

Fundamentals of Business Analysis

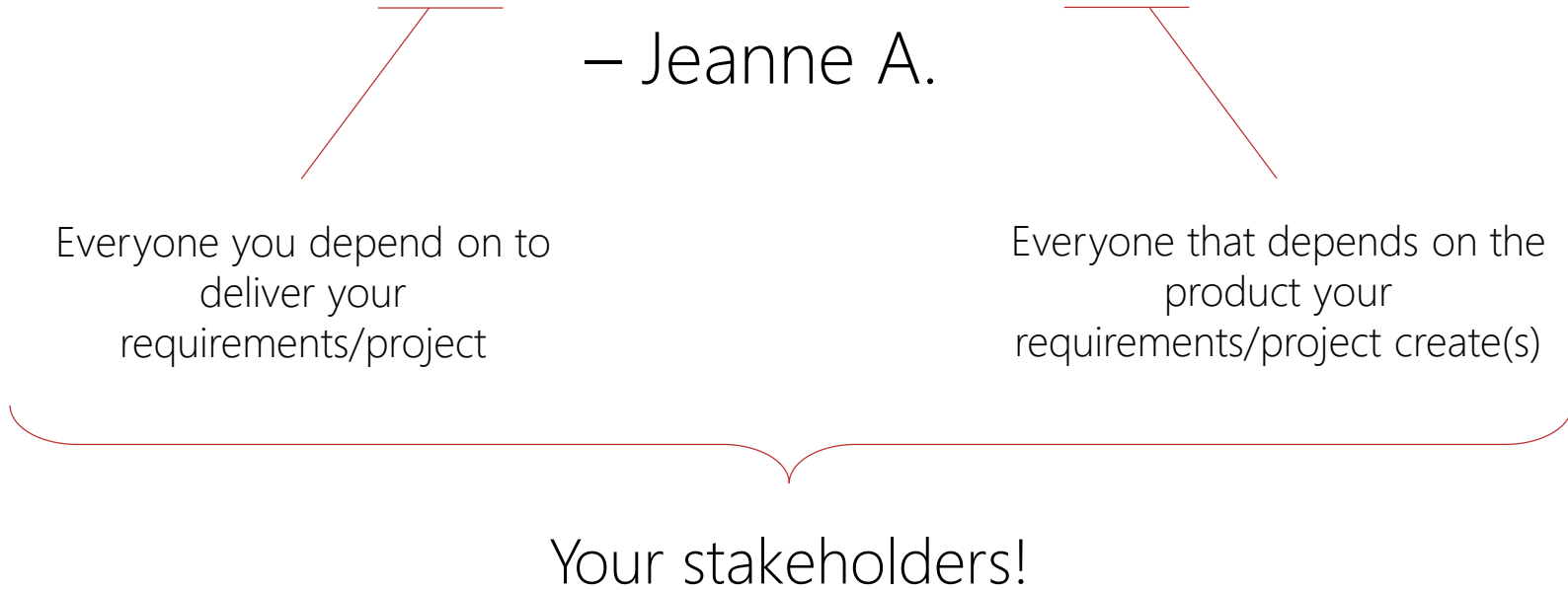
Overview of Stakeholders

This section is all about **stakeholders**.

Stakeholders are everyone that is impacted by your requirements in some way.

"Manage your upstream and downstream."

– Jeanne A.



Everyone you depend on to
deliver your
requirements/project

Everyone that depends on the
product your
requirements/project create(s)

Your stakeholders!

In this section, we'll cover the most common **types of stakeholders** and how to work with them most effectively.

Then we'll look at how you can most easily **reconcile conflicting stakeholder interests**.

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The Project Manager

In this lecture, we'll cover the Project Manager.

We'll look at:

- The role,

- A typical persona,

- Their problems and challenges, and...

- How we can help them.

Each project should have one PM.

They are responsible for executing the project, within constraints:

- Budget

- Schedule

- Scope

- Quality

BAs often become PMs later in their careers.

BAs often serve as the PM on their projects.

The typical Project Manager is
Task-oriented,
Goal-oriented,
And deadline-oriented.
(And often kind of pushy 😊)

They are *not* typically experts in the organization.
They *are* typically experts at getting things done.

Meet PM Pam.

She is a senior Project Manager with more than 20 years of experience on technology projects.

She started her career as a Developer, then became a senior Developer, and then a Development Lead before becoming a PM.

She started out in the pharmaceutical industry, then moved to a marketing agency, and finally moved into banking.

She spends most of her day *communicating*, solving problems, and otherwise helping people to get stuff done.



* A *persona* is a fictional character of a particular type commonly used to help us envision their needs and other attributes. They originally were devised for marketing, and we BAs borrowed/stole the concept.

Constraint-Related

- A workstream is running late...
- Unidentified work cropping up...
- Budget overflows...

Miscellaneous

- Pain-in-the-butt stakeholder...
- New requirements late in project...
- Lots of team conflict...

Worst: When their project gets out of control



#1

Manage your business analysis work effectively and on time.

#2

Keep them up to speed with your issues and risks.



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The Developer

...is the fabled *Developer*.

Hollywood has a stereotype of programmers that is not very accurate.

[This lecture *is* very accurate, so don't worry.]



Their role is to create the systems that our projects produce.

The systems might be used by **customers**.

Or maybe just by our **colleagues**.

Or even just by **other Developers**.

Developers will read your requirements very closely, because they are the blueprint for the Developer's product.

Developers do some other stuff too, sometimes: infrastructure management, architecture, admin, **etc**.

Meet **Developer Dan**.

He has been a Developer for four years, all at the same company.

He started out in a junior development role and is now a team lead for more junior developers.

He is a *social-savvy* nerd. And he knows a lot more than just technology.



