

The Key Tenets of Business and Process Analysis

BY TOM OSBORN

One of the fundamental questions when conducting business and process analysis is, ‘How do you know you are doing it right?’

Oftentimes, it’s easier to see how you are doing it wrong by the high defect counts, high change request rates, and overall business dissatisfaction. Regardless of the software development lifecycle you follow, the following are a few key principles that will ensure you maximize your team’s effectiveness.



BREADTH BEFORE DEPTH

Analysts and project teams have a tendency to dive into solution details before establishing an understanding of the scope boundaries, or how the problem and resulting solution may impact the organization as a whole. Creating a Business Process Landscape, which depicts the organization on a single piece of paper, can establish an instant starting point that resonates across business, technology, and process leadership. By depicting your business on a single sheet of paper, you are creating the map by which projects will navigate. From a technology perspective, you can leverage this to understand the number of business functions that are supported by different technologies. From a change management perspective, you can leverage this to understand how certain groups are impacted if every project is hitting the same key function.



MODEL THE PROCESS

Process analysis/modeling helps the analyst avoid missing critical questions. A visual process model will provide prompts for questions pertaining

to process decisions, actors and systems, and make missing steps more explicit and noticeable.

Process analysis/modeling helps the stakeholder understand the requirements. By linking requirements to modeled business processes, stakeholders are able to visualize where and how requirements fit from a process perspective. This is much easier for a stakeholder than trying to assemble a mental image of the meaning of dozens of arbitrarily categorized requirements.

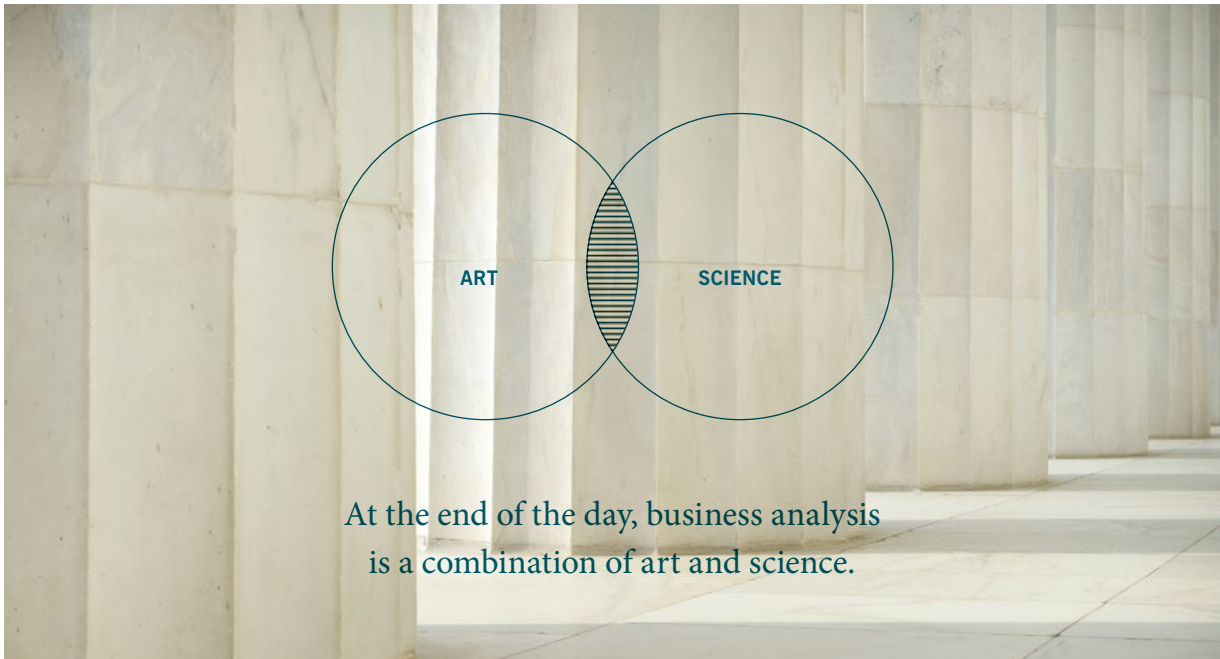
By starting with the business process, you not only understand the key business functions and interactions between groups that need to be analyzed, but also the key decisions that need to be made along the way. This can drive process efficiencies, organization decisions, technology changes, and/or requirements elicitation.



CAST A WIDE NET

The goal of the business analyst is to facilitate conversation between different groups. Traditionally, when people talk about whom to engage, they think of business and IT groups, but these are just two of the groups that could be impacted.

It’s equally important to know when to engage groups. When you are first going through the process flows with a stakeholder group, it may not be the most appropriate time to bring in other groups. There is significant churn, and it is not an effective use of others’ time and will frustrate the other groups. However, as the process flows start to mature and gain traction, it becomes important to involve



members from other organizations to gain their perspectives on touch points, the accuracy of the flows, and key dependencies.

By casting a wider net — especially earlier while discussing process — we can establish an understanding not only of the requirements, but of the reasoning behind them. For example, we often wait to engage some delivery team members and business stakeholders until after requirements have been specified. By not attending requirements working sessions, these critical stakeholders miss out on context and tacit knowledge that doesn't make it into the documentation. Documents recap what was decided (the “what”), but don't provide the valuable insights that come from actually participating in the deliberative process regarding options and tradeoffs (the “why”).

TRACEABILITY

One constant on any project is the inevitability of change. Scope may be added or removed, especially as you discover new data points in the process of conducting your analysis. To effectively manage the change, traceability becomes a critical component. For example, knowing which requirements are related to which process nodes and how they map back to the Business Process Landscape and business scenarios turns an almost impossible task, when the scope changes, into a very manageable task.

Traceability is also very useful for scope management. Every design element, test case, code module must trace back to a requirement and a process. If not, there needs to be some justification.

ESTABLISH A CADENCE AND COURSE CORRECT AS NEEDED

When performing business analysis, oftentimes projects will go from a green to red status in the last week of analysis. The ability for leadership to make the appropriate changes is impossible at that point without impacting schedule. Knowing the steps you need to complete for analysis, the ratio of steps to each other, and the amount of time you have with stakeholders allows you to set a cadence from day one of business analysis. If the group is exceeding this cadence, or, as is more often times the case, not producing the expected volume, you can course correct much earlier and increase the likelihood of maintaining the project schedule.

At the end of the day, business analysis is a combination of art and science. With any methodology, there will be a variance of how each analyst performs his or her tasks. Understanding the key tenets of business analysis helps establish the balance between the art (e.g., how to facilitate a meeting, business acumen, elicitation techniques) and the science (e.g., templates, the methodology steps themselves, KPIs).

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