



THE CHANGING ROLE OF THE BUSINESS ANALYST IN AGILE ENVIRONMENTS

Webinar Slides
Presented by Ori Schibi

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About the Presenter: Ori Schibi

MBA, PMP, PMI-PBA, Cert-APM, SMC, PMI-ACP

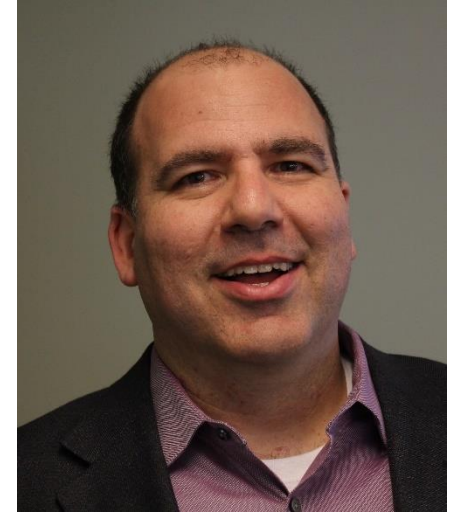
27+ years of PM experience

3 published books

- Managing Stakeholder Expectations for Project Success (2013)
- Effective PM-BA Role Collaboration (2015)
- Co-Author: Agile Business Analysis (2018)

Senior Consultant, www.procept.com

- Driving project success, process efficiencies, agile transformations, agile governance, BA centre of excellence, (complex) project recoveries, PMO's, and PM/BA skills assessments
- Stabilize business, create growth and value and lead sustainable change
- Clients include: UNHCR, Walt Disney Company EIT, Marriott, DTCC, SSA, JPM-Chase, MLSE, Governments, Municipalities, Pharmaceuticals, Telecoms, Financials

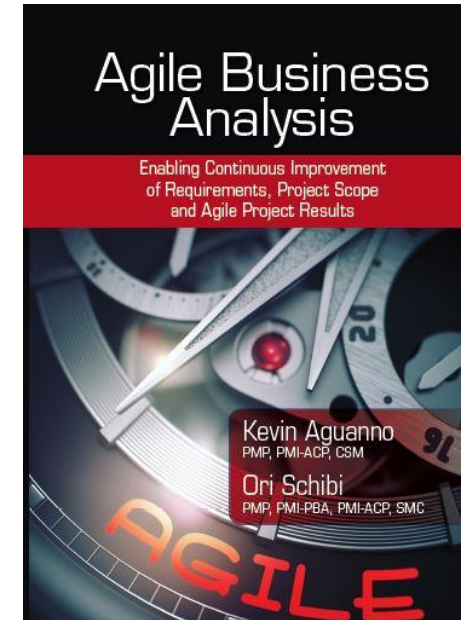


Our Goal

This dynamic session provides participants with a sneak-peek into the upcoming book – Agile Business Analysis.

The session examines the benefits agile projects can gain by ensuring that there are business analysis skills present and that team members demonstrate them consistently.

