

ModernAnalyst.com

ModernAnalyst.com Knowledge Appraiser

Business Case



Document Management Record

Revision History

Version	Date	Author	Changes
Created V0.1	November 12, 2007	Perry McLeod	
First Revision V0.2	December 10, 2007	Perry McLeod, Adrian Marchis	All sections revised as per Adrian's comments.
Second Revision V0.3	December 31, 2007	Perry McLeod, Adrian Marchis	<p>Feedback requested on this section – please review. # of members and comment from a quote from Adrian.</p> <p>Feedback requested on this section for the people involved in the live project</p> <p>Please provide any known project stakeholders here</p> <p>Please provide any known resources here</p> <p>Changed document look and feel from PJM Limited to ModernAnalyst.com</p> <p>Vision statement modified please reread</p> <p>Product stakeholders changed to reflect a generalized structure please reread Ability to submit questions/answers has been added to a generalized basic user. A Moderator user has been added – please review the model</p> <p>Added a Moderator – please give some idea what this user may do that is different than it's associated super actor</p>
Third Revision V0.4	January 12, 2007	Perry McLeod, Adrian Marchis	See Marked Changes
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1. Background/Introduction

ModernAnalyst.com is an internet community and resource portal dedicated to the enhancement of business/system analysts and their profession. ModernAnalyst.com's mission statement reads: "The One-Stop-Shop for the Business Systems Analyst!" Published and maintained by Modern Analyst Media LLC; the intent is to offer free membership to anyone interested in the profession of business and systems analysis. A basic membership currently offers community forms, book reviews, career analysis and options, articles from core members, links to training courses, blogs, events, profiles and networking opportunities. ModernAnalyst.com's central focus is to provide resources for business systems analysts.

With new members joining every day ModernAnalyst.com can also help companies, training providers, experienced practitioners, tool vendors and recruiters gain an edge over their competition by having access to various directory listings, core memberships, job postings, articles and white papers on products, networking and advertising.

ModernAnalyst.com is in association with the International Instantiate of Business Analysts™ - IIBA®.

2. Overview

2.1 Project Title

ModernAnalyst.com Knowledge Appraiser - PM01-MAKA

2.2 Situational Assessment and Problem Statement

This business case does not answer a specific business problem other than the ongoing strategic goal to increase the awareness of ModernAnalyst.com throughout the business and systems analysts community.

2.3 Vision Statement

To make freely available, as a gift to the internet community, under copyright to Modern Analyst Media LLC, a configurable Knowledge Appraisal and Assessment application that has been inspired by the business analysis profession but designed to be flexible enough to accommodate a wide variety of technical and leadership oriented core competencies. This tool would be available to "use for free" for registered members of ModernAnalyst.com.

In the future Modern Analyst Media LLC may freely license the application or the content to other sites/companies outside of ModernAnalyst.com. Modern Analyst Media LLC may also consider making the module (application) available to other interested parties for an as yet to be determined cost.

3. The Business Case

3.1 Purpose of the Business Case

The primary function of this business case will be to define the business need or problem in sufficient detail, analyze options (where resources have already been allocated this may involve determining what can be delivered with those resources), identify the costs, benefits and risks and to put forward a proposal for approval to proceed with the project.

This business case is based on the feedback that ModernAnalyst.com has been getting from its membership community, through direct e-mails, forum posts, job posts, etc.

The ModernAnalyst.com business vision is to become the “The One-Stop-Shop for the Business Systems Analyst”. This business case is intended to increase awareness of ModernAnalyst.com by focusing on the following key areas:

3.1.1 Support of the Mission Statement

ModernAnalyst.com is the “one-stop-shop resource community and resource portal for business analysts and systems analysts”. Our goal is to provide our members with relevant content and features which address the needs of this constituency.

3.1.2 Support of Self-Assessment Business Analysis Core Competencies

As the business community moves closer towards an information based economy new and experienced analysts alike should have access to what skills and competencies are needed for their current role as well as an ability to assess those skills as a foundation for future training. These skills should range from technical to leadership.

3.1.3 Support of Recruitment/Management Assessment of Business Analysts

Managers, recruiters, team leads and the like are finding it more and more difficult to acquire and retain Business Analysis professionals with the appropriate skills necessary to achieve project success in today’s rapidly changing economy. The ModernAnalyst.com appraisal tool will give these stakeholders an assessment foundation that is based on the most current methodologies and best practices.

