

smart·BA Distance Learning Programme

Module 1: Objectives



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Hello and welcome to the first module in the smart BA distance learning programme.

Arguably, this is the most important module for reasons that will become clear during the following presentation.

The fact is though that if the objectives for a project are wrong then everything that follows which is based on the objectives will also be wrong. All the analysis, design, coding, testing, rollout, migration, training and other activities will be wrong.

And the fact is that all project activities should be aimed at delivering project objectives. So, get this wrong and everything is wrong. Let's see what all this means in a bit of detail. We are going to start by looking at the underlying structure that is beneath all methods and approaches and is the essence of analysis. I call it the "chain of reasoning".

Chain Of Reasoning:



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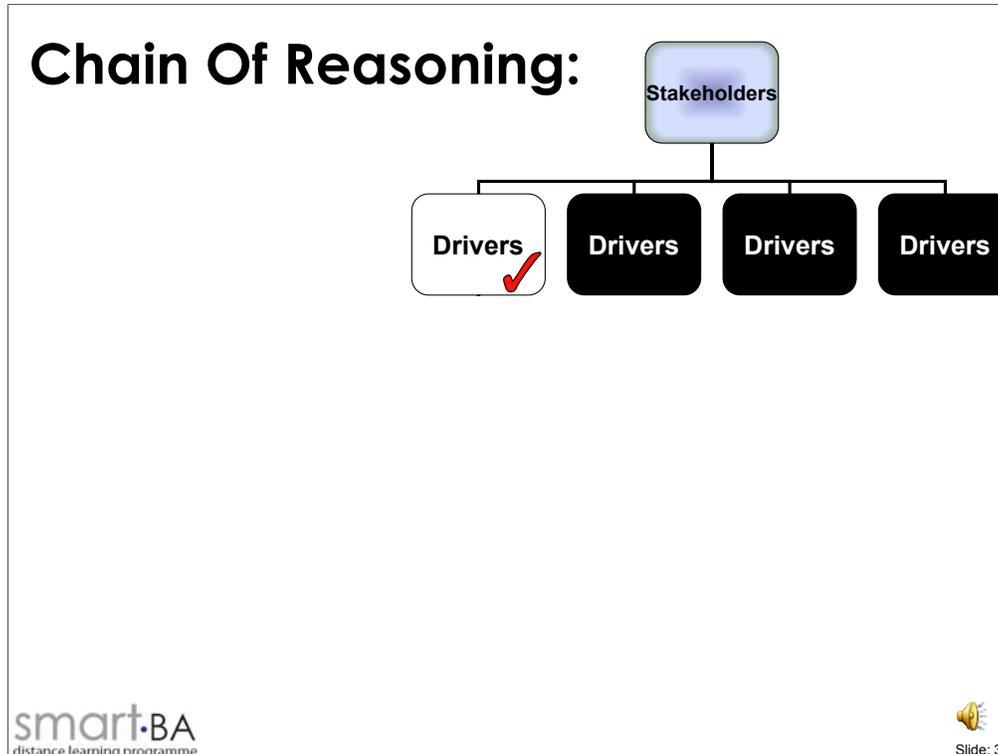
There is a chain of reasoning that leads from the sufficient definition of the problem to the sufficient definition of the requirements for the solution.

Break any one link in the chain and the rest of the chain is unsupported: unprovable.

The first link in the chain is the stakeholders. Identifying the relevant stakeholders is possibly the hardest thing to do in analysis. But they are the foundation of the whole project. They define what success is for the project and they have it in their power to halt the project. They decide at critical points whether a project should proceed or not.

So, identify the wrong group of stakeholders and we will have a project that is being controlled and assessed by the wrong people using the wrong measures.

We will have more to say and do on stakeholders later.



The next link in the chain is project drivers.

Drivers are one of 3 main types:

