

Why Does a Project Need a Project Manager and a Business Analyst?

**Similarities, Differences and How
They Work Together**

Training Company Mission

To train organizations to use business requirements and customer needs to drive their technology systems and manual processes.

Training focuses on proven skills and techniques to:

- ▶ Define and scope the business problem
- ▶ Gather requirements
- ▶ Analyze and Document the requirements
- ▶ Communicate the requirements
- ▶ Implement the requirements and verify the solution has met its defined objectives

Agenda

- ▶ What is a Business Analyst?
- ▶ Why Does a Project Need a PM and a BA?
- ▶ Role of the Project Manager
- ▶ Role of the Business Analyst
- ▶ Skills Comparison
 - ▶ Similarities
 - ▶ Differences
- ▶ Working Together
- ▶ When One Person is Both
- ▶ How to Achieve Specialized PM and BA Roles

What is a Business Analyst?

Definition of a Business Analyst:

Business Analysts are responsible for identifying business needs.

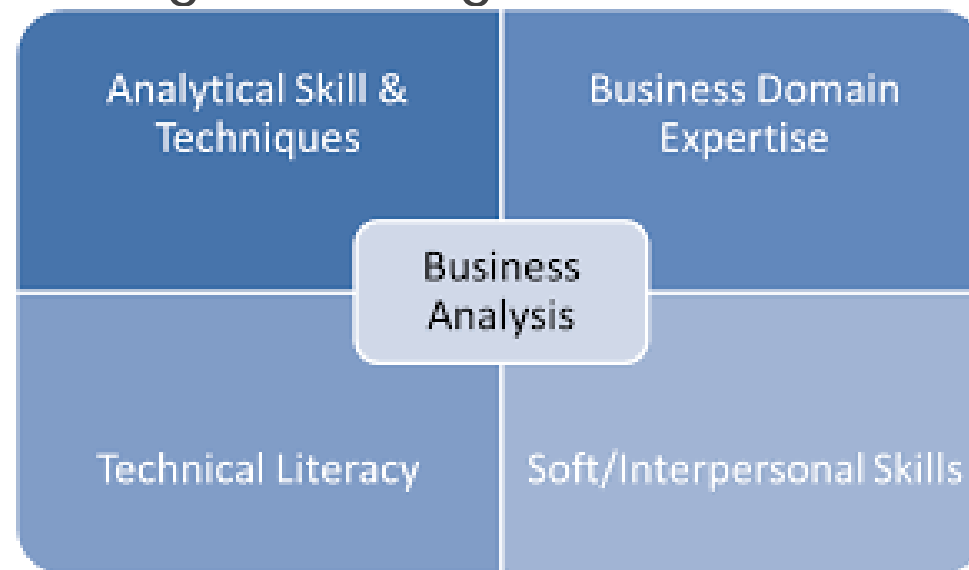
The Business Analyst is responsible for requirements development and requirements management. Specifically, the Business Analyst elicits, analyzes, validates and documents business, organizational and/or operational requirements. Solutions are not predetermined by the Business Analyst but are driven solely by the requirements of the business. Solutions often include a systems development component but may also consist of process improvement or organizational change.

What is a Business Analyst?

Definition of a Business Analyst (Contd.):







The Business Analyst is a key facilitator within an organization, acting as a bridge between the client, stakeholders and the solution team.

Business Analysis is distinct from financial analysis, project management, quality assurance, organizational development, testing, training and documentation development.