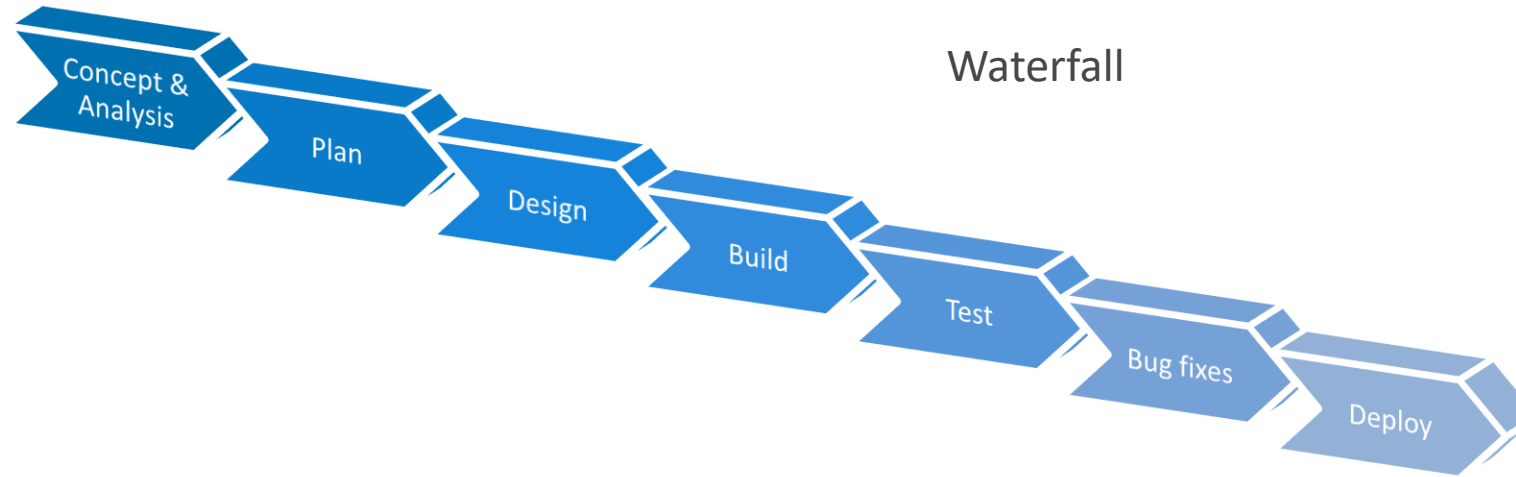
Every aspect of this webinar (like the book) is looked at with business analysis actions, areas of focus and considerations in mind.



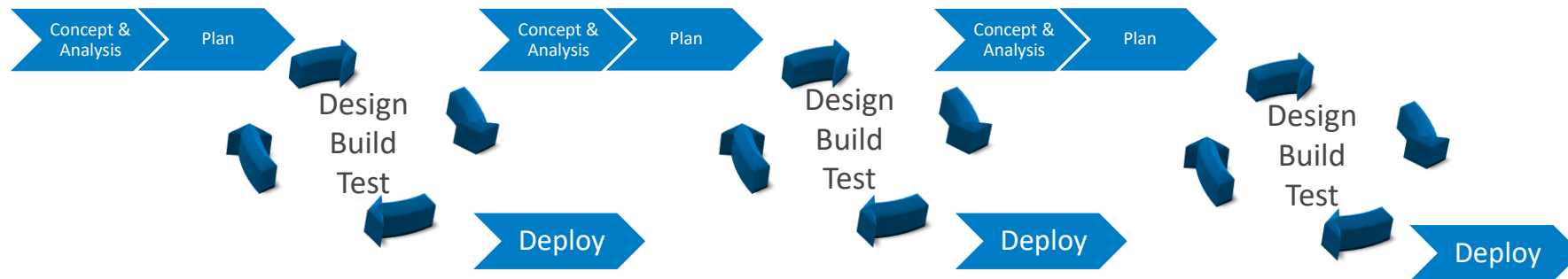
Today's Session Backlog

1. A quick intro to agile concepts and common agile-related challenges
2. Roles and responsibilities in agile environments and how the BA fits in
3. Agile requirements highlights and the main differences between “traditional” and agile requirements
4. Agile planning, estimating and documentation
5. Prioritization: making it effective and meaningful
6. Review of agile testing and solution evaluation
7. Breaking down the agile BA day
8. Moving forward: agile and social trends and organizational agility

“Traditional” Waterfall vs. Agile



Agile (Incremental and Iterative)



1. Agile Concepts and Common Agile-related Challenges

- Less documentation*
- Perception of less planning*
- Attempt to deliver early may confuse with working faster
- Short cycles, with repeat and ongoing need to revisit assumptions and high level plans
- Accepting ambiguity
- Thinking teams, not individuals
- Shared business analysis responsibility*
- Handling change
- Governance
- Organizational change
- Choosing the right approach
- Agile readiness
- Resource sharing
- Estimating techniques

