WE GET IT. WE'LL HELP YOU GET IT TOO.

Building a Successful BA and PM Relationship

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IIBA Endorsed Education Provider Charter Member

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Tweeting Today?

@RequirementsPro

@B2T_Training

#Agile
#BAOT
#PMOT
#alwayslearning

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Agenda

- What's with all the confusion
- Where to focus your attention
- Guiding a collaborative relationship
- The dual role dilemma

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The Confusion

Role Confusion

- Companies create titles and job description
- PMBOK v4 added *Collecting Requirements* as a process
- PMI came out with a new BA certification…PBA
- IIBA made changes in BABOK v3.0
- The same people are working with IIBA and PMI for analysis
- Interpretation that if my title is PM and its in the PMBOK, it must be my responsibility and vice versa
- Agile movement does not include either role

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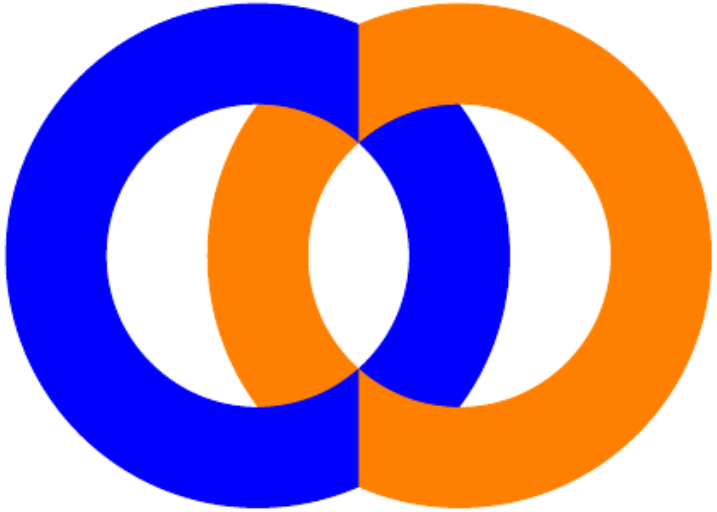
Other Titles Overlap

- Sales and Marketing
- Nurse and Doctor
- Principal and Teacher
- Mom and Dad
- Change Management and PMs, BAs
- BA and UX
- BA and BSA
- BA and QA
- ScrumMasters and PM
- This is not just a PM and BA thing…it's a team thing



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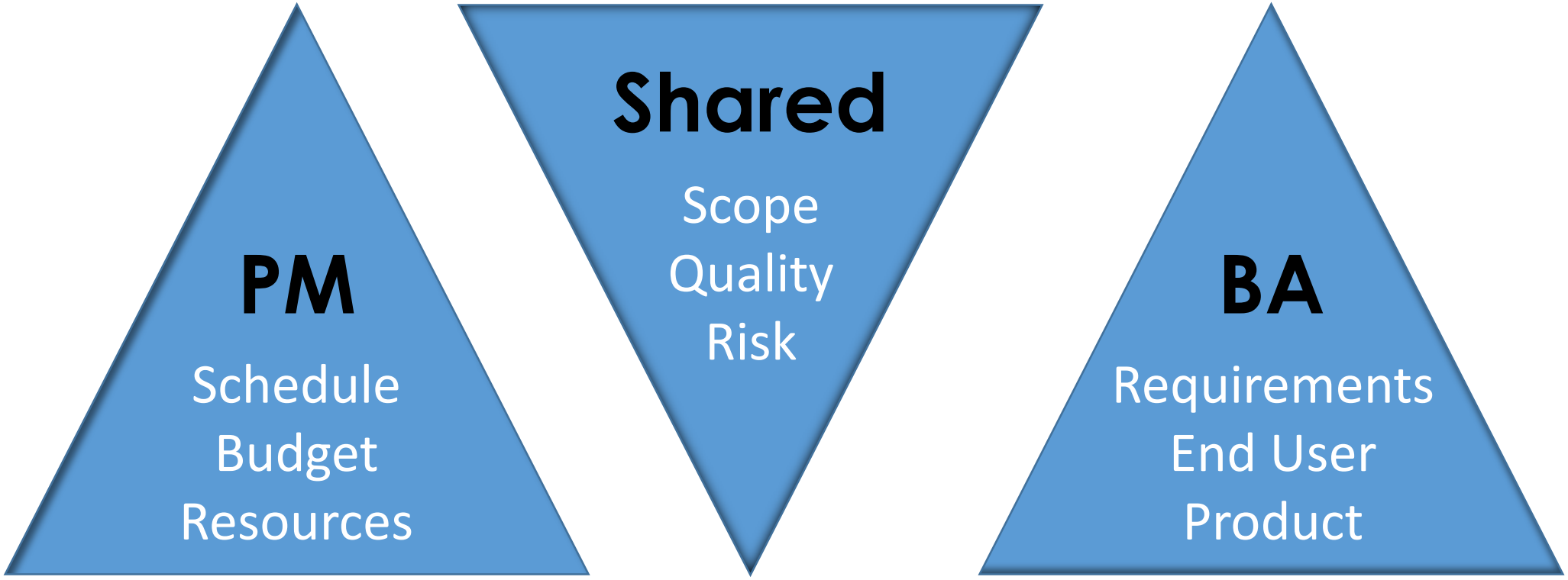
The Middle Ground Is the Key



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What is Project Management?

The application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals — and thus, better compete in their markets.

- A Guide to the Project Management Body of Knowledge (PMBOK® Guide), Fourth Edition

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What is Project Management?

10 Knowledge Areas

- Integration Management
- Scope Management
- Time Management
- Cost Management
- Quality Management
- Human Resources Management
- Communication Management
- Risk Management
- Procurement Management
- Stakeholder Management

- A Guide to the Project Management Body of Knowledge (PMBOK® Guide), Fourth Edition

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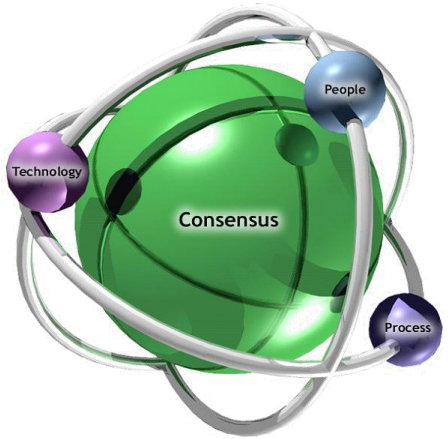
What is Business Analysis?

Business analysis is the practice of enabling change in an enterprise by defining needs and recommending solutions that deliver value to stakeholders. Business analysis enables an enterprise to articulate needs and the rationale for change, and to design and describe solutions that can deliver value.



- A Guide to the Business Analysis Body of Knowledge (BABOK® Guide), Version 3.0

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What is Business Analysis?

