

Planning a project

Business Analysis

Analysis Skills : 3

Planning a project always starts with writing a charter that serves as a guideline throughout the project. The main role is normally in charge of the sponsor, but it is not impossible that the business analyst and other people give a hand to this task.

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Introduction

The first task to be accomplished during a project is planning the project. Writing this can take many different forms, the most common being a roadmap or charter. Project planning is a document that is often done by several people, including the project manager, the sponsor, the business analyst, and some experts in a specific field. The sponsor is one of the stakeholders with whom you will have the most to do at the beginning of the project, simply because he is the one who will initiate the project and especially pay the bill at the end of the mandate. You might as well say that he is your employer or at least the one who will pay your salary. You might as well be on good terms with him from the start.

BAPM (Business Analysis, Planning and Monitoring)

The **BAPM** is the section about planning as seen by the **BABOK**.

A **PDF** attached to this publication, in the form of a data stream, summarizes all the tasks, their descriptions, tools, stakeholders involved, and mnemonic techniques. It has been produced for educational purposes.

Defining the roadmap (charter)

In a project, everything starts with a business need or needs. The need may be a problem to be solved or an opportunity that the company would like to implement for various reasons.

The roadmap, also called a charter, is one or more documents that will concisely describe :

- The topic.
- The context.
- A statement of project intent. In other words, the main goal the company is seeking to achieve.
- A description of the problem or opportunity.
- A succinct hypothesis of why the change is needed and its constraints.
- A description of what exists and/or a vision of what the future should look like.
- A description of how best to assess the problem or opportunity.
- The risks involved on the project.
- Elements about the work environment, such as IT tools, document storage.
- The project schedule and timelines. These are usually done by the project manager.
- The methodology. This can be a predictive (waterfall) management, or an adaptive approach, much more dynamic, like **"Agile"** and **"Scrum"**.

Identify stakeholders

Once the charter is defined, we'll need to go into more detail on all the points identified. To do this, one of the main tasks of the business analyst will be to elicit (interview) the various stakeholders in a project. They are a group of people who show an interest and can be assigned directly to a project or indirectly because they are needed. In the context of a project, it is the business analyst who will be responsible for :

- Create the list of stakeholders.
- Get to know them.
- Identify the best communication channel (Email, one-on-one session, group work session, etc...).
- The role of a collaborator is more important than his or her title.

Below are some of the roles :

Sponsor

- Initiates the project.
- Leads the project.
- Makes the decisions.
- Pays the bill.
- Signs and approves.

Product or account manager

- Defines the overall requirements.
- Defines the marketing approach.
- Make decisions.
- Review project requirements.
- Signs off and approves.

Project Manager

- Manages the project.
- Plans the project.
- Plans deadlines, task breakdown.
- Responsible for the team.
- Plans risks.

Experts in a field (SME)

Also called SME for Subject Matter Experts, experts can be designers, testers, database administrators. Experts :

- Assist in writing functional and non-functional requirements.
- Provide information specific to their work.
- Assist in looking for potential solutions or opportunities.
- Assist in defining the scope (project scoping).
- Assist in the realization of processes, interfaces, data, and definitions.
- Work in collaboration with the business analyst.

How to identify the right people

- Analyzing the company's organizational chart.
- Analyzing the project literature.
- Inviting potential collaborators to a **"brainstorming"**, a kind of group session where everyone gives their input.

Create the list of stakeholders

Nom	Titre	Rôle	Interne / Externe	Autorité de signature	RACI	Notes
Olivier	IT and Business Analyst	BA	External	No	RCI	
John	Marketing and Operations Director	Project Manager	Internal	No	RCI	John is very busy. He manages several projects
Martin	Director	Sponsor	Internal	Yes	ACI	Martin has the power of decision

The stakeholder table

RACI

The table above includes a column called **RACI** for **Responsible, Accountable, Consulted, Informed**. This information is added to determine everyone's responsibilities.

- **Responsible**: A person who is responsible for the work to be done.
- **Accountable**: A person who is responsible for the proper completion of a task.
- **Consulted**: A person who gives feedback.
- **Informed**: A person who is informed of the progress of the project.

How to elicit in general rules

The more relaxed an employee is, the easier it will be for them to speak up or give their opinion when a decision needs to be made.

- Let people talk without interrupting.
- Ask open-ended questions. That is, the expected answer is not defined.
- Ask close-ended questions to affirm or validate another question. The expected answer is then yes or no.
- Paraphrase to validate and confirm.
- Know your interviewer. Learn as much as possible from others in order to identify them.
- Turn off your cell phone.
- Never judge a person.
- Do not carry over a judgment from others.
- Keep questions short.
- Respect professional and/or personal secrecy.
- Stay humble and discreet.
- Never talk about deadlines, but estimates to avoid stress.

The questions to ask the sponsor

The sponsor is often the first person we will elicit about the project. He or she is the initiator of the project and the decision maker.

- Do you have a clear vision of what you want ?
- Are you clear on the ins and outs? In other words, the origins, risks and consequences ?
- Do you think you need statistics to make a decision ?
- Are you willing to think that your vision is not the most appropriate one? Are you willing to listen to other people express their ideas, including mine ?
- Are you expecting financial results? An increase in revenue? Lower costs? Or just better customer service ?
- What do you think will happen after the project is completed ?
- Do you think you will be actively involved in the project ?

Learning from SME (expert in a specific field)

The expert is often a busy person, speaking technical jargon, whose trust must be earned.

Good tips for getting an SME interested are :

- Come up with short, concise questions, so you can bother him more often.
- Put yourself in his position, take an interest or know his industry so he shares as much information with you as possible.
- Don't bore him with extraneous material.
- Keep him informed of the project's progress.

Conclusion

Once you've completed these tasks, you'll already have a good vision of what the company wants and who you'll be working with throughout the project. Now you'll need to move on to an **analysis of the needs** phase to verify that the project is on track.