2. Agile Roles; Where is the BA?

Role	Responsibilities
Product Owner: Sponsor / Customer / customer representative	<ul style="list-style-type: none">• Determine what will be built and when it is needed• Identify, elaborate, prioritize requirements• “The single wringable neck”
Team members: All disciplines (design, code, UI, DBA, test, train, document, etc.)	<ul style="list-style-type: none">• Build what is requested• Collaborate• Build shippable, production-quality product• Self-manage
Coach / Scrum Master / PM	<ul style="list-style-type: none">• Ensure effectiveness of team & individuals• Facilitate collaboration: customer, team, other stakeholders• Remove hurdles and impediments to progress• Interface outward to organization (reporting, status)

There may not be a need for a dedicated BA or a person with a title BA, but the business analysis activities need to be performed. If there is no BA role, team members need to perform these activities

The BA and Agile Development Principles

Improve

- Visibility
- Customer satisfaction
- Project flexibility
- Responsiveness for change
- Delivery of value to customer

Reduce

- Time to delivery
- Risk

The BA

- Enhance flow of communication to/from stakeholders / product owner
- Help articulate and validate true needs
- Iterative progress; manage ambiguity and required level of detail
- Facilitate iteration reviews and retrospectives for real time adaptation
- Closing the gaps to ensure value is articulated, delivered and realized

Reduce

- “Own” the flow of info; less defects, less risks, less misunderstandings
- Help focus on what matters through prioritization

The BA and the Agile Team

Not every Agile team will need a dedicated Business Analyst; some rely on team members who perform more than one role

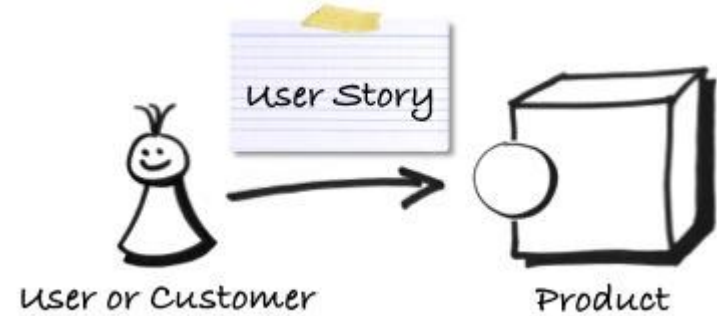
BA's may be asked to participate on an Agile team –

- Create specifications and help create a high trust environment
- Help the team unite around the iteration objectives, understanding the requirements at a lower level of detail, and bringing the team together to deliver an acceptable outcome

The BA may have to fill the role of a customer proxy; understand the needs of the customer and translate them to the development team

- This model introduces risk because the true end customer is not directly involved with the people developing the product

3. Agile Requirements



- The team should use use-cases or user stories
- Typically tend to be “lighter weight” specifications and requirements are written as user stories
 - A user story is a high level description of system behaviour
 - It is not a full specification of the requirement but a placeholder for conversation about the requirement
 - The user story will be fully specified as it is brought into an iteration or development cycle
 - Once delivered, a user story represents a fully functional (although possibly incomplete) slice of the overall system

Tasks

- Developers
 - Splits true user stories into tasks that must be accomplished to implement the story
- The BA
 - Split epics into user stories
 - Ensure non-functional requirements are embedded into acceptance criteria
 - Facilitate the iterative process
 - From high level / ambiguous requirements
 - Refining the story to sufficient level of detail
 - Helping determine the INVEST criteria
 - Check test plans
 - Help with testing

4. Agile Planning, Estimating and Documentation

- Planning takes place in every iteration
- Iteration zero
- Fast tracking – “Lenses”
- The BA supports, clarifies, escalates and helps refine estimates

