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AGENDA

• Welcome (45 minutes)
  • About…
  • IIBA Certifications
  • Group Study Sessions
• BABOK V3 Chapter 1 – Introduction (45 minutes)
• BABOK V3 Chapter 2 – Business Analysis Key Concepts (60 minutes)
• Q & A (30 minutes)
Welcome
ABOUT…

- General Admin
- About the IIBA Vancouver Chapter
- About Me (development@vancouver.iiba.org)
- About You
  - Name
  - Job title
  - What types of BA work do you currently perform?
  - What certification are you planning to get? CBAP®? CCBA®? ECBA?
  - When are planning to take the exam?
  - Where are you at preparation?
IIBA CERTIFICATIONS

Level 4
Certified Business Analysis Thought Leader™

Level 3
Certified Business Analysis Professional™

Level 2
Certification of Capability in Business Analysis™

Level 1
Entry Certificate in Business Analysis™

THOUGHT LEADER
10+ YEARS EXPERIENCE ADVANCES BA PROFESSION

LEAD
5+ YEARS EXPERIENCE DELIVERS BUSINESS VALUE

DO
2-3 YEARS EXPERIENCE RESULTS ORIENTED

LEARN
NO WORK EXPERIENCE DEVELOPING BA SKILLS
# Certification Requirements*

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<th>CCBA® (Certification of Capability in BA)</th>
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<td>Hours of BA Experience</td>
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<td>• 50 multiple choice questions</td>
<td>• 130 multiple choice questions</td>
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*Notes:
1. Level 4 — CBATL™ (Certified Business Analysis Thought) Leader
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STUDY GROUP SESSIONS

- BABOK 3.0
- Frequency
- Format
  - Introduction of the chapter(s)
  - Discussions
  - Practices
  - Individual Q&A
- Prep work required
- After session homework
- Professional development hours
STUDY TIPS

• Answer questions based on BABOK not “real life” experience

• Use mnemonics to help memorization

• Summarize the content with your own understanding

• Study techniques in the context of tasks that most closely associated

• Spend time for each chapter in the proportion to the percentage of questions
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*Notes:*
1. Level 4 – CBATL™ (Certified Business Analysis Thought) Leader
How Prepared Are You?

Pop Quiz!
Question 1*

Which of the following is true regarding the six knowledge areas contained within the BABOK?

a. The knowledge areas describe the process of business analysis within the context of a project.

b. The knowledge areas describe the process of business analysis within the context of continuous improvement.

c. The knowledge areas support the delivery of business value before, during, and after the life cycle of a project.

d. The knowledge areas support the delivery of business value within the context of continuous improvement.
Traceability is best described by the following statement:

a. Traceability identifies and documents the lineage of each requirement, including its backward traceability, its forward traceability, and its relationship to other requirements.

b. Traceability is used to obtain metrics by the Change Management Board to approve or deny requests for change.

c. Traceability assists in developing the project schedule.

d. Traceability requirements supplement business requirements and functional requirements.
You are in a meeting with key executives from around the company discussing long term, ongoing conditions the organization is striving to achieve. What is being discussed at this meeting?

a. Organizational strategy
b. Business synergy
c. Business values
d. Business measurements
You have been hired as the business analyst for an initiative. The project manager informs you that your first task is to figure out what needs to be done, how you will go about doing it, as well as exactly who needs to be involved with the work and how involved they should be. What deliverable will you provide to the project manager as a result of these activities?

a. Requirement management approach
b. Business analysis approach
c. Governance approach
d. Information management approach
Question 5*

Which of the following is needed to assess a change to requirements?

a. Traced designs
b. Traced needs
c. Proposed change
d. Current state description
1.0 Introduction
AGENDA

• Introduction

• 1.1 Purpose of the BABOK Guide

• 1.2 What is Business Analysis?

• 1.3 Who is a Business Analyst?

• 1.4 Structure of the BABOK Guide
• A Guide to the Business Analysis Body of Knowledge® (BABOK® Guide) is a globally recognized standard for the practice of business analysis.