3.1.4 Fill an Appraisal/Assessment Gap in the Business Analysis Community

Currently, there are no known appraisal/assessment tools which are free and easily accessible to the business analyst’s community and those who support it (managers, recruiters, etc...).

3.1.5 Increase the Number of Offerings from ModernAnalyst.com

We believe that the Knowledge Appraiser tool will be in big demand for our community and that most analysts would use this tool not just as a once a year appraiser but also as a way to learn and improve. It will also provide analysts with an additional tool to help analysts prepare for the Certified Business Analyst Professional™ (CBAP®) examination – should we choose to add questions related to the Business Analysis Body of Knowledge™ (BABOK®), which we most likely will.

3.1.6 Increase ModernAnalyst.com Membership

We hope that the publishing of this tool will increase the rate of growth of the ModernAnalyst.com membership base as well as the number of repeat visits for the site. However it should be noted that this will not be tracked formally.

There may be a need to track how many new users go directly to the tool page and take the test after registering. This would tell us that those users are registered just to use the tool. This is not a formal requirement however.

3.1.7 Showcase the ModernAnalyst.com Live Project

The ModernAnalyst.com "live project" is an informal exercise that has been undertaken by the ModernAnalyst.com core members, spear headed by Perry McLeod. Its purpose is to provide ModernAnalyst.com members with an example of how a real-project works from business case to formal operations hand-over. This in itself will provide ModernAnalyst.com members with additional benefits and increase repeat visits as we expect this project to have a longer duration than usual given the limited time that core members have.

3.2 Sponsor and Client Acceptor

Adrian Marchis Publisher of ModernAnalyst.com (Note: in an actual business environment no one person would be both the sponsor and client acceptor, as this would be a conflict of interest).

3.3 Intended Audience

ModernAnalyst.com Membership: new/junior business analysts & systems analysts, experienced business analysts/systems analysts, recruiters and hiring managers.

4. Critical Assumptions and Constraints

4.1 Assumptions

- Free or nearly free development
- The continued support and time from the ModernAnalyst.com core membership
- Partner with a 3rd party provider and have the base tool (not the content) be jointly owned by ModernAnalyst.com and the 3rd party Developer

4.2 Constraints

- Limited time from the ModernAnalyst.com core membership
- Unpredictable commitments of the amount and duration of time from the ModernAnalyst.com core membership
- This tool must seamlessly integrate within the ModernAnalyst.com website

5. Options Analysis

5.1 Identification of Options

5.1.1 Do Nothing

ModernAnalyst.com does not develop a Knowledge Appraiser tool and continues to increase its exposure to the community by continuing to write articles, publish forums and the like.

5.1.2 Buy and Configure

ModernAnalyst.com does an analysis of the current market and purchase a solution can be configured to meet requirements. Configuration does not include the writing of code.

5.1.3 Buy and Build

ModernAnalyst.com does an analysis of the current market and purchases a solution that can be changed or enhanced to meet requirements. Build includes the writing of code, services, objects, etc.

5.1.4 Build

ModernAnalyst.com develops a Knowledge Appraiser tool from scratch.

5.2 Comparison of Options

Option	Pro	Con
Do Nothing	No effort and no cost.	Deprive the BA community of a great tool and ModernAnalyst.com of the opportunity to increase membership and repeat traffic.
Buy and Configure	Cost savings on development and faster deployment.	Not an option as it is not known if a tool exists that would easily integrate with the ModernAnalyst.com site. Reduce scope of the live project portion. Budget constraints will not allow for this analysis
Buy and Build	Cost savings on development.	Not an option as it is not known if a tool exists that would easily integrate with the ModernAnalyst.com site. Reduce scope of the live project portion. Budget constraints will not allow for this analysis
Build	Tool being built to exact Requirements. ModernAnalyst.com would own the code and the tool which we	Longer duration and, potentially, higher than anticipated costs...

	<p>can change in the future.</p> <p>The ModernAnalyst.com community would have the chance to "witness" a live project.</p> <p>Build a tool which easily integrates with the ModernAnalyst.com website.</p>	
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5.3 Recommended Option

Build

6. Benefit/Cost/Risk Analysis

6.1 Positive and Negative Benefits

The most notable positive benefit will be an option for premium advertising on the sites that choose to showcase the tool.

ModernAnalyst.com does not compete with other community sites such as Catalyze™ and the Requirements Networking Group (RQNG®). However, since the intent of the ModernAnalyst.com Knowledge Appraiser tool is to add value for our community members, it stands to reason that with increased activity there may be some positive benefits in the way of advertising dollars. These dollars would come from various companies and groups with an interest in business analysis.

