

# Efficient Business Analysis Information Management



# Welcome, And Thank You For Coming!

- ❖ Hosted By AdvanceEdge Professional Services
- ❖ Based in Toronto, Canada
- ❖ An Endorsed Education Provider of the International Institute of Business Analysis (IIBA EEP)
- ❖ The 4th webinar in the series of our bi-weekly webinars
- ❖ Anastasia Entina, 11+ years in IT, CBAP, AAC, PMP, SAFe 6.0 PC

# Our Services

- ❖ **ECBA/CCBA Certification Preparation Course**
  - ❖ **Start Date:** September 28th, 2024
  - ❖ **End Date:** October 19th, 2024
  - ❖ **Duration:** 21 Hours
  - ❖ **Format:** 7 Zoom sessions, every Saturday and Sunday from 5:00 PM to 8:30 PM EDT
- ❖ **CBAP Certification Preparation Course**
  - ❖ **Start Date:** October 5th, 2024
  - ❖ **End Date:** November 3rd, 2024
  - ❖ **Duration:** 35 P Hours
  - ❖ **Format:** 10 Zoom sessions, every Saturday and Sunday from 9:00 AM to 1:00 PM EDT



# Next Webinar Announcement

- ❖ Wednesday, October 9th, 11:00 AM EDT
- ❖ Online, 1 hour, Zoom Session
- ❖ ***Positive BA Culture and Stakeholder Trust***
- ❖ Please complete the webinar registration form:  
<https://www.advanceedge.org/register-for-the-webinar>

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# Webinar Agenda

- ❖ What is business analysis information
- ❖ Examples of business analysis information
- ❖ Common misconception
- ❖ Business Analysis Information Management Plan
- ❖ Structure of Business Analysis Information
- ❖ Business Analysis Information Management: Best Practices and Examples
- ❖ Deficient information management
- ❖ Information management and your professional image

# Business Analysis Information

- ❖ **All the information** business analysts elicit, create, compile, and disseminate in the course of performing business analysis.
  - The BABOK Guide, v 3.0, International Institute of Business Analysis (IIBA).



# Business Analysis Information

## Meeting Agenda

Date: Feb 22, 2024 Time: 9:00 am Location: Room 42

### Topic 1: Title of First Topic

- Discussion point list with bullets
- Second talking point
- Third talking point

### Topic 2: Title of Second Topic

1. Discussion point list with numbers
2. Second talking point
3. Third talking point

### Topic 3: Title of Third Topic

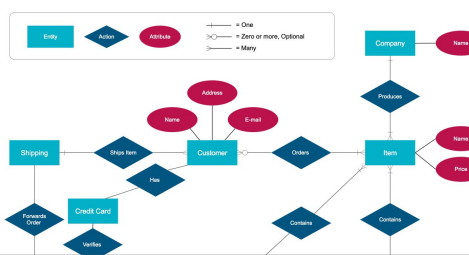
- A. Discussion point list with letters
- B. Second talking point
- C. Third talking point

### Topic 4: Title of Fourth Topic

- I. Discussion point with roman numerals
- II. Second talking point
- III. Third talking point

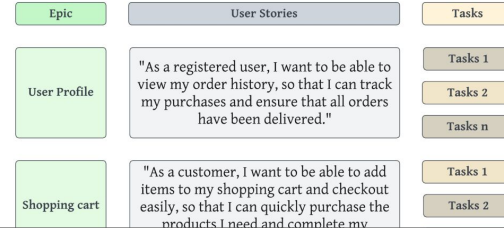
## Notes and Action Items

Entity Relationship Diagram - Internet Sales Model

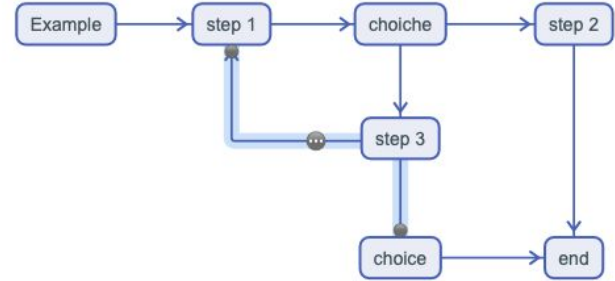


Likelihood	Consequences				
	<b>Insignificant</b> <i>Risk is easily mitigated by normal day to day process</i>	<b>Minor</b> <i>Delays up to 10% of Schedule Additional cost up to 10% of Budget</i>	<b>Moderate</b> <i>Delays up to 30% of Schedule Additional cost up to 30% of Budget</i>	<b>Major</b> <i>Delays up to 50% of Schedule Additional cost up to 50% of Budget</i>	<b>Catastrophic</b> <i>Project abandoned</i>
<b>Certain</b> >90% chance	High	High	Extreme	Extreme	Extreme
<b>Likely</b> 50% - 90% chance	Moderate	High	High	Extreme	Extreme

