Plan Business Analysis Approach

Purpose or Need

To define an appropriate method to conduct business analysis activities.

Value

Ensure the efficient performance of all business analysis activities with a stakeholder-supported approach.

Solution

A defined business analysis approach that includes planned activities, tasks, and deliverables.

Techniques

Frequently used techniques:

– *Business Cases;*
– *Financial Analysis;*
– *Functional Decomposition;*
– *Item Tracking;*
– *Risk Analysis and Management.*

*Refer to the **BABOK Guide v3** for the complete list of techniques.*

Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, regulators, and any additional stakeholders identified.

Description of Change

Plan Business Analysis Approach describes the overall method that will be followed when performing business analysis work, what business analysis tasks will be performed, how and when business analysis tasks will be performed, and the business analysis deliverables that will be produced.

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform the inputs into the outputs:

– Business Analysis Performance Assessment from previous initiatives;
– Business Policies;
– Expert Judgment;
– Methodologies and Frameworks;
– Stakeholder Engagement Approach.

Task Inputs and Outputs

Input	Task	Output or Deliverable
Needs	Plan Business Analysis Approach	Business Analysis Approach

Consider...

The Plan Business Analysis Approach provides a plan to follow in business analysis activities.

This task is equally important for an adaptive approach. Shorter-term execution steps are planned and aligned with what needs to be created during each iteration. This means repeating planning activities during each iteration and focusing on near-term delivery goals.

See *Guide to Product Ownership Analysis – Sec 4.3 POA and Agile Planning Horizons*

*Certifications: ECBA, CCBA, CBAP – Refer to the **BABOK® Guide** for study purposes*

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Plan Stakeholder Engagement

Purpose or Need

To plan an approach for establishing and maintaining effective working relationships with the stakeholders.

Value

Understanding who the stakeholders are, the impact of proposed changes on them, and the influence they may have on the change is vital to understanding what needs and expectations must be satisfied by a solution.

Solution

A defined stakeholder engagement approach that includes the list of the stakeholders, their roles and responsibilities, main characteristics, and also a collaboration and communication approach.

Techniques

Frequently used techniques:

– *Document Analysis;*
– *Interviews;*
– *Organizational Modelling;*
– *Scope Modelling;*
– *Stakeholder List, Map, Persona.*

*Refer to the **BABOK Guide v3** for the complete list of techniques.*

Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, customers, and anyone that will impact or be impacted by the initiative.

Description of Change

Plan Stakeholder Engagement describes identifying which stakeholders are relevant to the change, what is their role in the change, what are their main characteristics, what information business analysis professionals need from them, what information they need from business analysis professionals, and the best way to collaborate with them, having in mind their communication needs.

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform the inputs into the outputs:

– Business Analysis Performance Assessment;
– Change Strategy;
– Current State Description.

Task Inputs and Outputs

Input		Task	Output or Deliverable
Business Analysis Approach	Needs	Plan Stakeholder Engagement	Stakeholder Engagement Approach
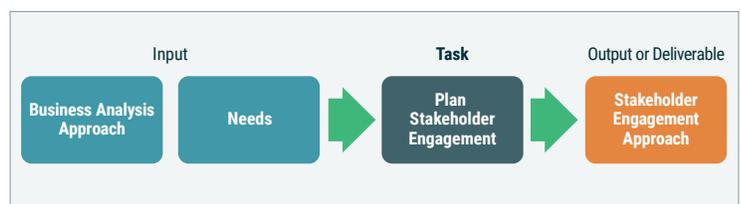
Consider...

Effectively engaging stakeholders is critical for a success.

Example: Consider a business data analytics initiative where data is sourced, assessed, and analyzed to drive key insights. Getting approval for a team's recommendations often depends on how engaged stakeholders have been throughout the process.

See *Guide to Business Data Analytics – 2.1.2 Identify and Understand the Stakeholders*

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Plan Business Analysis Governance

Purpose or Need

To define how decisions are made about requirements and designs, including reviews, change control, approvals, and prioritization.

Value

Clarifying who decides what and when helps ensure that decisions are made properly and consistently during the initiative.

Solution

A defined governance approach that includes the list of decision-makers, a description of the change control, prioritization, and approvals processes.

Techniques

Frequently used techniques:

- *Document Analysis;*
- *Interviews;*
- *Organizational Modelling;*
- *Process Modelling;*
- *Workshops.*

*Refer to the **BABOK Guide v3** for the complete list of techniques.*

Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, regulators, and any additional stakeholders identified.

Description of Change

Plan Business Analysis Governance defines the decision makers, change control process, prioritization approach, approval process, and information required to make a decision. It helps ensure that decisions about requirements and designs are made properly and consistently and follow a process that ensures decision makers have the information they need when they need it.

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform the inputs into the outputs:

- Business Analysis; Performance Assessment;
- Business Policies;
- Current State Description;
- Legal/Regulatory Information.

Task Inputs and Outputs

Input		Task	Output or Deliverable
Business Analysis Approach	Stakeholder Engagement Approach	Plan Business Analysis Governance	Governance Approach
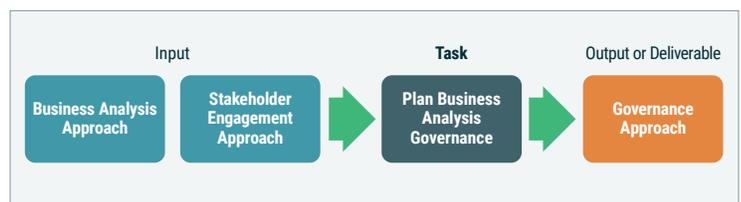
Consider...