It is possible the International Instantiate of Business Analysts (IIBA®) may choose to endorse this tool.

6.2 Costs

TBD

6.3 Project Stakeholders

Figure 1: Team Plan Model

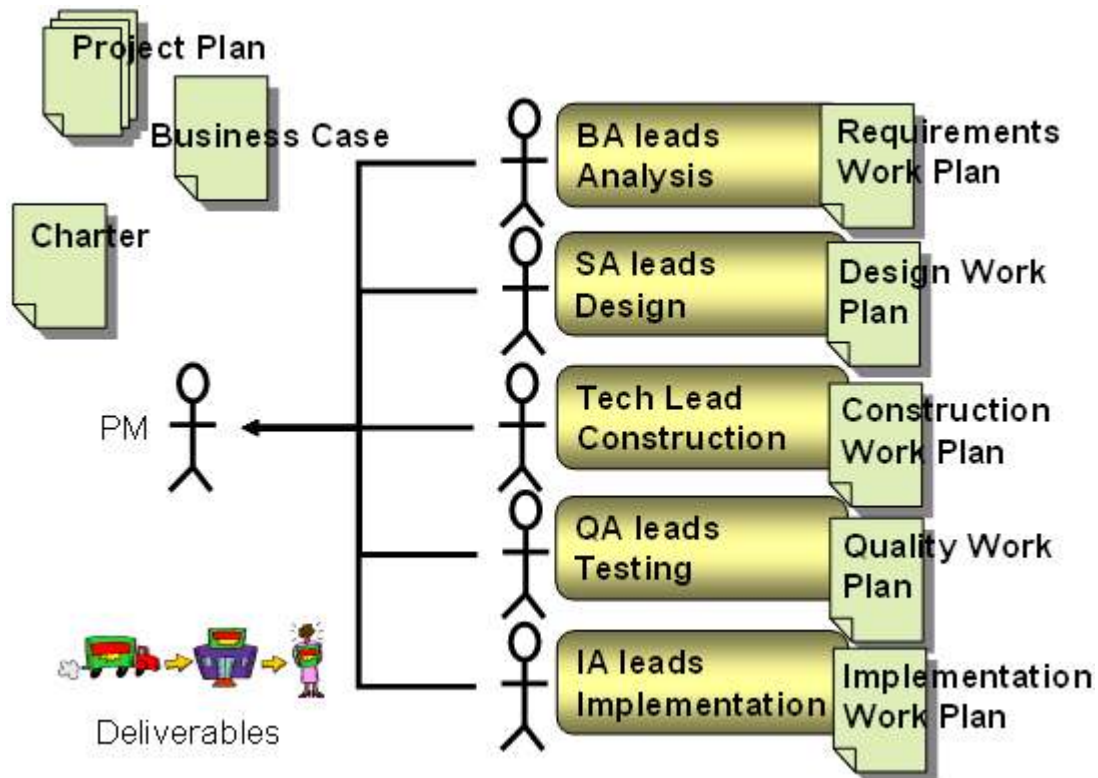
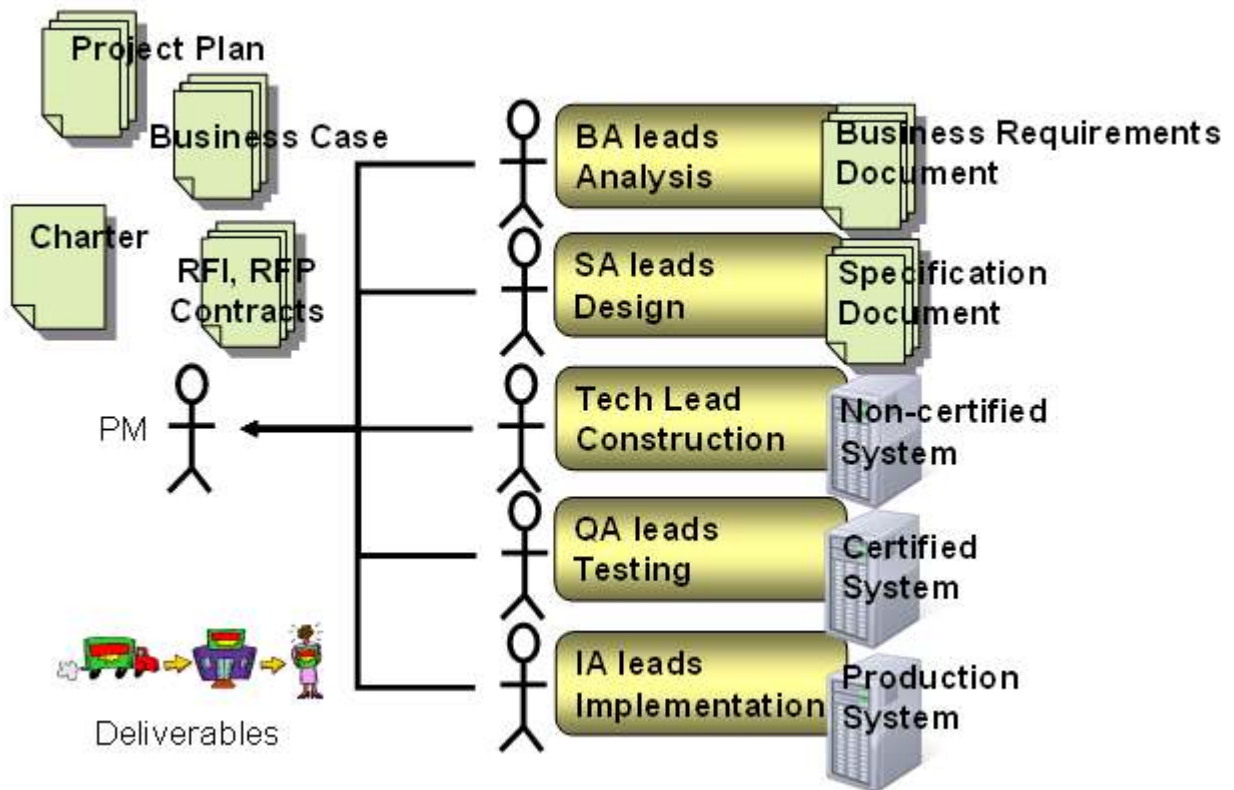