Iteration Zero

Specify Business Objectives

Define Success Criteria

Build a project team

Determine an Approach

Plan activities

Conduct large scale planning

Design Architecture

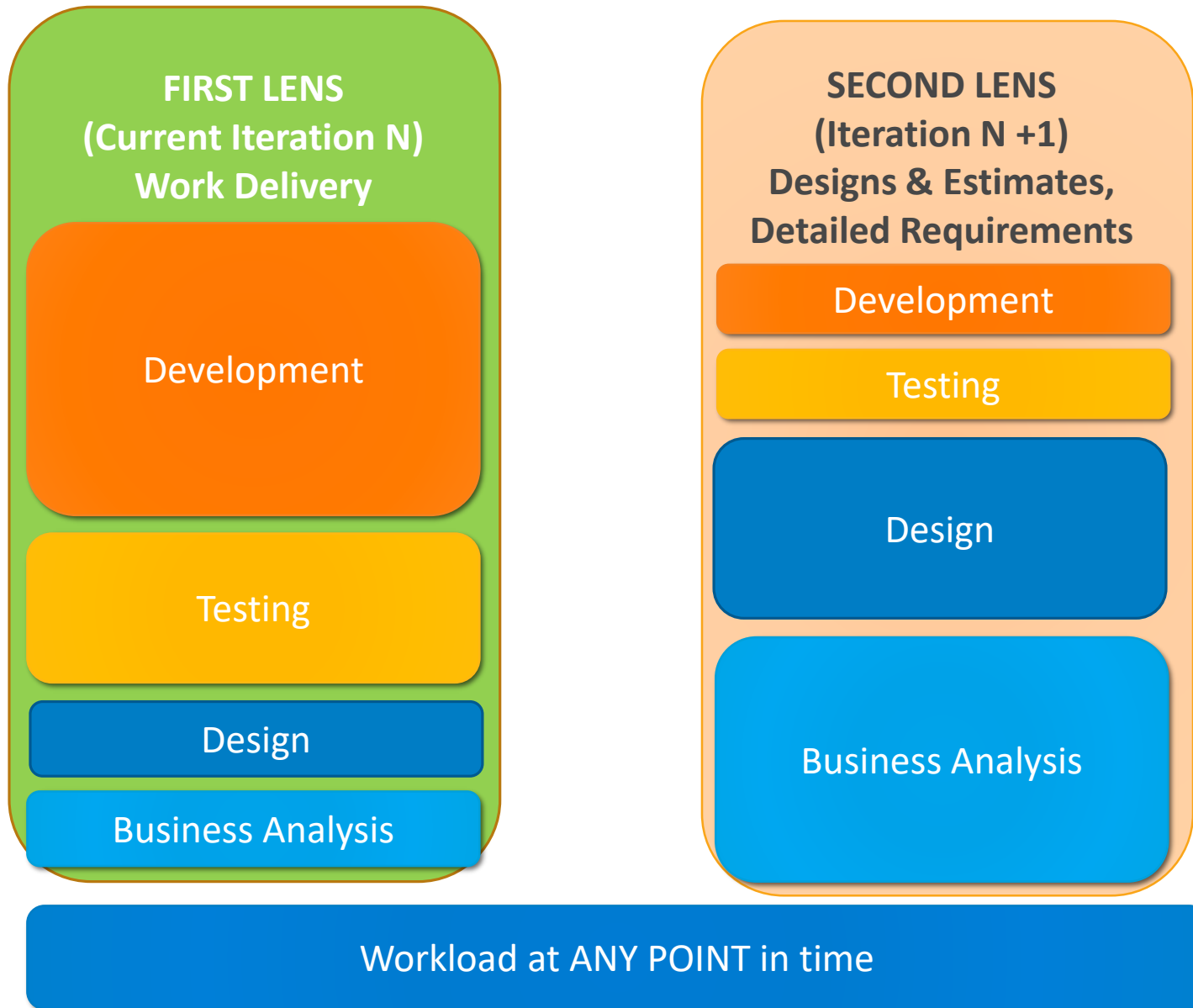
Identify Constraints

Develop first release plans

Plan BA work

Iteration One

Rough Time Breakdown Per Role – Each Iteration – 2 Lenses



- Common misconception: stories are handled within one iteration
- Reality: Fast Tracking
- “First Lens” – the iteration in which a given story is developed / tested
- “Second Lens” - detailed requirements, design and estimates for the story; one iteration prior to the “development” iteration
- Both sets of activities within lenses take place within each iteration

The First Backlog

As part of Iteration Zero, the team will be working on its first backlog. The backlog is the work that will be done in the next iteration.