Governance processes, practices, and responsibilities are critical for different types of initiatives.

Example: Consider a business intelligence initiative where it's important to promote an enterprise-wide view of information. Supporting this involves developing infrastructure services in the organization, such as data governance and metadata management.

See *BABOK Guide – 11.2 The Business Intelligence Perspective – 11.2.1 Change Scope*

*Certifications: ECBA, CCBA, CBAP – Refer to the **BABOK® Guide** for study purposes*

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Plan Business Analysis Information Management

Purpose or Need

To develop an approach for how business analysis information will be stored and accessed.

Value

Information management helps ensure that business analysis information is organized in a functional and useful manner, is easily accessible to appropriate personnel, and is stored for the necessary length of time.

Solution

A defined information management approach that describes how business analysis information will be stored, accessed, and utilized during and after the change is completed.

Techniques

Frequently used techniques:

- – *Interviews;*
- – *Item Tracking;*
- – *Lessons Learned;*
- – *Mind Mapping;*
- – *Process Modelling.*

*Refer to the **BABOK Guide v3** for the complete list of techniques..*

Stakeholder

Typically involves sponsors, domain subject matter experts, regulators, and any additional stakeholders identified.

Description of Change

Plan Business Analysis Information Management defines how all the information developed by business analysis professionals (including requirements and designs) should be captured, organized, stored, traced, and integrated with other information for long-term use.

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform the inputs into the outputs:

- – Business Analysis;
  Performance Assessment;
- – Business Policies;
- – Information Management Tools;
- – Legal/Regulatory Information.

Task Inputs and Outputs

Input			Task	Output or Deliverable
Business Analysis Approach	Stakeholder Engagement Approach	Governance Approach	Plan Business Analysis Information Management	Information Management Approach
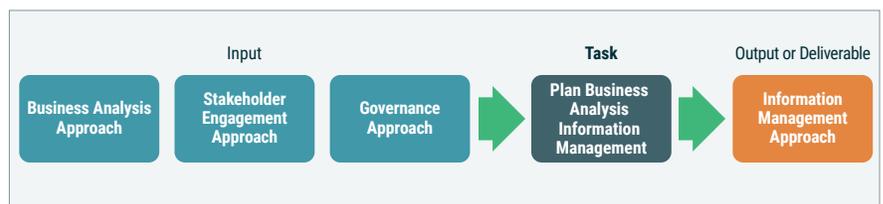
Consider...

Effectively managing information relevant to any change effort is an important element of success.

Example: From redesigning business processes — to ensuring all business data is appropriately referenced and available in the new process — to creating enterprise-level standards around data management.

See *Guide to Business Data Analytics – 2.6.3 Data Strategy*

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Identify Business Analysis Performance Improvements

Purpose or Need

To assess business analysis work and to plan to improve processes where required.

Value

Create opportunities to understand and improve the performance of business analysis processes.

Solution

Business analysis performance assessment that includes the results of the assessment, identified root causes of variances from the expected performance, and proposed approaches to improve performance.

Techniques

Frequently used techniques:

- – *Lessons Learned;*
- – *Metrics and KPIs;*
- – *Process Analysis;*
- – *Process Modelling;*
- – *Root Cause Analysis.*

*Refer to the **BABOK Guide v3** for the complete list of techniques.*

Stakeholder

Typically involves sponsors, project managers, domain subject matter experts, and any additional stakeholders identified.

Description of Change

Identify Business Analysis Performance Improvements describes managing and monitoring how business analysis work is performed to ensure that commitments are met and continuous learning and improvement opportunities are realized.

Reference (Guidelines and Tools)

The following resources, if they exist, can be used to transform the inputs into the outputs:

- – Organizational Performance Standards.

Task Inputs and Outputs

Input		Task	Output or Deliverable
Business Analysis Approach	Performance Objectives (External)	Identify Business Analysis Performance Improvements	Business Analysis Performance Assessment
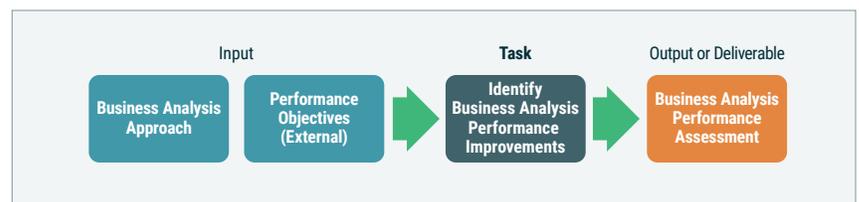
Consider...

Improving the process of how outcomes are created is a mainstay of adaptive approaches and is equally important for predictive and hybrid approaches. Change should only ever be embarked on, to add value. To ensure value, the performance of the Business Analysis efforts needs to be measured.

Example: Constantly looking for ways to improve both individual and team performance allows teams to create greater value, faster.

See *Guide to Product Ownership Analysis – 5.7.2 Optimize Value Delivery*

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