6 Knowledge Areas

- Enterprise Analysis
- Business Analysis Planning & Monitoring
- Elicitation
- Requirements Management & Communication
- Requirements Analysis
- Solution Assessment & Validation

- A Guide to the Business Analysis Body of Knowledge (BABOK® Guide), Version 3.0

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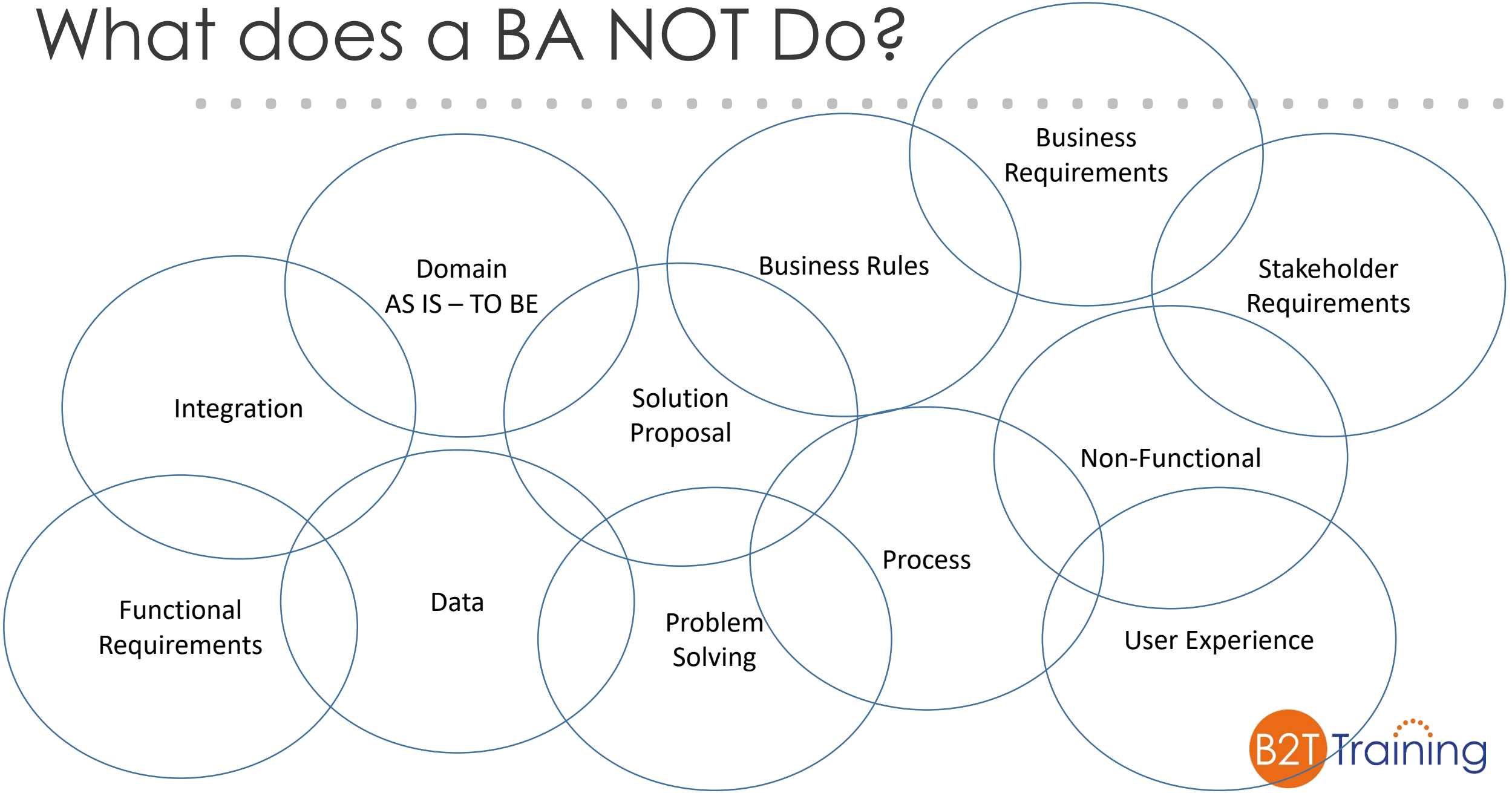
What does a BA NOT Do?



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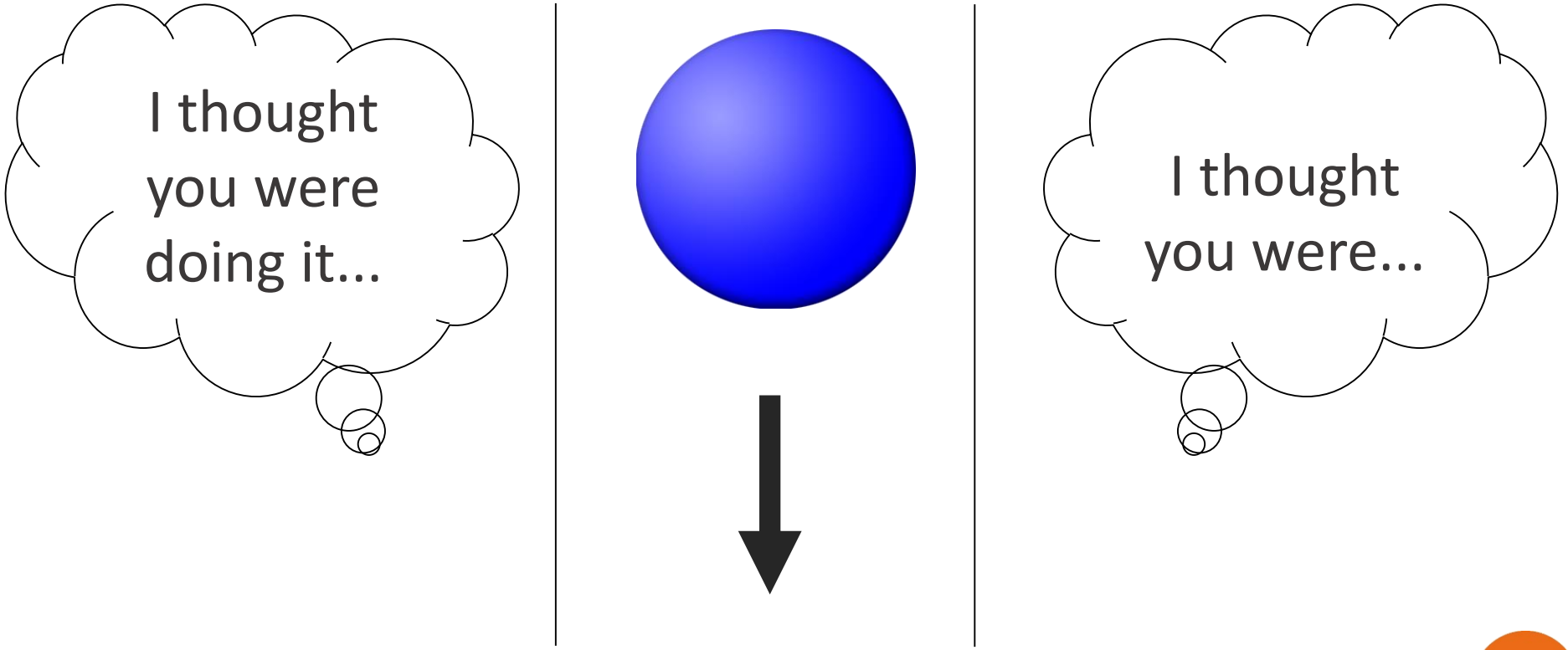
Who Cares What PMI & IIBA Say?