The Team

- Develops stories that add most value to the users
- Many will be epics and need to be split

The BA

- **Release planning**
- Teaches elicitation techniques
- Act as a role model for the team
- Works on certain stories
- Aware of other stories being developed
- Likely to capture most stories

Agile Estimating

- Story points
- “Rolling Wave Planning”
- High level, sample and supported by detailed estimating for each sprint
- Process, practices and suitability
- Clarify
- Support the team
- Challenge
- Document

Agile Documentation

- Minimize
- Challenge
- Less formal
- Late if possible*
- Set up the right tools
- BA
 - Consolidate and facilitate effort
 - Fills in gaps

The BA and Iteration Planning

Help estimate individual capacity

Realize the differences between resources (speed, experience) for more accurate estimates

Facilitate the discussions around estimates and the planning poker

Address differences in estimates, their causes and how to overcome them

Document estimates and track estimates' quality to leverage learning and experiences

Help match resources to tasks

Manage updates to estimates and the inclusion of new information throughout the process

Enhance communication among all those who are involved in the process

Ensure prioritization activities take place and that the backlog fully reflect the needs

Demo: the Review Process



The BA and the Iteration Retrospective

The role of the BA: facilitation, documentation, idea selection, focus and improvement

Small, continuous improvement, one hour every couple of weeks

Pick up only a couple of items for improvement in the next iteration

Allows everyone in the meeting to express themselves

This is a team meeting, so the improvement areas should focus on the team and not on what other stakeholders should do better