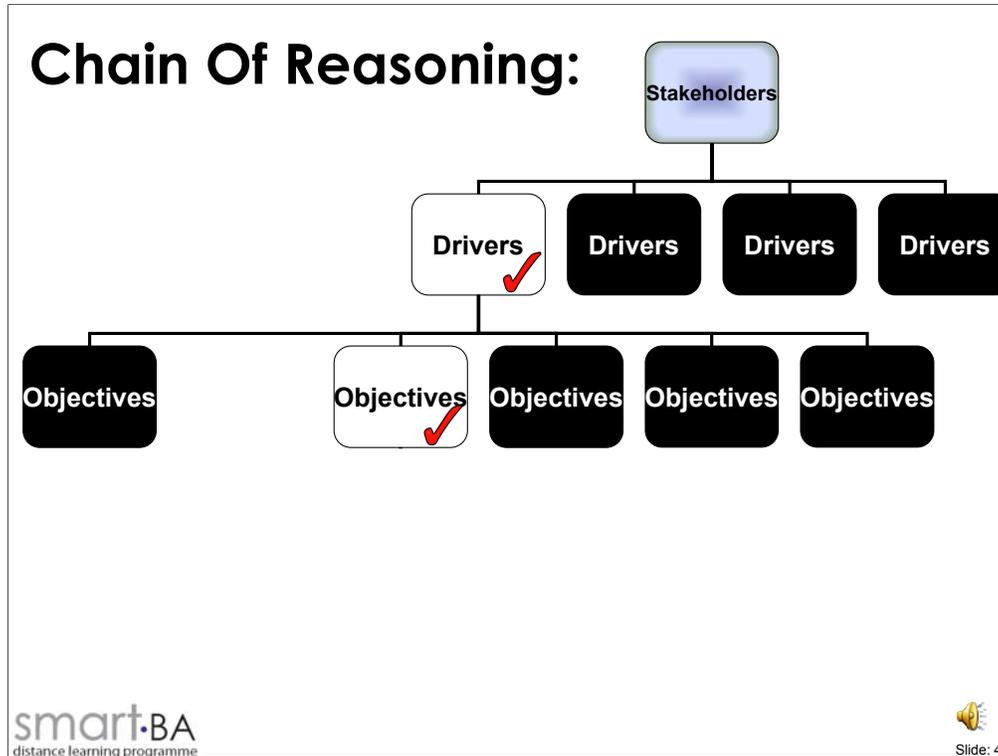
1. Problems that need fixing – for example a project driver might be to communicate with customer better.
2. Opportunities that can be exploited – for example a project driver might be to promote a new way of communicating with customers that has been developed with the company – using mobile phone text messages for example.
3. Constraints that must be adhered to – for example a project driver might be to make the changes required to keep the company legal in respect of laws about what messages can be sent in text messages.

Projects frequently have many drivers of mixed types. Your problem as a business analyst is to prove to the killer stakeholders' and your satisfaction that the right set of drivers have been identified.

Drivers are often linked and where they are they belong together in the same project. For example, the opportunity to communicate with customers using text messages must comply with any laws about what is allowable content within text messages.

Sometimes, the drivers will not link together at all. You have to analyse then why they are in the same project. There must be a logical reason for having these drivers together otherwise you can end up developing and implementing essentially 2 different projects that have no connection with each other under 1 project heading and budget.

So our challenge as business analysts is to make sure that the right set of drivers is identified. We will have more to say and do on drivers later.

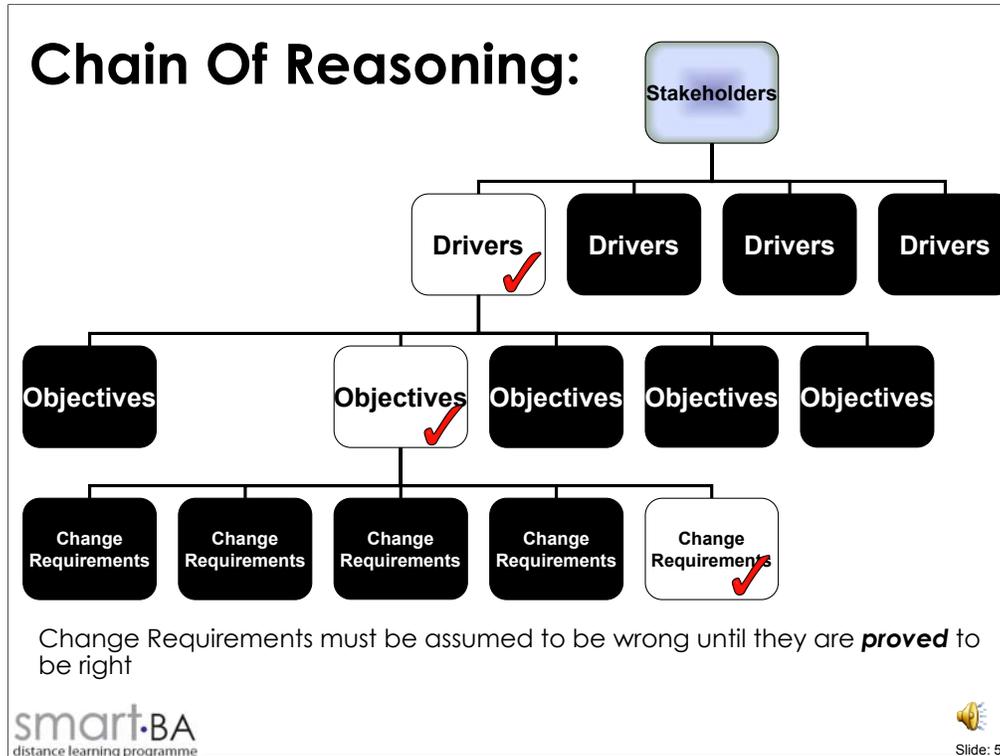


The fact that the drivers have been addressed is proved by achieving the objectives.

