www.cvr-it.com
info@cvr-it.com

Overview

BA Productivity Pack

A collection of tools for the Business Analyst

CVR/IT Consulting LLC

Introduction

The **BA Productivity Pack** is a collection of tools that a Business Analyst can use while performing requirements work. This tool set includes the following:

- An Introduction Page that describes each tool
- Project Ecosystem
- Requirements Types Checklist
- Requirements Team Contact Information
- Stakeholders Roles & Responsibilities
- Risk Analysis for the Requirements Process
- Data Definitions template

Each of these tools is described in this presentation.

Introduction Page

Introduction to the BA Productivity Pack

Welcome to the BA Productivity Pack. This workbook contains several tools that the Business Analyst will find helpful during any Requirements Analysis. Enter your project name in the field below and it will automatically appear on all other sheets. Instructions are provided for each BA tool.

Project Name: Project Name Here

Table of Contents:

Project Ecosystem (ProjEco) - The project ecosystem is that network of existing factors that defines the environment within which the project will be planned and executed. These factors establish boundaries, rules, assumptions and constraints

Requirements Types (ReqTypes) - The IT Project Requirements Checklist is used to ensure that all requirements types are considered during the requirements gathering phase of the project. Where specific requirements exist, you can describe them or provide a link to your requirements document.

Requirements Team Contact Information (ContactInfo) - This is a worksheet where you can record all of the contact information for the Requirements Team.

Requirements Stakeholders Roles & Responsibilities (Stakeholders-RACI) -This worksheet is used to specify exactly what each requirements stakeholder is responsible for during the Requirements effort.

Risk Analysis - Requirements Process (Risk_Analysis) - Use this worksheet to identify, analyze and plan responses to all significant risks to your requirements effort.

Data Definitions (DataDefs) - It is enormously helpful to the development team to have a clear definition of each data element in the application completed before code development begins. You can record that information here.

Introduction | ProjEco | ReqTypes | ContactInfo | Stakeholders-RACI | Risk_A

The Introduction page describes each of the tools in the BA Toolkit. Each tool is in a separate tab of the workbook. Tab names are shown in blue..

Project Ecosystem (1)

Project Ecosystem is a tool that helps define the environment within which the project will be planned and executed.

The template lists 12 factors that can effect the requirements engagement. The BA is asked to document all that they know about each factor.

The BA is then asked to distill what they have just documented into the following:

- Boundaries
- Rules
- Assumptions
- Constraints

Project Ecosystem (2)

Project Name: Project Name Here

Analysis Date:

Document all that you know about each of the following factors

Demographics - list groups and individuals who have interest in the outcome of the project, e.g. are "touched" by the project

Organizational rules and standards - are there formal procedures and standards that the requirements team must adhere to?

Attitude and Expertise of the stakeholders - are they excited about the project or do they dread it? Do they have experience in requirements development? Are they able to communicate well? Do they have the knowledge necessary for this project?

Culture -Are there cultural factors that can help or hinder the requirements process (e.g. need 6 weeks notice for meetings; unwritten rules about not giving details to outsiders, where "outsider" can mean anything from "anyone from outside our company" to "anyone not in our unit"; commitment to excellence)?

Politics - May be detrimental (e.g. rivalries, turf wars, grudges, empire building) or beneficial (e.g. current methods of making agreements, collaborations, partnerships, alliances)

This slide displays a portion of the template (4 of 12 factors). Information about each factor is entered into the white cell. The template is fully customizable.

Project Ecosystem (3)

Conclusions

Based on the above, derive each of the following:

Boundaries - are there limits on who can use tools? On the level of access the requirements team can have to information? On where team members can physically go? On how much time the team will have with SMEs? On the types and usage of communication channels?

Rules (e.g. for calling meetings, communication with executives; cultural rules; organizational rules; formal standards such as HIPPA)

Assumptions about Requirements Development and Management - list all statements assumed to be true for purposes of planning, but which may not actually be true.

Constraints on Requirements Development and Management - list any other constraints on the requirements process (e.g. how much time the team has to complete each aspect of its work).