Ensure lessons are implemented

Bring implemented lessons for review in the next iteration

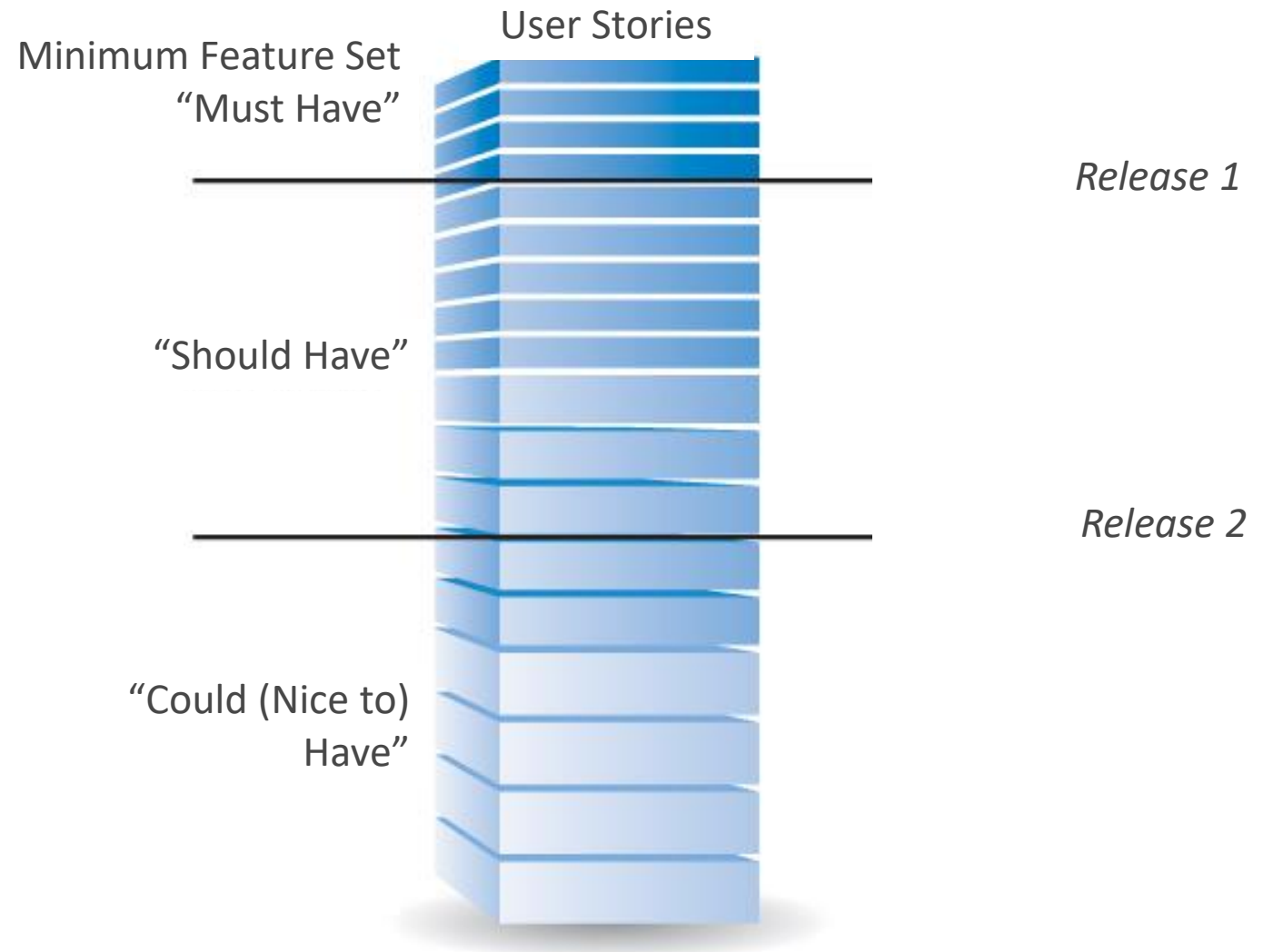
5. Prioritizing Items on the Backlog

- Estimates of stakeholder benefits (MoSCoW)
 - Stakeholders, BA
- Estimates of developers' efforts
 - The developers
- Risks
- External factors
- The BA consolidating information
- Feedback
 - Incorporate
 - Account for
 - Change control process, impact assessment and signatures

#	Criteria	Who
1	Business value (needs, judgment)	Product owner
2	Technical risk	Developers / Technical Team
3	MFS - Minimum feature set for product viability	Product owner & developers
4	Story dependencies	Developers