## User Stories



Product Backlog



## Assumption Log

Project:				Date:		
ID	Category	Assumption	Responsibility	Due Date	Status	Actions
	This should list what portion of the project the assumption impacts.	Define the assumption in this column.	Assumptions should be assigned to a team member to validate.	This is the date the assumption should be validated by.	This tracks the assumption and if it's open or closed.	Any actions associated with the assumption or validating the assumptions should be listed here.

Create a charge

To charge a credit card or other payment source, you create a charge object. If your API key is in test mode, the supplied payment source (e.g., card) won't actually be charged, although everything else will occur as if in live mode. Stripe assumes that the charge would have completed successfully.

ARGUMENTS

**amount** A positive integer representing how much to charge, in the specified currency unit. (e.g., `100` cents to charge \$1.00, or `100` to charge 100€ in non-decimal currency). The minimum amount is \$0.50 USD or equivalent in charge currency.

**currency** Three-letter ISO currency code, in lowercase. Must be a supported currency.

**application\_fee** A fee in cents that will be applied to the charge and transferred to the application owner's Stripe account. The request must be made with an OAuth key or the live key account. Reader in order to take an application fee. For more information, see the application fee documentation.

```
POST /v1/charges
Example Request
{
  "amount": 100,
  "currency": "usd",
  "source": "tok_visa"
}
Example Response
{
  "id": "ch_123456789012345678901234",
  "object": "charge",
  "amount": 100,
  "amount_received": 100,
  "application_fee": null,
  "application_fee_amount": null,
  "balance_transaction": "txn_123456789012345678901234",
  "billing_details": {
    "email": "customer@example.com",
    "name": "Customer Name"
  },
  "created": 1417222000,
  "currency": "usd",
  "description": "Test Charge",
  "disputed": false,
  "failure_code": null,
  "failure_message": null,
  "invoice": null,
  "livemode": false,
  "metadata": {},
  "on_behalf_of": null,
  "paid": false,
  "paid_at": null,
  "receipt_email": null,
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  "status": "succeeded",
  "transfer_data": null
}
```

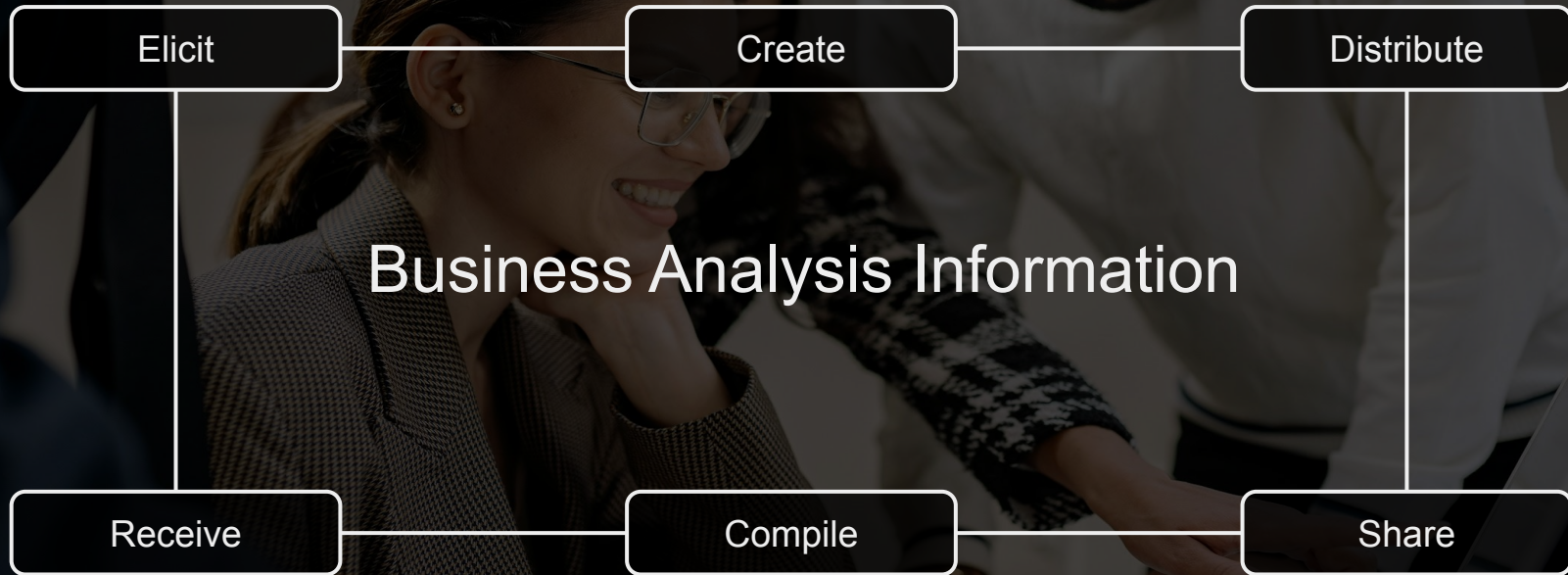
# Examples Of Business Analysis Information