- They are not bibles for titles
- There great guides for the work that has to be done and competencies companies need to achieve their goals

Room for Assumptions

There are gaps in work:



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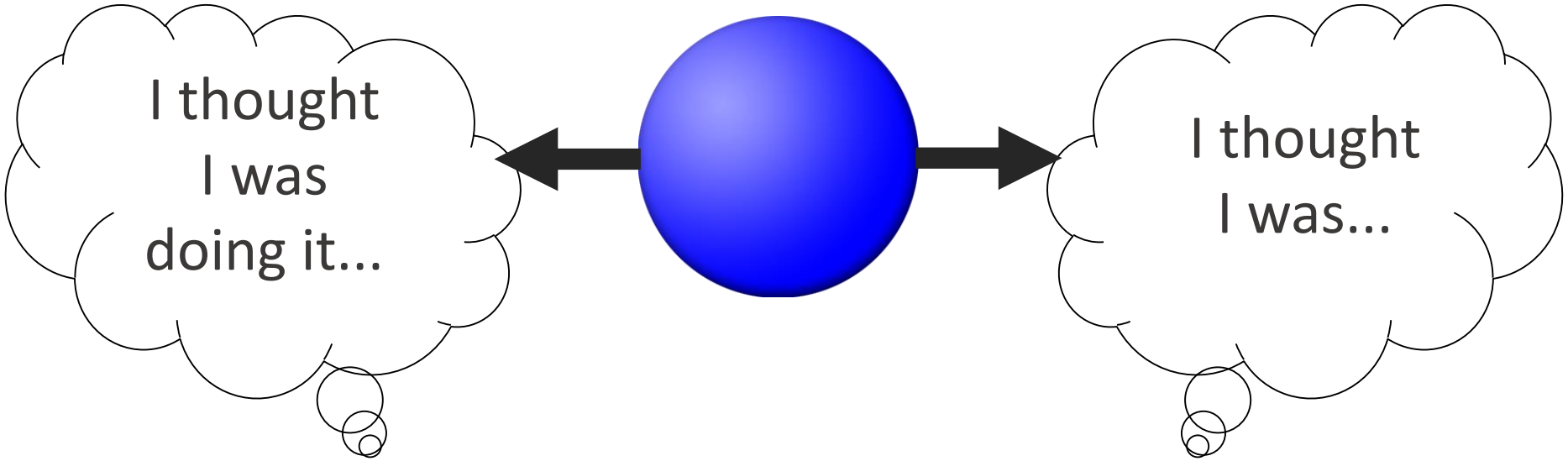
Room for Assumptions

Both groups are doing the same work:



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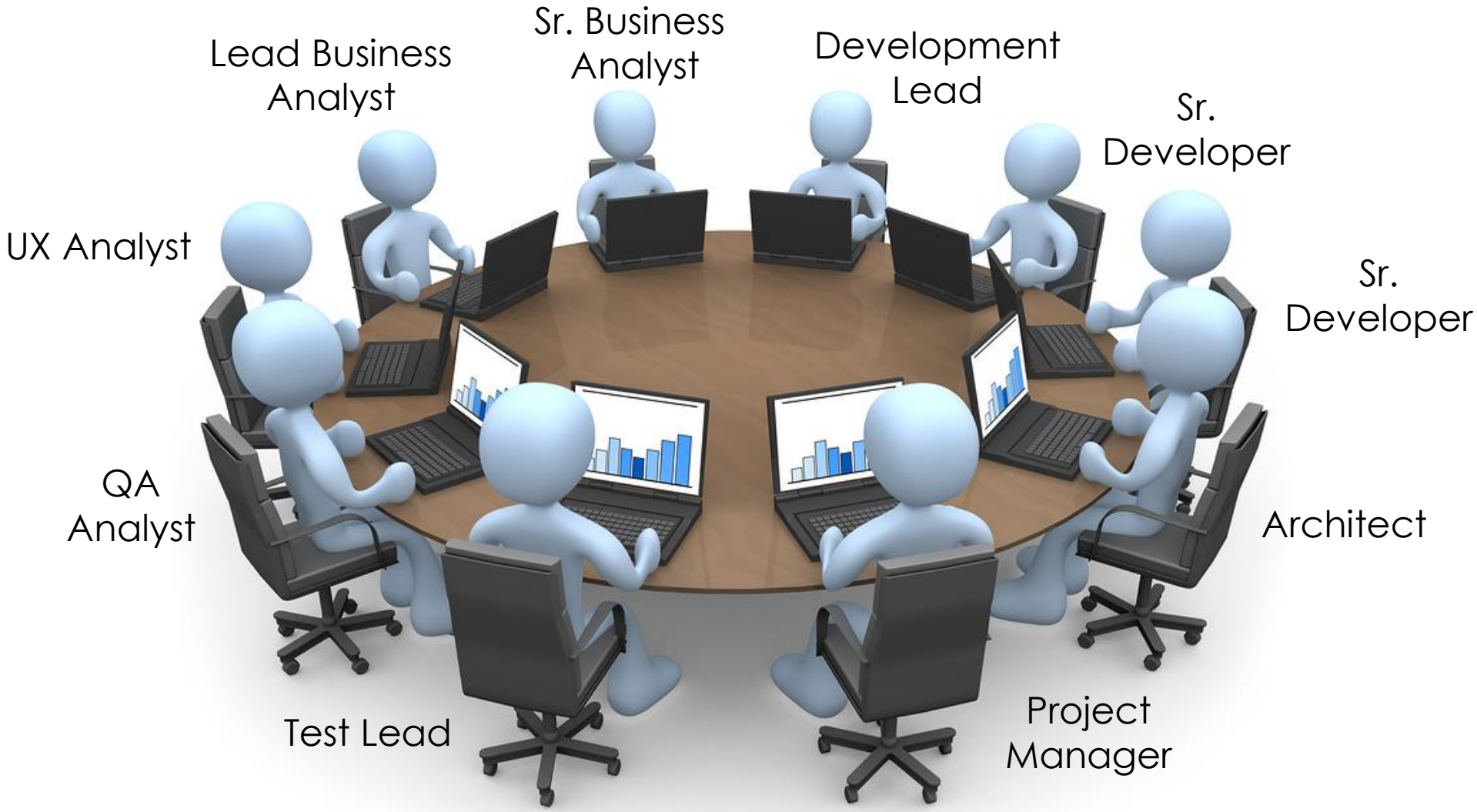
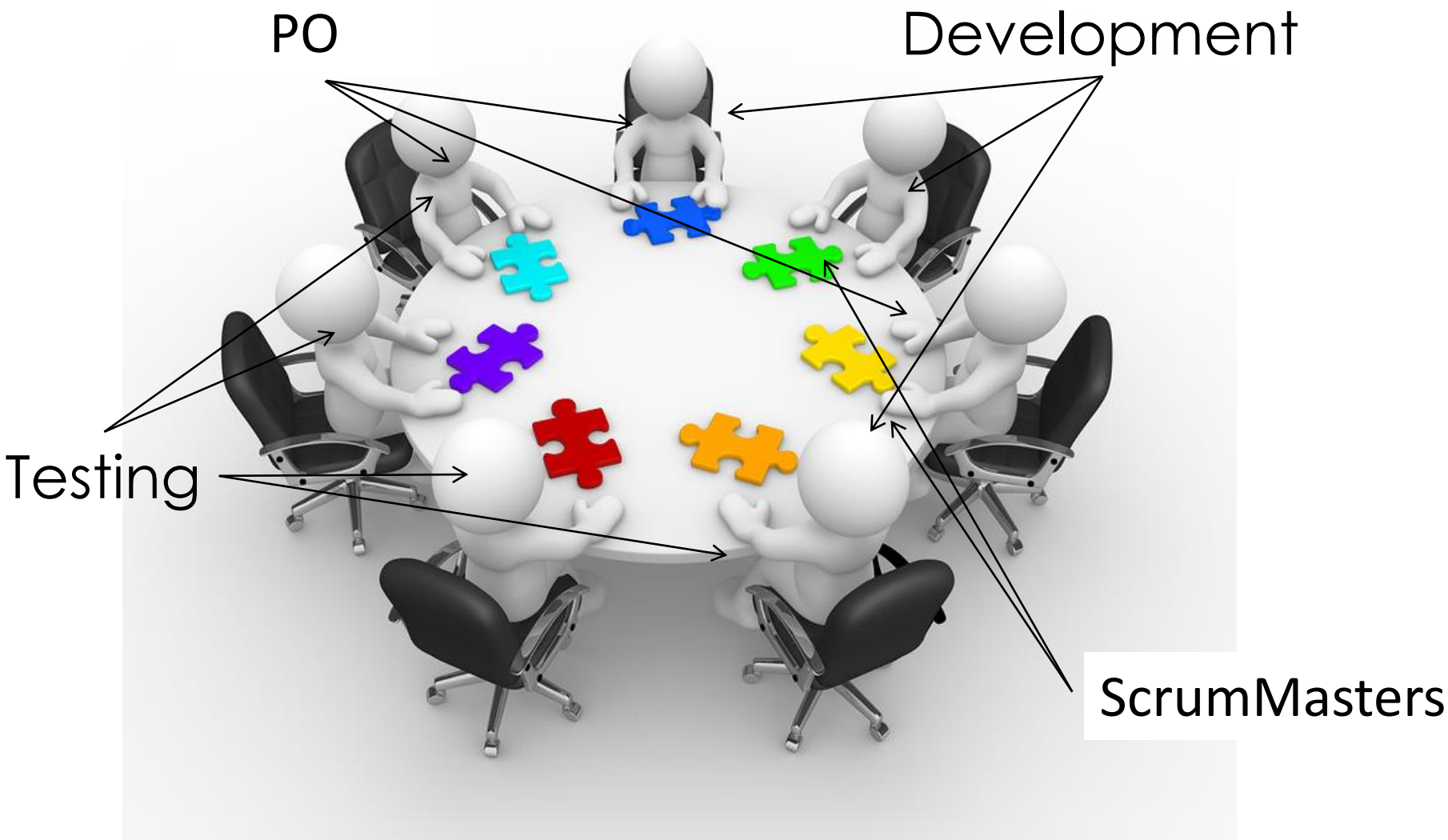
The Traditional Team …



… Team Re-imagined



Real Talk

All PMs do Is micro-manage the folks that do the real work

BAs are always looking and finding more questions to ask to drag out the time it takes to do requirements

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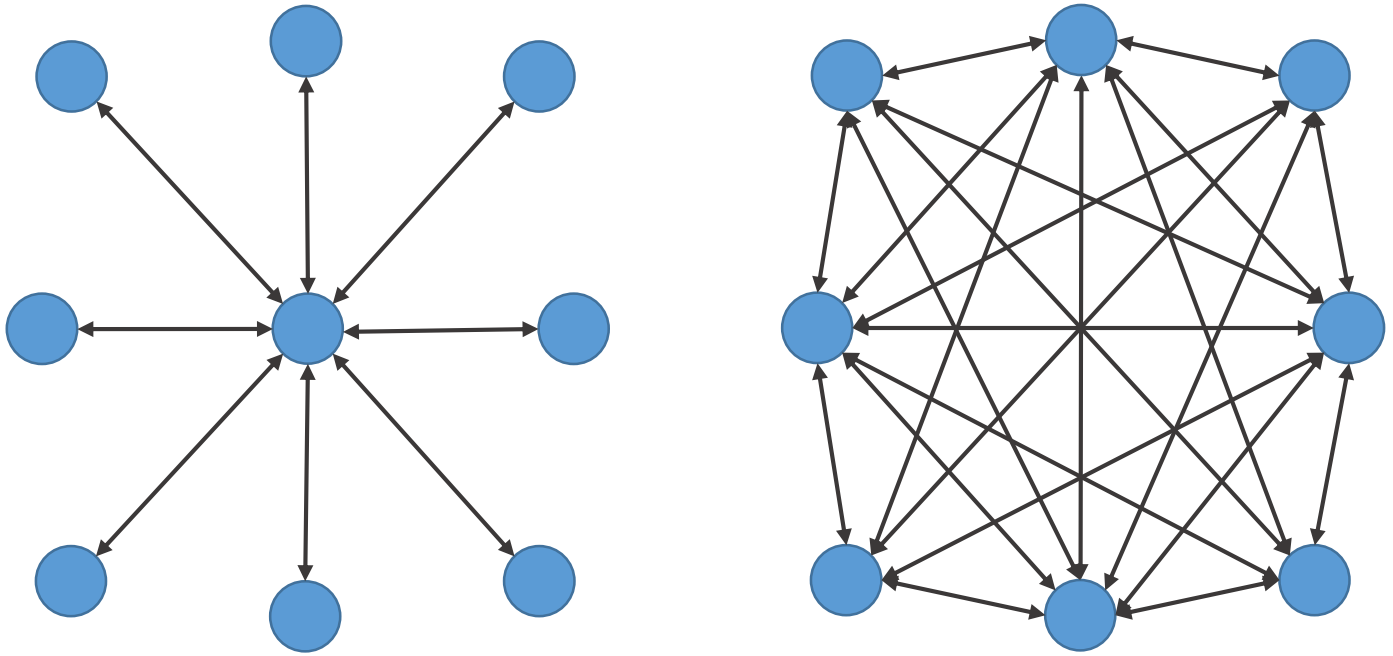
Removing the Middle Man