This slide displays the Conclusions section of the Ecosystem template. The BA summarizes Information previously recorded as Boundaries, Rules, Assumptions and Constraints that can impact the Requirements Engagement.

Requirements Types Checklist (1)

The **Requirements Types Checklist** is used to ensure that all requirements types are considered during the requirements gathering phase of the project. Several different requirements types are considered, including:

- Functional Requirements
- Technical Requirements
- Transition Requirements
- User Requirements

The template is set up as a checklist. The BA considers each requirement type, and if it is relevant to the project it is checked off and details may be entered for later consideration.

Over 30 requirements types are currently included in the template.

Requirements Types Checklist (2)

✓	Requirement Type	Examples	Comments
Technical Requirements (a.k.a. Non-Functional Requirements)			
Technical Requirements are the specific conditions under which project deliverables will operate. There are many kinds of Technical Requirements but not all will apply to every project.			
	Accessibility	Is it necessary for your deliverables to consider Handicapped access?	
	Architecture - s/w	Do you have need for specific architectural elements such as J2EE or .NET; OO design; XML, SOAP; O/S, middleware	
	Architecture - h/w	Is it necessary to develop a hardware architecture for system elements such as server platform; SAN; firewall?	
	Availability	At what times of the day / week must the deliverables be available to users? 24/7?	
	Business Recovery	Does this system introduce new Business Recovery requirements?	
	Disaster Recovery	Does this system introduce new Disaster Recovery requirements?	

A portion of the checklist is shown. Seen here are the first of over 20 Technical Requirements included in the form. The BA checks all those that apply to the project, and then enters notes to explain exactly what will be needed. This checklist helps ensure that critical requirements are not overlooked (e.g. system load capacity, scalability, etc.)

Contact Information (1)

The **Contact Information** Template offers a convenient place to record all of the contact information for the Requirements Team, including technical staff and business staff who will be working on the project (e.g. Subject Matter Experts). Features include:

- Pre-formatted for most types of contact information
- Each person can be associated with a Requirements Role. That drop list is fully customizable
- A cell is provided for a link to the project Resource Plan, which can be an important source of this information

Contact Information (2)

Requirements Team Contact Information

Instructions: *Enter the name, role and contact information of each member of the requirements team. Put a link to your Resource Plan in the field to the right of these instructions.* | Put Resource Plan link here

Project Name: Project Name Here

Name	Requirements Role	Title / Organization	Location	email	Phone #	Comments
Team	Business Analyst					
Member						
Names						
and						
Stakeholder						
Participant						
Names						
Go						
Here						

Business Analyst
Programmer Analyst
Database Analyst
Documentation Spec
End User
Developer
Project Manager
SME

This slide displays the Contact Information template. The Requirements Role drop list is shown; that list is fully customizable through changes to a table located below the data area.

Stakeholder RACI Chart (1)

The **Stakeholder RACI Chart** is used to assign a level of responsibility to each requirements stakeholder (i.e. Responsible, Accountable, Consulted and Informed). Features include:

- The names and role of each stakeholder are automatically brought forward from the Contacts worksheet
- Standard RACI responsibility assignments are used
- Responsibility for each stakeholder can be made specific to one ore more aspects of the requirements engagement (e.g. Elicitation, Analysis, etc.)
- It is possible to include information that can assist in management of stakeholder expectations
- An explanation of each column is provided through mouse-over help in Comments
- The RACI drop list is fully customizable

Stakeholder RACI Chart (2)

Requirements Stakeholders Roles & Responsibilities (RACI)

This worksheet is used to specify exactly what each requirements stakeholder is responsible for during the Requirements effort. Dropdown selection list can be modified in the Control Block below the data area.
Note: *As needed, expand rows vertically to display all of the text that you have entered.*

(R)esponsible: does the work
(A)ccountable: decision maker
(C)onsulted: must be consulted ; gives input
(I)nformed: keep them well informed

Project Name: Project Name Here

Name	Requirements Role	Availability	Role in the Requirements Process - RACI: Requirements Planning	Elicitation	Analysis	V&V	Documentation	Management & Control	Solution ID & Assessment	Other Requirements Responsibilities	Interest in project / Expectations
Team	Business Analyst		R								
Member	0										
Names	0										
and	0										
Stakeholder	0										
Participant	0										
Names	0										
Go	0										
Here	0										

R
A
C
I
RA
AC
CI
ACI

Name and role of each stakeholder is automatically brought forward from the Contact worksheet. Each stakeholder can be assigned responsibility to specific aspects of requirements work (e.g. must be Consulted during Analysis). A stakeholder can be assigned more than one responsibility.

