#StratExLive

The Business Analyst Catalyst

The Role of the BA in Today's Business World

TWENTYEIGHTY™ Strategy Execution

FORMERLY IPS LEARNING & ESI INTERNATIONAL

©2016 **TWENTY**EIGHTY Strategy Execution. All Rights Reserved.

MODERN analyst .com

©2016 TWENTYEIGHTY Strategy Execution. All Rights Reserved.

#StratExLive

TwentyEighty Strategy Execution

COURSES

Over 100 standard, project-focused courses with customized options available:

- Project / Program / Portfolio Mgmt.
- Business Analysis
- Contract / Vendor Mgmt.
- Agile
- Project Leadership

CERTIFICATIONS

19 professional certifications offered across disciplines through renowned educational partners

- Over 2.85 million professionals trained
- 30+ years of global client successes across industries

ADAVANCED CURRICULUM

Advanced Project Management program available

- 65,000 students and 7,700 certifications awarded since 2000

PARTNERS

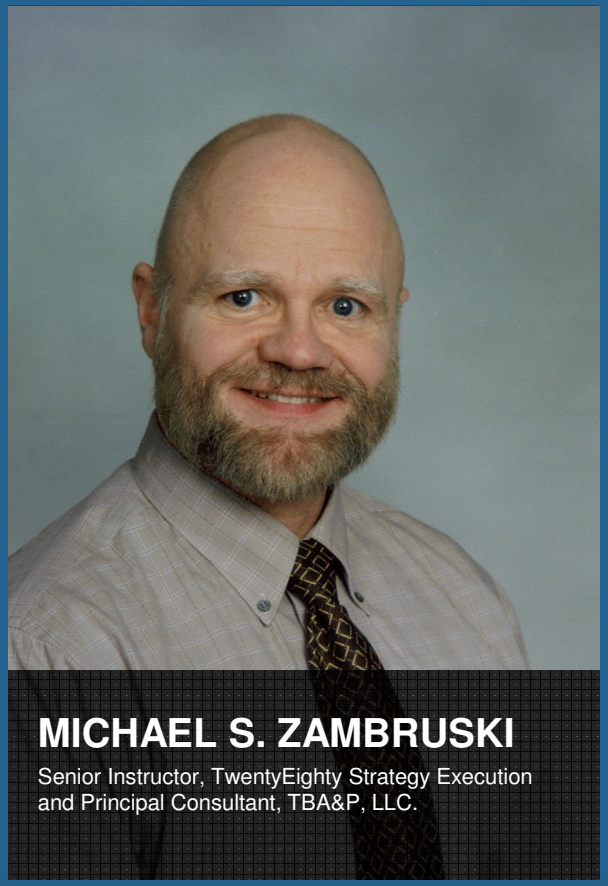
Key organizational partners: Project Management Institute (PMI), International Institute of Business Analysis (IIBA), National Contract Management Association (NCMA), Prince2

WAYS TO LEARN

Learning modalities include: public classroom, e-training, virtual instructor-led training, on-site training at client organizations, learning on demand modules and workshops

TWENTYEIGHTY Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

©2016 TWENTYEIGHTY Strategy Execution. All Rights Reserved.



MICHAEL S. ZAMBRUSKI

Senior Instructor, TwentyEighty Strategy Execution and Principal Consultant, TBA&P, LLC.

Your Presenter

Michael S. Zambruski is a senior trainer and consultant with more than 30 years of experience providing strategic planning, comprehensive business analysis, and complex program and project management coaching to multibillion dollar international firms, small fast-growing companies, and entrepreneurs.

Michael is a published author of two books, “The Business Analyzer & Planner” and “A Standard for Enterprise Project Management”, and has published articles that include “Steering Strategy to Success” (Project Summit & BA World, 2015), “The Enterprise Triple Constraint” (PMI and IIBA, 2014), “Understanding and Practicing Project Management as Part of a Business Continuum” (Project Summit & BA World, 2009), and “From Chaos to Order” (NASA, 2005).

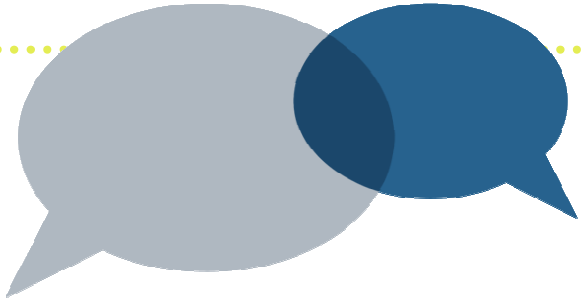
Michael is a certified Project Management Professional (PMP®) and Certified Business Analysis Professional (CBAP®). He holds the Advanced Master’s Certificate in Project Management and the Professional Certificate in Business Analysis from George Washington University. Michael earned an M.B.A. from Southern Illinois University and a Bachelor of Science from Georgetown University. He is also a member of the Project Management Institute, International Institute of Business Analysis, and the Business Relationship Management Institute.

©2016 TWENTYEIGHTY Strategy Execution. All Rights Reserved.

