Business Analysis Plan

Project Name:	
Prepared by:	
Date (MM/DD/YYYY):	

Document History				
Version	**Date**	**Author**		**Reason for Change**
1.0				

<Note: Place your cursor over the 📖 symbol to see inline help>

<Italic text within angle brackets is instructional and should be removed from the final document.>

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Purpose of this Document

The primary purpose of a Business Analysis Plan is to describe those activities necessary for the performance of business analysis work. For a project this can include, for example, requirements development, requirements tracing to design and test, solution validation, and post-project solution value assessment.

This document provides a tool that the Business Analyst (BA) can use to document key decisions about how project analysis work will be done. It includes elements of a Requirements Management Plan focused on the requirements engagement. Completion of this plan before the work begins makes it much more likely that the project will experience a successful delivery and produce the intended value.

Some of the information from this Business Analysis Plan can be included in the overall Integrated Project Plan, e.g. requirements elicitation activities can be included in the project schedule, etc. This level of integration helps to ensure that the work of requirements is carried out in a manner that fully supports the project.

This document should be filled out and approved early in the planning phase of the project. It is written from the perspective of the project BA, or lead BA when there is a business analysis team. In the template, "you" refers to that BA. The BA should fill out those portions of the template that pertain to the work at hand. After the document is approved, a record should be kept in the document history table of all changes, when they were made, and who approved them.

This template was completely rewritten in April, 2016, to be fully consistent with the latest release of the BABOK® Guide and PMI® BA Practice Guide.

<You will probably find that answers in later sections will cause you to rethink your answers in earlier sections. This is to be expected. As you fill out this template you will engage in a progressive elaboration of what is necessary for your requirements effort to be a success.>

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\<Check the appropriate box and answer questions as needed.\>

*\< **To check a box**, double click it and select Default Value = Checked.\>*

\< Provide the requested information in the space provided.\>

1. Scope Validation
The Project Manager (PM) has responsibility for defining scope. Either PM or BA may validate product scope through development of a Work Breakdown Structure (WBS). Because each project deliverable may have requirements associated with it, it is necessary for the BA to be aware of all product scope so that complete project requirements can be developed.

1.1 Will you be involved in scope validation?

- If **No**, skip to the next section.
- If **Yes**, explain your role.

Yes ☐ No ☐	

1.2 Is a detailed WBS available for this project?

- If **No**, explain in the space below who will create the WBS and when that will be done.
- If **Yes**, provide a link to the WBS here. 📖

Yes ☐ No ☐	

1.3 Are you 📖 responsible for keeping the WBS up to date when requirements development uncovers the need for changes in scope?

If **No**, indicate below who has that responsibility

Yes ☐ No ☐	

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3. Requirements Storage and Access

The BA must create a written record of all requirements. In this section indicate how and where those requirements will be stored.

3.1 In what format will you record requirements information?

- If you will use a Word Document, Excel workbook or similar tool, indicate if you will use an existing template and its source
- If using a requirements management software tool, specify which one
- If using an alternative to the above (Other), describe

☐ Word Document	
☐ Excel workbook	
☐ Requirements tool	
☐ Other	

3.2 Where will requirements be stored?

Describe were the recorded requirements can be found (e.g. SharePoint; Requirements tool).

3.3 Will stakeholders have direct access to the stored requirements?

If **No**, explain how stakeholders will access the requirements.

Yes ☐ No ☐	

3.4 Will the project team have direct access to the stored requirements?

If **No**, explain how the team will access the requirements.

Yes ☐ No ☐	

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5. Requirements Attributes

These attributes provide information about requirements. Use only the attributes that will be useful in your project. Items marked with * are recommended for every project.

\<Use the check box to indicate which requirements attributes you will record in this project.\>

☒	*Absolute Reference	a.k.a. unique identifier. This ID is not changed when the requirement is modified, moved or deleted
☒	*Priority	An importance rating for requirements. See the Requirements Prioritization section of this document for details.
☒	*Rationale	The reason for including the requirement, i.e. its value.
☒	*Source	Origin of the requirement. It may be necessary to consult the source when a requirement changes or the need for it comes into question.
☐	Author	The name of the person who wrote the requirement. Used when multiple BAs are writing requirements. Helpful when a requirement is found to be ambiguous, unclear, or in conflict.
☐	Complexity	A measure of how difficult a requirement will be to implement. Can be used to help with effort estimates.
☐	Ownership	• The stakeholder(s) that need the requirement or • The person/group who will be the business owner after implementation
☐	Stability	An indication of how likely the requirement is to change. Low risk of change indicates high stability.
☐	Status	Indicates the state of a requirement, e.g. proposed, accepted, contested, postponed, cancelled, or implemented.
☐	Urgency	Indicates when the requirement is needed. Immediate need indicates high urgency. This attribute adds a temporal aspect to priority, and is helpful when working with an implementation deadline.
☐	Other	

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9. Requirements Reuse

In certain circumstances, properly structured requirements can save an organization substantial time and money as they are reused for various purposes.

9.1 Is requirements reuse a concern in this project?

If **No**, explain and skip to next section.

Yes ☐ No ☐	

9.2 Which factors are at work in this project to prompt preparation of requirements for reuse?

Provide additional information where appropriate.

☐	Regulatory concerns	
☐	Contractual obligations	
☐	Mandatory quality standards	
☐	Service level agreements	
☐	Business rules	
☐	Business processes	
☐	Requirements describe products for sale or distribution	
☐	Requirements are held in common among multiple systems, processes, or programs	
☐	Other	

9.3 What steps will you take to prepare requirements for reuse?

For example, requirements should be clearly named, defined, and stored in an accessible repository.

16. Additional Business Analyst Responsibilities

Because of their deep understanding of project requirements, the BA is often in a good position to perform project tasks that go beyond requirements definition. This section examines which of those tasks, if any, the BA will engage in.

Execution Phase

16.1 In which of the following activities will a BA engage?

Check the box; provide detail as needed

	Activity	
☐	Help build usability into the design 📖	
☐	Review technical design deliverables	
☐	Maintain design information in the Requirements Traceability Matrix	
☐	Participate in Organizational adoption 📖	
☐	Develop procedure manuals	
☐	Conduct user training (e.g. in the use of new business process and software)	
☐	Assist in development of deployment strategies (to ensure delivery success)	
☐	Assist in development of a test plan (e.g. for functional testing)	
☐	Assist in development of test cases and test scripts (e.g. for functional tests)	
☐	Perform Graphical User Interface testing 📖	
☐	Perform Functional testing	
☐	Assist in development of user acceptance tests 📖	

☐	Assist business stakeholders during user acceptance testing	
☐	Other (List):	

Post-Implementation Phase

16.2 Are there plans to have a maintenance and support team maintain the quality of requirements after project delivery?

If **No**, explain why this is not needed and skip to **16.4**

Yes ☐ No ☐ N/A ☐	

16.3 Which requirements deliverables will you transfer to the maintenance and support team?

Example: Requirements document; traceability matrix

16.4 Indicate those post-project activities in which a BA will engage.

Check the box; provide detail as needed

☐	Organizational adoption, e.g. assist stakeholders to adjust to change	
☐	Problem resolution 📖	
☐	Assessment of solution utilization 📖	
☐	Solution optimization 📖	
☐	Management of enhancement requests	
☐	Other (List).	

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17. Notes
Provide additional information that may be useful for planning this analysis work.

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