

BUSINESS ANALYSIS CANVAS

ROADMAP TO EFFECTIVE
BUSINESS ANALYSIS
EXCELLENCE.

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VOLUME

5

Business Analysis Canvas

Bio

The author, Jason Kelly, has extensive experience in the academic and professional application of Business Analysis techniques and processes. 20 years plus working for industry leading global organizations, plus public sector experience with engagements in lottery, casino, and municipalities.

He has been awarded and recognized as an exceptional thinker and subject matter expert in the area of business and business analysis. He has built a knowledge and understanding of business that propels organizations towards success.

His experiences he has led a cross spectrum of subject matter experts through many projects, including transformational business projects. He has applied, designed and implemented new and dynamic approaches to Business Analysis. He has mentored and coached Business Analysts, as well as implementing BA Centre of excellence within numerous organizations.

Co-Founder of ascio Consultancy Services in Vancouver, BC (www.ascio.ca) and has written books and publications on gamification, business analysis, project management, and strategy.

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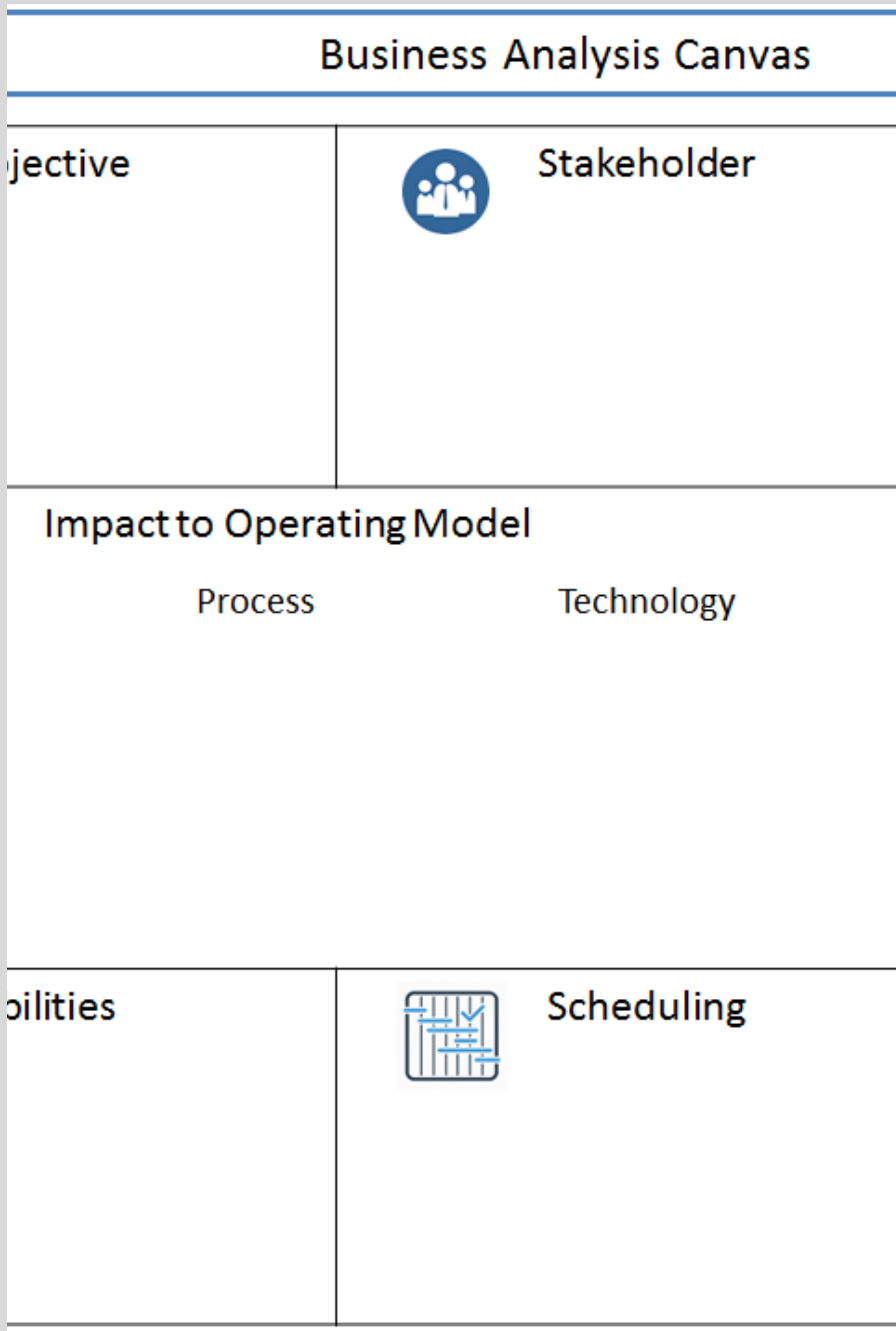
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INTRODUCTION

What is a Business Analyst?