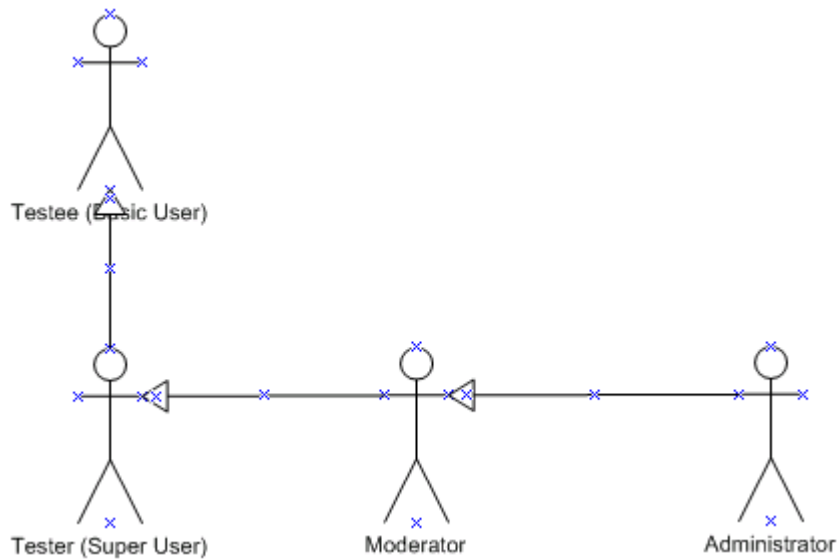
Figure 2: Team Deliverable Model



Name	Title	Primary Role
Adrian Marchis	Client Acceptor, Sponsor	Own the risk as well as control project budget. Final approval and product and project scope
Perry McLeod	Lead Project Manager, Lead Business Analyst	Own the project scope as well as the product scope. Gather and document all business requirements. Manage and control all project related plans and documents
TBD	Lead System Analyst, Designer	Provide an implementation plan
TBD	Lead Quality Assurance and Quality Control	Provide a quality and testing plan. Provide
TBD	Developer, Coder	TBD
Guy Beauchamp	Core Member SME	As a recruiter Guy may provide feedback from the Test Proctor's perspective. He might be a good stakeholder in that sense.
Registered Members	SME	The registered members of ModernAnalyst.com may follow the project and be excellent stakeholders for the "Test Taker" role

6.4 Product Stakeholders

Figure 3: User Generalization Diagram



6.4.1 Basic User ('Test Taker')

A basic user must be a registered member, who is in good standing, of ModernAnalyst.com

The basic user may include activities such as, but not limited to:

- The ability to Login/out;
- The ability to take a test or take a test that has been assigned to them;
- The ability to receive a message that a test has been assigned to them;
- The ability to submit suggestions and comments to ModernAnalyst.com;
- The ability to submit suggested questions and answers to ModernAnalyst.com;
- The ability to update personal profile;
- The ability to print a report showing the result of the test;
- The ability to link directly to the saved result/report from the user's profile or external blog/site (even link that can be added in the resume).