The Context

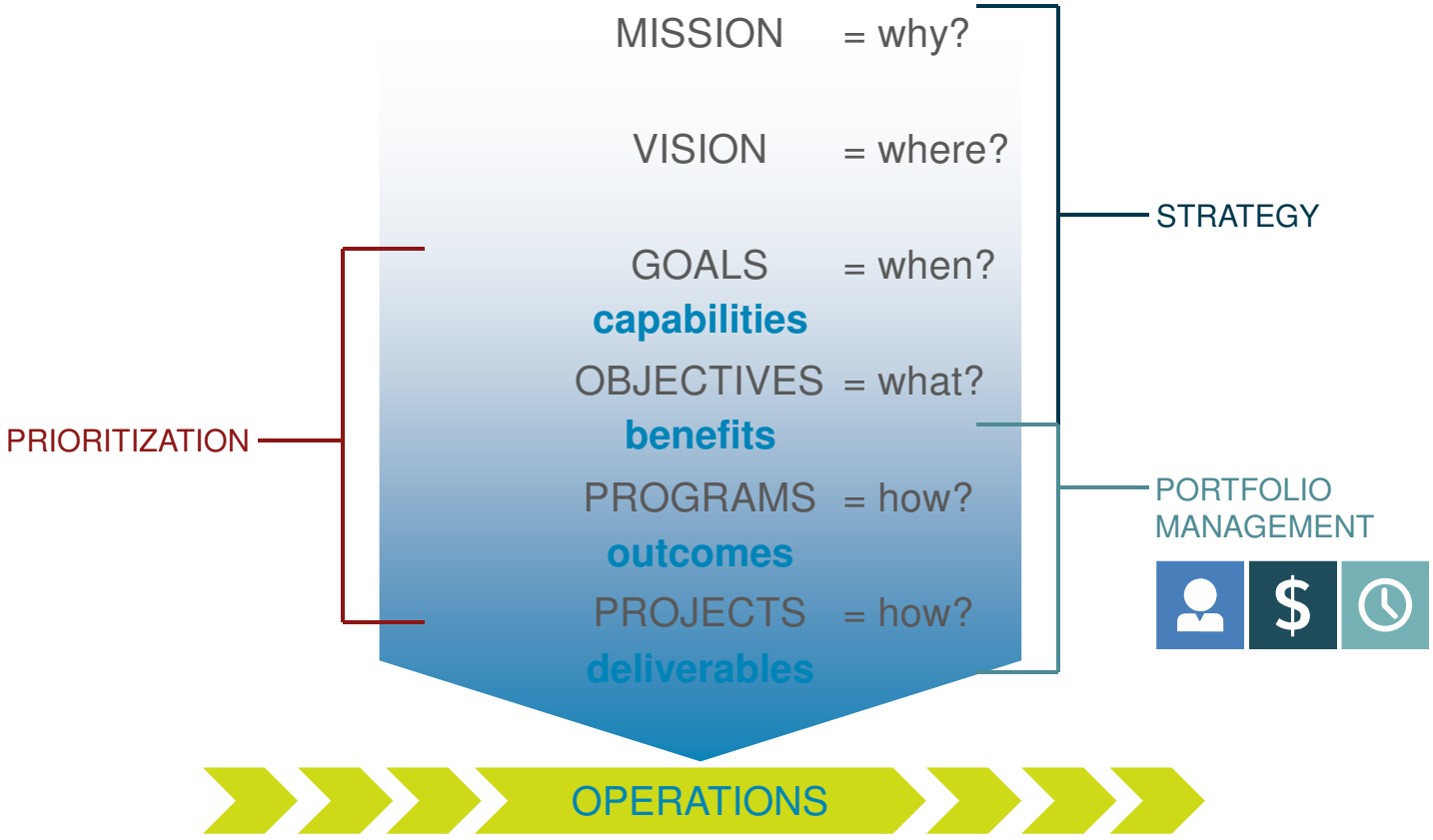
The Role

The Application



The Context

How Dreams Become Reality…

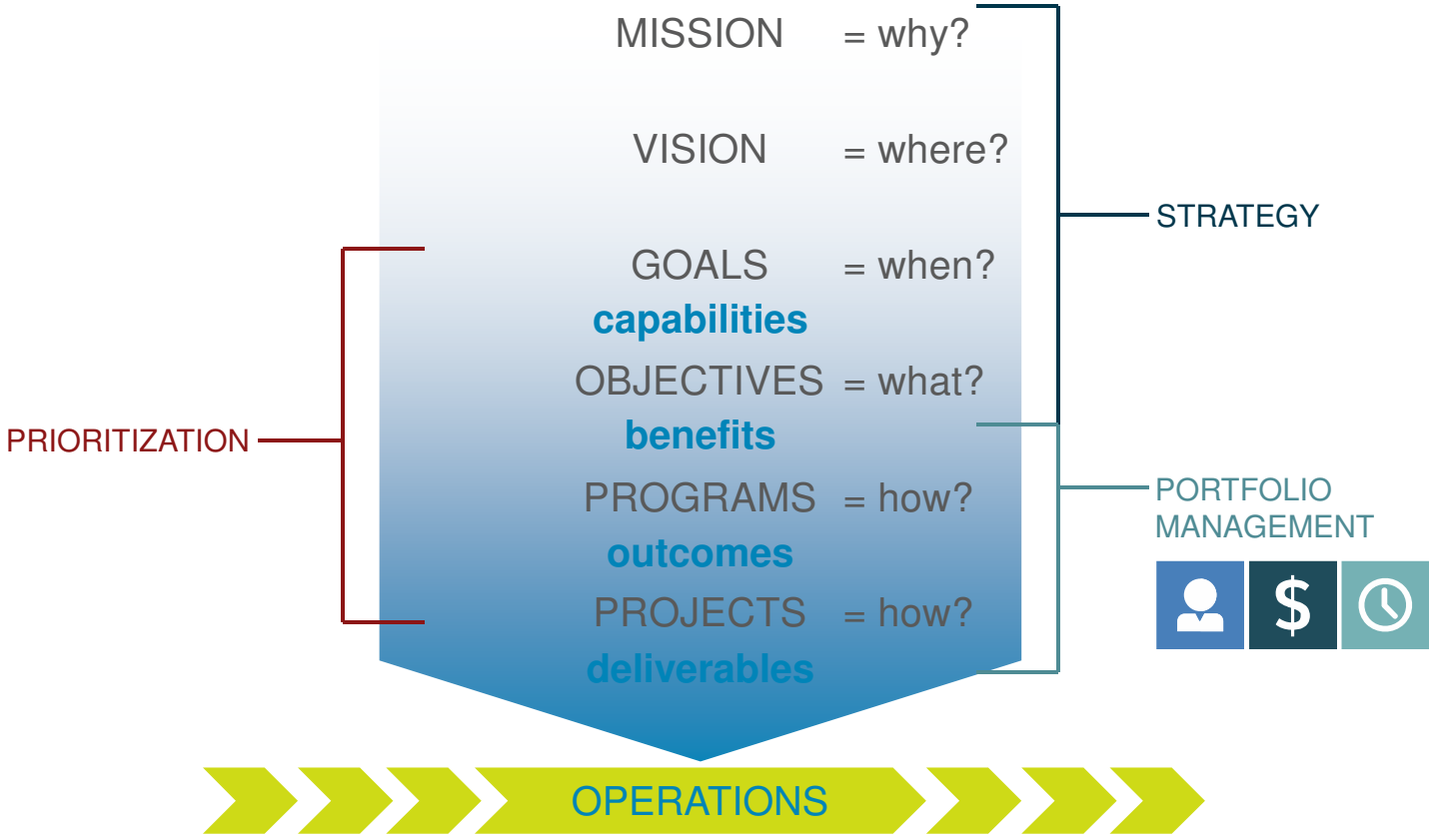


TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

How Dreams Become Reality…

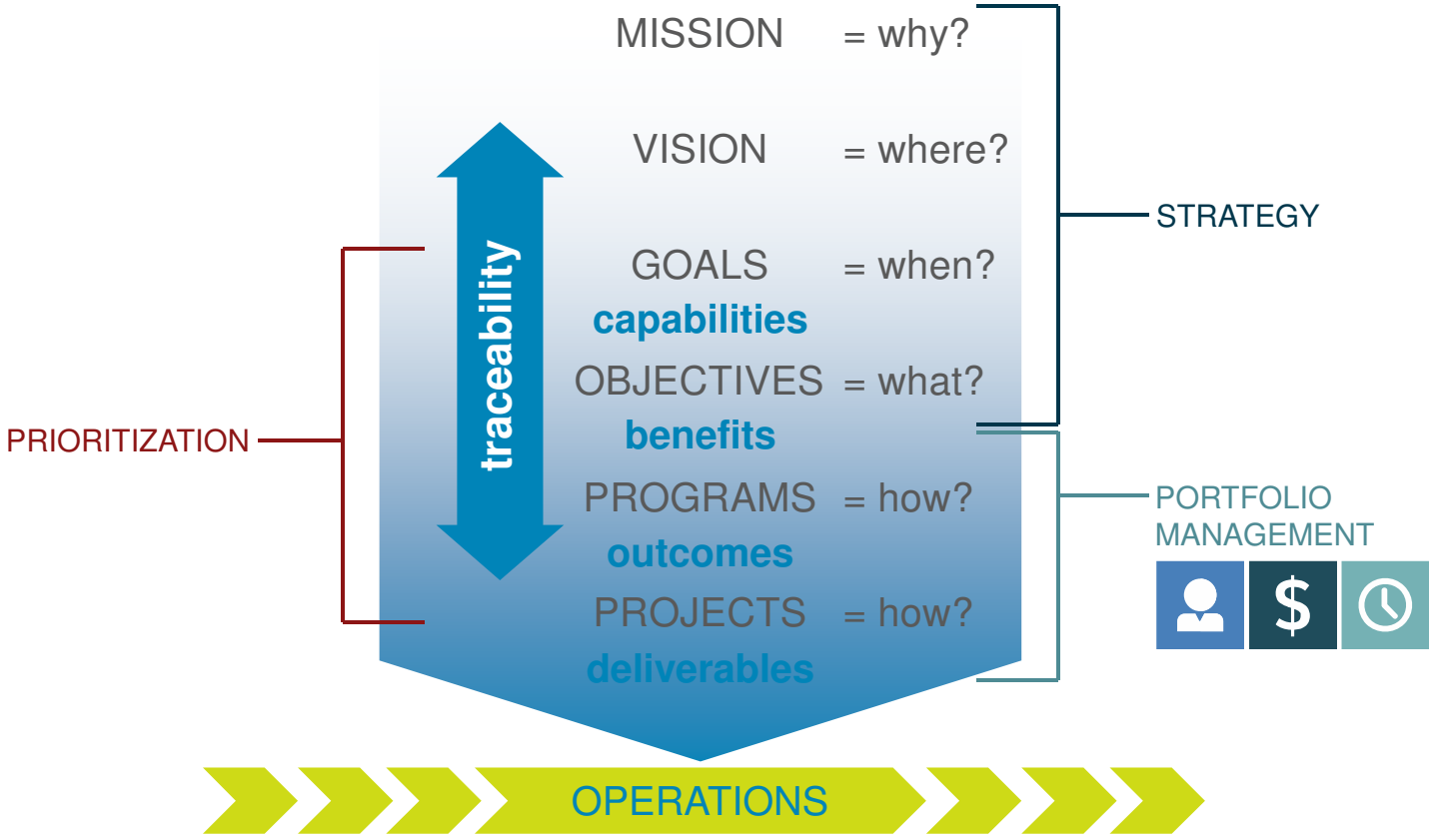
with the **traceability** provided by careful, comprehensive **business analysis.**



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

How Dreams Become Reality… with the **traceability** provided by careful, comprehensive **business analysis.**



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

The **Enterprise Triple Constraint**: the **Context** of Business Analysis

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

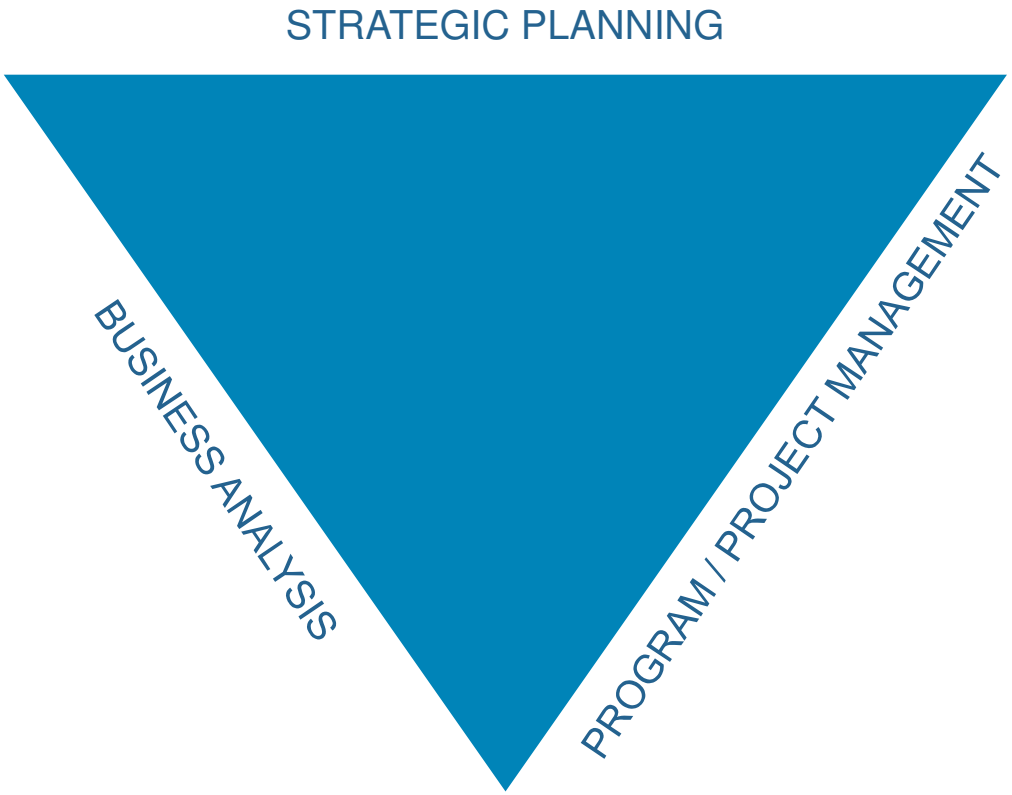
Each element of **The Enterprise Triple Constraint** is equally critical for success:

...without **strategic planning**, both business analysis and project management become orphans, and success is elusive at best;

...without **business analysis**, transforming the strategy into actionable scope becomes a process of trial and error – risky and expensive;

