2: UNDERSTANDING PROJECT WORK AND THE PEOPLE INVOLVED

Stephen Salvia

PROJECT work
As IS
• What is a **requirement**

• How would you document one?

“A requirement is a condition or capability needed by a stakeholder to solve a problem or achieve an objective” IIBA Business Analysis Body of Knowledge (BABOK)
What is the best way to document a requirement?

a) A sentence (“The system shall...”)
b) A structured sentence (as in a business rule)
c) A structured text template
d) A table or spreadsheet (list of stakeholders)
e) A diagram (workflow)
f) A model (ERD)
g) A prototype or simulation
h) A graph
What are the **core requirement** components
Core Requirement Components

- Business Rules
  - Data (Attributes Entities)
  - Processes (or Use Cases)
  - External Agents (or Actors)
Core Requirement Components

**Actors/Agents:** individuals, departments, business areas or systems inside or outside the organization

**Data:** is information

People, Products, Locations and the information about them

**Processes:** automated or manual activities

**Business rules:** guidelines, constrains or policies governing the actor/agents, data and process
Exercise: As a team discuss and identify the Core Requirements for a Grocery Store:

- External Agents
- Processes
- Data
- Business rules.

Give examples of each and how they relate to each other.
Grocery Store Example

Data:
- Products for sale
- Prices
- Inventory
- Tax rate

Processes:
- Order from suppliers
- Sell to customers
- Calculate total order

External Agents:
- Supplier
- Customer
- Government
DESIGN INQUIRY / 5 questions to answer:

1. what inspired you (good or bad)
2. who are the affected stakeholders
3. what are their unmet needs + why are they important
4. what is your solution
5. what resources do you need to create and sustain your solution
Projects vs. Operations

• What is a project

• What differentiates a project from other operational work activities?
Project vs Operations

1. Temporary endeavor
2. Specific start and completion dates
3. Undertaken to create a unique product or service which brings about beneficial change or added value.

What are the implications?
• Outside the current state
• Need to bring it to a conclusion at some point
• Money being invested toward some end
• People know if they ignore you, you might go away

Operations is work done to sustain the business
• What is a **product**
  – A product is the result of a project.

• What is a **solution**
  – A solution “meets a business need, by solving problems or allowing an organization to take advantage of an opportunity.” (IIBA BABOK) Does not always involve computer system!

• What is a **deliverable**
  – Anything given or presented to a stakeholder because it has some value to the stakeholder or the stakeholder is expected to act upon it.
PEOPLE + roles
Who are the affected stakeholders

or

Who are the people who have something to gain or lose because of your project?
What is a Stakeholder?

“Persons and organizations actively involved in the project or whose interests may be positively or negatively affected by the execution or completion of the project.”
• As a Business Analyst (BA), how many of these stakeholders work for you?

• If they don’t work for you, how do you get them to do what you need them to do? After all, they all have their regular job to do too.
Project roles
• What is a “Project Sponsor”?  
  – He/she is the “boss” of the project. Ultimate decision maker.

• What is the project sponsor’s roles and responsibilities?  
  – Secured funding and has specific objectives for that funding.
  – Sponsor determines success/failure of the project.
  – Do you know what motivates your sponsor, their personal biases, their areas of expertise and personal experiences?
  – Sponsors remove barriers to the success of the project.

• How do you communicate with the sponsor?  
  – Brief, focused, to the point – 1 page status reports, dashboards, and executive summaries
• **What is a “Project Manager”?**
  – usually first person assigned to project
  – responsible for planning the project and ensuring team follows the plan

• **What is the project manager’s roles and responsibilities?**
  – manages changes, handles problems, keeps project moving
  – MANAGES PEOPLE, MONEY, RISK AND PROJECT SCOPE
  – chief communicator to sponsor and management
  – helps clear obstacles

• **Can the BA also be the PM?**
  – PM is more of director than BA is. – directs team, gives assignments, makes sure people working on tasks – requires STRONG MANAGEMENT SKILLS
  – BA more focused on listening and analyzing – requires STRONG INVESTIGATIVE SKILLS
• What is a subject matter expert (SME)?
  – Managers manage people but they may not always know in detail exactly what their people do or how processes are performed. Do they seem to know area? Generalities v exceptions, specific work flows, etc.
  – If this happens, discuss with your PM. Give the manager, “an out”...”I know that you are very busy running the department and that your time is tight, would you like me to work with one of your key people on this project? If insist on being the SME, don’t embarrass, take information, check it with others,

• What makes an SME an expert?
  – Experts are a precious resource in a department. Don’t be surprised if they assign a person who is not an expert. Diagnose: Clueless or just new? If former discuss with your PM. If later, as who they talk to – suggest working together to build expertise. If there are problems, quietly and diplomatically escalate.

• Is the manager of a department always an expert on what goes on in their department?
  – Speak with others in the department to validate the information you are getting.
• What are other technical roles
  IT Architect
  IT Developer
  Data Administrator/Architect/Analyst
Who is important to the Project

Understand your stakeholders - including their motives, personal biases, expertise, and experiences!
Exercise:
Warehouse stakeholder case
Read the case

Work with your team

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Review your notes and:

Identify all the stakeholders associated with this project and explain why you think they are a stakeholder.

Identify the subject matter experts associated with this project and explain why you think they are SME’s.

What further questions would you ask each stakeholder and SME?
Consider:
Who are your stakeholders?
Ask yourself:
Are they the stakeholders for YOUR project?
Common Stakeholder Mistakes

• Company stakeholders are not likely to be project stakeholders (closeness to the project)
• *Roles* are as likely stakeholders as *individuals* but often forgotten
• SME’s probably are stakeholders if they are assigned to the project from the organization. *You can be both!*
• Lower level roles in the organization are often missed
• Groups that interact with the organization are often missed
Stakeholder Analysis: **Template**

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Roles</th>
<th>Responsibilities</th>
<th>Interest</th>
<th>Success Criteria</th>
<th>Concerns</th>
<th>Technical Proficiency/Work Environment Constraints</th>
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See pages 62-63 in Memory Jogger
# Core Requirements Template

<table>
<thead>
<tr>
<th>External Agents / Actors</th>
<th>Process / Use cases</th>
<th>Data - Entities and Attributes</th>
<th>Business Rules</th>
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Individual Challenge:

JustinMind Prototype
Due Class 3, May 19, 2015

JustinMind Introduction Lab