6.4.2 Super User (Test Proctor)

In addition to the basic functions inherited (through the rules of UML® inheritance) from the basic user, the super user may include activities such as, but not limited to:

- The ability to create tests, write test questions and answers and add them to a knowledge area;
- The ability to create a new knowledge area;
- The ability to assign tests to users and groups;

- The typical functions of a test presenter and evaluator, to be determined.

Moderator

In addition to the basic functions inherited (through the rules of UML® inheritance) from the basic user, the super user may include activities such as, but not limited to:

- TBD
- TBD

6.4.4 Application Administrator

In addition to the basic functions inherited (through the rules of UML® inheritance) from the basic user, the super user, and the moderator, the administrator user may include activities such as, but not limited to:

- The typical abilities of a system administrator, which are to be determined;
- The ability to 'promote' new test designs to the application (such as: providing the knowledge areas, categories, questions and answers) which can then be used by the super user.

6.5 Key Issues

- TBD

6.6 Identified Risks & Mitigation Costs

- TBD

6.7 Summary of Benefit/Cost/Risk Analysis

- TBD

7. Implementation Strategy

7.1 Target Outcomes/Benefits

- TBD by the Lead System Analyst, Designer

7.2 Impact Analysis

- TBD by the Lead System Analyst, Designer

7.3 Related Projects

- None

7.4 Organizational Impact

- None

7.5 Work Plan

- TBD by Perry McLeod

7.6 Resources

Name	Title	Location	Best time to Communicate	Expected Usage
TBD				
TBD				
TBD				
TBD				
TBD				
TBD				
TBD				
TBD				
TBD				

7.7 Project Management Framework

This project will loosely follow the Project Management Institute’s project framework. However since there are limited resources working on a volunteer basis project artifacts will be produced on an as needed bases.

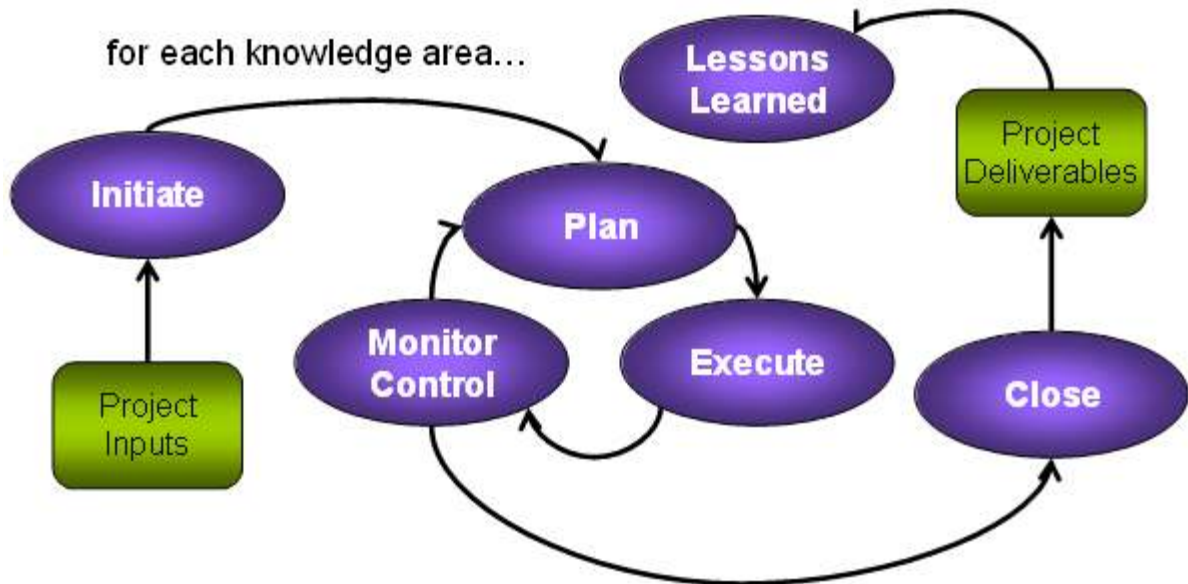
Figure 4:Project Framework Overview

Scope Management	Quality Management	Risk Management
Cost Management	Integration Management	Human Resource Management
Communications Management	Time Management	Procurement Management