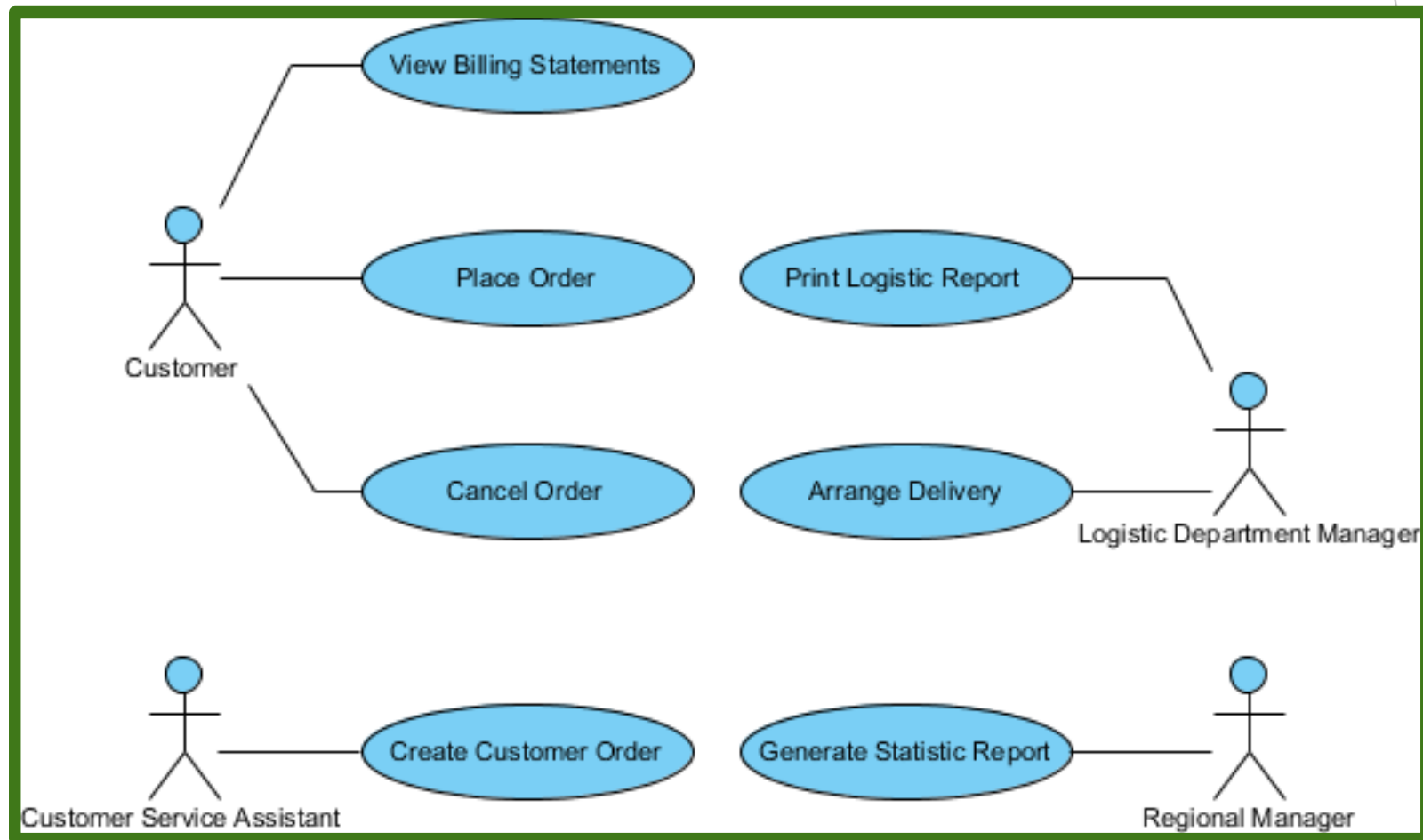


Documentations:

Documents Created By Business Analyst

-  **Project Vision Document**
-  **Requirement Management Plan**
-  **Business Requirement Document**
-  **Use Cases**
-  **Functional Requirement Specification (FRS)**
-  **System Requirement Specification (SRS)**
-  **Test Cases**

Documentations (Use Cases):



Documentations (Project Charter)