Risk Analysis (1)

Requirements engagements can face risks from many sources. The **Risk Analysis** Tool is a simple risk register that supports proactive risk management. It can be used to identify, analyze and plan responses that can minimize or eliminate important risks to requirements work. Features include:

- Each risk can be given a unique ID
- The template supports input of standard risk management information such as root cause, impact and probability of risk, and risk status
- Impact Area and Priority help determine which risks are most important. Priority scores are color coded according to thresholds that are adjustable.
- An explanation of each column is provided through mouse-over help in Comments. For example, guidance is given for development of effective Risk Descriptions

Risk Analysis (2)

Project Name: Project Name Here

Analysis Date:

Risk ID	Risk Description	Impact Area	Risk Cause	Impact Score	Probability	Priority	Status	Response Strategy
120315a	If SMEs cannot make it to the requirements meetings, requirements may not be complete or accurate and that could negatively impact deliverables quality	Accuracy	Management has not given them time to work on the project	9	50%	4.5	Watch	Ask the project sponsor to intervene.
		Scope		3	50%	1.5		
		Accuracy		5	70%	3.5		
		Accuracy		9	90%	8.1		
						0		
						0		
						0		
						0		
						0		
						0		

- Scope
- Accuracy
- Design
- Documentation
- Management
- Solution
- tbd
- tbd

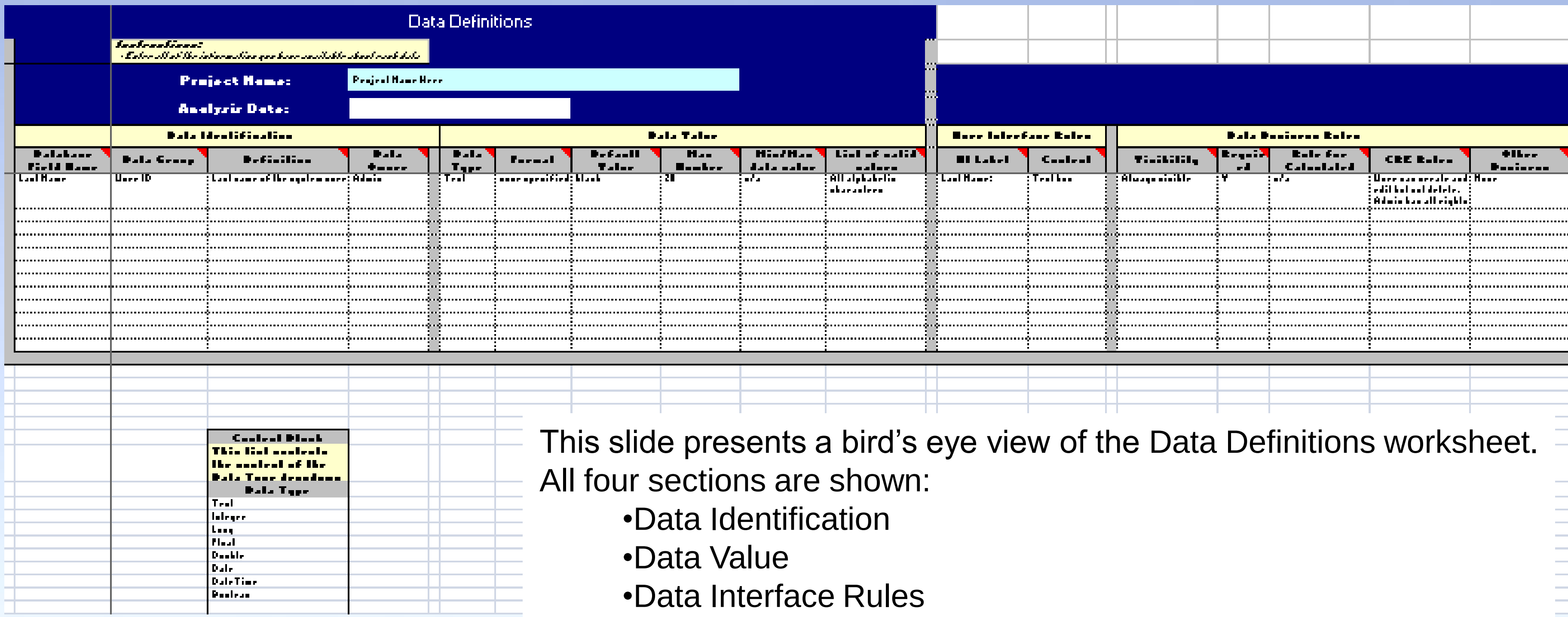
This Risk Register supports application of the standard Risk Management process to requirements work. Each risk is given a unique ID and is described as shown. Impact area and root cause can be recorded. Priority Score is calculated as Probability x Impact, and color (red = high risk) is set through adjustable thresholds. Response strategy is used to mitigate or avoid the risk and to establish a contingency plan. The drop list for Impact Area is shown; it is fully customizable.