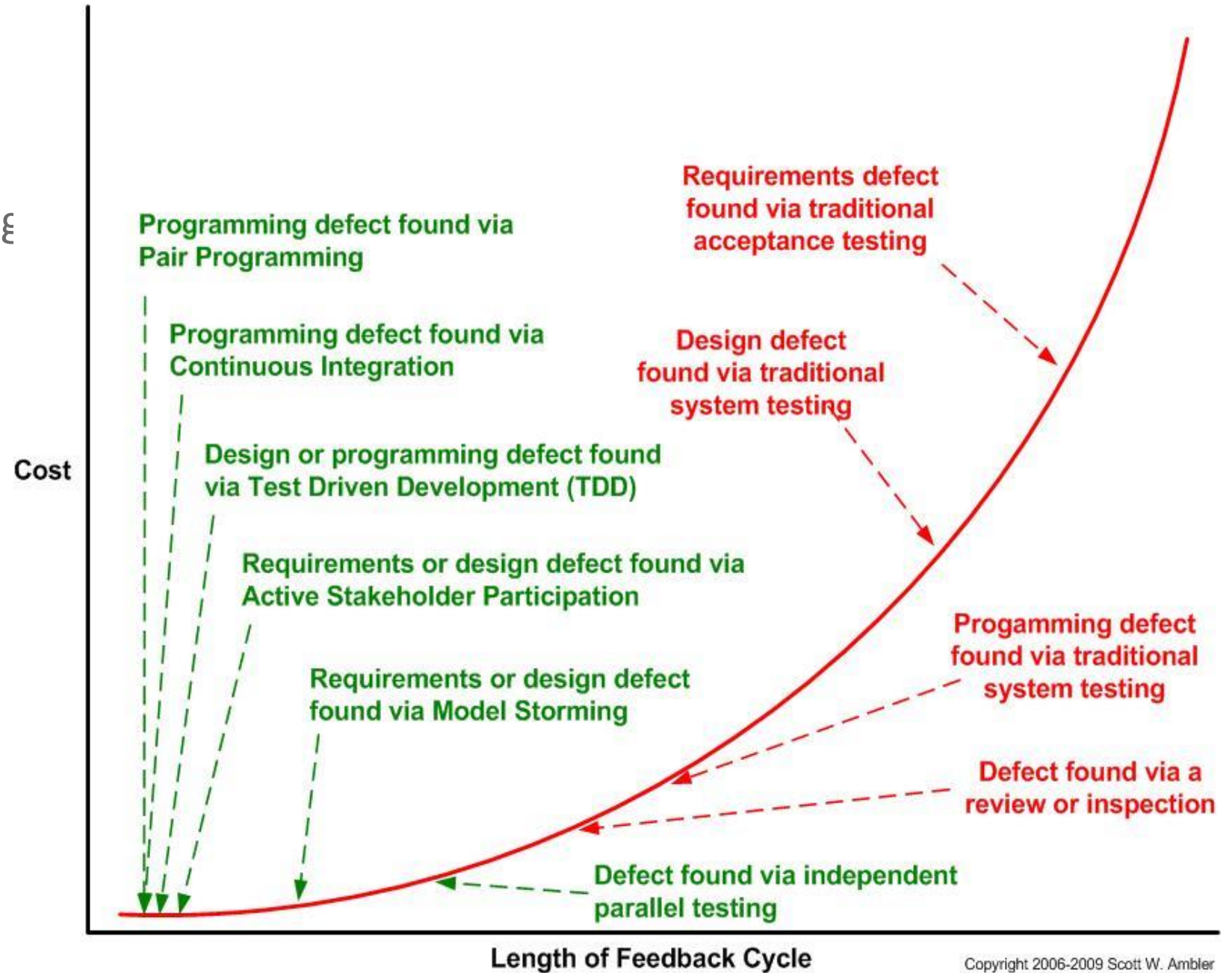
Backlog Management – the BA

- Acts as the backlog manager
- Listens to feedback
- Serves as the backlog grooming leader
- Changes the product backlog radiator
- Brings undeveloped and new stories or requirements



6. Agile Testing

- Growing role of testing
- Need for automation
- Acceptance criteria
- Testers' involvement
- Definition of Done
- The BA
 - Test plans
 - Test cases
 - Testing