PROJECT CHARTER					
Project Title	Project and Portfolio Management Tool			Project Manager	Sameer Patel
Project Start Date	May 21, 2017	Project End Date	August 31, 2017	Project Sponsor	Randy Hadden
Business Need					
All Information Technology projects that require agreement on the Memorandum of Understanding between the Customer and the Service Provider are approved through email. This project was initiated to reduce the manual approvals and create a system to obtain and track the approvals to reduce any discrepancies and loss of data.					
Project Scope			Deliverables		
Create an in-house PPM to include all Global IT projects.			1. Generate consolidated project status report 2. Extract Global Headcount details for all projects		
Risks and Issues			Assumptions/Dependencies		
1. Data discrepancy due to large amount of projects 2. Involvement of multiple teams			1. All Global IT projects to be added to the tool 2. Managers to provide regular updates for the projects		
Financials					
Budget to complete this project is \$3000					
Milestones Schedule					
Milestone			Target Completion Date		Actual Date
Upload all Global IT Projects to the tool			May 20, 2017		
Complete UAT testing for the tool			July 30,2017		
Project Team			Approval/Review Committee		
Project Manager	Randy Hadden		Sponsor	Randy Hadden	
Project Manager	Sameer Patel		Business Division Head	Aniket Bhonsle	
Team Members	Vice President, Senior Manager,Analyst		Business Unit Head	Sunil Rajan	
			Finance Manager	Ketan Shah	

Roles vs. Titles

- ▶ Business Systems Analyst
- ▶ Data or Process Analyst
- ▶ Test Engineer
- ▶ Business Unit Manager
- ▶ Solution Architect
- ▶ Business Information Manager
- ▶and many more!



Why Does a Project Need a PM and a BA?

- ▶ Having both a Project Manager (PM) and a Business Analyst (BA) is critical to a project's success.
- ▶ Each role provides specialized capabilities that can make the difference between a project that succeeds and one that struggles.

Why Does a Project Need a PM and a BA?

- ▶ The PM and BA each play distinct, critical roles on a project
- ▶ Both have a common ultimate goal, but focus on different aspects to achieve it
- ▶ It is difficult to wear both hats effectively on the same project
- ▶ The roles often intersect but also diverge

Role of the Project Manager

- ▶ Usually the 1st person assigned to the project
- ▶ Responsible for planning the project and ensuring the team follows the plan
- ▶ Manages changes, handles problems, keeps the project moving
- ▶ Manages people, money, risk
- ▶ Chief communicator of good or bad news to the Business Sponsors and IT Management



Role of the Business Analyst

- ▶ Usually assigned to the project after it has started
- ▶ Responsible for bridging the gap between the Business and IT
- ▶ Learn the business inside and out
- ▶ Essentially the architect of effective business systems
- ▶ Job title, definition and responsibilities viewed inconsistently across the industry



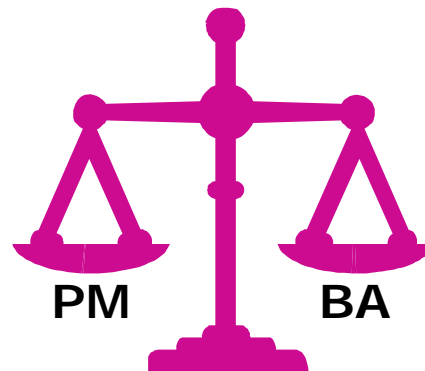
Skills Comparison - Similarities

Project Manager

- ▶ Strong communication skills
- ▶ Understanding of the SDLC
- ▶ Negotiation/consensus building
- ▶ Strong interpersonal and client management skills

Business Analyst

- ▶ Strong communication skills
- ▶ Understanding of the SDLC
- ▶ Negotiation/consensus building
- ▶ Strong interpersonal and client management skills



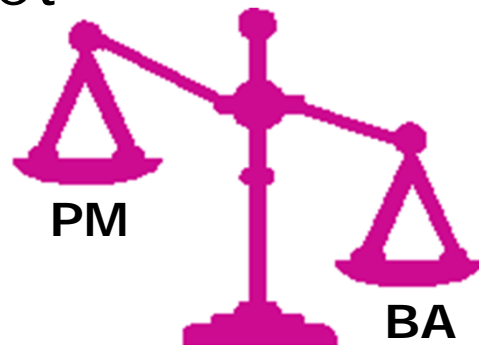
Skills Comparison - Differences

Project Manager

- ▶ Ability to see the "big picture" for the project
- ▶ Directs project team
- ▶ Helps people (project team) get things done
- ▶ Ensures the product is delivered on time, within budget

