

Project Management & Business Analysis: The Perfect Partnership?

Whats in a name?

If I asked you to list the top five critical success factors for any business change project, you would probably come up with a list something like this:

- Strong leadership
- Well defined requirements
- Effective business change
- Prudent risk management
- A compelling business case

But how often are projects started without a clear responsibility for these factors? Its one thing to pay lip service to them and just expect them to happen, but we all know that leaving things to chance isn't the most effective way of getting things done.

Instead, wouldn't you rather have the resources with the skills to do this assigned to your projects?

Well, to start with, the project manager should be the first vacancy you fill. (And if you don't always appoint a project manager for your projects, then shame on you!). As the APM remind us¹: "the Project Manager manages the project on a day-to-day basis and is responsible for delivering the capability that allows the benefits to be realised". As such, he/she should share the leadership role with your project sponsor and manage the project within the triple constraint of time, cost and scope. Plus all the other benefits of good project management such as planning, risk management and change control.

But what about defining requirements and supporting business change? Are these activities you expect your Project Manager to do as well? And do they have the requisite skills? In all but the smallest projects, this may be too high an expectation.

Rather, I would suggest you consider the merit of assigning a business analyst to the project. Now, different people have different names for this creature, so here's a definition from the IIBA to help us²: "A business analyst works as a liaison among stakeholders in order to elicit, analyse, communicate and validate requirements for business change"

Doesn't that sound like a valuable resource to have? Someone who has the interpersonal skills to find out what is needed, help build a business case to justify it and then define the baseline requirements that we are trying to satisfy. And who can act as an agent of change in making sure we implement the outputs of our project.

Critical skills and useful techniques

Hopefully, you are now prepared to consider a business analyst in your projects so to convince you further, let's look at what skills he/she would need to have.

¹ Project Management Body of Knowledge 5th edition – Association of Project Management

² Business Analysis Body of Knowledge v1.6 - International Institute of Business Analysis

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|-----------------------------|-----------------------------|
| ✓ Interpersonal skills | ✓ Interpersonal skills |
| ✓ Business domain knowledge | ✓ Business domain knowledge |
| ✓ Communication skills | ✓ Communication skills |
| ✓ Consultative | ✓ Leadership |
| ✓ Doing things right | ✓ Getting things done |
| ✓ Detail focus | ✓ Big picture view |



Figure 1 - Key Skills

This is primarily a 'people' role and so good interpersonal skills are a given; influencing, negotiation and assertiveness skills are invaluable. Clearly, communication is also key; our business analyst must have good verbal, written and presentation skills. And having a requisite level of domain knowledge is needed to ensure credibility in this role.

So far, this would equally apply to our project manager, but there are some specific traits that mark out a good business analyst. He/she has to adopt what I call a consultative approach; active listening, incisive questioning and innovative thinking. He/she has to be very focused on detail and obsessive about quality, making sure things are done 'right'.

It's interesting to compare this to the traits we would like our project manager to exhibit. He/she should be a little more hard-nosed about getting things done, pushing the team to meet deadlines and driving the project along. But also ensuring the overall objective of the project isn't lost in the context of the underlying business case.

And there are some specific techniques that a business analyst can use to help us achieve some of these critical success factors. For example, good interviewing and workshop facilitation technique are helpful in eliciting the requirements of users and other stakeholders. Understanding how to construct use diagrams and business activity models, help to convey meaning and communicate new processes. Crafting precise, unambiguous requirement specifications ensures common understanding and a good baseline for the project manager to manage.

Who does what and when?

Like any other role in our project team, we need to consider when we will need our business analyst's skills and what tasks he/she would be doing. We'll come to the specifics in a minute but in general terms, I find it helpful to think of the business analyst focused on the beginning and end of the project, when the project is conceived and closed, with the project manager driving the middle part, when the project is defined, started and performed. This ties in with my own experience that many projects start and finish badly, but are managed competently in the middle. Could this be because we don't have the right resources with the right skills at this time?