- ❖ Meeting agendas and meeting notes;
- ❖ Access info and credentials to different platforms relevant to the initiative;
- ❖ The list action points agreed at the meeting, their ETAs and assignees;
- ❖ Interview results, observation results;
- ❖ Any documents: documentation from 3rd party providers or organizational documents;
- ❖ Wireframes, schemas, grids, use cases, user stories, models, etc.;
- ❖ Stakeholder concerns, approvals, confirmations, decisions, assumptions;
- ❖ Depending on the role: project plan, business case, product backlog, release notes, risk register.



# Typical Misconception

- ❖ Business Analysis Information **IS NOT** limited to:
  - Only final business analysis artefacts, such as functional or technical design specification (reviewed and approved);
  - Only requirements documentation.
- ❖ Business Analysis Information includes the items above but goes beyond than just that.



# Business Analysis Information

# Efficient Information Management

- ❖ To manage
  - to control the use of, to administer, to maintain control or influence over
- ❖ Efficient
  - achieving maximum productivity with minimum wasted effort or expense.



# Questions To Be Answered

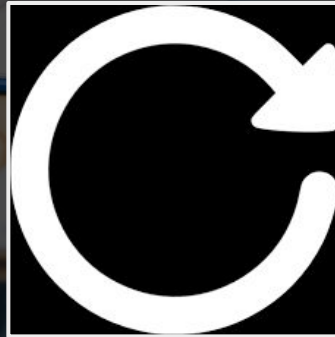
- ❖ Where to store the information?
- ❖ What information to store?
- ❖ Who should have access to the information?
- ❖ What type of access do they need? (View/Edit/Comment/Delete)
- ❖ How to organize the information?
- ❖ How to manage the relationships between the information?
- ❖ How long will the information be needed?
- ❖ What is the breadth and the depth or the level of details of the information?



Business Analysis Information Management Plan

# Questions To Be Answered - Important Note

- ❖ Some of the answers can be defined by organizational standards, processes, rules and templates
- ❖ If the environment is less formal, a business analyst may influence those decisions
- ❖ These are NOT one-time activities
- ❖ They are DAILY decisions to be made and reviewed by the business analyst



# Business Analysis Information Management Plan

- ❖ Explaining other stakeholders how they can use and manage the business analysis information
- ❖ Sync business analysis information management activities between the other business analysts
- ❖ Easy onboarding to the BA team/easy onboarding of any other new stakeholder
- ❖ Ability to introduce changes to the business analysis information management approach and communicate those updates

The screenshot shows a Notion page titled "Business Analysis Information Management". The page is owned by Anastasia Eklina and was last updated "just a moment ago". The content includes an overview of the plan, a list of key information management principles, and a section on what information should be stored.

**Business Analysis Information Management**

Owned by Anastasia Eklina  
just a moment ago · 1 min read · [View Analytics](#)

**Overview**

The Business Analysis Information Management Plan is a comprehensive document designed to outline the strategies and protocols for managing project-related information throughout the initiative. This plan specifies:

- **What Information to Store:** Identifying key documents, data, and resources essential for project success.
- **Where to Store Information:** Establishing designated storage locations to ensure easy access and collaboration.
- **Who Can Access Information:** Defining access roles for team members, stakeholders, and clients to facilitate effective communication and collaboration.
- **When Access is Granted:** Setting timelines for ongoing and scheduled access to keep all parties informed.
- **Level of Access:** Clarifying permissions to ensure data integrity and security while allowing necessary visibility.