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Typical Roles in the Agile Environment

There are commonly five roles associated with groups working in an agile environment:

Stakeholders

Product Owner

Neighbors

Scrum Master

Delivery Team

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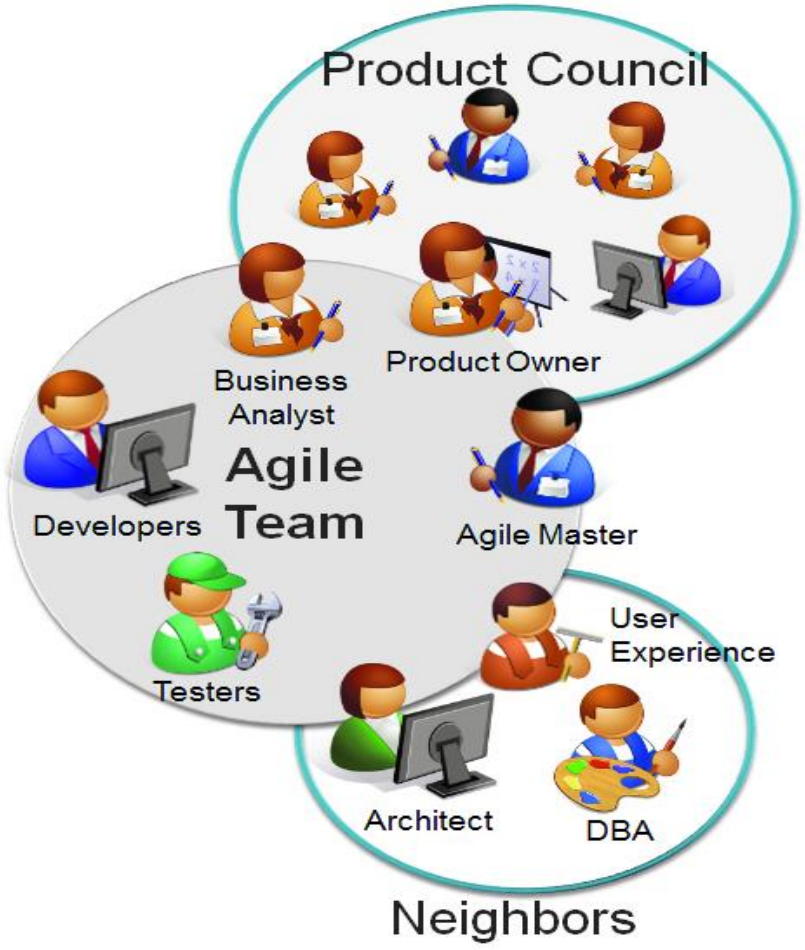
Agile (Scrum) Team



- Cross functional
- Largely self directing
- Teams (8 +/- 2)
- High transparency
- Change is welcome
- Whole team working in same iteration

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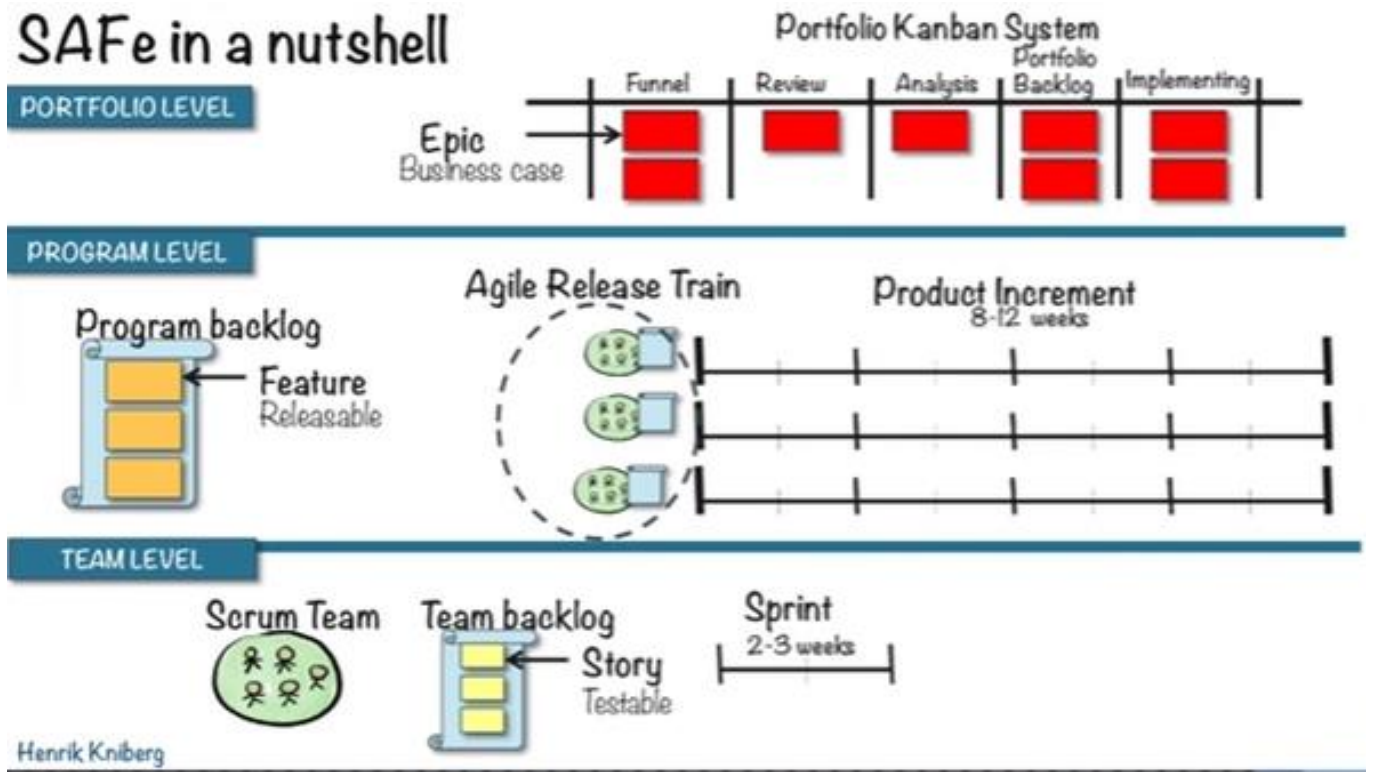
Removing the Micro Manager

