



# **Business Process Analysis Questionnaire**

**Includes Questionnaire Response & Requirements Tracking  
Template**

# Read Me First

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Process models are essential to organizations because they provide a standard description of key business processes that lie at the heart of organizational operations. In organizations where few people understand how a process works, workarounds will be introduced, leading to inefficiencies and a lack of transparency. To avoid chaos, it is important to define key business processes and create a common understanding of how things work in the organization.

Process improvement starts first with defining and understanding how the process works, so whether you're interviewing process participants, holding an elicitation event (e.g. workshops, focus groups, interviews, etc.) or observing a process, this template outlines 35 key questions for arriving at a comprehensive description of a business process (As-is) and identifying how and which improvements should be made to implement a To-be process.

## *OBJECTIVES & GUIDELINES*

The objective of this template is to provide a list of questions analysts should ask stakeholders during any process improvement exercise and track the responses received.

This template also provides a guideline for channelling discussions at elicitation events to focus on questions that trigger stakeholders to think about existing processes and how they can be improved. The questions may be asked in any particular order.

The questions you ask stakeholders will need to be tailored to suit the demands of your environment, the project and the objective of the process improvement exercise.

## *TEMPLATE SECTIONS*

***Business Process Analysis Questioning Framework*** – This comprises a list of questions to ask stakeholders, the process elements each is related to and the objective of each question. Each question falls under a category and is targeted at defining the existing process (As-is process) with the objective of creating an improved version of it (To-be process). The term, *Process element*, refers to any piece of information that can affect the definition and design of the process.

For each process element, there's an overarching question that should always be asked to arrive at an accurate definition of the To-be process and stakeholders' requirements: What improvement would you like to see?

***Questionnaire Response & Requirements Tracking*** – This section should be populated with an overview of responses received from stakeholders and can be used for tracking which stakeholders proffered which answers (or requirements) and the status of each process element. You may modify the template by creating multiple rows for the different responses received, as needed. Once the information in this section is complete, process modelling and documentation may begin.

**This questionnaire may also be sent directly to stakeholders to fill or can be used to record the minutes of an elicitation event.**

***Helpful Links*** – This is a compilation of articles on Business Process Management that provides further context to the relevance of this template.

This template is best used in conjunction with the following supporting templates which are available [here](#):

Business Process Documentation (BPD) – *Provides a starting point for business analysts looking to create standard and comprehensive process definitions.*

Business Process Functional Specification (BPFS) – *Provides a starting point for business analysts looking to create standard and comprehensive requirements documents.*

Business Rule Documentation & Questionnaire (BRDQ) – *Provides a guideline for channelling discussions at elicitation events (workshops, focus groups, interviews, etc.) to focus on questions that trigger stakeholders to think about existing processes and the business rules that should be adhered to.*

***Delete sections highlighted in wine colour and remove the Business Analyst Learnings Logo/Company name before sending this document out as they have been provided for guidance only.***

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Your opinion counts. Please send your comments or feedback on this template to [info@businessanalystlearnings.com](mailto:info@businessanalystlearnings.com)

# Business Process Analysis Questioning Framework

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Understanding The Process			
#	Process Elements To Define	This category of questions is directed at understanding how the process works	Question Objectives
1	Process Name	How do you refer to this process?	To elicit information on the standard name of the process. Process names usually start with a verb, for example, "Apply For Leave". It is also important to review existing process names with the objective of ensuring they conform to industry convention e.g. <a href="#">APQC Process Classification Framework</a>
2	Triggering Events	What causes this process to be executed?	To elicit information on the trigger(s) of the process, that is, the condition(s) under which the process is initiated. These are the conditions that must be met at the beginning of the process.
3	Process Steps/ Activities	What are the steps involved in this process?	To elicit information on the steps involved in the process and the sequence in which the steps are carried out. The number of steps in a process can help to understand how complicated a process is and identify any redundancy or repetition.
4	Actors	Who are the main participants in this process?	To elicit information on the actors involved in the process and what they do. This can also help to understand who will be affected by the process improvement exercise.
5	Process Objective	What is the objective of the process?	To elicit information on what the process is intended to accomplish for the business.

# Questionnaire Response & Requirements Tracking

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Organization Name: [Insert Organization Name e.g. Business Analyst Learnings]  
Project Name: [Insert Name of Project e.g. Business Process Management System Project]  
Prepared By: [Insert name of Author e.g. Stephanie Jones]  
Reviewed/Approved By: [Insert name/role of approver e.g. Human Resource Director]  
Version Number: [Insert version number, e.g. V1]  
Issue Date: [Insert date the document is to be distributed]

Other document attributes like Distribution list, Contributors' list, etc. may be included, if necessary.

S/N	Process Elements To Define	Question	Comments [Insert comments provided by stakeholder]	Source [Insert name of stakeholder providing comments]	Action/Next Steps [State what action is required, if necessary]
1	Process Name	How do you refer to this process?	Apply For Leave	Eric Benton	
2	Triggering Events	What causes this process to be executed?	<ol style="list-style-type: none"> <li>1. Staff is ill</li> <li>2. Staff is pregnant</li> <li>3. Staff is bereaved</li> <li>4. Staff has an exam</li> <li>5. Staff would like to proceed on annual vacation</li> </ol>	Eric Benton	To be elaborated
3	Process Steps/Activities	What are the steps involved in this process?	<ol style="list-style-type: none"> <li>1. Staff fills paper form</li> <li>2. Staff attaches supporting documentation</li> <li>3. Staff's manager reviews application and may approve, defer or reject application. As part of the review process, manager may consult other team members to determine if there are any urgent tasks yet to be completed by the staff. The Manager may also consult the organizational event calendar to check for conflicting dates, if any.</li> <li>4. Staff receives printed notification of leave application from the Human Resource Department (HRD)</li> <li>5. The HR Administrator periodically monitors leave applications and prints leave letters for staff, based on request.</li> </ol>	Eric Benton	