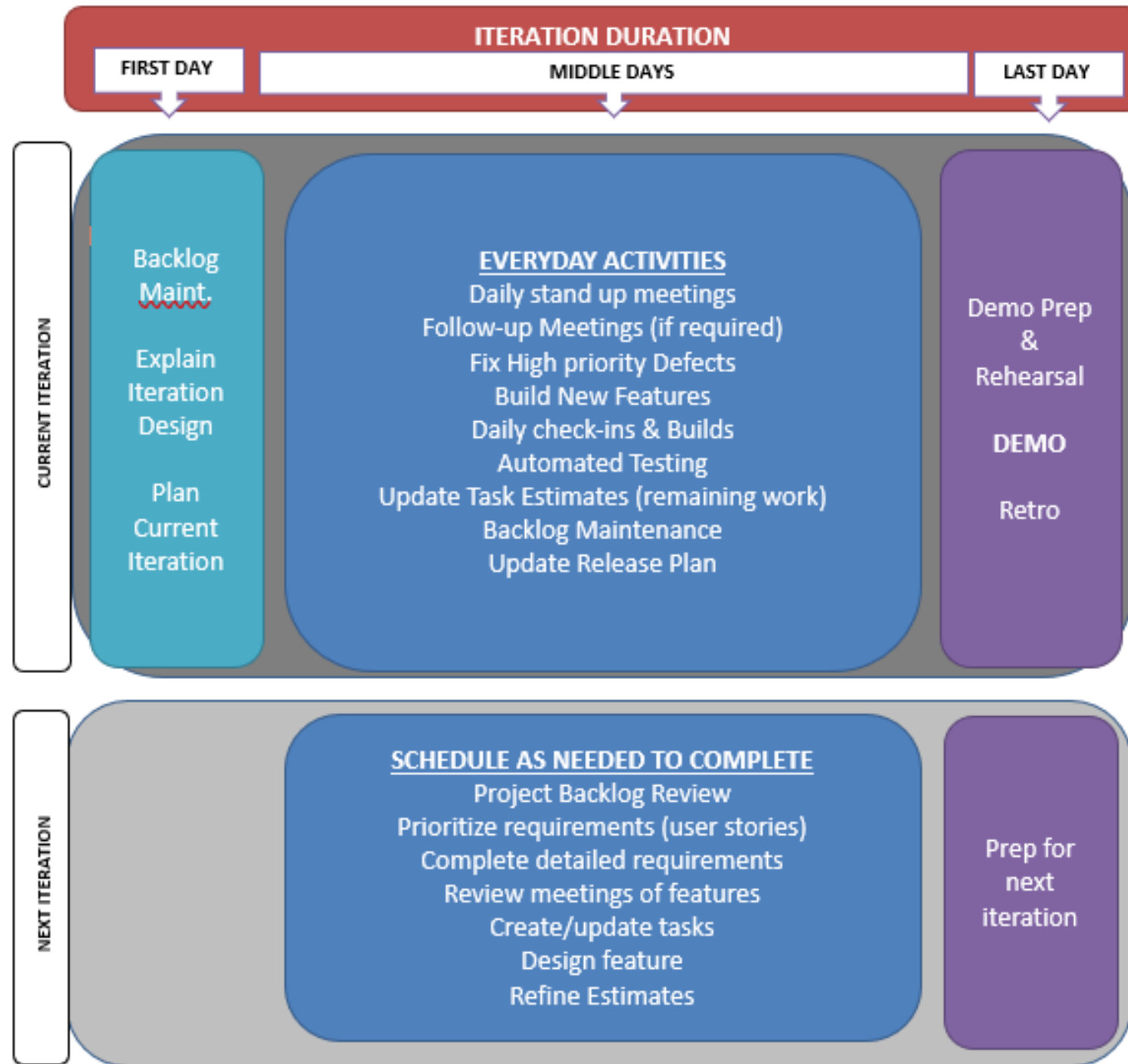
The BA and Agile Testing

Business Analyst	Tester / QA
Analyze user stories from business point of view	Test completed functionality each iteration from the end user's perspective
Facilitate creation of project and iteration backlog	Define and refine acceptance criteria for each user story
Facilitate the backlog prioritization process	Regression testing: ensure previously completed functionality has not been damaged by the new product increment
Help articulate new and changing needs and facilitate the planning and prioritization process of new items	Ensuring complexity and acceptance criteria are clear for any new need and story
BA role is integrated with testers' role, with other team roles (developers), as well as with that of the Scrum Master / PM and that of the Product Owner	Testers work closely with the Product Owner to clarify anything related to acceptance criteria, with developers and with the BA

The areas that overlap may introduce common issues that are associated with the touchpoints: from misunderstandings, to lack of clarity about specific roles and responsibilities, to other team members' failing to give BAs and/or testers sufficient amount of attention – especially in large teams, with many changing needs and with heavy workloads.

Just as people who have two roles tend to be drawn to their primary role, there are risks associated with anything that is being looked after by more than one role or individual.

7. A Day in the Life of the Agile BA



8. Moving Forward: Agile, Social Trends and Organizational Agility

- A BA or having these skills and responsibilities shared by team members
- Agile Planning and Scheduling
- Team capacity
- Day/Iteration/Release planning
- Prioritizing the list
- Documentation
- Keep an eye on risks
- Help / support
 - Product Owner
 - Team (designers, developers, testers)
 - PM / Scrum Master

Skills for the Agile BA

- Agile challenges our notion of software engineering best practices, project management methodology, and how we lead our teams
- Introduces a major shift in how teams look at requirements and when they are defined
- Collaboration, facilitation, leadership, coaching and team building – become significant new skills required for Business Analysts on Agile projects
- Business Analysts are well positioned to become critical to the success of Agile teams
- The BA acting like a BA – facilitating these areas, liaison among team members, with the customer, with SMEs and with Product Owner

Looking Back....

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Thank you