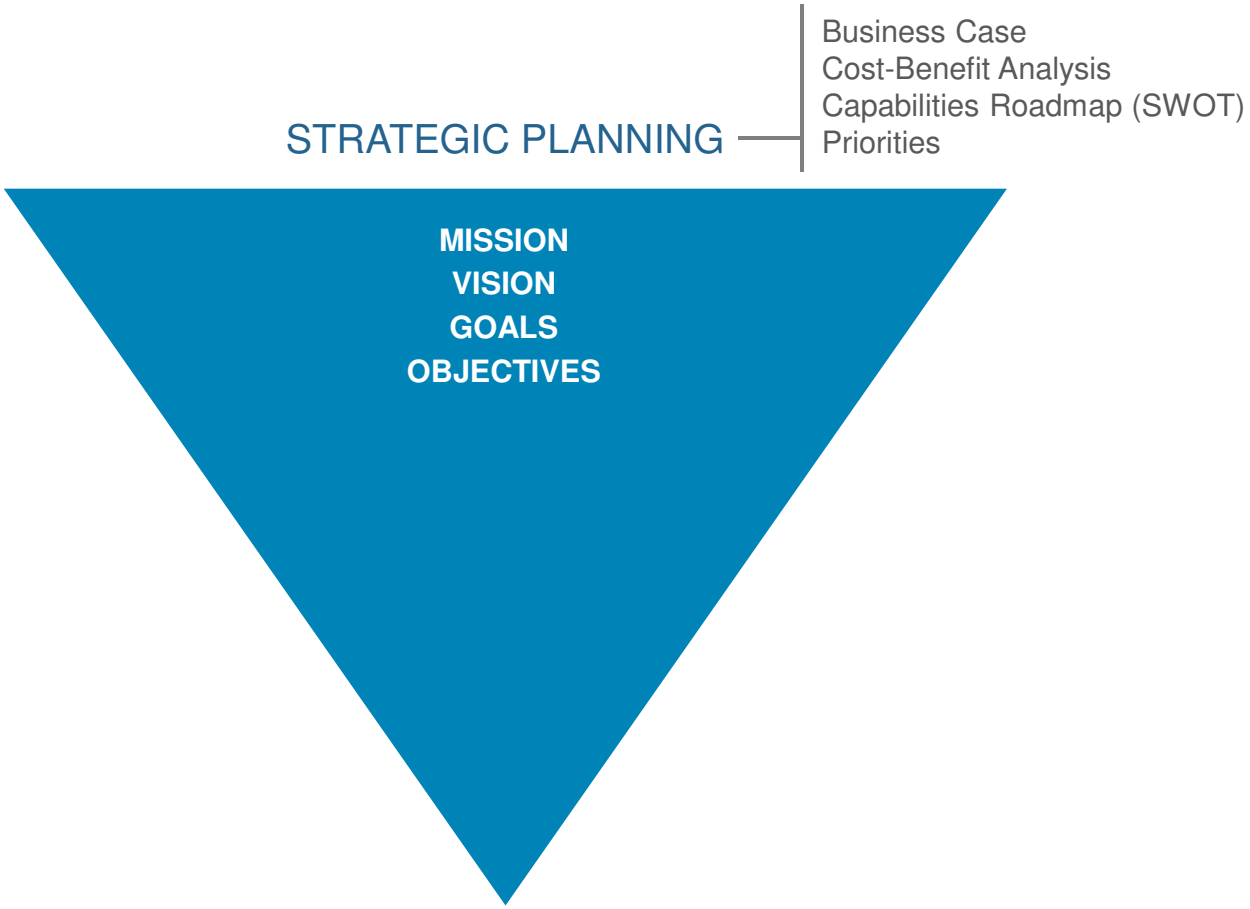
...without mature **project management**, both strategic planning and business analysis become academic exercises.

Copyright © 2015 Michael S. Zambruski



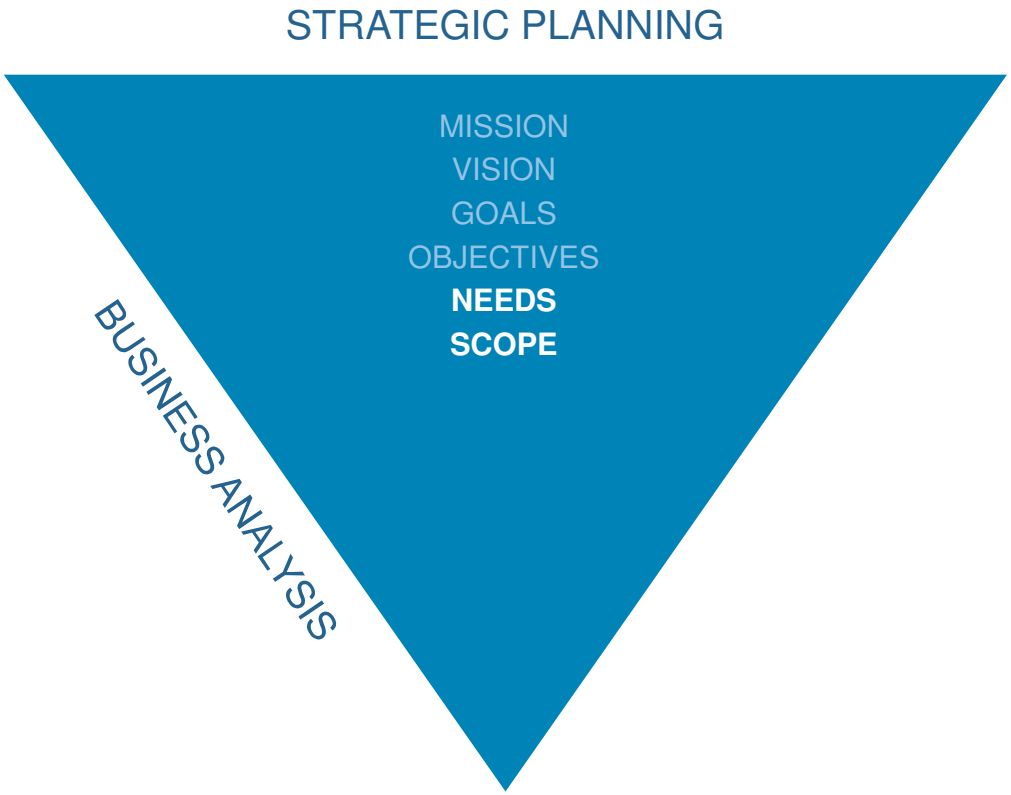
TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski


STRATEGIC PLANNING
MISSION
VISION
GOALS
OBJECTIVES
NEEDS
SCOPE
BUSINESS ANALYSIS

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

Copyright © 2015 Michael S. Zambruski

Copyright © 2015 Michael S. Zambruski

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

The Role of the BA

TWENTYEIGHTY℠
Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

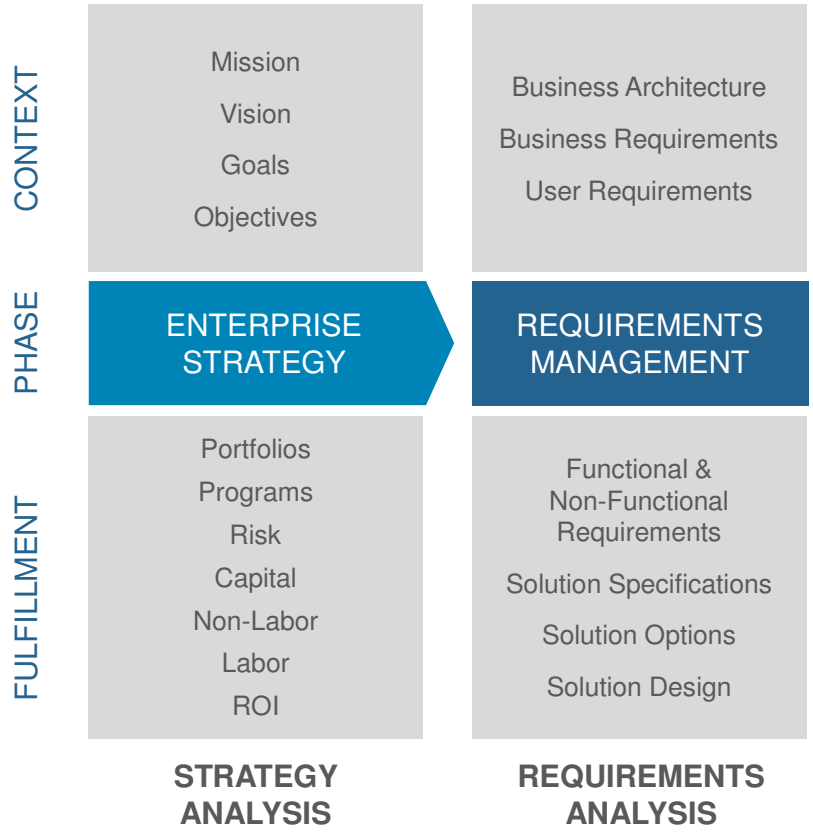
The **Building Blocks** of Strategy Execution