The objectives simply measure that one or more drivers have been addressed. What scale do the objectives have and what target value equates to success? We need that information if we are to prove that the drivers of the project have been successfully addressed.

The problem we face is that it is easy to identify the wrong objectives and - if we do - then everything that follows is wrong.

We will have more to say and do on objectives later.



Now we know what the project is trying to achieve, the next set of questions to be answered is how will it achieve the objectives? What will need to be there in order for the objectives to be realised?

There are many types and levels of requirements and these are the subject of several further modules.

For now, you just need to realise that without the right objectives we will analyse the wrong requirements.

And as there are an infinite number of requirements that don't support achieving project objectives and only a small set that do, requirements must always be assumed to be wrong - in the sense they don't help achieve objectives - until they can be proved to be right.

The big questions...who are the project killer stakeholders?

- There are a set of people and organisation units that can kill your project
- They may be obvious and they may not
- They may not all be killer stakeholders for the same reasons



So now we should understand how the key elements in the chain of reasoning link together, let's consider the first Big Question: who are the project killer stakeholders?

Some Business Analysts might argue that this is the Project Managers job, some might say the BA should do it. It doesn't matter who does it! What matters is that it is done and that the right killer stakeholders are identified.

As a Business Analyst all you should care about is that the killer stakeholders ARE killer stakeholders and that there are none missing. If they are already in place, check and challenge they are the right ones and none are missing and then move on.

This is a very important idea for Business Analysts: so long as the analysis is being done we do not care who is doing it BUT we will always check and challenge it has been done correctly – even if we have done it ourselves!

There must be a group of individuals and organisation units that have the authority to authorise our project to proceed or halt it. We need to know who these stakeholders are so we can analyse the right drivers and gain their agreement that we have the right drivers.

Now we hit the first problem with identifying killer stakeholders: they are not always obvious – until something goes wrong in a project and a killer stakeholder appears from nowhere and stops the project that is! For example, suppose we have a project to send out text messages to customers mobile phones and we only involve the stakeholders who own the relationship with customers. When we come to implement the stakeholder who own the company's IT infrastructure that sends these text messages may say "the project deliverables will not comply with our standards and guidelines so you cannot implement". It turns out there was a killer stakeholder from infrastructure who had a set of drivers that constrained our project deliverables to their standards and guidelines.

This brings me on to the second problem: not all stakeholders will be involved in our project for the same reasons – that is the same drivers. In the case I just mentioned, the customer and infrastructure stakeholders had different drivers that were linked by the desire to send out text messages.



This diagram shows the generic set of stakeholders that any project might reasonably expect to interact with and why. Use this as a starting point for the analysis of your project killer stakeholders. You may find that not all apply to your project and there might be others for your project not represented on the diagram.

Do what you need to do in order to do the analysis: If you need other types of stakeholders, add them. If some are not applicable, delete them.

This principle applies to the whole programme: do not be constrained by templates, do what you need to do in order to do the analysis.

Assignment task 1: Define all the project killer stakeholders

- Identify and analyse the reasons for involvement of the killer stakeholders
- Use the previous slide and templates in the supporting documentation pack
- Challenge the products of your analysis
- Get them all challenged by killer stakeholders
- Get them all signed-off by killer stakeholders.



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You first task in this module then is analyse the killer stakeholders.

Start by identifying and analysing the reasons for involvement of all the project killer stakeholders. The obvious killer stakeholder is the stakeholder who is funding the project, but there are always others and often they are not obvious until they halt our project. Let's identify them before we get to that stage so that we can avoid them halting our project.

Use the previous slide that lists out types of stakeholders and the templates in the material that accompanies this presentation to document them.

Do not assume anything or document anything without challenging if it is correct.

When you are confident that they are right prove it by getting the killer stakeholders you have identified to review your analysis and challenge it.

When they have no more challenges, get them to sign it off.

The big questions...why does your project exist?