Business Analysis and the role it plays has evolved over time as organizations strive towards refinement, improvement, and optimization. A Business Analyst is someone whose role and function is ever changing with organizational evolution. The pace of change has increased over the last few years as more and more organizations shift towards a technology enabled future. Technology does provide the opportunity to harness efficiencies in process automation/removal as well as improved speed to change.

To allow for the change it is important for the organization to understand the pivotal role the Business Analyst plays within the realization of organizational development.

The Business Analyst role has developed into a range of skills and capabilities that are aligned to an internal consultant, technology, and a financial expert. Business Analysts can enter a project at any phase and can add a considerable amount of value to the project.

With this said, I propose the following definition of Business Analyst:

"A business analyst is someone who analyzes and documents business, processes or systems. Assesses and recommends the business model or its integration with technology."

There were a number of key questions posed whilst developing this playbook:

- What are the key questions Business Analysts need to ask?
- How can a Business Analyst plan be effectively and easily communicated?
- What supporting documentation would assist all Business Analysts?
- How can a book become a playbook to support current and future needs of Business Analysts?

Extensive research, personal experience, group work, and collaboration have answered these questions. Each section of this playbook seeks out to provide insight to the Business Analysis activities to support the Business Analyst complete their duties more efficiently. The Business Analysis Canvas can be utilized at project initiation or planning phases.

Brief history of Business Analysis

Throughout the technology era Business Analysis and the role of the Business Analyst has developed from the origins of system analyst into more general business applications. IIBA (International Institute of Business Analysis) was formed in 2004 to help support the growth and development of the subject.

The traditional workload would have consisted of code changes, database updates, and other IT related activities. Organizations saw the benefit of more business centric talent who understand processes, operating models, business models and the application of technology to efficiency gains.

The Business Analyst role grew from this desire for business expertise, but still many confuse the role with that of a system analyst. The modern Business Analyst is not only concerned with the requirements but also the context of those requirements.

Business Analysts seek out the answers to the following key questions:

- Drivers / Force for change – why do we need to make a change?
- Vision / Goals – what does the business look like after we make the change?
- Objectives – how do we measure our success?
- Requirements – what elements need to be implemented in order to realize the business vision?
- Business Rules – what conditions govern the behavior of the implemented solution?

The importance of the Business Analyst has really been recognized in the last decade as businesses more readily seek technology solutions to complicated business problems. But because of the added business focus a Business Analyst provides, businesses have been able to utilize the Business Analyst to solve problems that do not require technology changes such as business process improvement, organization changes and the streamlining of operations.

More and more, Business Analysts are becoming involved at an earlier stage of project work where they can not only define the business requirements but outline the current state and future state of the business as it relates to the business problem and solution.

Future expectations of Business Analysis

No one can predict the future of any organizational function or role, but as the Business Analysis role continues to evolve, the following outlines of the future expectations for the Business Analyst role:

- Prediction – Greater reliance upon the Business Analyst identifying future trends/pivots in organizational internal/external market.
- Numbers – Currently the role of analysis of numbers resides within the role of Business Analytics. Over time there will be a blending upon these roles to create an opportunity for a process and numbered centric role who will help drive improvement throughout organizational processes.
- Influence – Within today's organizations, Business Analysis is seen a component of a larger department such as projects or transformation. The importance and reliance on Business Analysis will create a more distinct work area/department for Business Analysts to work within such as BAO (Business Analysis Office) or BACoE (Business Analysis Centre of Excellence).








The three predictions outline a bright future for the role of Business Analysis within the organizational future state. The underlining justification for this is the value proposition of the role. Just like other key organizational roles such as Project Management, Enterprise Architecture, Financial Accountancy, Database Administrator, etc, the Business Analysis role is vital for a healthy and profitable future. This perceived value of the role has increased exponentially over the years and will continue to drive benefits.

CANVAS

What is the Canvas?

The CANVAS is not a magic pill that will resolve all your Business Analysis concerns/issues. It is a flexible approach to complex matters.

This sounds rather grand, however, what is meant by this statement is the CANVAS is a robust or troubleshooting tool that can be applied to the most complex of Business Analysis activities in a simple, yet refined manner. The CANVAS is repeatable and easy to share with subject matter experts (SME's) and other stakeholders.

Business Analysis Canvas		
 Project Objective	 Stakeholder	 Deliverables
Impact to Operating Model People Process Technology		 Communication Approach
 Responsibilities	 Scheduling	 Key Dates

Section – Project Objectives

Understanding what the project is trying to achieve is vital to any successful Business Analysis engagement. There is a fundamental need for awareness of macro and micro environments in which you are working, such as, forces on organization due to competition, technology advancement, and organizational maturity across the impacted areas.