The **Building Blocks** of Strategy Execution

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

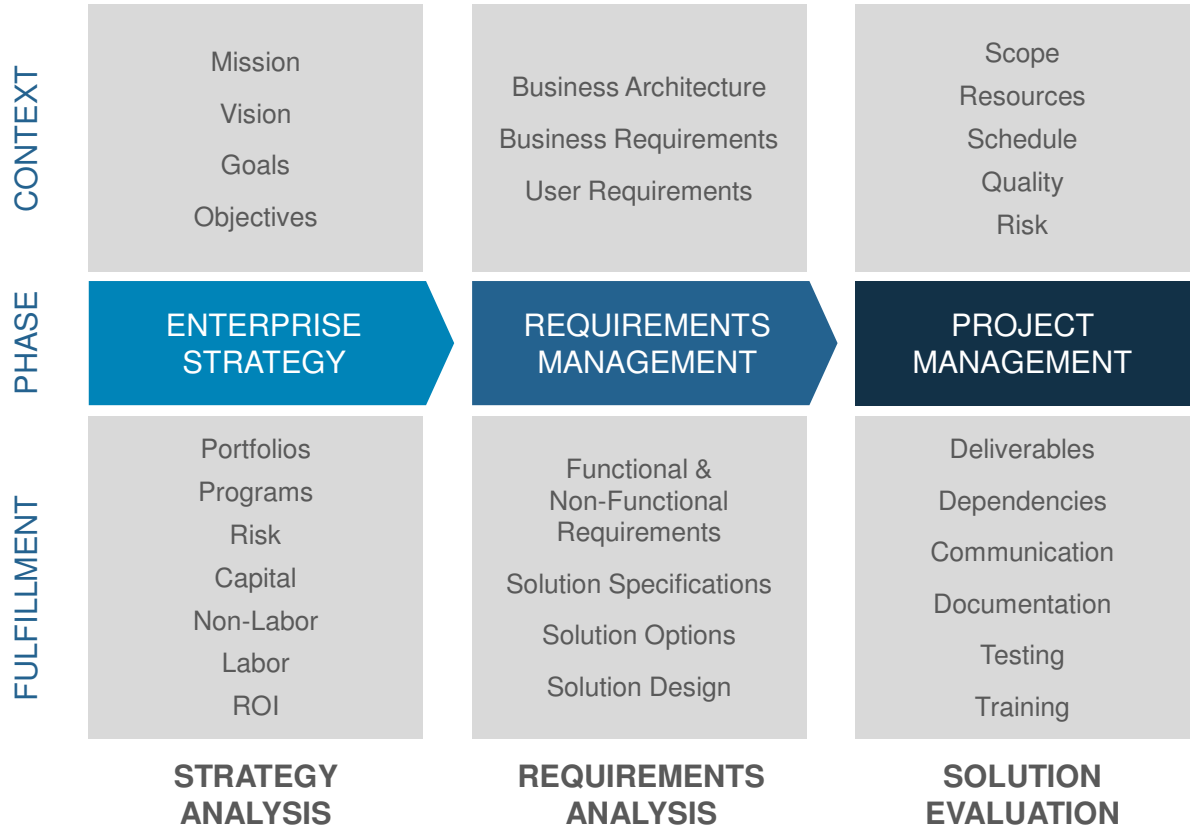
Copyright © 2009 Michael S. Zambruski

The **Building Blocks** of Strategy Execution



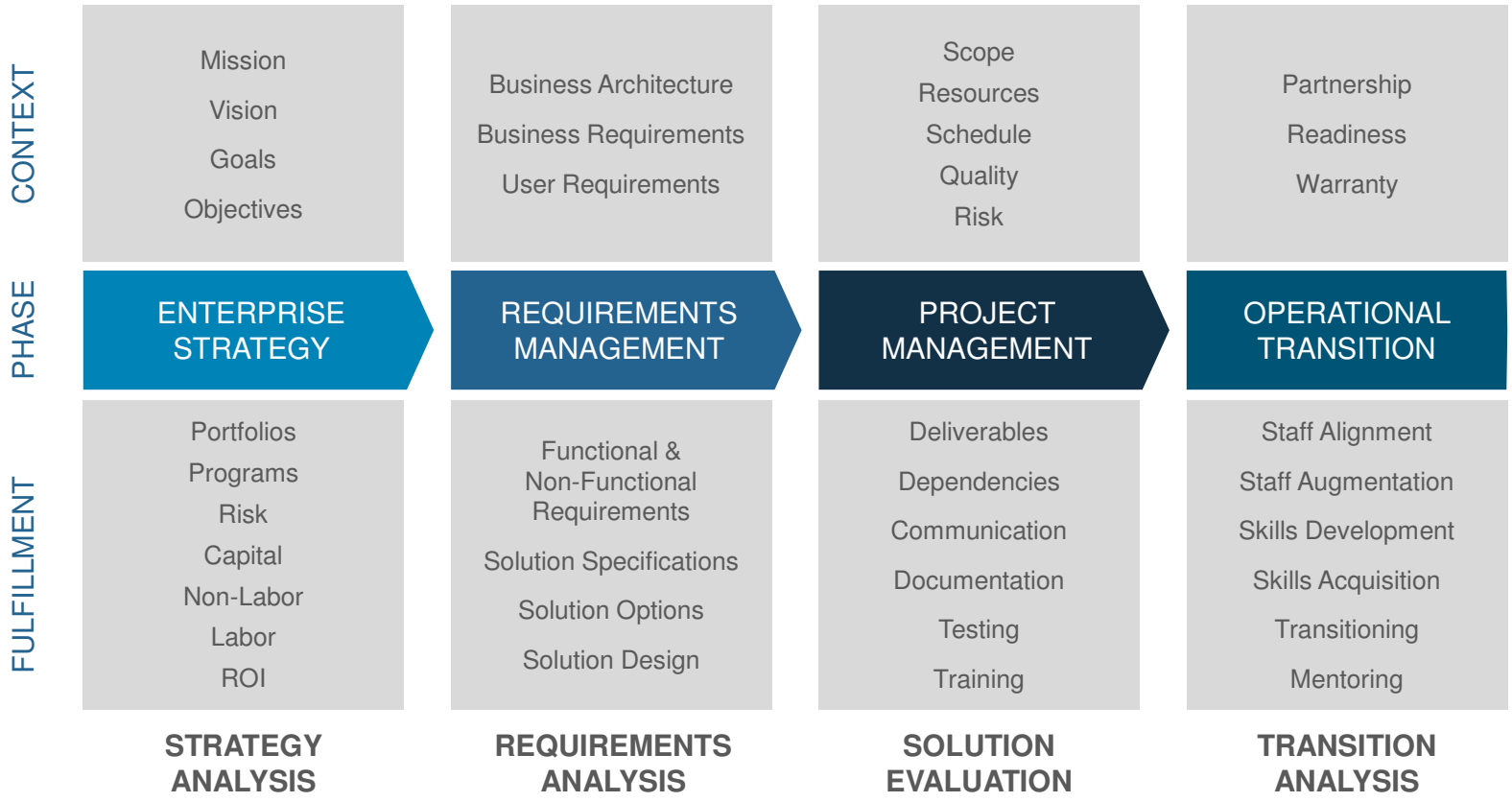
Copyright © 2009 Michael S. Zambruski

The **Building Blocks** of Strategy Execution



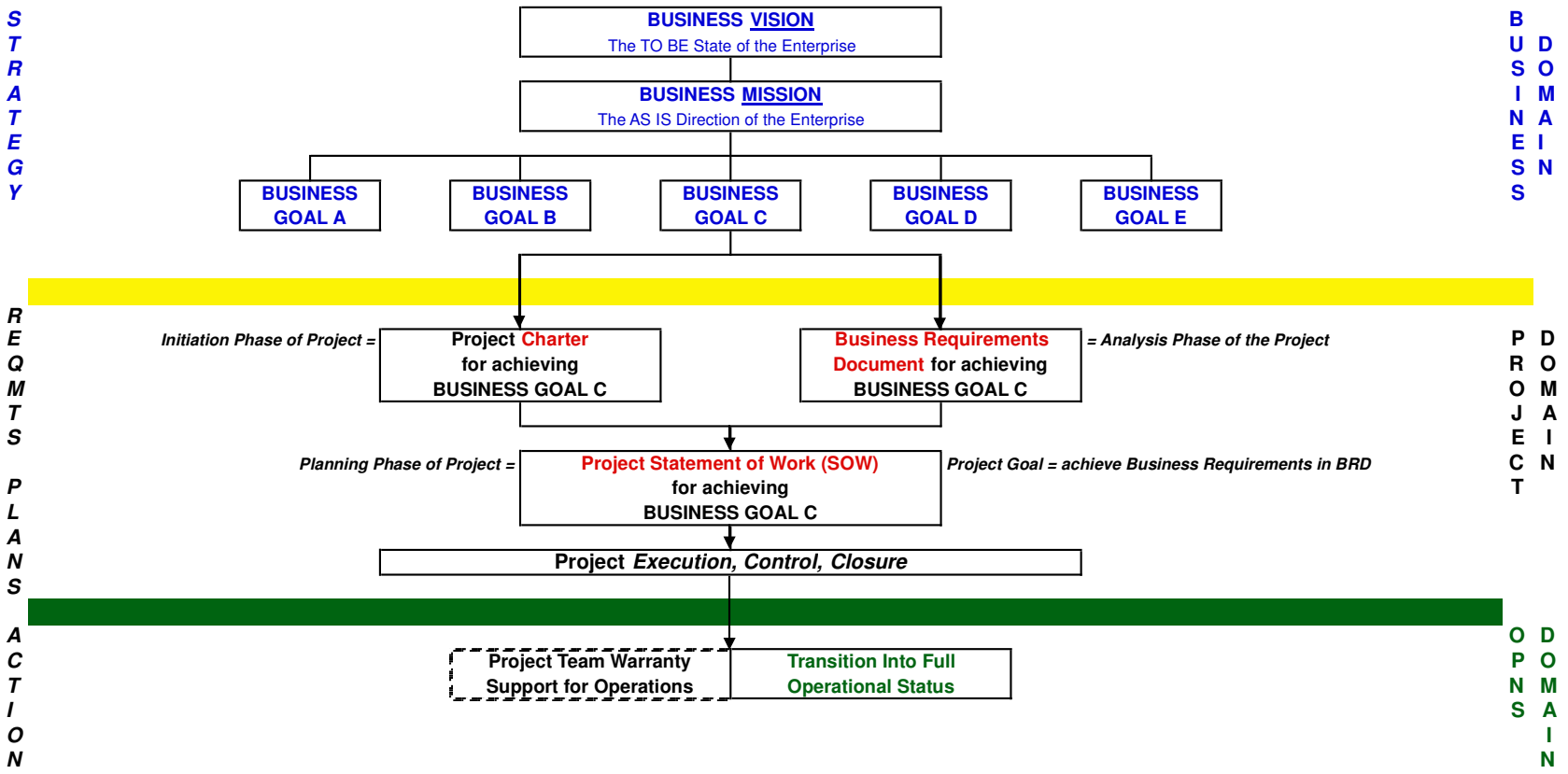
Copyright © 2009 Michael S. Zambruski

The **Building Blocks** of Strategy Execution



Copyright © 2009 Michael S. Zambruski

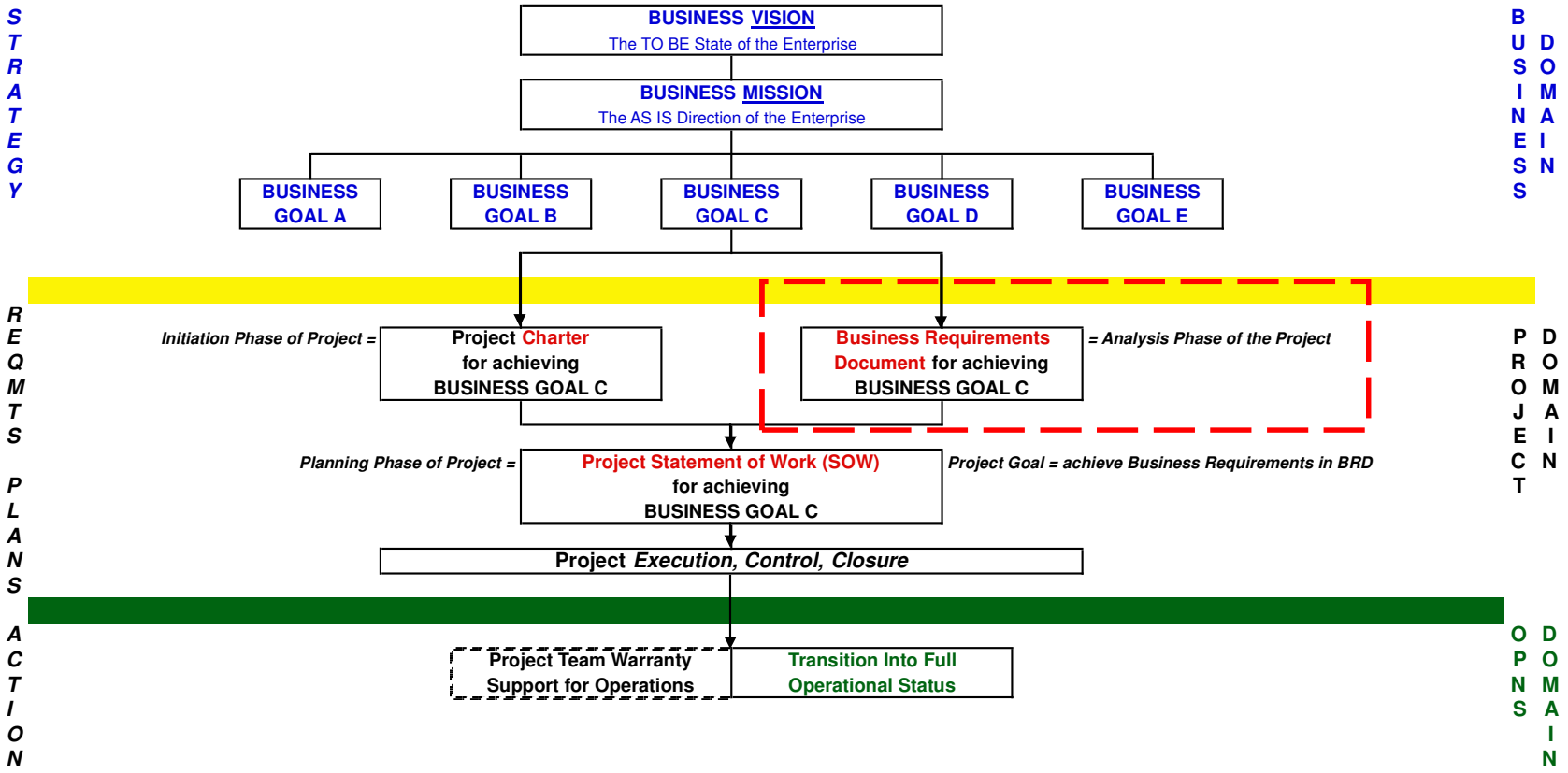
The Blueprint of Strategy – Business Analysis – Project Management



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

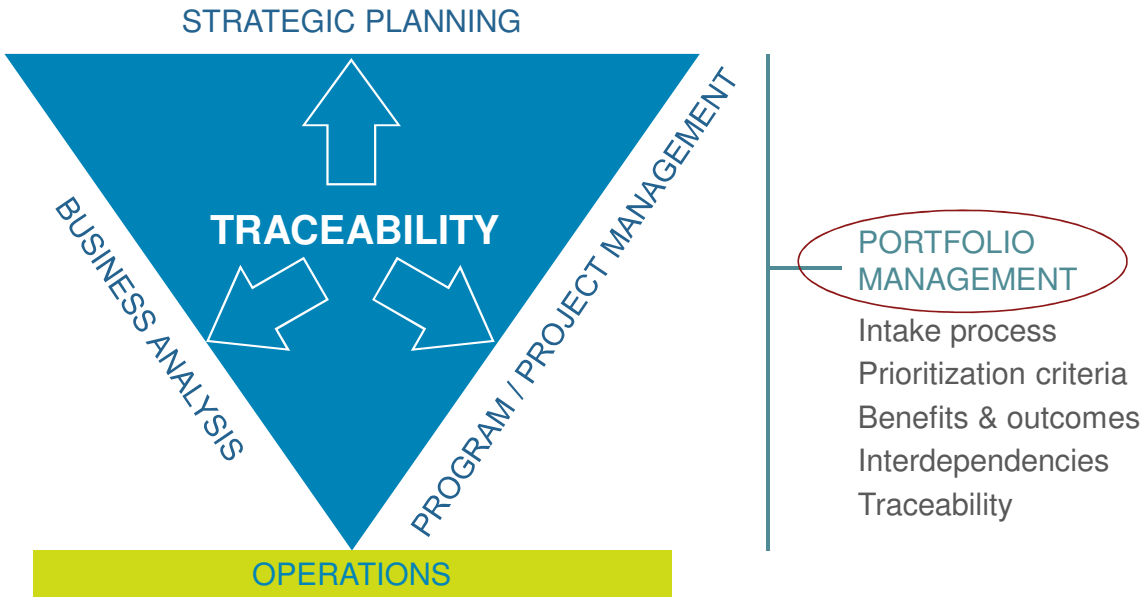
Copyright © 2015 Michael S. Zambruski

The Blueprint of Strategy – Business Analysis – Project Management



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski



Portfolio management refers to oversight of all discretionary initiatives that are underway or under consideration by the enterprise. It focuses on the following questions:

1. What projects and programs **ARE** we working on?
2. What projects and programs **SHOULD** we be working on?
3. Do any projects relate to each other, such that they be managed as a **PROGRAM**?
4. Is every project in a portfolio supporting one or more **STRATEGIC GOALS**?