- What desires do the killer stakeholders have for the project?
- What would need to be in place for this to happen?
- Why isn't this happening now?
- So what are the resulting problems or opportunities that the desires address?



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Now we know who defines success for this project, we are ready to take on the next big question: why do these killer stakeholders think they need this project at all?

Each killer stakeholder wants – desires – one or more deliverables from the project. What is they want that they think they will get from the project? For example, the customer relationship killer stakeholder may have to desire to be able to send text messages to customers.

Given this desire, what elements must be in place in order for this desire to be met? Extending our text messaging example, the killer stakeholder would need to agree that in order for them to be able to send text messages, they need a facility for maintaining text messages and a way of sending them.

Presumably, this project exists because they can't already do these things. In our example, the infrastructure to send text messages does exist, but the facility to maintain them does not. We need to define why the desires can't be satisfied right now.

The problem that would be addressed by being able to maintain text messages is that

1. They can't send text messages right now even though they have the infrastructure to do it
2. There is unused infrastructure which cost time and money to develop and maintain and is not being used! (Makes you wonder why they developed it without the means to use it, doesn't it?)
3. The current means of sending messages to customers is too slow/costly/not flexible enough.

Assignment task 2: Define all the project killer stakeholders drivers

- Use the templates in the supporting documentation pack to try and build a sentence for each driver:
 - “given the desire to [do something] it follows that [some things are in place] but the reason this isn’t happening now are [problems] and this has resulted in [issues for the organisation]”
- Challenge the products of your analysis
- Get them all challenged by killer stakeholders
- Get them all signed-off by killer stakeholders.



So now you can analyse the killer stakeholders project drivers.

Try to build a sentence for each driver identifying what the stakeholder wants – their desires for the project -, what needs to be happening or in place for this to be delivered right now, the gaps that exist that prevent this from being delivered right now, and the issues that result from the fact the stakeholder hasn’t got what they want right now. For example, “given the desire to communicate with our customers better it follows that we know who our customers are, we have a means of communicating with them and we know what we need to communicate but the reason this isn’t happening now is that we do not have a clear view of what we want to communicate and this has resulted in the issues of an unused communication method and lower sales than would otherwise be expected.”

Use the templates in the material that accompanies this presentation to document them.

Do not assume anything or document anything without challenging if it is correct.

When you are confident that they are right prove it by getting the killer stakeholders you have identified to review your analysis and challenge it.

When they have no more challenges, get them to sign it off.

The big questions...what are the project objectives?

- How can the project prove the problems/opportunities were successfully addressed?
- **Have the killer stakeholders agreed the objectives?**

Remember objectives from Module 1? It should come as no surprise to learn that they apply to projects as well as your role as a BA...

There are a set of measures that killer stakeholders will use to assess whether the project has been successful or not. For each measure, there will be a target value that the project MUST as a MINIMUM achieve or it will be deemed to have failed.

This raises some fundamental questions about the benefits of the project because the Objectives ARE the project benefits – they are one and the same thing.

The killer stakeholders have to agree what the project objectives are since the project has to be able to prove to them that it achieved success.

What are the characteristics of good objectives?

- Specific
- Measurable
- Achievable
- Relevant
- To die for



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Remember this from Module 1? Again, the same concepts apply to projects...

Each objective must define one and only one measure and target value that equates to success – and it must define it in unambiguous terms. Let's extend our text messaging example. The customer relationship manager says that because they will be able to send targeted, relevant text messages offering goods and services more frequently than before they will be able to increase sales of these goods and services by this method. The target is to increase sales by 10% against like for like comparisons with offers made by other means.

It must be possible to measure the objective. There must be a realistic way to measure these sales or how is the project going to be able to prove it was successful?

It is not realistic to declare that the target sales will increase 1,000%. This will not happen without very significant costs in terms of time and money. So what target value is acceptable to your killer stakeholder and do you consider that it can be realistically achieved?

Suppose the objective was simply declared to increase sales overall by 10% irrespective of how the sales offer is made. Is this something the project can be responsible for? The answer is no: there are other factors such as competition or poor performance by the fulfilment part of the company that may affect sales. The project objectives must be relevant to the project and only the project: the project's deliverables can affect the measure of the objective and only the project's deliverables can affect the measure of the objective.

Suppose you had an objective that was to increase use of the text message infrastructure by 50%? This is a specific measure that can be measured and has an achievable target and is entirely under the project's control. Its just that who cares? Is there any inherent benefit to the business from this objective? If not, why is the project trying to achieve it and why should it's success be measured by it?

