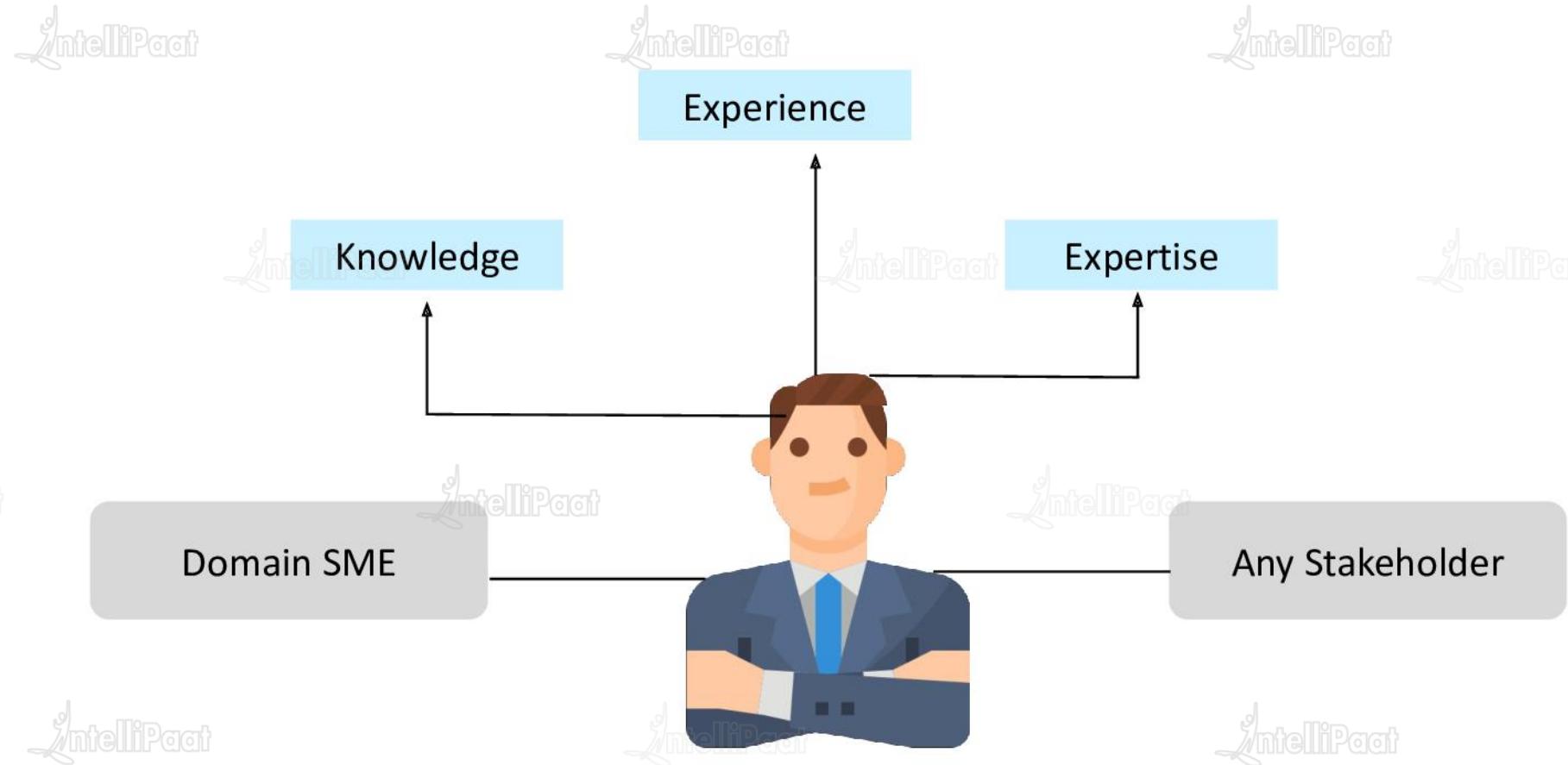
Reviews



Interviews



Workshops



### 3. Communicate Business Analysis Information



It provides stakeholders with the information they need at the right time

**Purpose:** The purpose of communicating Business Analysis information is to ensure that the stakeholders have a shared understanding of it

**Description:** Business Analysts must communicate appropriate information to stakeholders at the right time and in formats that meet their needs



## Inputs

- Business Analysis information
- Stakeholder engagement approach

## Elements

- Determine the objectives and format of communication
- Communicate the Business Analysis package

## Guidelines & Tools

- Business Analysis approach
- Information Management approach

# Techniques, Stakeholders, & Output

## Techniques

- Interviews
- Reviews
- Workshops

## Stakeholders

- End user
- Customer
- Domain subject matter expert
- Implementation subject matter expert
- Tester
- Any stakeholder

## Output

- Business Analysis information (communicated)

## 4. Manage Stakeholder Collaboration

It describes working with stakeholders to engage them in the overall Business Analysis process and to ensure that the Business Analyst can deliver the outcomes needed

- **Purpose:** The purpose of managing stakeholder collaboration is to encourage stakeholders to work toward a common goal
- **Description:** The Business Analysis work lends itself to many collaboration opportunities between groups of stakeholders to come up with the products of the Business Analysis work



# Inputs & Elements

## Inputs

- Stakeholder engagement approach
- Business Analysis performance assessment

## Elements

- Gain agreements on commitments
- Monitor stakeholder engagement
- Collaboration

# Elements

## Gain Agreements on Commitments

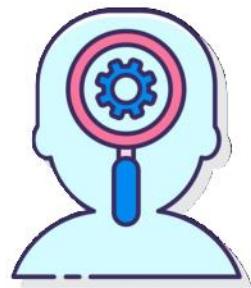
- Time commitment
- Resource commitment

## Monitor Stakeholder Engagement

- Monitor the participation and performance of stakeholders
- Monitor for risks related to stakeholders engagement

## Collaboration

- Maintain the free flow of information
- Promote shared efforts to resolve the problem
- Achieve desired results



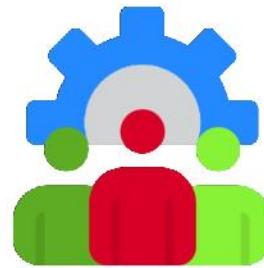
Business Analysis  
Approach



Business  
Objectives



Future State  
Description



Recommended  
Actions



Risk Analysis

# Techniques, Stakeholders, & Output

## Techniques

- Collaborative games
  - Lessons learned
  - Risk analysis and management
  - Stakeholder list, map, or personas

## Stakeholders

- All stakeholders

## Output

- Stakeholder engagement





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**24/7 Chat with Our Course Advisor**