Copyright © 2015 Michael S. Zambruski

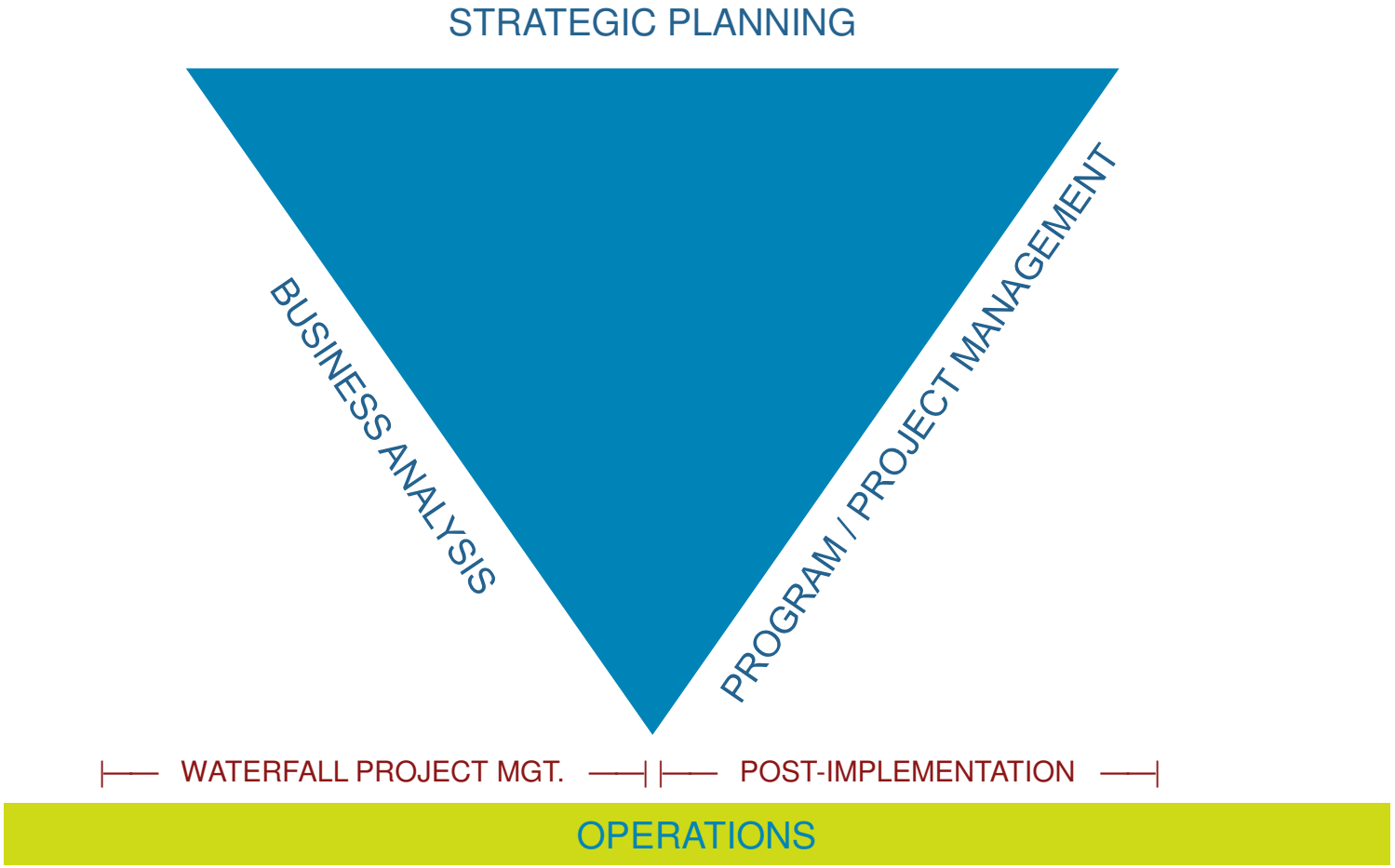
		PRIORITIZATION CRITERIA													
Submitted by	DESCRIPTION OF CURRENT OR PROPOSED INITIATIVE	STRATEGIC GOAL ALIGNMENT H=Fulfills in 1 yr M=Fulfills in 3 yrs. L=Supports goal: STRATEGIC GOAL # 1	STRATEGIC GOAL # 2	STRATEGIC GOAL # 3	STRATEGIC GOAL # 4	STRATEGIC GOAL # 5	Goals Fulfilled @ HIGH	Also Submitted by	CAPACITY NEEDED: CAPITAL A >$2M 1yr -or- $5M 2 yrs. B >$1M 1yr -or- $3M 2 yrs. C = under Medium	Non-labor resources A >$500K, B <$500K, C = 0	Labor resources A >$500K, B <$500K, C = 0	PROJECT RISK LEVEL (H, M, L)	ROI, Payback period, Cost/Risk Reduction	Timeframe (Fiscal Quarter)	"H"s at each blue & black category level
PORTFOLIO # 1															13
	PROGRAM # 1														9
<NAME>	Project # 1	H	H	M	H	H	4	<NAME>	A	B	A	H			
<NAME>	Project # 2	L	H	H	M	M	2	<NAME>	A	A	A	M			
<NAME>	Project # 3	M	H	H	H	L	3	<NAME>	C	A	C	L			
	PROGRAM # 2														4
<NAME>	Project # 1	H	H	H	L	L	3	<NAME>	C	B	A	H			
<NAME>	Project # 2	M	L	M	M	L		<NAME>	A	C	B	M			
<NAME>	Project # 3	H	L	L	L	M	1	<NAME>	B	C	C	H			

Copyright © 2008 Michael S. Zambruski

Business analysis together with program/project management bring each broad element of the strategy into sharp operational focus.
And this applies whether the methodology used is waterfall/traditional or iterative/agile/scrum.