The purpose of this document is to streamline information management, enhance collaboration among stakeholders, and ensure that all relevant parties have the information they need to make informed decisions, thus contributing to the overall success of the project.

**What Information To Store**

The following business analysis information should be stored:

1. Any project related documents provided by 3rd party vendors.
2. Any organizational documents: organizational chart, description of the processes, business rules, etc.
3. Any access info to the resources related to the project.



# Define Business Analysis Information Attributes

- ❖ Unique Identifier
- ❖ Author
- ❖ Ownership
- ❖ Source
- ❖ Cost
- ❖ Stability
- ❖ Urgency
- ❖ Priority
- ❖ Resource Assignment
- ❖ Revision Number
- ❖ Complexity
- ❖ Status
- ❖ Notes

# Storing Business Analysis Information

- ❖ Keeping the information in your mailbox is not “storing BA info”
- ❖ Keeping the information in instant messaging solution (Slack, Skype, Microsoft Teams, etc.) is not “storing BA info”
- ❖ Use a knowledge base or a solution that allows for constant access and use by all relevant stakeholders



# Recognize The Ownership

- ❖ Different stakeholders may contribute to the business analysis information management: share some info, provide documents, publish new materials;
- ❖ There can also be multiple business analysts, a product owner, a product manager or a project manager involved into the business analysis information management process;
- ❖ Development team members use the same knowledgebase to publish more technical data;
- ❖ There should be a person who oversees and monitors the structure, the relevance and the timeliness of the information;
- ❖ It is okay for many people to be involved and contribute to the business analysis process;
- ❖ There should be one person accountable for the overall structure and quality of the business analysis information.
- ❖ If this is a complex process, it can be resolved by creating a RACI matrix and through managing the level of access.

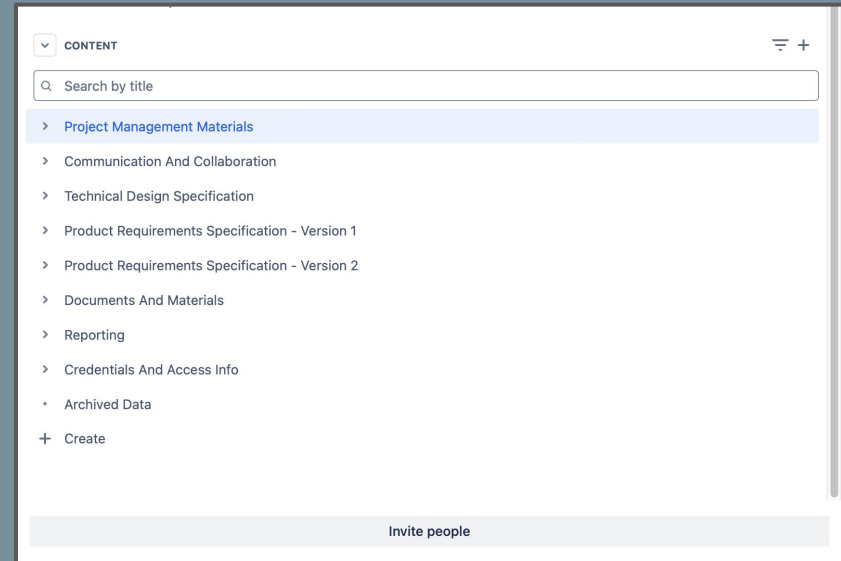


# The Single Source of Truth

- ❖ Limit the places where information is stored: try to maintain the single source of truth
- ❖ Do not add additional resources if there is no specific need for that
- ❖ Or store the links and access info in the same knowledgebase
- ❖ Ease of navigation, access, no lost data:
  - Where can I find the API documentation?
  - Where is the wireframe for the screen A?
  - Where should I document the credentials the stakeholder has shared with me?
  - I do not know where to create a diagram...
- ❖ Example: as a business analyst you are conducting a survey and using Google Form to collect the responses. The responses are stored in the Google Spreadsheet.