Figure 5:Project Framework Detail

	Initiate	Plan	Execute	Monitor Control	Close	
Integration	Charter and scope statement	Project mgmt plan	Manage project	Monitor project, change control	Close project	
Scope		Scope Plan, WBS		Monitor Project Change Control		
Time		Activity Sequence, Activity Duration, Activity Resources		Verify Scope Control Scope		
Cost		Cost Estimates, Budget Planning		Schedule Control		
Quality		Quality Planning		Perform Quality Assurance		Cost Control
Human Resource		HR Planning		Acquire Team Develop Team		Perform Quality Control
Communications		Communication Planning		Distribute Information		Manage Project Team Performance Reports Manage Stakeholders
Risk		Risk Analysis, Risk Planning, Risk Response				Monitor Control Risk
Procurement		Contracts, Purchases, Acquisitions		RFP and RFQ processes		Contract Administration

Figure 6: Knowledge Area Process



7.8 Business Analysis and Development Framework

This project will loosely follow the iterative Rational Unified Process™ (RUP®) framework. However since there are limited resources working on a volunteer basis project artifacts will be produced on an as needed basis. In addition, the project team will proceed using an agile method, where it feels that that is an appropriate course of action.

Iterative Rational Software Development Methodology

Figure 7: Rational Outline

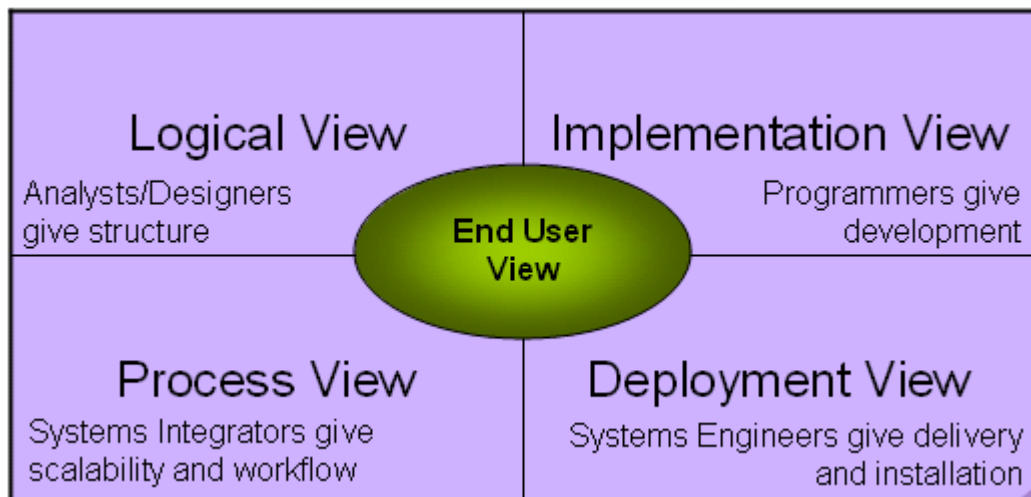


Figure 8:Rational Framework

Disciplines	Phases			
	Inception	Elaboration	Construction	Transition
Business Modeling	Basic use-case, business vocabulary, Stakeholders,	Structured use cases, Proof-of-concept (optional), business rules, business entity(s), TBD	Focus is on design and implementation	Training, user acceptance and guidance, support
Requirements	software requirements, specifications, plans visions,	Prioritize use cases, the BRD, complete use case model, baseline BRD	Focus is on design and implementation	Control moves to operational team
Analysis and Design	User interface, use case realization	Architectural, and class design, Database design, TBD	Greater depth in design and analysis, iterative versions of product created	Development shrinks
Implementation	Developer tests, design elements,	Integrate subsystem and system, TBD	Begin to plan transfers to community	Alpha, beta and final releases
Testing	Logical testing of models	Logical testing of models	Black and white box testing of iterative releases	User acceptance testing
Deployment	Bill of materials (what was built),	Implement all details, not only those of central architectural value	support materials, TBD	acceptance tests, beta tests, release notes
Configuration and Change Mgmt	To be covered in project management discipline through iteration plans and assessments			
Environment Mgmt				
Iterations	I1, I2, I3, I4...	E1, E2, E3, E4...	C1, C2, C3, C4...	T1, T2, T3, T4...