Project Objectives go beyond the lofty goals of a project, they focus on the outcomes, such as, we will build a specific system or we will gather requirements on a specific process. A project is an activity that has a start and end date in which activities/tasks are completed.

where do you
find the info

Project objectives can be found in a variety of locations within the organizations documentation supporting the project activities. Examples of locations of project objective information are:

- Original Project charter
- Business case / value for money justification
- Strategy outline which can be associated to a roadmap aligned to project engagement

Each of these documents will provide insight and understanding into the objectives of the project. These documents will allow the Business Analyst to appreciate the efforts and impact of the project engagement.

1. What are the high-level expectations of the project?
2. What is the project trying to change/improve/remove?
3. Is this project part of a larger program, if yes, what is the expectation of the program?
4. Has there been a project plan development for all project activity (beyond Business Analysis activity)?
5. Is the business edging towards a specific outcome (try to identify embedded bias within the organization)?
6. What systems/processes are affected by this project engagement?

What
questions do
you ask?

Section – Stakeholders

Stakeholders are the people or organizations that will be impacted by the activities completed as part of the Project Objectives. Awareness and understanding of the stakeholders allow the Business Analyst to align outputs to reflect different stakeholder needs and expectations.

A stakeholder is any person, organization, social group, or society at large that has a vested interest in the business and its activities. They can be internal or external to the organization.

where do you
find the info

The Stakeholders can be a wide cross spectrum of society and the extent of the stakeholder group is dependent upon the project scope and size. For example, there will be a significant number of stakeholders involved in a project for a new power plant, whereas, not many stakeholders would be affected by requirements for a new time keeping the program for a small works department.

Stakeholder's information can be contained within the following documents:

- Stakeholder Impact Assessments
- Project Charter
- Business Case / Value proposition

1. Who are the Stakeholder groups affected by this project?
2. Where are these Stakeholder groups located?
3. How complex is each Stakeholder group?
4. What is the Attitude / Influence of each Stakeholder?
5. What is the impact of the project on each Stakeholder?
6. What is the Decision-making Authority of each Stakeholder?

What
questions do
you ask?

Section – Deliverables

A Business Analysis Deliverable is an output that at the commencement of the project is identified. As Business Analysts work across technical and enterprise based projects there are a wide variety of Deliverables that can be developed during the Business Analyst's engagement.

The following are examples of Deliverable groups.

- Functional and non-functional requirements
- Vision / Strategy
- Enterprise Analysis
- Business case / Value proposition

where do you
find the info

The Deliverables as mentioned before can range to extensively complex strategies for major projects to functional requirements for a minor process change. It is important that the Business Analyst understands expectations on them for the level of detail to be completed as their output within the project.

Deliverable information can be contained within the following documents:

- Project Charter
- Business Case
- Project Plan

1. What is the Deliverable key area(s)?
2. How detailed is the Deliverable required to be?
3. Is there an opportunity to review previous Deliverables?
4. What is the approval/sign off expectations for each Deliverable?
5. What is the sequence of the Deliverables (if more than one)?
6. What are project dependencies aligned to each Deliverable?

What
questions do
you ask?

Section – Communication Approach

Effective communication skills allow you to express yourself and the project activities effectively and help you gather and disseminate information.

Within projects the Project Manager will typically develop a communication plan at the commencement of a project. The Business Analyst's role is not to replace the Project Manager but rather compliment their activities. A Project Manager is viewing their communication plan as the holistic (entire) project life cycle, whereas, the Business Analyst is focused on their distinct elements of work.

where do you
find the info

Communication approach for a project can as indicated earlier be already outlined within existing project information. It is important for the Business Analyst to have reviewed this information before they think about their communication approach.

Deliverable information can be contained within the following documents:

- Project Plan
- Project Charter
- Communication Plan

1. Who needs to be communicated?
2. What does each group need to understand in the communication?
3. What form does each group require?
4. Who is the owner of this communication transmission?
5. How often does each communication need to be sent?
6. Is this communication part of the larger project communication approach?

What
questions do
you ask?

Section – Key Dates

Key Dates are moments in the project timeline that have one or more milestone delivery occurring. We have already touched on what is a Deliverable. Capturing the key dates for your project will allow the Business Analyst to sequence and manage his / her time whilst working on the project.

Within the Business Analysis CANVAS Key Dates are those that hold Business Analyst deliverables, rather than other Project milestone dates. Those dates are important, but that is all managed within the Project Plan by the Project Manager.

where do you
find the info

Understanding a Business Analysis project key dates is a relatively easy task. There are a number of locations to find this information, the Business Analyst will need to extract and filter (to only show their responsible tasks).

