

3

BUSINESS ANALYSIS PLANNING

3.1 Overview of this Section

Within business analysis, planning consists of the activities that are performed in order to ensure that the optimal business analysis approach is selected for the project and that:

- Stakeholders are thoroughly identified and analyzed;
- Business analysis activities and deliverables are defined and agreed to;
- Processes that will be used for validating, verifying, and approving requirements and solutions are acceptable to key stakeholders;
- The process for proposing changes to requirements is defined and understood; and
- Key stakeholders are aware of and support the activities and time commitments required to complete the requirements effort.

The business analysis approach is simply the method the business analyst uses when managing and performing the business analysis activities on the project. As described later in this section, the approach is described within the business analysis plan.

How business analysis planning is conducted is heavily dependent on the selected project life cycle; therefore when a planning activity is performed differently across life cycles or not performed at all, the differences are noted in this section. There is no one approach to business analysis planning that will work for every project, so ultimately the business analyst should understand the context and project characteristics enough to ensure the planning activities are sufficiently sized for the situation.

This section describes the important things one needs to think about when defining the business analysis approach. The level of thought described in this section applies to all programs and projects whether it is performed all at once at the forefront of the project or throughout the project, regardless of the degree of formality used to document the business analysis plan.

3.2 The Importance of Business Analysis Planning

Planning the business analysis work is critical for project success. When business analysis planning is bypassed, it is difficult to understand the scope of work, stakeholder's expectations, and the appropriate amount and level of business analysis required for the project. This in turn makes the estimation process difficult and can result in unrealistic expectations by those involved in the requirements-related activities. Business analysts who begin

elicitation sessions without a well thought out roadmap of how they will address the work will often find themselves pressed for time and rushing through activities to meet a schedule to the detriment of the project.

3.2.1 Rationale

Because requirements are the foundation from which the project is based and a key contributor to project success, the sponsor and project manager should ensure that a sufficient level of business analysis planning is conducted. Many projects are initiated with tight timelines that place pressure to address the tactical activities before the plan. The project team should avoid the urge to rush into requirements elicitation without first understanding the expectations for the business analysis process and the roadmap for pursuing the work.

Business analysis planning achieves the following:

- Sets expectations with the sponsor, project team, and key stakeholders as to the business analysis activities that will be performed;
- Ensures that roles are identified, understood, and communicated to everyone participating in the business analysis process;
- Achieves buy-in and support for the business analysis process before work begins;
- Provides context to support estimation of the business analysis activities; and
- Produces a more efficiently run business analysis process, because activities are not missed or excessively performed.

While planning provides many benefits and reduces a number of requirements-related risks, planning work should be judiciously performed to ensure the process is not too heavy or formal for the needs of the program or project. It may not be necessary or advisable to plan entirely up-front and in great detail on every type of program or project. When using a predictive life cycle, planning is performed up-front prior to elicitation. In adaptive life cycles, some planning is performed up-front and plans are adapted or evolve over the course of the program or project. Too much planning can be counterproductive, therefore the business analyst needs to plan a sufficient level of detail to address the specific needs of the project such as the size, complexity, and risk level.

3.2.2 Business Analysis Planning and Project Management Planning

Business analysis is a critical portion of the overall project activities. The work involved to perform a successful business analysis process is detailed and the number of activities conducted can be quite extensive. Program and project success is dependent on adequate business analysis; therefore, attention should be given to ensure that activities are well thought out and meet the needs of the program or project and the stakeholders.

Business analysis planning and scheduling is not performed independent of project management scheduling activities. It is a best practice to have the project manager and business analyst working closely together while the business analysis approach and plan is formulated. Business analysts will develop a work plan to cover the activities they are responsible for performing; however, the work plan should be integrated into the overall project management plan managed by the project manager.

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