

---

# How do I manage my Project Scope using Business Analysis

Venus Patel, PMP, PMI-PBA  
Raygene Patterson, PMP, CBAP, CSM

# Presenters

---

- ❑ **Venus Patel**
- ❑ PMP, PMI-PBA
- ❑ 10 years on IT projects in Financial Services
- ❑ Hybrid roles – PM, BA, analyst
- ❑ PMI MSL Chapter Officer
- ❑ IIBA STL Member
- ❑ [venuspatel@gmail.com](mailto:venuspatel@gmail.com)

- ❑ **Raygene Patterson**
- ❑ PMP, CBAP, CSM
- ❑ 10+ years in IT
- ❑ Developer, Trainer, BA and PM roles
- ❑ IIBA Board Member
- ❑ PMI Member and Volunteer
- ❑ [rapatter9289@hotmail.com](mailto:rapatter9289@hotmail.com)

# Agenda

---

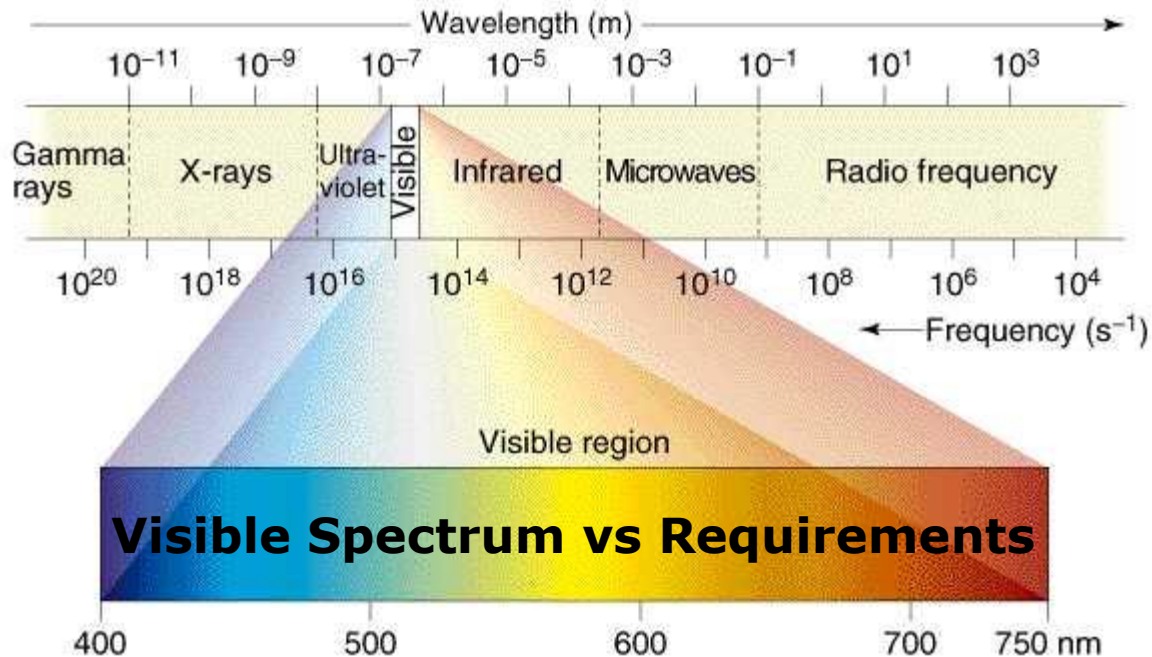
- ❑ What is Business Analysis
- ❑ Business Analysis Spectrum / BA Roles
- ❑ Conflicts and collaborations between PMs and BAs
- ❑ PM managing scope with no BA
- ❑ PM managing scope with a BA
- ❑ BA managing scope with a PM
- ❑ Career Path Conundrum
- ❑ Resources for reference
- ❑ Questions??

# What is Business Analysis

---

- ❑ **IIBA** - Business Analysis is the practice of enabling change in an organizational context, by defining needs and recommending solutions that deliver value to stakeholders.
- ❑ **PMI** - Business Analysis is the evaluation of an organization's needs—followed by the identification and management of requirements—to arrive at a solution.
- ❑ **Wikipedia** - Business analysis is a research discipline of identifying business needs and determining solutions to business problems.
- ❑ **BusinessDictionary.com** - Investigation into the operations of a business to expose the causes behind the results achieved, and the effects of those results on the business.