The following are typical locations for key dates:

- Project Plan
- Project Charter

1. What is the overall project completion date?
2. What is the sequence of the project (key tasks/phases)?
3. When do we expect each key task/phase to be completed?
4. What are the elements of the key tasks/phases relating to Business Analysis activity?
5. When is the Business Analyst resource expected to be off boarded from the project?
6. What is the expected Business Analysis resource availability/allocation on the overall project?

What
questions do
you ask?

Section – Responsibilities

Responsibility means who is accountable, responsible, consulted and informed (RACI) of key activities completed throughout the Business Analysis activities.

Accountable means the person(s) who is overall accountable for the success of that activity.

Responsible means the person(s) who is allocated to get the job completed.

Consulted means the person(s) who will work with the responsible person(s) to complete the activity.

Informed means the person(s) who are kept up to date with the performance of that specific activity.

where do you
find the info

There are a number of source documents that can support the identification of the responsible parties and their responsible type (RACI).

The following are documents that may contain this information:

- Project Charter
- Project RACI
- Project scope/plan

1. Who is the project sponsor and steering committee (if available)?
2. Who are the SME identified for each key Business Analysis Activity?
3. What are business units in which the Business Analysis activities will take place?
4. Who are the Talent allocated to the Business Analysis project (who is doing work and producing deliverables)?
5. Who is accountable for the overall deliverables / Business Analysis Activity and does this person(s) change depending upon the deliverable?

What
questions do
you ask?

Section – Target Operating Model (TOM)

Target Operating Model (TOM) is a technique to illustrate the future state of the organization once the project work is completed. TOM focuses on the three key elements of an organization (PEOPLE, PROCESS, TECHNOLOGY). When you consider the organization today and when the project is successfully completed, the future is the TOM.

Business Analysts work across a wide variety of project types ranging from Technology functional requirements, Process Improvement, business case development, staff reorganization etc.

where do you
find the info

Changes to the TOM do not need to be significant, they should be reflective of the engagement activity of the Business Analyst. The changes will be limited to small iterative developments that will be enabled throughout the organization operating model.

A good source for TOM information is the master project/program information. This should provide guidance to the holistic expectation. If this is not available, you should explore the following:

- Business Case
- Straw Dog (outline doc describing the future state)
- Vision statement

PEOPLE QUESTIONS –

1. Will the project affect staffing hours of operating?
2. Will labor structure change (number of people required to complete the role(s))?
3. Does the skills/capabilities of the resource base change?

PROCESS QUESTIONS

1. What processes are effected within the future state?
2. How do these processes change the overall organization value stream?
3. What are the process dependencies?
4. What is the customer journey impacts of the change to process?

TECHNOLOGY QUESTIONS –

1. Which Legacy systems will be impacted by the change?
2. How is the enterprise architecture impacted by the project activity?
3. What are process touch points impacted with technology changes?

What
questions do
you ask?

Section – Scheduling

Once the Business Analyst has captured the expectations across the other Business Analysis CANVAS sectors he /she can now build out their own project plan/task scheduling to help illustrate the activities to the stakeholder groups.

When a Business Analyst is allocated an activity or collection of work to complete or manage (if more than one Business Analyst involved) it is vital they have planning capabilities. Planning and monitoring of plan is a key capability for Project Managers.

where do you find the info

Business Analysts can find information on planning their own work and within the overall project activity.







The following are locations where you may find information to support your planning activity:

- Project plan
- Project charter

1. How long is the Business Analysis project activity (i.e. when is it starting and expected completed date)
2. What resources are available to support the Business Analysis activity?
3. What percentage of the time are these resources allocated to the Business Analysis specific activity (be mindful the resource may be working on other elements of the project beyond the Business Analyst activity)?
4. What are the deliverables or their sequence?

What questions do you ask?

Business Analysis Canvas

 <p>Project Objective</p>	 <p>Stakeholder</p>	 <p>Deliverables</p>
<p>Impact to Operating Model</p> <p>People Process Technology</p>		
 <p>Responsibilities</p>	 <p>Scheduling</p>	 <p>Key Dates</p>

WHAT NEXT

What next?

The Business Analysis Canvas has been designed to quickly be adapted to meet your project needs. The questions help guide the Business Analysis through the steps of gathering and completing the information required to effectively kick off the Business Analysis project.

WWW.BUSINESSANALYSISCANVAS.COM

The website is a great source of additional content to support your Business Analysis project activities, including templates and further reading.

WWW.ASCIO.CA

ascio Consultancy Services will be happy to discuss your project needs and develop a custom solution for your organization.

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EXPLORING THE UNKNOWN

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