• The BABOK® Guide describes business analysis knowledge areas, tasks, underlying competencies, techniques and perspectives on how to approach business analysis.
BABOK THEMES*

• Understand stakeholders
• Be flexible and adaptable
• Initiatives, not projects
• Incorporate key concepts
• Changes vs. solutions
• Approaches, not plans
• Consider the approach
• Governance
• Designs
• Information management vs. communication
1.1 PURPOSE OF THE BABOK

- **Define BA profession with commonly accepted practices**
  - Globally accepted

- **Discuss and define necessary skills**
  - Among BA practitioners

- **Set knowledge and skill expectations**
  - People hiring or working with BA practitioners

- **Framework for all business analysis perspectives**
  - Analyze change or evaluate necessity for change

- **Business analysis applied to**
  - Projects, enterprise evolvement and continuous improvement
1.1 PURPOSE OF THE BABOK

- Business analysis beyond project
1.2 WHAT IS BUSINESS ANALYSIS?

- **Enable Change in an Enterprise**
  - Defining needs and recommend solutions that delivers value to stakeholders.
  - Articulate needs and rationale for change.
  - Design and describe the solution.

- **Strategic, Tactical or Operational Initiatives**
  - Understand current state.
  - Define future state.
  - Determine activities required to move to future state.
1.2 WHAT IS BUSINESS ANALYSIS?

- **Business analysis perspective (Lens)**
  - Agile
  - Business Intelligence
  - Information Technology
  - Business Architecture
  - Business Process Management

- **One or many perspectives may apply to an initiative**
  - BABOK Guide does not represent all contexts for business analysis or all business analysis disciplines.
1.3 WHO IS A BUSINESS ANALYST?

- Anyone who performs business analysis activity
  - No matter job title or organizational role
  - Discover, synthesize, analyze information from variety of sources
  - Elicit stakeholder needs, investigate and clarify desires, to understand issues and causes

- Aligns designed & delivered solution with needs
  - Understand enterprise problems and goals
  - Analyze needs and solutions
  - Devising strategies
  - Driving changes
  - Facilitate stakeholder collaboration
1.3 WHO IS A BUSINESS ANALYST?

• Other common job titles
  • Business Architect
  • Business System Analyst
  • Data Analyst
  • Management Consultant
  • Process Analyst
  • Product Manager
  • Product Owner
  • Requirement Engineer
  • System Analyst
  • ...

Introduction and Key Concepts
1.4 STRUCTURE OF THE BABOK GUIDE

- Knowledge areas
  - Collection of logically, not sequentially, related tasks

- Business analysis key concepts
  - Define key terms

- Underlying competencies
  - Behaviours, characteristics, knowledge, personal qualities

- Techniques
  - Means to perform business analysis tasks

- Perspectives
  - Various views of business analysis
1.4 STRUCTURE OF THE BABOK GUIDE

- Key Concepts
  - Business Analysis Core Concept Model™ (BACCM™)
  - Key Terms
  - Requirement Classification Schema
  - Stakeholders
  - Requirements and Design
1.4 STRUCTURE OF THE BABOK GUIDE

- Knowledge Areas (PLEASE)
  - Business Analysis Planning and Monitoring (BAPM)
  - Requirement Life Cycle Management (RLCM)
  - Elicitation and Collaboration (EC)
  - Requirements Analysis and Design Definition (RADD)
  - Strategy Analysis (SA)
  - Solution Evaluation (SE)
1.4 STRUCTURE OF THE BABOK GUIDE

Introduction and Key Concepts
1.4 STRUCTURE OF THE BABOK GUIDE

• **Tasks**
  • Discrete pieces of work, formally or informally performed.
  • A BA task is universally applicable, independent of initiative type.
  • Business Analysts may perform non BA activities.
  • Tasks are grouped into knowledge areas, may be performed in any order.
  • BABOK® Guide does not prescribe a process.
  • A business analysis initiative may start with any task.
1.4 STRUCTURE OF THE BABOK GUIDE

- **Tasks Presentation Format**
  - Purpose
  - Definition
  - Inputs
  - Elements
  - Guidelines/Tools
  - Techniques
  - Stakeholders
  - Outputs
1.4 STRUCTURE OF THE BABOK GUIDE

• Underlying Competencies
  - Not unique to business analysis profession.
  - Proficiency in understanding competencies essential to a Business Analyst’s success.