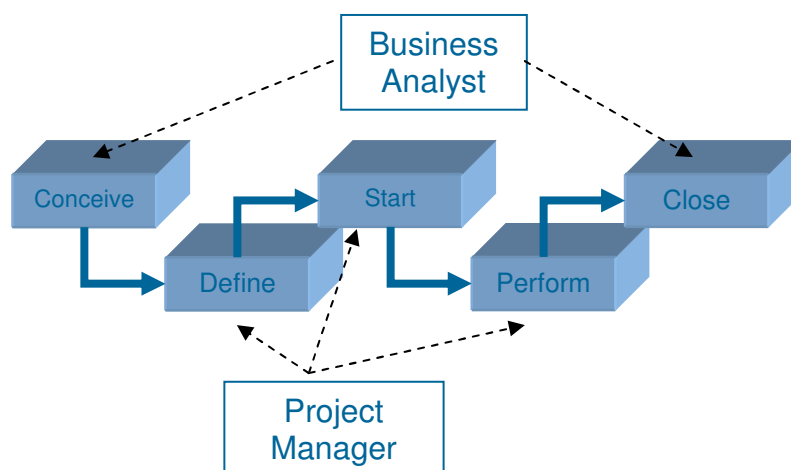


Figure 2 - Mapping of Roles to the Project Life Cycle

During the Conceive phase, we are concerned with understanding the business need or problem, evaluating different options for solving it and justifying the preferred option in a business case. And during the Close phase, we are concerned with handing over the deliverables of the project to the users, which in the case of a business change project means making sure the change sticks! These are both areas where the requirements elicitation and business change skills of the business analyst come into their own.

During the Definition, Start and Perform phases, on the other hand, we are concerned with establishing a baseline for the project, mobilising our project resources and controlling the project activity. And here our project manager comes into his/her own, with their project planning, risk management and change control skills.

Of course, it's rarely as clear cut as this and there is a degree of overlap with the project manager and business analyst working in parallel during each phase. But as a starting point for resource planning, this isn't a bad approximation.

Dysfunctional Partnerships

Unfortunately, to really make your project successful, it not as easy as just allocating any available individuals to these roles. Like teambuilding generally, it pays to consider how the individuals will work together. Have you got the right combination of thinkers, doers and team players?

Getting the right balance between your project manager and business analyst is particularly crucial, as it will influence the way your project is managed. A strong project manager but weak business analyst may result in a well managed project that meets time, cost and scope constraints, but doesn't quite deliver the benefits expected, as the initial requirements may not be fully thought through or the business change hasn't been well managed at the project close. On the other hand, a weak project manager but a strong business analyst may result in a thorough understanding of the business problem and a well implemented solution, but it may take a lot longer and cost a lot more than initially planned, as the driving force isn't there to keep it on track. Which may make the whole business case less compelling than when you started.

What we really want is a combination, where the complimentary skills and personalities ensure the optimum balance between doing the job right and getting it done efficiently.

The problem with split personalities

I remember when I started my career in the ICT industry I was called an 'implementation consultant' and I was expected to help the customer implement my company's ERP application. These were small/medium projects often with a budget less than £100,000 and a project team of less than five. Looking back now, I realise that my job was a hybrid project manager and business analyst role as I could be working on understanding requirements one day and then planning the project and monitoring work the next. Much as I enjoyed the challenge, it did have its difficulties, such as deciding how to allocate time to these different tasks. More fundamentally, I lacked training and experience in the different techniques required to fulfil both these roles and had to rely on common sense and instinct more than was ideal. However, the reality is that we are often faced with the situation where we have a small project like this with limited funding and it's a struggle to resource a full-time project manager let alone a business analyst as well. What can you do in these circumstances; apart from expect your project manager to act as the business analyst, as I was?

If you have a number of this type of projects, it is worth developing some core business analyst skills within your IT department or project support office (PSO), if you have one that you can engage on a temporary or part-time basis and hence spread the cost across many projects. Or failing that, dare I suggest working with an external consulting organisation that can provide these skills as and when required.

But if you really have to consolidate the roles into one individual, at least by acknowledging the fact they are different roles, you are able to plan your project manager/business analyst's time more effectively. You can also support him/her with specialist help at certain points in the project when they recognise their skills are limited, for example with eliciting requirements or risk management.

Developing the perfect partnership

Building this perfect partnership will take time and should be approached a step at a time:

- Think about what key skills and techniques your project manager and business analyst will need and plan training accordingly. There are associations like the IIBA³ and APM⁴ who can give unbiased advice and guidance for this as well as direct you to training providers who can assist.
- Start to develop your teams of project manager and business analyst by running workshops, piloting on small, non-critical projects and generally making use of any opportunity for them to practise and work together so they develop the balanced approach we are looking for.
- Take a look at how you run projects and if you already have a role defined for the project manager and business analyst. Most organisations have a set of standards, or at least a template, that is the baseline for managing projects and this should be updated to reflect the right emphasis on both the roles we've discussed.

The perfect partnership

Hillary and Tenzing, Lennon and McCartney, Redgrave and Pinsent.

They are all world class performers in their own field and achieved what would be impossible for an individual to achieve. But they certainly didn't reach the pinnacle of their professions by accident. Instead, they worked out what their roles were, practised together and developed that elusive synergy that made them great.

³ International Institute of Business Analysis www.iiba.com

⁴ Association for Project Management www.apm.org.uk

I'm afraid your project managers and business analysts may never climb Everest, write classic pop songs or win Olympic gold. But by building the perfect partnership for your business change projects, you will achieve great things and make your business change a reality.

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