The exception to this is suppose the owner of the infrastructure is one of the project killer stakeholders. Objectives should be of great interest to at least one of your killer stakeholders. If this measure is something that your infrastructure killer stakeholder cares about then maybe it is valid, but make sure you can justify it in these terms: the infrastructure killer stakeholder will halt this project (and has the authority to do so) unless the project achieves this objective.

What are the project principles?

- Principles are objectives that are not measured – just as objectives ARE the benefits, so principles ARE the intangible benefits
- Principles are aspirational ONLY
- **Have the killer stakeholders agreed the project principles?**

Not all objectives are measured as you will remember from Module 1.

Some objectives can't be measured. Some won't be measured even though they could be. If they are not being measured there can be no target for them. Objectives that are not measured and have no target value are principles.

You will endeavour to do everything you can to support principles, but since no-one or group is going to measure the achievement of principles, you cannot be judged on whether you have achieved them or not. If you can be judged in anyway at all then they are an objective.

Be careful with principles. Your killer stakeholders may say that ease of use of the solution will not be a measure of project success but it is a principle that should be thought about throughout the project. But then you discover that assessments are being made of the deliverables by killer stakeholders based on whether users like the solution or not. If the project finds itself in this kind of situation you as the BA need to find out how the assessment of the principle is being made and define a relevant objective with the relevant killer stakeholders.

Killer stakeholders have to agree what your principles are since you need to be able to justify that while you will act in the spirit of principles, you will not be measured by your killer stakeholder on how much you achieve them.

Assignment task 3: Document the project's objectives & principles

- Use the objectives, principles and glossary templates in the material in the supporting documentation pack to document the analysis of the project objectives and principles
- Challenge all the products of your analysis
- Get them all challenged by killer stakeholders
- Get them all signed-off by killer stakeholders.



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Your third task in this module then is analyse the project's objectives and principles.

Use the templates in the material that accompanies this module to document them.

Do not assume anything or document anything without challenging if it is correct.

When you are confident that they are right prove it by getting the killer stakeholders you have identified to review your analysis and challenge it.

When they have no more challenges, get them to sign it off.

...and finally

- **Dependencies**
 - What processes/factors/groups/people are you dependent on and for what?
- **Constraints**
 - What constrains your activities? In what way? How much?
- **Issues**
 - What factors have arisen that are impeding your work which are outside of your control? How do they impede you?
- **Assumptions**
 - What assumptions have you made – and why (to work around an issue?)
- **Risks**
 - What might go wrong (maybe as a result of the issues you identify), how likely is it they will occur and what will be the impact?

There is one more set of information we need to analyse...

Dependencies are things outside of the project that need to happen before the project can complete or are other projects waiting on this one. For example, our text messaging project cannot complete without a fully operational infrastructure being in place.

Constraints limit what you are able to do. For example, the text messages that can be sent must be in certain format or the infrastructure to send them won't work. The format constrains what can be done.

Issues are things that happen that prevent the project from progressing. The project cannot control the issue but what it can do is make an assumption that allows it to progress. For example, suppose that one of your killer stakeholders says the final details of the text format that the infrastructure supports is not signed off yet. In theory this should stop the project from progressing in this area, but what can be done instead is to assume that the format that has not yet been signed off will be signed off and proceed on that basis.

So assumptions are often linked to issues but not always. In any case, you need to define the assumption and analyse what the impact would be if the assumption turned out to be false.

Finally, risks. In the course of doing this project, what might happen that could stop the project from progressing or impair achieving objectives? How likely is it that it will happen and what will be the impact if it does? For example you might discover that the infrastructure may not be sufficiently big enough to send the volume of messages required. Clearly if it does this will have a high impact – is there anything the project can do other than monitor the risk?

All of these items are usually maintained on a central project register that is maintained by the Project Manager. Our duty as Business Analysts is to escalate to that register those items that need to be managed at a project or above level.

**Assignment Task 4:
Document the dependencies, constraints, issues,
assumptions and risks you discover**

- Use the relevant templates in the supporting documentation pack for this module to document them
- Analyse the material impact they have on the project
- Challenge them
- Escalate them as required.



Your final task in this module then is analyse the project's dependencies, constraints, issues, assumptions and risks.

Use the templates in the material that accompanies this module to document them.

Don't document them for the sake of documenting them: analyse the material impact they have on the project.

Challenge them and every part of them until you are happy they are correct.

When you are confident that they are right, escalate any that need escalating (particularly risks, issues and assumptions) – probably to the Project Manager.

End of introduction to Module 1

That is the end of this introduction to Module 1. I look forward to receiving the products of your analysis.