# Structure of Business Analysis Information

- ❖ An example of business analysis information structure;
- ❖ Unique names and time stamps in page titles;
- ❖ Archiving information for previous months/years;
- ❖ Children display;
- ❖ Creating a page for upcoming event (demo, meeting, report);
- ❖ Link - <https://advanceedge.atlassian.net/wiki/spaces/WTS/pages/98307/Project+Management+Materials>



# Cross Linking

- Typically, there is a knowledge base and a tasks management software, e.g, Confluence and Jira;
- A work item includes specification or the source and the task to complete that work item
- These two pieces should be linked together: the specification and the Jira task
- Useful links may include:
  - Communication results - approvals, decisions
  - Links to the documentation and associated tasks
  - Other relevant tasks
  - Supporting documents
- Why cross link?
  - Improve the navigation process
  - Save time
  - Improve the flow
  - Improve record tracking





# Cross Linking - Discuss Examples

1. Wireframe documentation -  
<https://advanceedge.atlassian.net/wiki/spaces/WTS/pages/295429/Customer+Portal+-+Wireframe+-+Signup>
2. Stakeholder Feedback
  - a. Example: feedback submitted by a stakeholder - automatically changed the status of all newly created accounts to “approved”
    - i. Why are we doing this?
    - ii. Who told to do that?
    - iii. When was this requested?
    - iv. <https://advanceedge.atlassian.net/wiki/spaces/WTS/pages/295468/2024+-+08-12+-+Feedback+From+John+Doe+-+Accounts+Approval>

# Avoid Duplication

- ❖ Duplication creates additional work
- ❖ Duplication leads to mistakes
- ❖ If some business analysis information has been already published and documented, just link to other relevant pieces of data, do not duplicate it
- ❖ Examples:
  - The survey results in a Google Spreadsheet
  - Email templates for the signup wireframe

# Updates And Versioning

- ❖ Versioning - the process of creating a new model of the same product, changing the parts of the product.
- ❖ If a business analysis artifact is updated after it has been approved, agreed and further work has started on it (e.g. the development process), the updates should be clearly documented:
  - Add the date and time stamp of the update;
  - Explain the reason for the update;
  - Clearly identify what has been updated (summary of updates);
  - Communicate the updates to the relevant stakeholders;
- ❖ Never introduce updates to an approved artifact by simply changing the old version to the new one.
- ❖ Versioning and clear updates documentation:
  - Saves time;
  - Adds clarity to the communication process.

# Updates And Versioning - Example

- ❖ Making changes to a signup wireframe
  - Version 1.2
  - Update Date: 2024-09-16
  - Update Source: Requested by the client at the call on 2024-09-15 (link to the meeting agenda)
  - Update Summary: add the step to collect credit card info during the signup process, keep only the option to sign up using email address
  - Updated wireframe is below.
- ❖ Advantages:
  - Communicate the update to the stakeholder who requested the change: before - now
  - Communicate the update to other relevant stakeholders so that they don't have to guess what changed

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# Reuse Documentation, Requirements and Materials

When elaborating requirements or documenting information, plan for its reuse:

- ❖ Within the same initiative
- ❖ Across multiple initiatives

Candidates for reuse:

- ❖ Common features or services;
- ❖ Data dictionaries and glossaries;
- ❖ Non-functional requirements;
- ❖ Recurrent tasks materials: weekly reports, monthly reports, email templates.

Reusing saves time and improves efficiency.

# Why Take Care Of Business Analysis Information?

- ❖ Business Analysis is the practice of *enabling change*.
- ❖ Change can be enabled through the series of consistent steps and continuous collaborative effort.
- ❖ For this collaborative effort to be successful there should be an agreed and shared understanding of the context, initiative, business, solution and requirements.
- ❖ Business analysts act as a liaison or the bridge between the business and the change management effort (e.g. product development initiative).
- ❖ Creating a shared understanding of the business analysis information, easy access to the information, clear understanding of the materials and the connections between them enables the change process.

# Deficient Information Management

- ❖ No connections between the pieces of information;
- ❖ Conflicts in the business analysis information;
- ❖ Duplicated data is stored in different locations and it is not consistent;
- ❖ The business analyst cannot find what he/she needs;
- ❖ Other stakeholders cannot find what they need;
- ❖ Other stakeholders often ask the BA to help them to locate the data they need;
- ❖ The documents that have been shared or provided are stored in the BA's inbox and nobody else can use them;
- ❖ Other stakeholders cannot contribute to the business analysis activities.





# How information management influences your image?

- ❖ Mess with the business analysis information;
- ❖ Errors in the business analysis information;
- ❖ Lack of understanding;
- ❖ Stakeholders feel not heard;
- ❖ Lack of trust;
- ❖ Incomplete requirements and documentation;
- ❖ Errors and missed deadlines in the product development process.