Project Mgmt



Velocity

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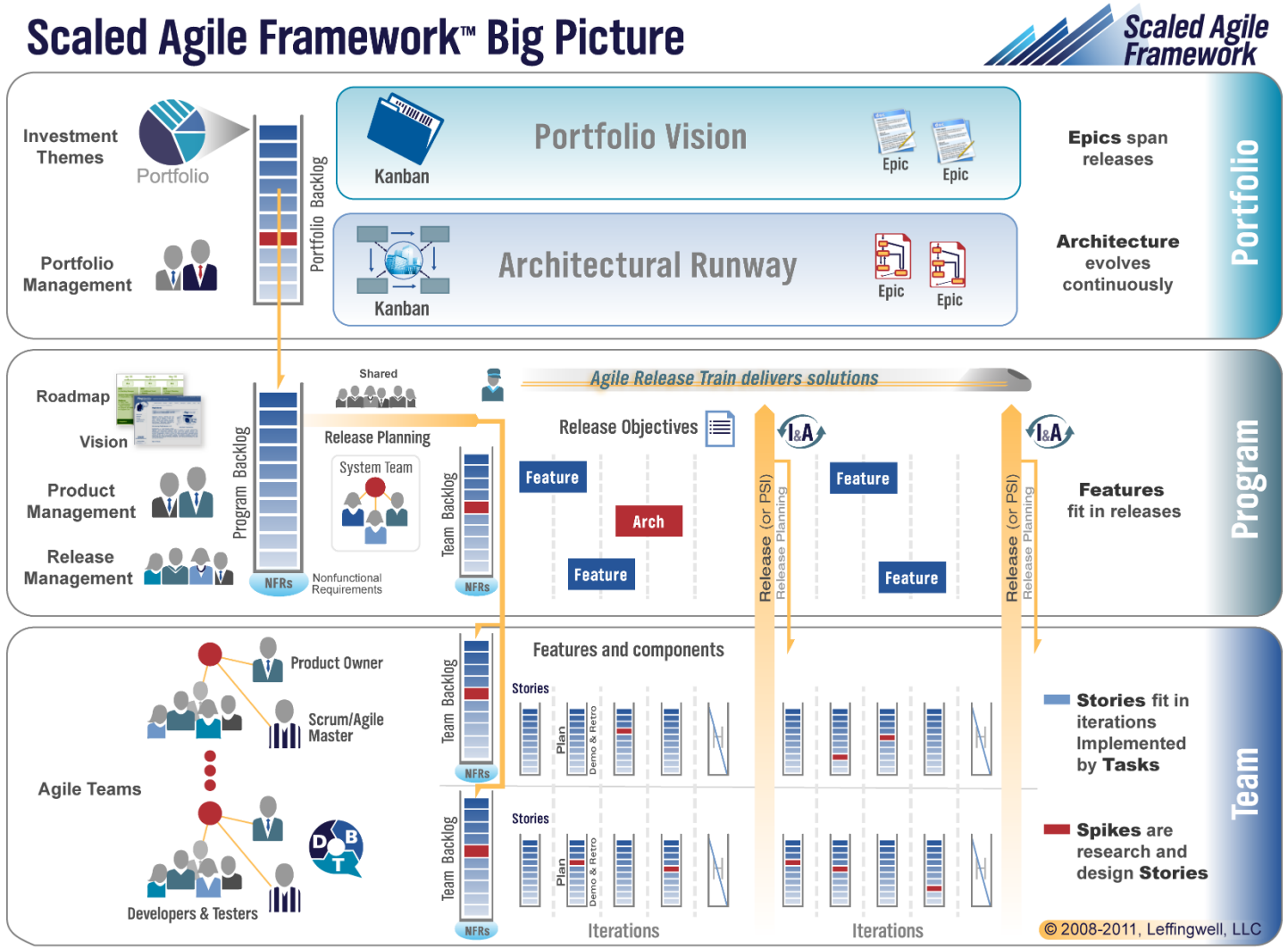
SAFe



See also www.scalingsoftwareagility.wordpress.com and Leffingwell, D. *Agile Software Requirements: Lean Requirements Practices for Teams, Programs, and the Enterprise*, Addison-Wesley (Pub. 2011) v 0.8

Has Your Cheese Gone MIA?

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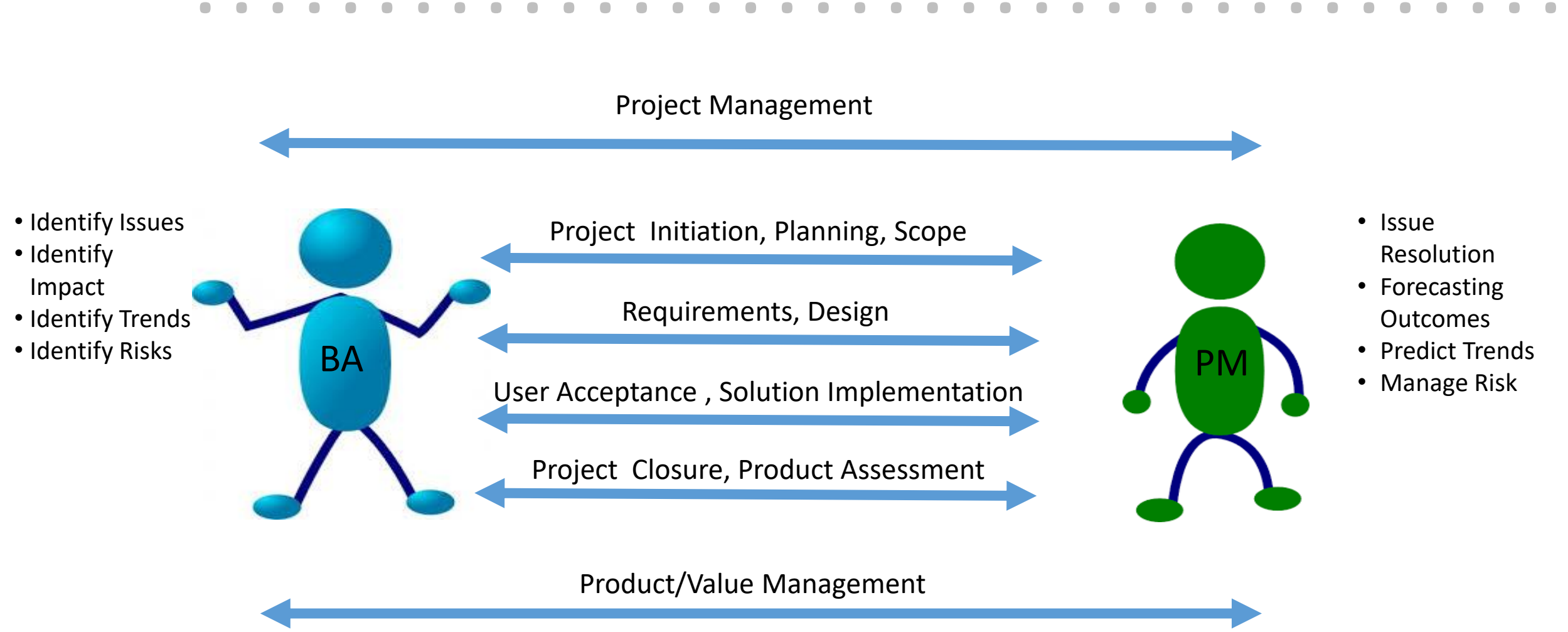
Changing Your Conversation

