

## BAL2-1 Professional Skills for the Business Analyst

### OVERVIEW

This course trains participants to help business clients articulate their needs and wants, and to document them clearly, concisely, and completely. By grasping this core Business Analyst (BA) skill, BAs can contribute significantly to successful projects and the products they create.

Through a realistic case study and interviews, participants discover and then practice writing “good” requirements. The course also explores and lets attendees practice a simple process for validating and verifying requirements to ensure they are well documented. Also, attendees learn the importance of traceability and how to construct a traceability matrix.

The course concludes with considerations and techniques for creating a “requirements package” for maximum communication value, reviewing and managing requirements. Plus, attendees also learn a repeatable process for verifying that requirements are included in the final solution.

### DURATION

Course Duration: **2 days (14 hours)**

### AUDIENCE

People that have project experience working with a variety of roles (BA, QA, PM, sponsors) but have not had formal BA training. New business analysts (transferred from the business, or from a different IT job) and have had some formal BA training will also benefit. Experienced BAs and project managers who want a more formal and industry-standard business analysis approach will gain new skills and methods from this course.

### COURSE CONTENT

#### Module 1: Requirements Foundations

- ***Business Analysis Overview***
  - ✓ Business Analysis defined
  - ✓ BA competencies
  - ✓ Exercise: Key activities and artifacts of a BA
  - ✓ BA Body of Knowledge model
  - ✓ Simplified requirements process model
  - ✓ Exercise: Art versus science

- **Requirements Defined**
  - ✓ Requirements defined
  - ✓ Requirements classifications
    - Business
    - Stakeholder
    - Functional
    - Non-Functional
    - Transition
    - Analysis vs. design
    - Exercise: Practice distinguishing different types of requirements
  
- **Business Rules**
  - ✓ Business rule defined
  - ✓ Business rule checklist
  - ✓ Business rule categories
  - ✓ Requirement vs. business rule
  - ✓ Exercise: Identify business rules in your organization
  - ✓ COTS Considerations
  - ✓ Requirements approaches
  - ✓ Waterfall (plan-driven)
  - ✓ Agile (change-driven)

## Module 2: Define the Business Need

- **Understanding the business need**
  
- **Defining business requirements**
  - ✓ Business requirements
  - ✓ Business goals vs. objectives
  - ✓ Writing good business goals
  - ✓ Writing SMARTER business objectives
  - ✓ Identify problem or opportunity
  - ✓ Example business problem & opportunity statement
  - ✓ Business requirements questions
  - ✓ Case Study Workshop: Elicit and identify business requirements

## Module 3: Plan for Requirements

- **BA planning activities**
  
- **Understanding project context**
  - ✓ Context for requirements
  - ✓ Important of understanding project context

- ✓ Understand project background
- ✓ Questions to ask
- ✓ Where to start
- ✓ Anatomy of project objectives, actions and deliverables
- ✓ Case Study Workshop: Identify and understand project context
- **Define solution scope**
  - ✓ Defining solution scope
  - ✓ Process scope diagram
  - ✓ Context diagram
  - ✓ Use case diagram
  - ✓ Case Study Workshop: Create a scope diagram for the solution
- **Identifying stakeholders**
  - ✓ Roles and responsibilities
  - ✓ Stakeholder onion
  - ✓ Techniques to identify stakeholders
  - ✓ Selecting stakeholder representatives
- **Case Study Workshop: Identify key stakeholders**
- **Communicating with Stakeholders**
  - ✓ Communication considerations
  - ✓ What to communicate
  - ✓ Communication tips
  - ✓ Exercise: Insights color energy communication

#### Module 4: Eliciting requirements

- **Elicitation defined**
- **Common elicitation challenges**
- **Prepare for elicitation**
  - ✓ Elicitation prep checklist
  - ✓ Elicitation techniques
  - ✓ Exercise: When to use or not use each technique
  - ✓ Prepare questions
  - ✓ Case Study Workshop: Prepare for eliciting requirements and business rules
- **Conduct elicitation and document results**
  - ✓ Conduct
  - ✓ Document results
  - ✓ Confirm elicitation results

- ✓ Case Study Workshop: Conduct requirements interviews and document results

## Module 5: Document and Analyze Requirements

- **Requirements analysis tasks**
- **Documenting requirements**
  - ✓ Quality characteristics of “good” requirements
  - ✓ Exercise: Analyzing requirements
  - ✓ Requirement formats (templates for writing each category of requirement):
    - ✓ Stakeholder
    - ✓ Functional
    - ✓ Non-functional
    - ✓ Business rules
    - ✓ Writing guidelines
  - ✓ Case Study Workshop: Writing “good” requirements & business rules
- **Define assumptions & constraints**
  - ✓ Case Study Workshop: Identify assumptions & constraints
- **Organize & trace requirements**
  - ✓ Traceability
  - ✓ Benefits
  - ✓ Traceability alignment
  - ✓ Organization components
  - ✓ Types of relationships
  - ✓ Traceability / organization matrix
  - ✓ Case Study Workshop: Create traceability matrix
- **Prioritizing requirements**
  - ✓ Benefits of prioritization
  - ✓ Prioritization challenges
  - ✓ Basis for prioritization & techniques
  - ✓ Case Study Workshop: Prioritize requirements
- **Validate & verify requirements**
  - ✓ Validation vs. verification
  - ✓ Validation checklist
  - ✓ Verification checklist
  - ✓ Tools
  - ✓ Case Study Workshop: Validate and verify requirements

## Module 6: Model Requirements

- **What is a model?**
- **Benefits of modeling**
- **Modeling guidelines**
- **Current solution modeling**
  - ✓ Business Process Models
    - *Case Study Workshop: Eliciting, documenting, and tracing new requirements*
  - ✓ Data Models
    - *Case Study Workshop: Eliciting, documenting, and tracing new requirements*
  - ✓ Use Case Models
    - *Case Study Workshop: Eliciting, documenting, and tracing new requirements*
  - ✓ Interface Models/Prototypes
    - *Case Study Workshop: Eliciting, documenting, and tracing new requirements*

## Module 7: Manage & Communicate Requirements

- **Requirements management & communication tasks**
- **Creating a requirements package**
  - ✓ Package process
  - ✓ Considerations for packaging
  - ✓ Communication channels
  - ✓ Common package components
  - ✓ Case Study Workshop: Requirements Package outline
- **Requirements reviews**
  - ✓ Why conduct reviews
  - ✓ Effective review planning
  - ✓ Requirements reviews
  - ✓ Review approaches
  - ✓ Effective requirement review tips
  - ✓ Case Study Workshop: Conduct a requirements review session
- **Managing requirements**
  - ✓ Manage requirements documentation and approvals
  - ✓ Maintain requirements for reuse