There is an inferred outline between each phase known as a baseline

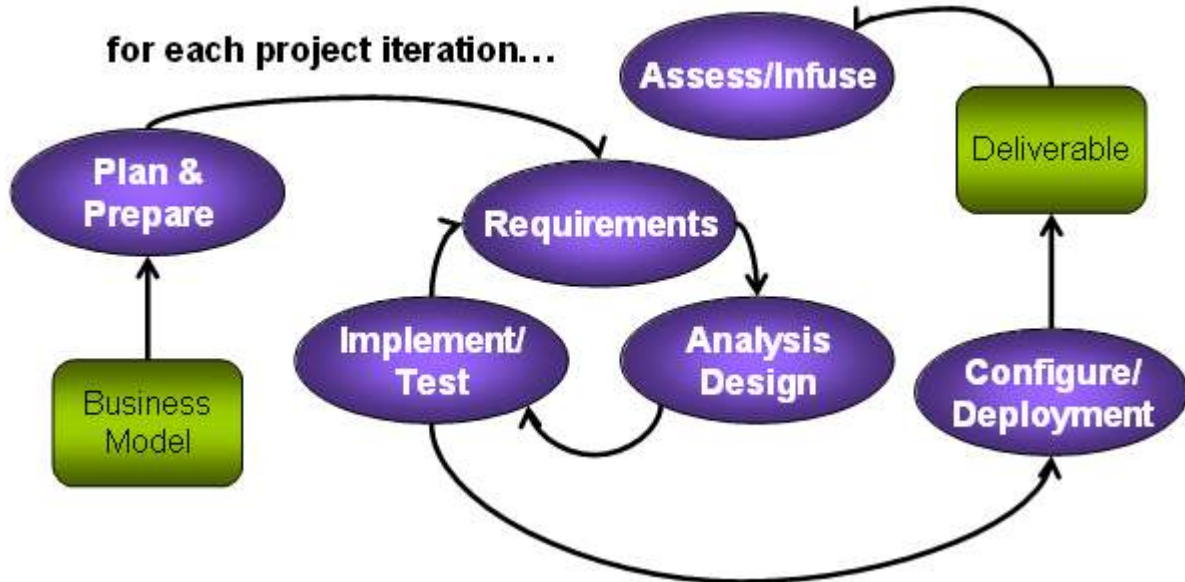
- Setting a baseline for an artifact is an important step in any SDLC process;
- In project management a baseline is a starting point or condition against which future changes are measured;
- A named set of object versions, which fixes a configuration at a particular point in time;
- A baseline normally represents a milestone or key deliverable of a project;
- Any changes to the objects fixed at the baseline must be revised through a formal change control process;

- Baselines may also occur within an individual iteration.

There is also inferred outline between each of the iterations known as an assessment

- Planning an iteration and then assessing that iteration is key to the rational process;
- Each iteration is intended to chip away at the project;
- Each iteration is like a mini-waterfall with a much small set of goals;
- A named set of artifacts are intended to be produced within an iteration;
- Those artifacts are free to change until they are set as a baseline;
- Iterations can not happen concurrently;
- One iteration must be complete and assessed before another iteration can begin.

Project Iteration Process



7.8.1 Iterative Agile Software Design Methodology

Agile, like Rational, also promotes development through iterations; however the intent is not to produce processes or artifacts but rather results. The goal is to produce the most software in the least amount of time. The measure therefore is working software and not actual artifacts.

There is no single agile method; some are more structured than others. In this sense Agile is a way of thinking. This project will use that way of thinking, where appropriate, by following the Agile Manifesto.

Agile emphasizes face-to-face communication over written documents. This is difficult given the current project environment – teams are spreads across the globe

7.8.2 Agile Manifesto

“We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- Individuals and interactions over processes and tools;
- Working software over comprehensive documentation;
- Customer collaboration over contract negotiation;
- Responding to change over following a plan.

That is, while there is value in the items on the right, we value the items on the left more.”

7.9 Change Management Plan

7.10 Purpose

- Ensure that all changes to the project are reviewed and approved in advance;
- All changes are coordinated across the entire project;
- All stakeholders are notified of approved changes to the project;
- This is critical since the project team is spread over the globe;
- All project Change Requests (CRs) should be submitted in written form using a Change Request Form – TBD;
- The project team should keep a log of all Change Requests.