Identity Crisis



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Talking Point #1

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Talking Point #2

BA: Focus on producing the right solution and delighting the stakeholders

PM: Focus on creating a solution within the parameter of project

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Talking Point #3

BA: I need to identify things that could impact or cause risk to the project

PM: I need to manage things that have been identified as problems or risks.

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Talking Point #4

BA: I need to keep everyone aware of the big picture

PM: I need to manage expectations of everyone involved

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Talking Point #5

BA: I need to make sure all perspective are considered

PM: I need to help drive the final decisions

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Talking Point #6

BA: I need to identify if changes requested bring value & ROI

PM: I need to determine if changes effect the deadline or budget

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Talking Point #7

BA: I need to focus on requirements value management

PM: I need to focus on project management

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Talking Point #8

BA: I need to let my PM know when items out of scope creep in

PM: I need to keep out of scope items contained

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Talking Point #9

BA: I need to make sure we don't sacrifice a MVP or viable solution because of the schedule and budget

PM: I have to manage analysis paralysis and gold plating and find a solution that is realistic*

*Realistic includes something that fits in the budget and timeline

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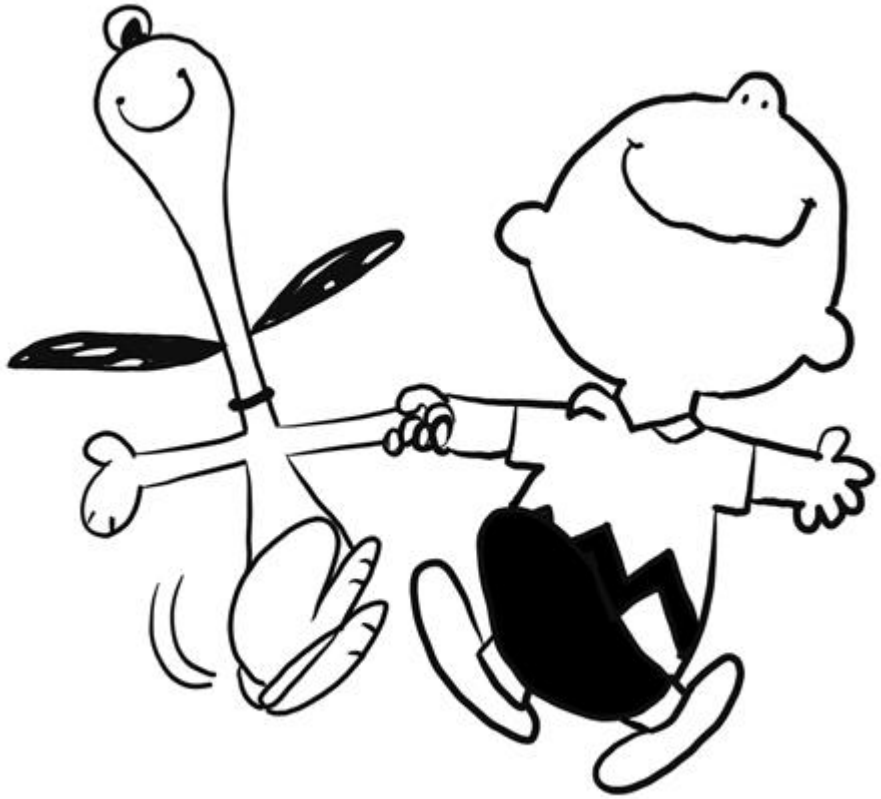
I'm So Glad We Talked!



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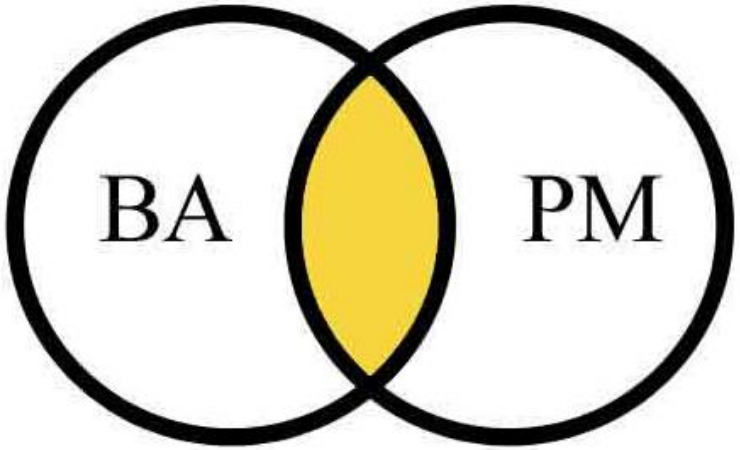
Collaboration

Finding the Common Ground

- Project scope definition
  - Project statement of purpose
  - Project objectives
  - Project business risks



- Stakeholder relationships and communication

- Value Based Solution: goals, requirements, designs & validation

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Guideline to Better Working Relationship

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Guideline to Better Working Relationship

1. Get to know each other
2. Understand and appreciate their role and try it
3. Find out how you can support them
4. Show and tell (transparency)
5. (Retrospect) Talk about what's NOT working

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Three Things in Common

What does the project need?