# Spectrum of Business Analysis



**Original Concept:**

Michel Thiry  
PMI Congress 2014

**Image courtesy:** <http://faculty.colostate-pueblo.edu/linda.wilkes/111/3c.htm>

# BA Roles

---



# Hamper of BA Roles

---

- ❑ Business Requirements Analyst
- ❑ Business Systems Analyst (BSA)
- ❑ Systems Analyst
- ❑ Functional Analyst
- ❑ Service Request Analyst
- ❑ Agile Analyst
- ❑ Process Analyst
- ❑ Decision Analyst
- ❑ Business Analysis Leadership
- ❑ Enterprise Architect
- ❑ Business/Solution Architect
- ❑ Requirements Engineer
- ❑ Data Analyst
- ❑ Design Analyst
- ❑ Product Analyst
- ❑ Quality Analyst

# Conflicts and Collaborations

---

- The roles of BA and PM may seem similar and times overlap
  - Both work towards the same goal (meet project objectives)
  - Most overlaps occur at the start of the project
    - Developing goals
    - Identifying risks
    - Developing strategic plans
  - But, BA's and PM's don't *always* focus on the same goals (project vs. product focus):

Project Managers	Business Analysts
Manage Schedule	Develop WBS and Tasks
Manage Cost	←
Manage Scope	← Elicit and Manage Requirements



# PM managing scope with no BA

---

- Tools and Techniques
  - Business Requirements Package
    - Brainstorming, Focus Group, Delphi Decision, Enterprise Analysis
  - Functional / Technical specifications
    - WBS, Functional Decomposition, State Chart Diagrams, Prototyping, Walkthroughs
  - Checkout Strategy
- Challenges
  - Unknown system features
  - People and personalities
  - Business and technical semantics, virtual teams
  - Testing manager / Quality Analyst

# PM managing scope with a BA

---

- Tools and Techniques
  - Delegation ☺
  - Issues tracking / Problem tracking
  - Risk Register
  - Facilitation
  - Vendor management, contracts, procurement
- Challenges
  - Butting head with the BA ☺
  - Duplicate issue tracking
  - Too much transparency
  - BA absent during a real issue!!

# BA managing scope with a PM

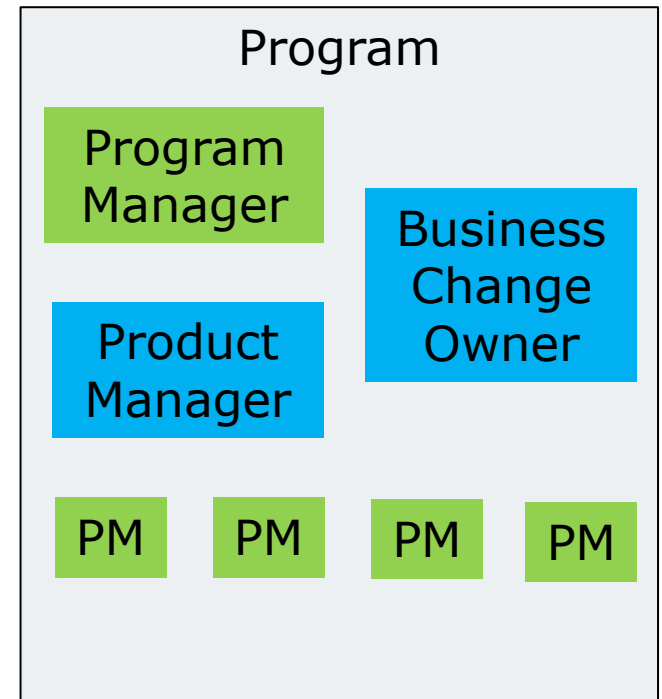
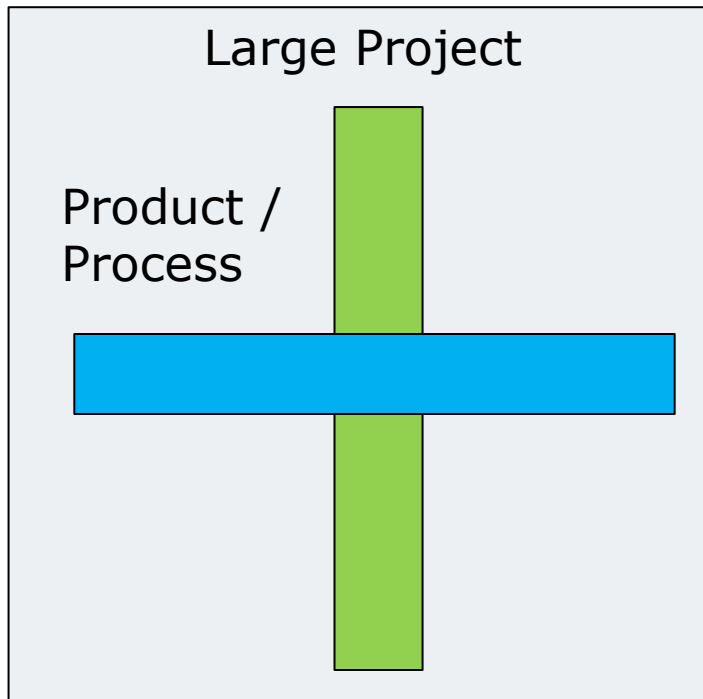
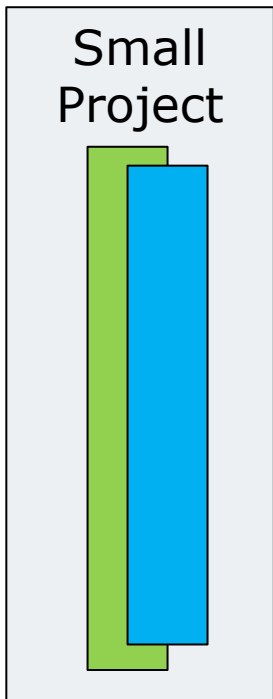
---