Need for deep and wide-ranging technical expertise (plus time pressure).

Interruptions. They need to be able to be “in the zone.”

Requirement change (at least in waterfall projects).



#1

Provide them with fantastic requirements.

#2

Keep them aware of potential changes to requirements.

#3

Interrupt them as rarely as possible.

#4

Meet with them at the beginning/end of the day.



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The QA Professional/Tester

The QA Professional/Tester

(QA stands for “Quality Assurance,” by the way.)

The Tester role is just as important as the Developer, but they are often forgotten, and their work is often underestimated.

(That’s bad.)

The role of the tester is to make sure the product is high quality.

On software projects, they test the software for defects (i.e. bugs).

Defect = Any difference between the product requirements and the product implementation

Meet **Tester Tanya**.

She studied MIS in university, like many BAs.

She has a good understanding of how your “enterprise architecture” works together.

She started at your company as a Junior QA Analyst, executing test scripts.

She subsequently moved on to developing test scripts, devising project test strategies, and running department projects.



They are often engaged later in the project than they should be.

Sometimes the product has **lots** of defects when it gets to them.

The testing phase of the project is often squeezed for time.

Worst: The product is of low quality.



#1

Engage them early in the project. Please!

#2

Make sure that Developers are communicating with Testers (managing *their* downstream).

#3

Make product quality a high priority.

#4

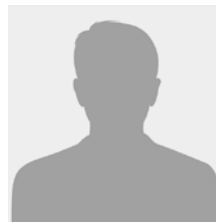
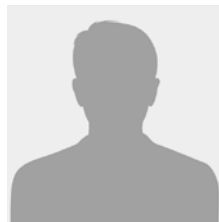
Spend time with them to understand their work.



That's it for the project team (that we'll cover here).



You will have other roles working on your projects.



They will be your stakeholders too.

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Management

Next up? Management.

First: Our managers and those of the project team.

Second: The Project Sponsor.

Your manager is impacted by the work you do, so they are an important stakeholder.

More than anyone else, your manager is judged by the quality of your work.

Sometimes, you'll need to consider your manager's manager (and so on, up the chain of command).

And the same goes for the management of your fellow project team members.

Meet **Manager Mary**.

Mary is a Business Analysis Manager at a bank.

She oversees all business analysis activities for her division of the bank.

She manages six Business Analysts with varying amounts of experience.

Mary typically is focused on...

- Ensuring management is pleased with the quality of her team's work
- Ensuring stakeholders' problems are solved
- Developing her team's capabilities



Managing up (her management)
and down (her team)

Developing a track record of
success for her team

Worst: When one of their team
projects “blows up”



#1

Doing your job effectively! (sound familiar?)

#2

Keep them aware of your problems, issues, risks, and *successes*.

#3

Try to never surprise them.

#4

Get to know the bosses of your project team too.



AKA The “business owner” of the project.

Usually very senior in the organization.

Responsible for delivering the project to senior management, and making sure that the organization realizes value from it.

If you keep your sponsor happy, you will have a wonderful life. If not, you won't.

Meet **Sponsor Sean**.

He's the Vice President of Marketing for a big technology company.

He's very senior in the organization, what you call an "executive."

He has a team of 400 people, spread among various divisions of the company.

He is extremely knowledgeable about all things marketing... and most other things as well.



You only have to worry about one (usually):

The problem your project is supposed to solve

That's it. Simple.

Worst: The combination of a failed project and a lousy product.



#1

Conduct your analysis in a very high-quality and timely way.

#2

Communicate with them effectively and strategically.

#3

Work with them to make sure the product will meet their goals and needs.



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The Front Line

Our last class of stakeholders are those people who actually use your product.

A perfect project whose product flops... is a **failure**.

Understanding your end users will help you avoid these flops.

In this lecture, we'll cover two types: customers and internal users.

These are people that pay your company money for products and services.

Always ask: How will they be impacted by our project?
(Even if they won't be using your product)

Consumers want good, usable, high-quality products.

If they don't like your product, they'll find someone else who will solve their problems.

In some cases, bad products can negatively impact customers' lives, and this leaves a long-lasting bad impression.

This refers to large business/organizational clients.
(B2B, as opposed to B2C)

Institutions buy products to improve their business position.

Institutional customers are often highly engaged in your product, providing information, data, and requirements.

Poor business analysis can have dire results for institutions.

These are the people in your organization that will be using your product.

Since they are internal to your organization, they have extremely valuable knowledge that can inform your requirements analysis.

Accordingly, they are a key stakeholder group.

Internal users need highly usable systems that enable them to execute the organization's work.

Tips:

1. Include them during your requirements gathering
2. Get their input on prototypes and early versions of your product
3. Ask them *lots* of questions

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Managing Stakeholder Conflicts

Our conundrum:

What if stakeholders have conflicting needs for our product?

Three categories:

1. External-external conflict
2. Internal-internal conflict
3. External-internal conflict

Perform a *Stakeholder Needs Analysis*

- What does each party say they want?
- Why do they want that?
- What is the priority of the need in the mind of the stakeholder?
- What are the stakeholder's assumptions, and are they valid?



Your
first
analysis
tool!

(Be sure to check the lecture resources for your complementary template)

Perform a Stakeholder Needs Analysis.

If that doesn't work, it's negotiation time – bring the conflicting parties to a mutually-beneficial agreement (See *Getting to Yes* by Fisher & Ury).

Remember: This isn't about being right or wrong – it's about finding solutions that work for everyone.

Perform a Stakeholder Needs Analysis! (Notice the trend?)

Tips

- Be the “voice of the customer” and advocate on their behalf
- Rely on facts and numbers, not your opinions
- Involve your boss or PM whenever necessary