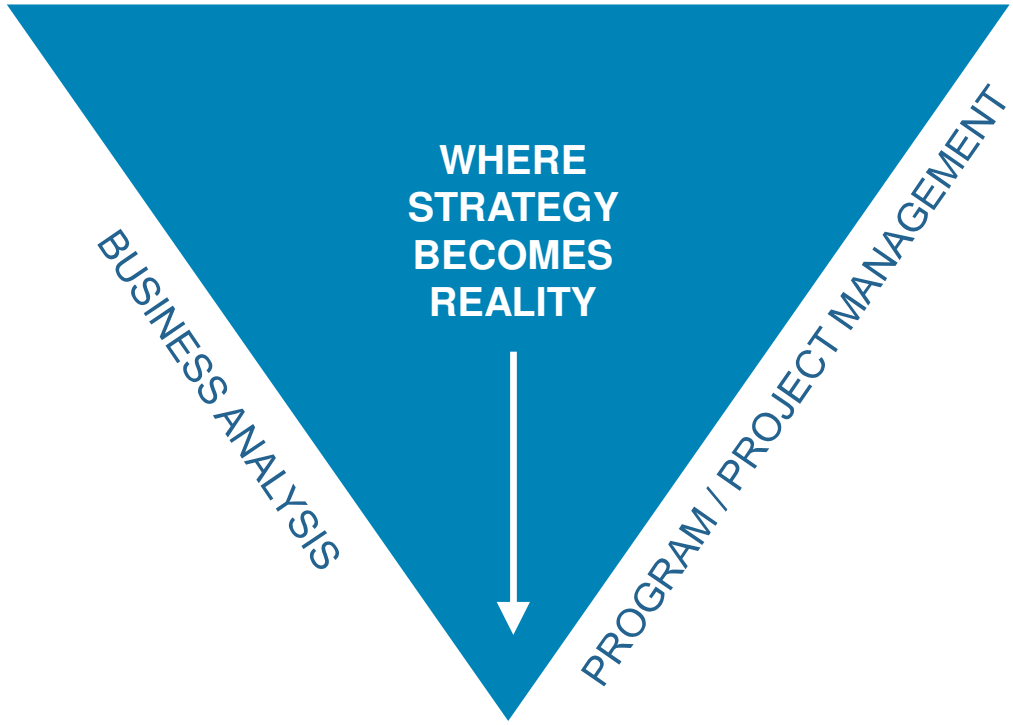
Copyright © 2015 Michael S. Zambruski

What about
traditional/waterfall PM
vs.
iterative/agile/scrum/SAFe PM,
and how is the BA involved with each?



Copyright © 2015 Michael S. Zambruski

STRATEGIC PLANNING

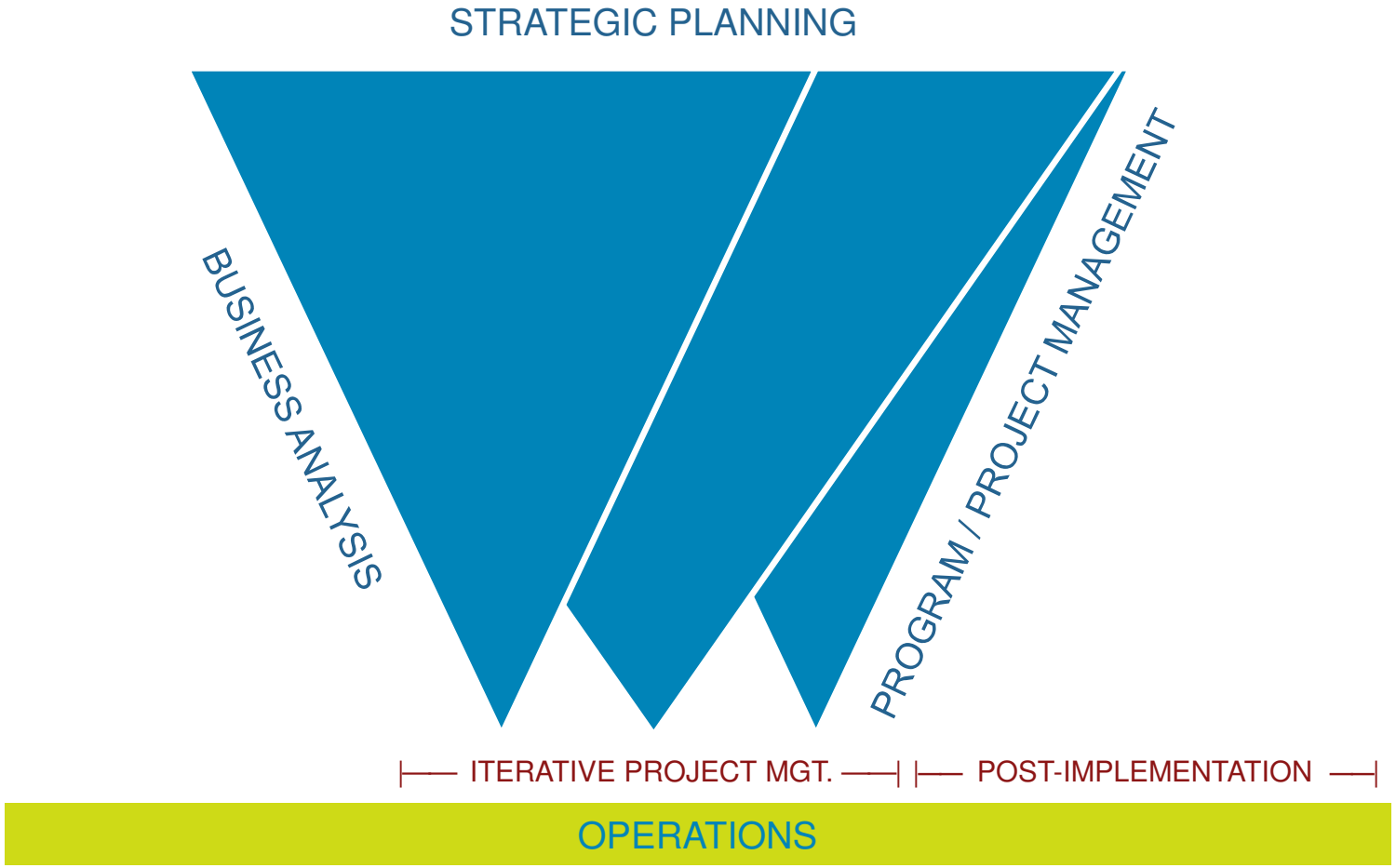


WATERFALL PROJECT MGT. | POST-IMPLEMENTATION

OPERATIONS

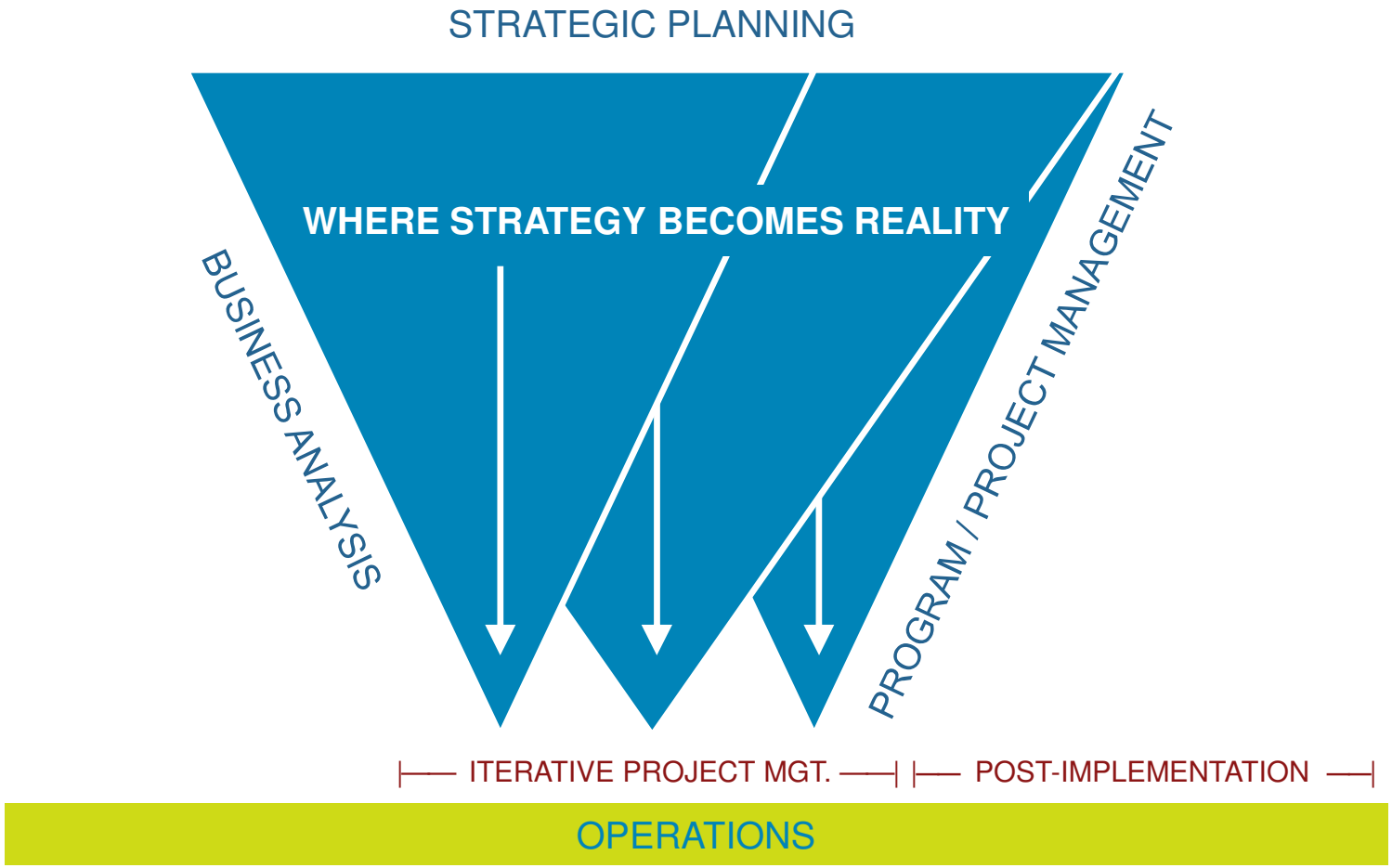
TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski



TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

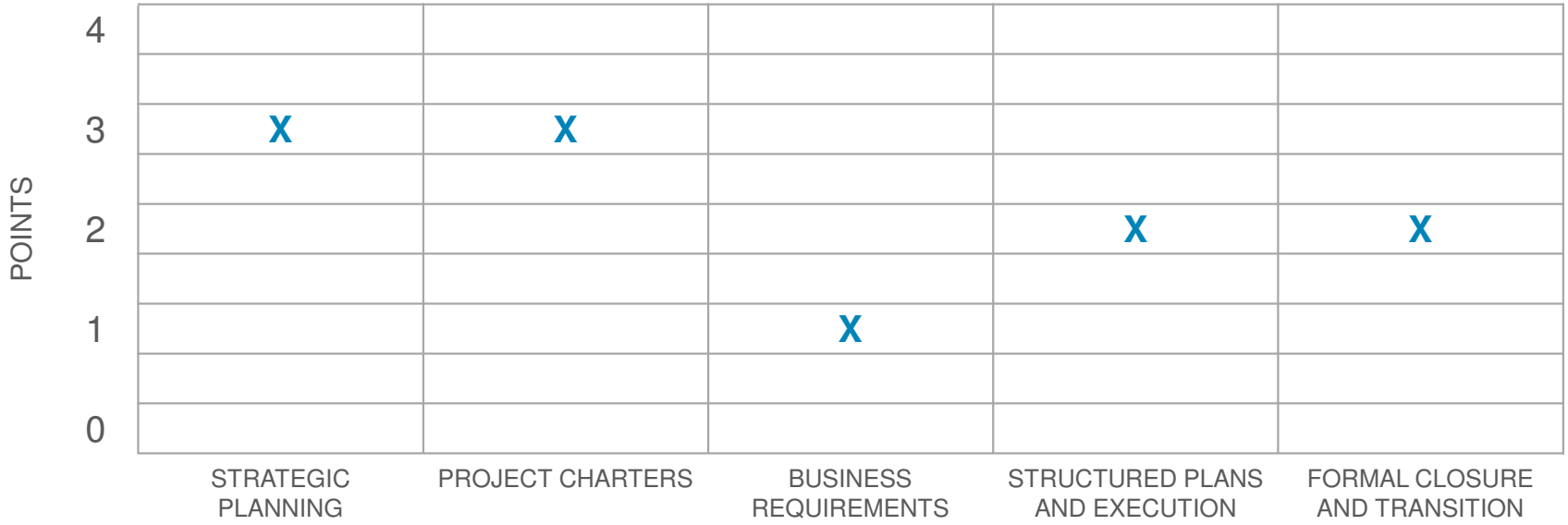
QUESTIONS: ANSWER EACH NUMBERED AND LETTERED QUESTION ON EACH LINE	POINTS: YES = 1, NO = 0
1. Does your organization have a formal and documented **strategic planning** process?	
a) Does it specify the enterprise vision?	
b) Does it specify the enterprise mission?	
c) Does it outline the goals supporting the vision and mission?	
Total points for question 1 (maximum 4)	
2. Does each project have a formally documented and signed **charter**?	
a) Does each charter contain a high-level scope definition?	
b) Does it include an initial budget estimate?	
c) Does it have a preliminary milestone schedule?	
Total points for question 2 (maximum 4)	
3. Are **business requirements** gathered prior to project planning and execution?	
a) Are the requirements formally documented and validated?	
b) Are they formally approved by stakeholders (users, etc.)?	
c) Are they easy to find, for review and updates?	
Total points for question 3 (maximum 4)	
4. Is there a formal **structure** for planning and implementing projects?	
a) Does it contain documented processes and tools?	
b) Is it flexible and adaptable, to fit project needs?	
c) Is it enforced for all projects?	
Total points for question 4 (maximum 4)	
5. Is there a formal closure and **transition process** for projects?	
a) Does it include documenting and reviewing lessons learned?	
b) Does it specify plans for transition into production?	
c) Does it include a warranty period providing support after transition into production?	
Total points for question 5 (maximum 4)	

Copyright © 2015 Michael S. Zambruski

QUESTIONS: ANSWER EACH NUMBERED AND LETTERED QUESTION ON EACH LINE	**POINTS:** YES =1, NO=0	
1. Does your organization have a formal and documented **strategic planning** process?	**1**	
a) Does it specify the enterprise vision?	**1**	
b) Does it specify the enterprise mission?	**1**	
c) Does it outline the goals supporting the vision and mission?	**0**	
Total points for question 1 (maximum 4)		**3**
2. Does each project have a formally documented and signed **charter**?	**1**	
a) Does each charter contain a high-level scope definition?	**1**	
b) Does it include an initial budget estimate?	**1**	
c) Does it have a preliminary milestone schedule?	**0**	
Total points for question 2 (maximum 4)		**3**
3. Are **business requirements** gathered prior to project planning and execution?	**1**	
a) Are the requirements formally documented and validated?	**0**	
b) Are they formally approved by stakeholders (users, etc.)?	**0**	
c) Are they easy to find, for review and updates?	**0**	
Total points for question 3 (maximum 4)		**1**
4. Is there a formal **structure** for planning and implementing projects?	**1**	
a) Does it contain documented processes and tools?	**1**	
b) Is it flexible and adaptable, to fit project needs?	**0**	
c) Is it enforced for all projects?	**0**	
Total points for question 4 (maximum 4)		**2**
5. Is there a formal closure and **transition process** for projects?	**1**	
a) Does it include documenting and reviewing lessons learned?	**0**	
b) Does it specify plans for transition into production?	**1**	
c) Does it include a warranty period providing support after transition into production?	**0**	
Total points for question 5 (maximum 4)		**2**

Copyright © 2015 Michael S. Zambruski

In the chart below, an X corresponds to the total points for each question answered above – to see the current strengths and weaknesses in the overall environment where your projects exist.



Copyright © 2015 Michael S. Zambruski

The Application

The Business Analyst in Each Phase of the Extended Project Life Cycle

Eleven stages in the solution-development process →	1. Business Mission, Vision, Strategy & Goals	2. Business Process & Requirements	3. User Requirements	4. Functional Requirements	5. Non-Functional Requirements (NFR)	6. Solution Analysis	7. Solution Design	8. Solution Construction	9. Testing	10. Documentation	11. Training
	←---------- Planning (WHY & WHEN) and Analysis (WHAT) ----------→					←---------- Solution Development (H O W) ----------→			←-- Implementation & Transition --→		
PROGRESSIVE and ITERATIVE ACTIVITIES...	Articulate clear direction at the enterprise or business unit level.	Identify clear business-level performance improvements via gap analysis of the AS-IS vs. TO-BE.	Determine what improvements users need from individual business processes and systems (AS-IS vs. TO-BE).	Determine the needed operational behavior of improved business processes and systems.	Specify anything that enhances the success and value of project deliverables to the users.	Convert requirements to solution specifications.	Develop the complete technical details for preliminary logical and functional designs and for final design and construction.	Build the complete technical solution.	Plan and conduct Unit, String, System, and Usability testing.	Develop and deliver user- and support-oriented documentation.	Develop and deliver user- and support-oriented instruction.
[KEY ROLES]: →	Business Sponsor [A] Bus Process Expert [P] Strategic Marketing [S] Product R&D [S]	Business Sponsor [A] Bus Process Expert [P] Strategic Marketing [P] Product R&D [P]	Bus Process Expert [P] Strategic Marketing [P] Product R&D [P]	Bus Process Expert [S] Strategic Marketing [S] Product R&D [P]	Bus Process Expert [S] Product R&D [P]	Product R&D [P]			Bus Process Expert [P] Strategic Marketing [P]	Bus Process Expert [P] Strategic Marketing [P]	Bus Process Expert [P] Strategic Marketing [P]
	Business Analysis [S]	Business Analysis [P]	Business Analysis [P]	Business Analysis [P]	Business Analysis [P]	Bus Sys Anlyst [P]	Bus Sys Anlyst [S]	Bus Sys Anlyst [S]	Business Analysis [S] Bus Sys Anlyst [S]	Business Analysis [S]	Business Analysis [S]
ORGANIZE/OVERSEE APPROVE/AUTHORIZE PERFORM/PRODUCE SUPPORT	IT Architecture [S] IT Development [S] IT DBMS [S] IT Infrastructure [S]	IT Architecture [S] IT Development [S] IT DBMS [S] IT Infrastructure [S]	IT Architecture [S] IT Development [S] IT DBMS [S] IT Infrastructure [S]	IT Architecture [P] IT Development [P] IT DBMS [S] IT Infrastructure [S] QA [S]	IT Architecture [P] IT Development [P] IT DBMS [S] IT Infrastructure [P] QA [S]	IT Architecture [P] IT Development [P] IT DBMS [P] IT Infrastructure [P] QA [P] Sys Analyst [P]	IT Architecture [P] IT Development [P] IT DBMS [P] IT Infrastructure [P] QA [P] Sys Analyst [P]	IT Architecture [S] IT Development [P] IT DBMS [P] IT Infrastructure [P] QA [P] Sys Analyst [P]	IT Architecture [S] IT Development [P] IT DBMS [P] IT Infrastructure [P] QA [P] Sys Analyst [P]	IT Architecture [S] IT Development [S]	IT Architecture [S] IT Development [S]
			End User [S]	End User [S]					End User [S]	End User [S] Help Desk [S]	End User [S] Help Desk [S]
	Finance [S] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [S] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [S] Procurement [S]	Finance [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [S] Training [S] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [P] Marketing [P] Training [P] Procurement [S]	Finance [P] Legal/Regulatory/ Compliance [S] Marketing [P] Training [P] Procurement [S]
	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]	Project Mgmt [O]
	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]	Program Mgmt [O]
PMI PMBOK Process Correlation Key Deliverables	INITIATE Business Case, CBA, Charter	PLAN (incl. analysis) Statement of Work				EXECUTE, MONITOR, CONTROL Statement of Work					
IIBA BABOK Knowledge Areas Correlation	Enterprise Analysis	Business Analysis Planning & Monitoring Requirements Elicitation and Analysis Requirements Management and Communication				Solution Assessment and Validation Requirements Management and Communication			Requirements Management and Communication		
Agile Correlation	Envision Product, Capture User Stories/Features, Prioritize Features, Plan Iterations & Releases ⇆					⇆ Conduct Iterations and Releases					

TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

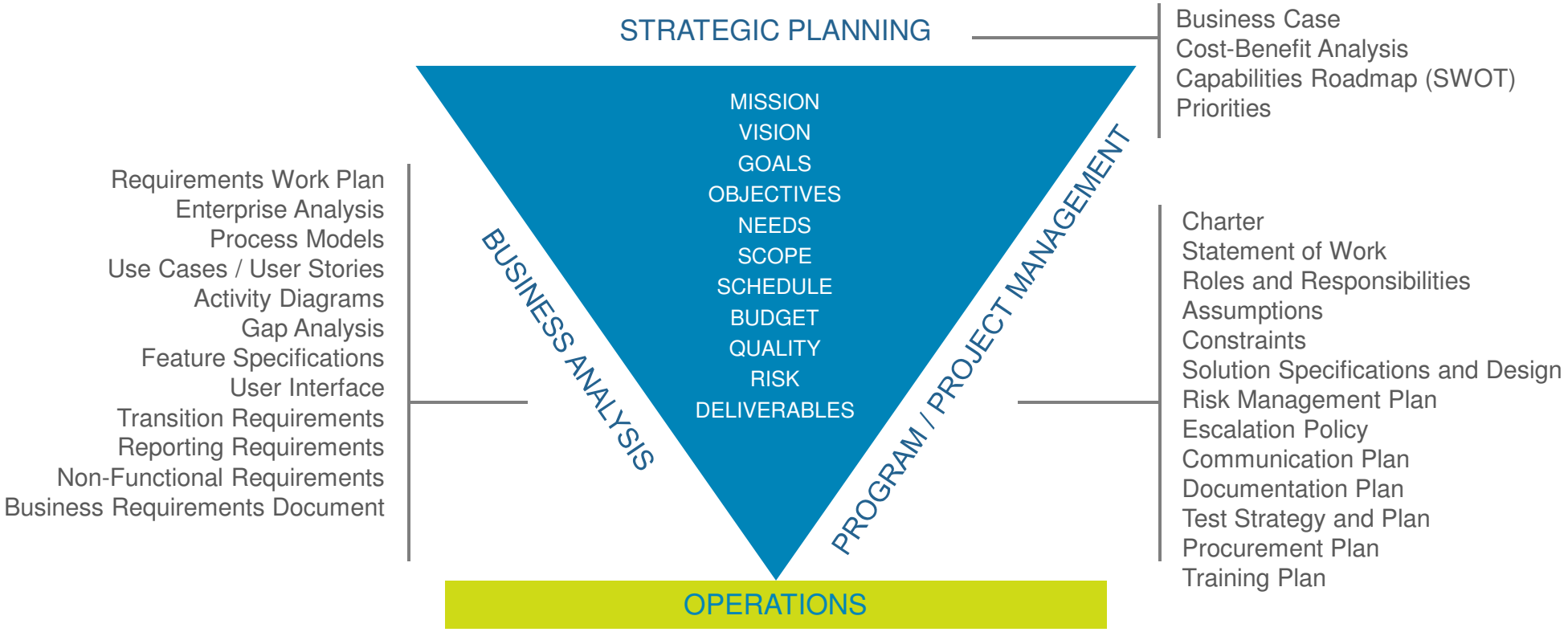
The Business Analyst in Each Phase of the Extended Project Life Cycle

Eleven stages in the solution-development process →	1. Business Mission, Vision, Strategy & Goals	2. Business Process & Requirements	3. User Requirements	4. Functional Requirements	5. Non-Functional Requirements (NFR)	6. Solution Analysis	7. Solution Design	8. Solution Construction	9. Testing	10. Documentation	11. Training
	←----------Planning (WHY & WHEN) and Analysis (WHAT)----------→					←---------- Solution Development (H O W)----------→				←--Implementation & Transition--→. . .	
INPUTS	Business Case. Cost-Benefit Analysis. Roadmap. Business Capabilities Summary.	Requirements Work Plan (high-level). Context & relationship models. Business process models. Business rules. Business use case models. Organizational change requirements.	System Use Case models. Activity Diagrams. Screen concepts. Use case outline & inventory. Transition Requirements (high-level). Reporting requirements (high-level).	System Use Case models. Activity Diagrams. Screen concepts.	NFR List ▪ Response time ▪ Backup frequency ▪ Security levels ▪ Disaster recovery	User experience conceptual model. Screen mockups (high-level). Test analysis & design plan. IT Architecture Design (logical). Data Models (e.g., Business Object Model, ERDs, state and class diagrams). DBMS & System Interfaces (high-level).	Data maps. Data flow Test analysis & design detail. Data report design.	Pseudo code.	Use Cases.	Document Index & Repository. Transition Requirements – e.g., processes, staffing, training, and skills needed for successful deployment into production.	Training Plan. Modes and Audiences. Transition Requirements – e.g., processes, staffing, training, and skills needed for successful deployment into production.
OUTPUTS	Charter.	Requirements Work Plan (refined).	System Use Case narratives (actor side). Activity Diagrams (refined). Transition requirements (detailed). Reporting requirements (detailed).	System Use Case narratives (system side). Activity Diagrams (refined). Content Matrix. Data for reporting requirements (detailed). Feature specifications.	Feature Specifications.	Modified Use cases & ADs. Processing rules. Functional specs: - UX design. - User Interface rules. - Screen mockups (detailed). - Metadata. Data elements & diagrams. DBMS & system interfaces (detailed). Transitional requirements. Cross-application dependencies.	Content Matrix (finalized). IT Arch Design (physical).	Program code. Data report construction.	Test Scenarios. Test Cases. Test Scripts. Report Testing. Financial Testing.		Training scripts.
		Business Rqmts Doc (BRD) →	**Business Rqmts Doc (BRD) →**	**Business Rqmts Doc (BRD) →**	**Business Rqmts Doc (BRD)**	**Solution Rqmts Document (SRD)**	**Solution Design Document (SDD) →**	**Solution Design Document (SDD)**			

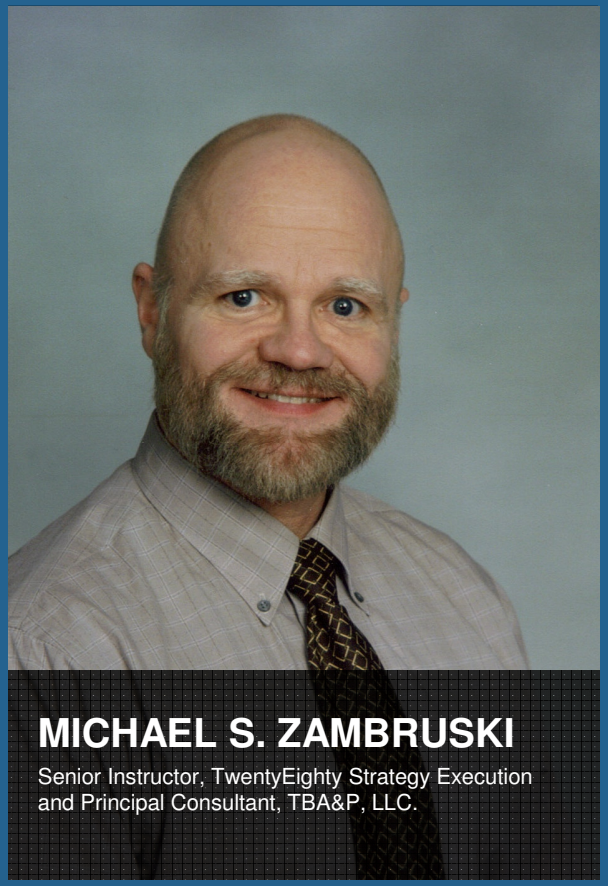
TWENTYEIGHTY™ Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

Copyright © 2015 Michael S. Zambruski

The Business Analyst Catalyst: Context, Role, Application



Copyright © 2015 Michael S. Zambruski



MICHAEL S. ZAMBRUSKI
Senior Instructor, TwentyEighty Strategy Execution
and Principal Consultant, TBA&P, LLC.

Thank you.

Let TwentyEighty Strategy Execution empower you and your organization's project teams to help achieve your strategy.

Visit **strategyex.com**

TWENTYEIGHTY Strategy Execution
FORMERLY IPS LEARNING & ESI INTERNATIONAL

MODERN analyst .com

©2016 **TWENTY**EIGHTY Strategy Execution. All Rights Reserved.