Data Definitions (1)

It is enormously helpful to the development team to have a clear definition of each data element available before code development begins. The **Data Definitions** worksheet supports collection of that information. Features include:

- Data are collected with the intent that they will be handed off to a Database Analyst for inclusion in a database
- The worksheet collects four types of data: Data Identification, Data Value, Data Interface Rules, and Data Business Rules
- All column headings provide help in the form of a mouse-over comment
- Drop list can be customized

Data Definitions (2)



This slide presents a bird's eye view of the Data Definitions worksheet. All four sections are shown:

- Data Identification
- Data Value
- Data Interface Rules
- Data Business Rules

Tables located below the data area (partially shown) control content of the drop down list in the worksheet

Data Value

	Data Value					
Database Field Name	Data Type	Format	Default Value	Max Number Characters	Min/Max data value	List of valid values
Last Name	Text	none specified	blank	20	n/a	All alphabetic characters

If this data element can only have a value from a predefined list, enter all elements of the list here or describe the list. Example:
- Text field: all valid US two letter state codes
- Text field: Brown, Blue, Green White, Red
- Integer field: 1,2,3,4,5

The Data Value section of the worksheet is shown. Several Data Value parameters can be collected for each data element. All column headings feature mouse-over help, as is shown for “List of valid values”. The Data Type column uses a customizable drop list; default values include Text, Integer, Long, Float, Double and more.

Summary

The **BA Productivity Pack** supports the Business Analyst during requirements work by providing tools that make it much easier to perform critical tasks, e.g. understand the project environment, assign responsibility to stakeholders and manage risk.

The **BA Productivity Pack** is part of a powerful Business Analysis template set available at very low cost from this source:

http://www.cvr-it.com/PM_Templates/

Other templates in this set include:

- **Project Requirements Document (a.k.a. BRD)**
- **Business Process Toolkit**
- **Requirements Management Plan**
- **Use Case Template**
- **Much more…**

About CVR/IT Consulting LLC

CVR/IT Consulting, established in 2002, provides guidance and support in the effective use of Project, Program, Portfolio Management and Business Analysis Technologies. The company provides professional consultation, training and tools in all matters related to Project Management and Business Analysis, such as:

- Implementation of governance structures and processes essential to effective Portfolio Management
- Establishment of a Project Management Office that finds its own success solely in the success of its customers
- Delivery of flexible, customized PM and BA Methodologies and tools
- Assessment of organizational project, program, portfolio management and business analysis practice
- Training (or re-training) of the project workforce
- Implementation of Organizational Change to make it all work

www.cvr-it.com
info@cvr-it.com

Overview

BA Productivity Pack

A collection of tools for the Business Analyst

CVR/IT Consulting LLC