Business Analyst

- ▶ Detail-oriented
- ▶ Listens to people (SMEs)
- ▶ Helps SMEs describe how and why they perform tasks
- ▶ Ensures the product is built right according to the requirements



Skills Comparison - Differences

Project Manager

- ▶ Removes issue barriers
- ▶ Manages project change control
- ▶ Manages the Work Breakdown Structure (WBS)
- ▶ Management skills

Business Analyst

- ▶ Identifies business issues
- ▶ Manages requirements change requests
- ▶ Performs requirements-related tasks in the WBS
- ▶ Investigative skills



How do a PM and a BA Work Together?

- ▶ Fundamentally, the PM manages project resources (people, money) and the BA manages the business stakeholders
- ▶ The BA reports to the PM on a project
- ▶ These two roles have significant overlap of responsibilities in certain areas
- ▶ Excellent PMs and BAs will work hand-in-hand to make the most of each other's strengths

How do a PM and a BA Work Together?

- ▶ Areas of overlapping responsibilities
 - ▶ Project scope definition
 - ▶ Project statement of purpose
 - ▶ Project objectives
 - ▶ Project business risks
 - ▶ Client relationship
 - ▶ Communication with SMEs and technical team
 - ▶ Review of requirements, designs and plans

How do a PM and a BA Work Together?

Areas of clear delineation of responsibilities

▶ Business Analyst

- ▶ Gathering, documenting and reviewing business requirements from SMEs
- ▶ Translating business requirements into functional system specifications to be developed by the technical team
- ▶ Testing the solution, training SMEs on the new system and documenting new procedures

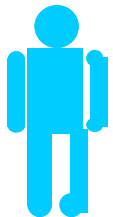
▶ Project Manager

- ▶ Plan and organize projects determining scope, deliverables, milestones, schedule, resources
- ▶ Manage project scope, risk, issue, communication, quality and cost
- ▶ Interact, collaborate, and negotiate with all project stakeholders and business partners/clients

How do a PM and a BA Work Together?