- ❖ Unwillingness to collaborate
- ❖ Wasted time
- ❖ Dissatisfaction



# Efficient Business Analysis Information Management

- ❖ All necessary data is stored in a knowledge base;
- ❖ Relevant stakeholders have access to the data they need;
- ❖ Relevant stakeholders have the required level of the access to the data they need;
- ❖ No important data, documents, decisions, materials are stored in emails, messages in Slack/Skype/MS Teams etc.;
- ❖ The business analysis artifacts are linked to each other building a cohesive whole;
- ❖ The business analysis information is well organized and easy to locate;
- ❖ The business analyst acknowledges the ownership of the business analysis information and continuously manages and organizes it to keep it structured and up-to date.

# Webinar Summary

- ❖ Business Analysis Information is any information business analysts receive, elicit, create, compile, distribute and deliver;
- ❖ Business analysts are responsible for storing, organizing and structuring the business information within an initiative;
- ❖ Managing business analysis information efficiently means documenting and maintaining the information that is useful within the project;
- ❖ Business analysis information should be stored and carefully organized in a knowledge base;
- ❖ Different documents, materials and pieces of information should be linked to each other;
- ❖ Business analysts should avoid duplicating the data;
- ❖ Whenever updates to the business analysis information are introduced, they should be captured carefully and communicated to all relevant stakeholders;
- ❖ The way business analysis information is organized and stored influences the overall quality of the business analysis work and the personal image of the business analyst.

# Agile Manifesto

**Individuals and interactions** over processes and tools

**Working software** over comprehensive documentation

**Customer collaboration** over contract negotiation

**Responding to change** over following a plan

That is, while **there is value** in the items on the right, **we value** the items on the left more.



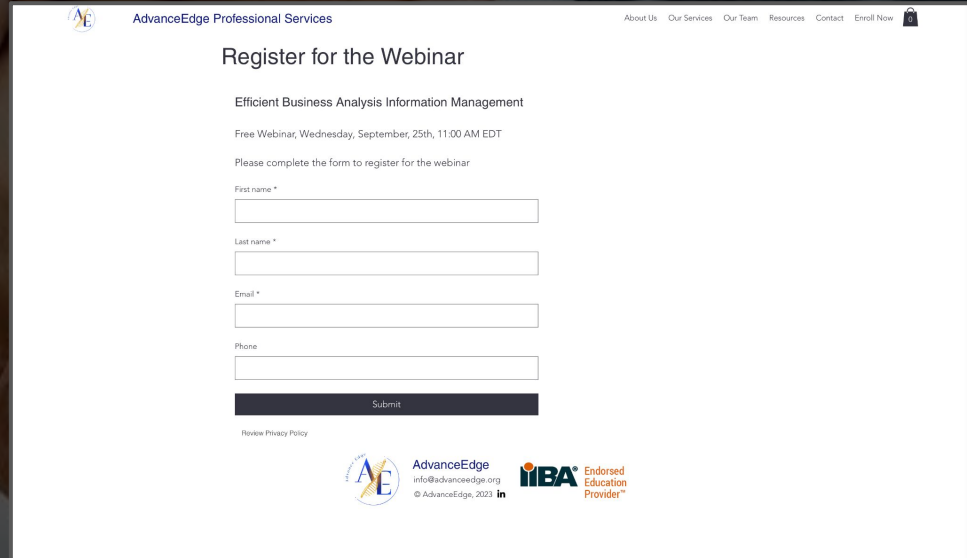


# Questions and Answers



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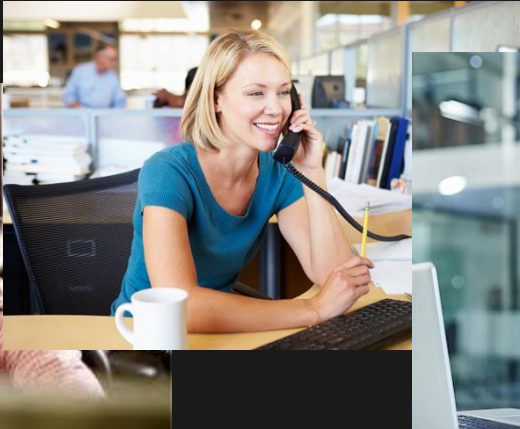


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