- Tools and Techniques
  - Ask for help!
  - Requirements Traceability
  - SWOT Analysis
  - Risk analysis
  - Root Cause analysis
  - Project success factors and product metrics
- Challenges
  - Overpowering / Controlling PM
  - Un-engaged Sponsor
  - *The Problem Solver*
  - Programming / Software developer

# Boundaries and Alignments

PM

BA

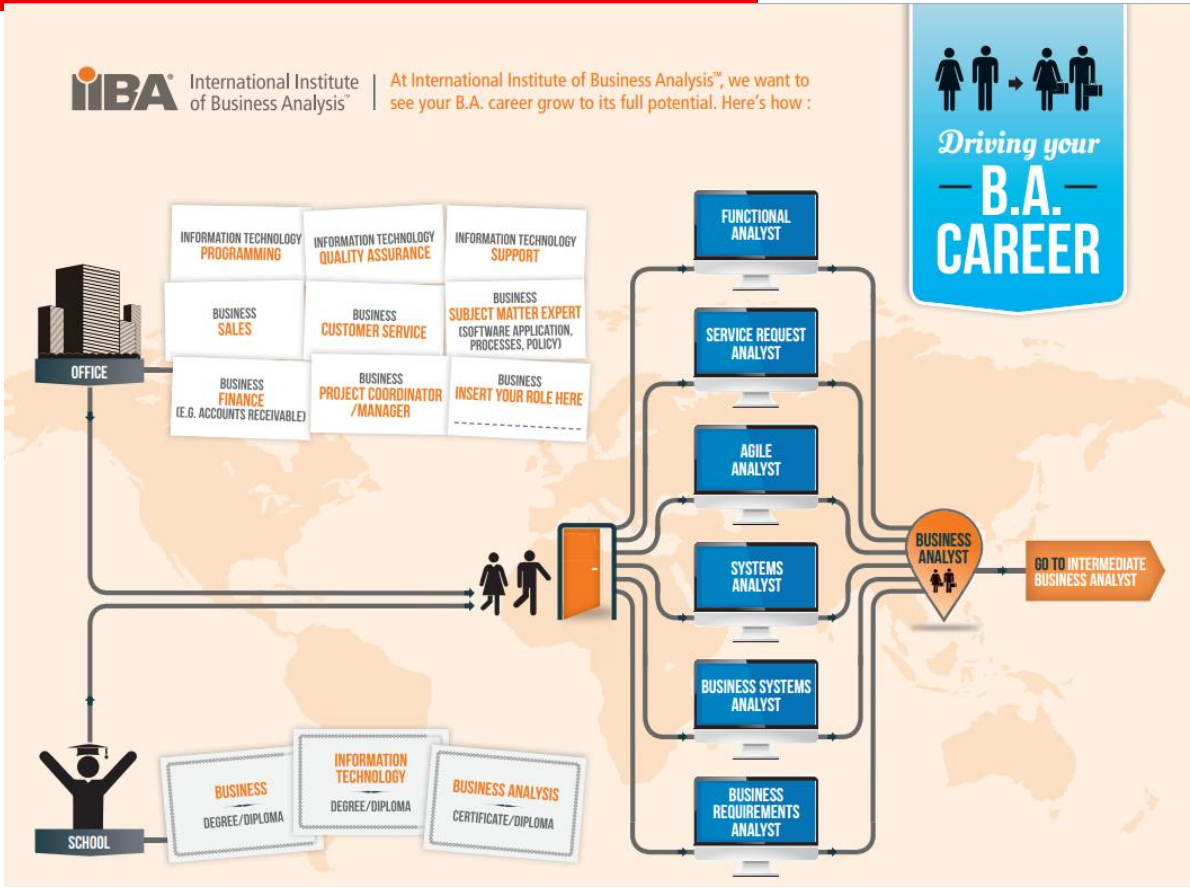


# Career Paths

---

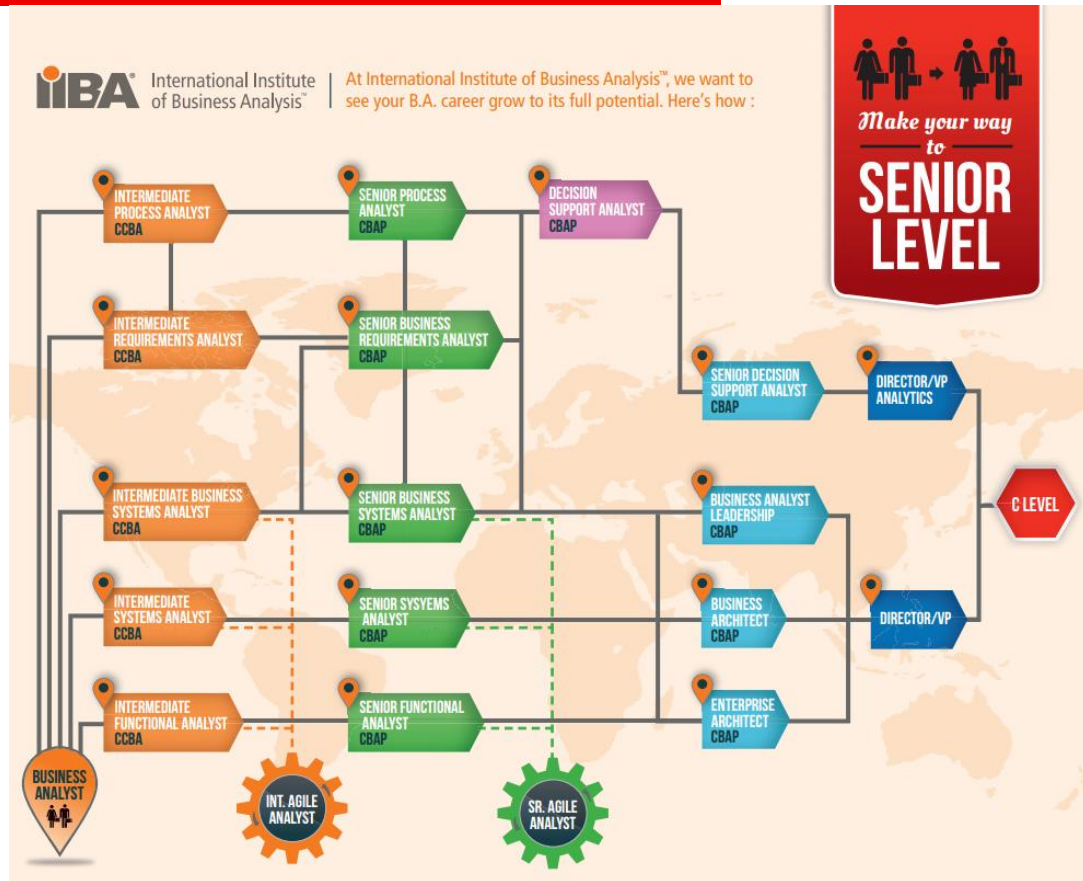
- Is Senior BA a Junior PM?
- Can Senior PM be a Junior BA?

# Career Paths



**Image courtesy:** <http://www.iiba.org/Careers/Business-Analyst-Career-Road-Map.aspx>

# Career Paths (senior)



**Image courtesy:** <http://www.iiba.org/Careers/Business-Analyst-Career-Road-Map.aspx>

# Business Analysis Resources

---

- ❑ Modern Analyst: <http://www.modernanalyst.com/>
- ❑ BA Times: <https://www.batimes.com/>
- ❑ Business Analyst: <http://www.businessanalyst.com/>
- ❑ Practical Analyst: <http://practicalanalyst.com/>
- ❑ Techwell: <http://www.techwell.com/requirements>



# PMI & IIBA Resources

---

- ❑ IIBA: <http://www.iiba.org/>
- ❑ St. Louis Chapter of the IIBA: <http://stlouis.iiba.org/>
- ❑ IIBA's CBAP and CCBA certifications
- ❑ IIBA's BABOK
- ❑ PMI: <http://www.pmi.org/>
- ❑ PMI Metro St. Louis Chapter: <http://www.stlpmi.org/>
- ❑ PMI-PBA Certification
- ❑ PMI's Practice Guide in Business Analysis
- ❑ PMI Requirements Management  
Community of Practice
- ❑ ProjectManagement.com >> Practices >>  
Requirements & Scope Management

# Thank You!

---