The Execution of a Project

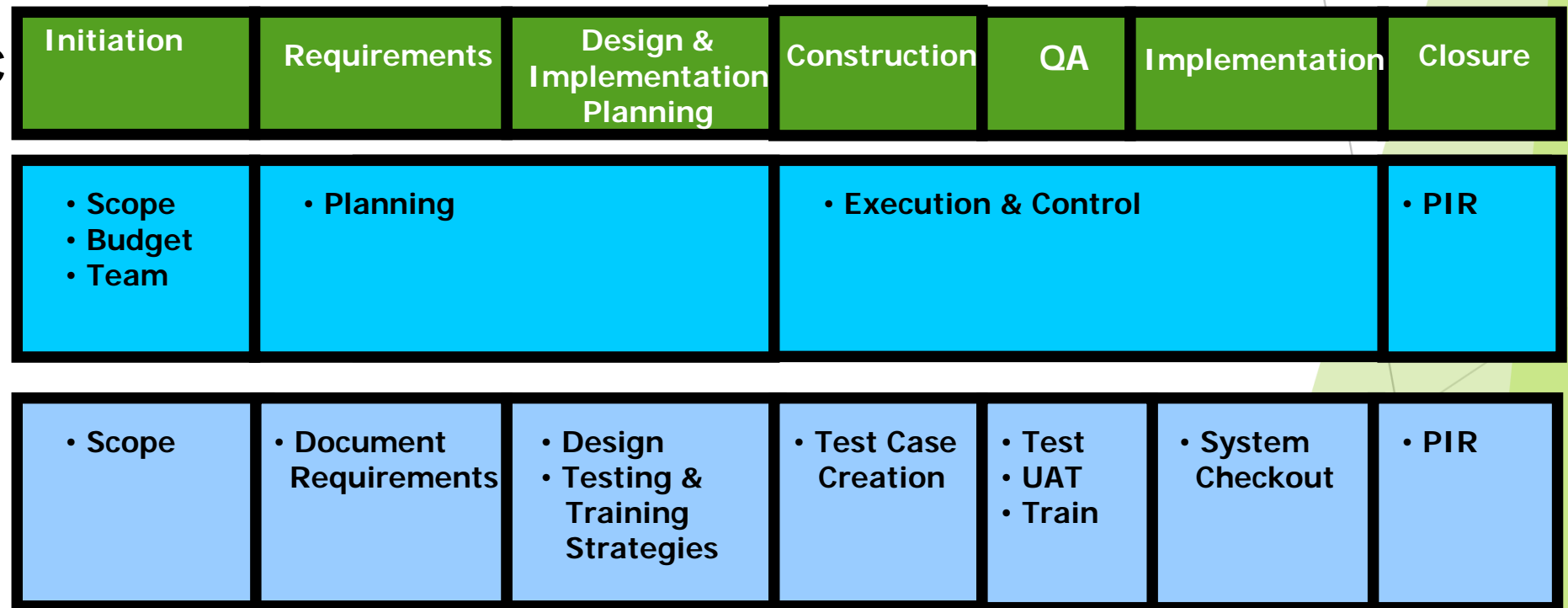
SDLC



PM

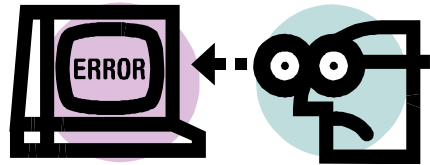


BA

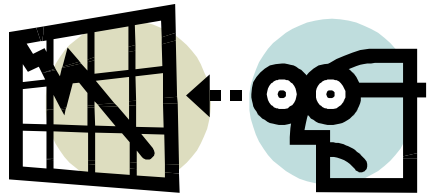


PIR stands for Post Implementation Reviews

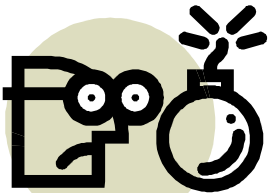
Examples of Cooperation (“Dynamic Duos”)



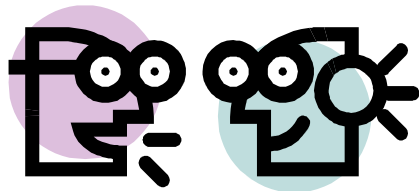
- ▶ Strong PM, Weak BA
 - ▶ Result = Requirements are rushed, some may be missed, rework needed late in the process, schedule and budget suffers



- ▶ Weak PM, Strong BA
 - ▶ Result = Too much time developing requirements, project falls behind schedule, “scope creep” often occurs



- ▶ Weak PM, Weak BA
 - ▶ Result = Project failure!



- ▶ Strong PM, Strong BA
 - ▶ Result = Success, great balance between thorough requirements-gathering and moving forward

What if One Person has to do Both Jobs? Why this happens...

- ▶ Common on small projects
- ▶ Common when the organization is short-staffed
- ▶ Common where there is a lack of understanding of the BA role
- ▶ Common where the expectation is that business analysis is just another task a PM performs

What if One Person has to do Both Jobs? Impact...

- ▶ Difficult to manage both roles concurrently
- ▶ Skills/traits needed to execute PM and BA tasks are different
- ▶ Requirements may be missed
- ▶ Schedule may be affected
- ▶ Further complicated when layered with other unrelated project responsibilities
- ▶ Negative domino effect on project budget and quality of product

What if One Person has to do Both Jobs? Helpful Tips...

- ▶ Heighten awareness regarding conflicting roles
 - ▶ Make Management and Team aware of conflicting responsibilities and challenges associated with them
- ▶ Seek help in managing the schedule
- ▶ Seek help to gather and document the requirements
- ▶ Try to minimize involvement on other concurrent projects

Summary

- ✓ All projects need business analysis and project management
- ✓ PM and BA roles intersect and support each other
- ✓ Skills are similar and different
- ✓ Cooperation results in project success
- Some people wear two hats