Finish

Start

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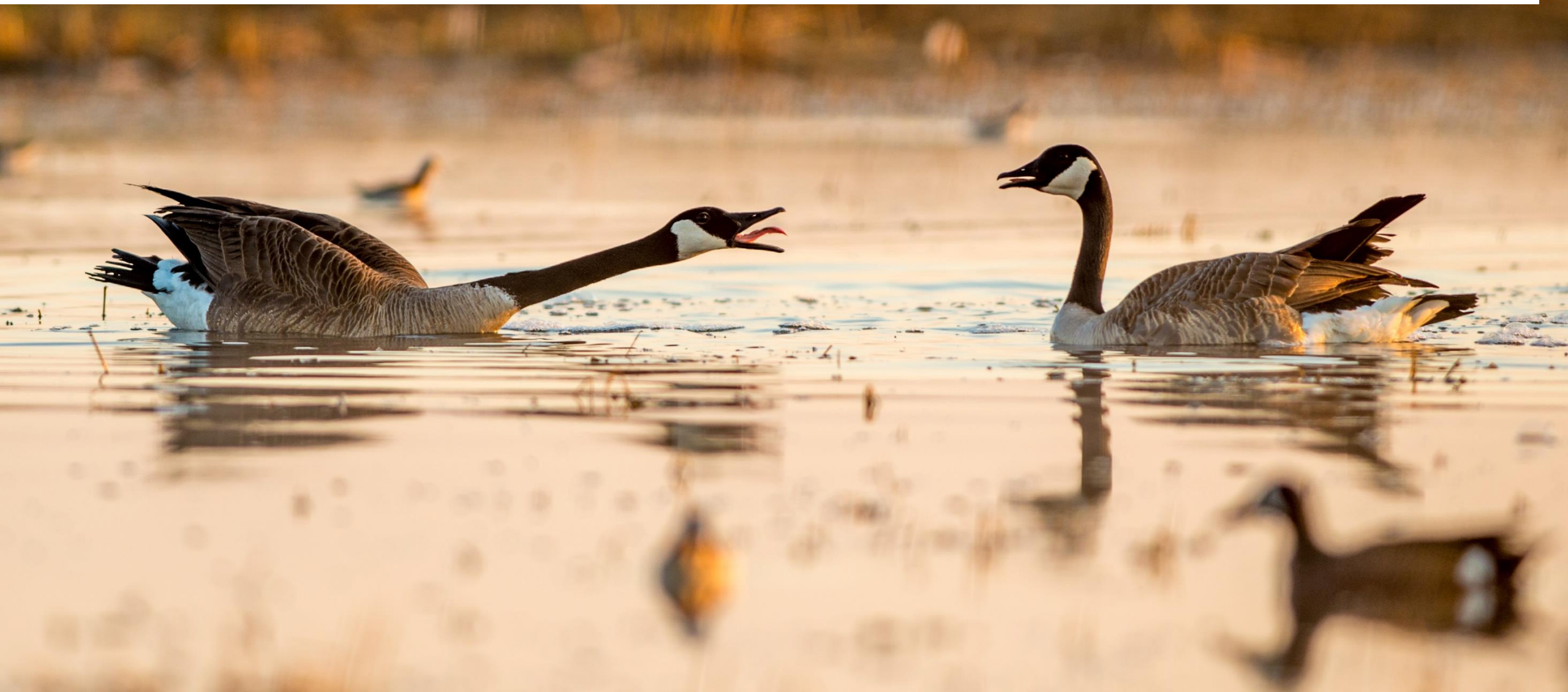
We Are NOT Going To Agree



PM/BA Dual Role

PM/BA Dual Role Challenges

- Be aware of the conflicting focus – only wear one hat at a time
- Be aware that you will most likely prefer one role over the other. Don't let yourself neglect the tasks of the other role
- Make sure that you schedule enough time to adequately perform both roles

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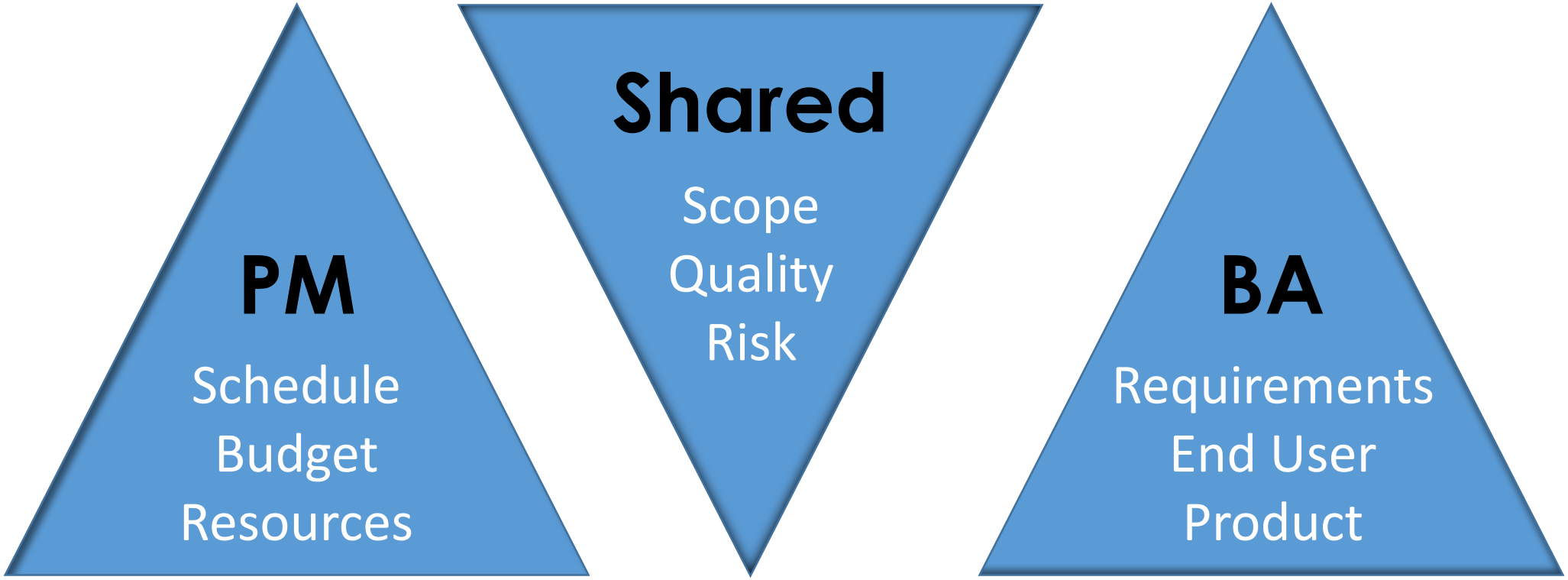
When the PM and BA are one role

Finding the Balance is the Key



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Compare Work

- BA Work (according to PMI-PBA):
  - Needs Assessment
  - Business Analysis Planning
  - Requirements Elicitation and Analysis
  - Traceability and Monitoring
  - Solution Evaluation
- PM Work
  - Initiation the Project
  - Planning the Project
  - Executing the Project
  - Monitoring and Controlling the Project
  - Closing the Project

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Shocking Admission

- Multi-tasking is not effective.
- People do not multi-task. They switch rapidly between areas of focus.

- Let’s Do an Exercise

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Multitasking is an Illusion

If you remember nothing else…

- Focus on the work, not the title
- Teams need to collaborate to come up with the best approach
- The combined role is OK…
  in the right circumstance…
  but recognize the risk

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Questions?

Stay in Touch

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