7.11 Goals

- Give due consideration to all requests for change;
- Identify define, evaluate, approve, and track changes through to completion;
- Modify Project Plans to reflect the impact of the changes requested;
- Bring the appropriate parties (depending on the nature of the requested change) into the discussion;
- Negotiate changes and communicate them to all affected parties.

7.12 Responsibilities

Person Responsible	Responsibility
Project Manager	Facilitate or execute the change management process. This process may result in changes to the scope, schedule, budget, and/or quality plans. Additional resources may be required.
Project Manager	Maintain log of all change requests
Client Acceptor	Conduct reviews of all change management activities with team on a periodic basis. Make decisions on changes

Client Acceptor	Ensure that adequate resources and funding are available to support execution of the Change Management Process.
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7.13 Change Control Process

The Change Management process may be simple or complex. The following text is provided as an example of how requests for change can be handled in your project. Supplement with a graphical flowchart if that will help your stakeholders understand the process. Modify as necessary.

1. The Change Management process occurs in six steps:
2. Submit written Change Request (CR);
3. Review CRs and approve or reject for further analysis;
4. If approved, perform analysis and develop a recommendation;
5. Accept or reject the recommendation;
6. If accepted, update project documents and re-plan;
7. Notify all stakeholders of the change.

In practice the Change Request process is a bit more complex. The following describes the change control process in detail:

Any stakeholder can request or identify a change. He/she uses a Change Request Form to document the nature of the change request.

The completed form is sent to a designated member of the Project Team who enters the CR into the Project Change Request Log.

CRs are reviewed daily by the Client Acceptor or designee and assigned one of four possible outcomes:

Reject	Notice is sent to the submitter Submitter may appeal (which sends the matter to the Project Team) Project Team reviews the CR at its next meeting.
Defer to a date	Project Team is scheduled to consider the CR on a given date Notice is sent to the submitter Submitter may appeal (which sends the matter to the Project Team) Project Team reviews the CR at their meeting.
Accept for analysis immediately (e.g., emergency)	An analyst is assigned and impact analysis begins Project Team is notified.
Accept for consideration by the project team	Project Team reviews the CR at its next meeting.

All new pending CRs are reviewed at the Project Team meeting. Possible outcomes:

Reject	Notice is sent to the submitter Submitter may appeal (which sends the matter to the Project Sponsor, and possibly to the Executive Committee) Executive Committee review is final.
Defer to a date	Project Team is scheduled to consider the CR on a given date Notice is sent to the submitter.

Accept for analysis	An analyst is assigned and impact analysis begins Notice is sent to the submitter.
Once the analysis is complete, the Project Team reviews the results.¹ Possible outcomes:	
Reject	Notice is sent to the submitter Submitter may appeal which sends the matter to the Project Sponsor (and possibly to the Executive Committee) Executive Committee review is final
Accept	Project Team accepts the analyst's recommendation Notice is sent to Project Sponsor as follows: Low-impact CR – Information only, no action required Medium-impact CR – Sponsor review requested; no other action required High-impact CR – Sponsor approval required
Return for further analysis:	Project Team has questions or suggestions that are sent back to the analyst for further consideration.
Accepted CRs are forwarded to the Project Sponsor for review of recommendations. Possible outcomes:	
Reject	Notice is sent to the submitter Submitter may appeal to the Executive Committee Executive Committee review is final
Accept	Notice is sent to the submitter Project Team updates relevant project documents Project Team re-plans Project Team acts on the new plan
Return for further analysis	The Sponsor has questions or suggestions that are sent back to the analyst for further consideration Notice is sent to the submitter: Analyst's recommendations are reviewed by Project Team (return to Step 5)

7.14 Types of Change Requests

Type	Constrains
Scope	Scope Statement and WBS, Budget, Project Schedule, Resource Plan, Risk Log, Requirements, Specifications
Schedule	Project Schedule, Budget, Resource Pan, Risk Log,
Budget	Budget, Project Schedule, Resource Plan, Risk Log,
Quality	Budget, Project Schedule, Resource Plan, Risk Log, Quality Plan, Requirements, Specifications,

¹ Note: Sponsor participates in this review if the analysis was done at Sponsor's request.

8. Glossary and Appendices

- Will be kept in a central repository and created as the project progresses