

PM-BA Collaboration Contract

Work Division and Touchpoints: Areas of responsibility

Section 3 - Tasks and Activities by Project Lifecycle Stage – specifies a common division of the responsibilities.

This table should go to a deeper level of detail, including specific document ownerships, stakeholder engagement and reporting areas.

PM Lead	Joint	BA Lead
Project planning and subsidiary plans		Business analysis planning
	Set up a collaborative work environment with each other including specific roles and responsibility.	
	Set up rules of engagement with team members, SMEs and other stakeholders – based on areas of expertise, skills, availability, experience, rapport, personal style and relationships.	
	PM and BA should operate seamlessly, as “one entity” and look for ways to maximize their access to information, skills and experience for the benefit of the project.	
	Setup ownership of communication and reporting areas	
	Agree on terminology (Glossary), lifecycles, checkpoints, methodologies, best practices, communication (PM-BA) intervals, styles and formats and on organizational Standards and best practices .	
	Alignment to organizational strategy, policies, and rules (e.g., collaboration and interaction with PMO)	
	The PM-BA duo’s shared values: The contract should also address the PM-BA duo’s shared values and the culture they are trying to establish for the project—including values related to integrity, accountability, respect, partnership, commitment, and other personal values. Alongside these values, the contract should stipulate what specific actions the PM and the BA should take to ensure these values are fulfilled.	

PM Lead	Joint	BA Lead
	Skills review: The contract discusses the experience and skills the PM and the BA bring to the table and assigns specific tasks to each individual in a way that ensures both the PM and the BA engage in activities they are each good at and that each individual also gets a chance to develop their skills	
	Decision making protocols	
	Potential overlapping areas and friction points: The contract also directly addresses the traditional friction points and areas that may produce conflict between the PM and the BA—for example, what each individual expects from the other, any expectations that each individual has for their role and from the other person, as well as assumptions, constraints, issues, and obstacles	
	The BA Package: An important deliverable the BA should produce in the early stage of the project is the BA package. This is an information package that the BA who worked on the pre-project activities produces for the PM and the project BA (if a different BA is assigned to work on the project) in an effort to bring the PM and the project BA up to speed and inform them about basic considerations, objectives, and business needs related to the project. Creating such a package does not require extensive effort, and it would provide significant value for the PM-BA duo toward understanding the context of the project. Although the information package is not a traditional part of the mini stakeholder analysis, the information in the package will help serve as a foundation that will shape the need to define areas of focus and other touch points between the PM and the BA	