• Underlying Competencies Structure
  - Purpose
  - Definition
  - Effectiveness measures
1.4 STRUCTURE OF THE BABOK GUIDE

• Techniques
  • Not exhaustive list.
  • Techniques may be used as alternatives or in conjunction.
  • Adapt or create techniques to suit the situation.

• Techniques Structure
  • Purpose
  • Description
  • Elements
  • Usage consideration
1.4 STRUCTURE OF THE BABOK GUIDE

- **Perspectives**
  - Provide focus to tasks.
  - Techniques specific to initiative context.
  - Most initiatives engage one or more perspectives.

- **Perspectives Structure**
  - Change Scope
  - Business Analysis Scope
  - Methodologies, Approaches, and Techniques
  - Underlying Competencies
  - Impact on Knowledge Areas
Exercise
2.0 Business Analysis
Key Concepts
AGENDA

• Introduction

• 2.1 The Business Analysis Core Concept Model (BACCM)

• 2.2 Key Terms

• 2.3 Requirements Classification Schema

• 2.4 Stakeholders

• 2.5 Requirements and Design
INTRODUCTION

• The Business Analysis Key Concepts chapter includes information that provides a foundation for all other content, concepts, and ideas within the BABOK® Guide.

• It provides business analysts with a basic understanding of the central ideas necessary for understanding and employing the BABOK® Guide in their daily practice of business analysis.
2.1 THE BUSINESS ANALYSIS CORE CONCEPT MODEL

- **BACCM**
  - Conceptual framework that encompasses what business analysis is and what it means to perform business analysis tasks
  - Regardless of perspective, industry, methodology or level in the organization
  - Six terms, core concepts, that have a common meaning to all business analysts

- **BACCM Key Terms**
  - Change
  - Need
  - Solution
  - Stakeholder
  - Value
  - Context
2.1 THE BUSINESS ANALYSIS CORE CONCEPT MODEL

- **BACCM**
  - Describes the profession and domain
  - Communicates about business analysis with a common terminology
  - Evaluates the relationship of key concepts
  - Perform better business analysis by holistically evaluating the relationships among six concepts
  - Evaluate the impact of the concepts and relationship at any point to establish a foundation and path forward
2.1 THE BUSINESS ANALYSIS
CORE CONCEPT MODEL

- Changes
- Needs
- Solutions
- Stakeholders
- Contexts
- Value
2.1 THE BUSINESS ANALYSIS CORE CONCEPT MODEL

- **Change**
  - The act of transformation in response to a need
  - Improve enterprise performance deliberately and controlled

- **Need**
  - A problem or opportunity to be addressed
  - Can cause changes by motivating stakeholders to act or eroding or enhancing the value delivered by existing solutions

- **Solution**
  - A specific way of satisfying one or more needs in a context
  - Satisfies a need by resolving a problem for stakeholders or enable stakeholders
2.1 THE BUSINESS ANALYSIS CORE CONCEPT MODEL

- **Stakeholder**
  - A group or individual with a relationship to the change, the need or the solution.
  - Defined by their interest in, impact on and influence over the change.
  - Grouped by their relationships to the needs, changes, solutions.

- **Value**
  - The worth, importance, or usefulness of something to a stakeholder within a context.
  - Can be potential realized returns, gains and improvements or a decrease of losses, risks, and costs.
  - Tangible vs. intangible.
  - Absolute vs. relative terms.
• Context
  • The circumstances that influence, are influenced by, and provide understanding of the change.
  • Everything relevant to the change that is within the environment.
  • May include attitudes, behaviours, beliefs, competitors, culture, demographics, goals, governments, infrastructure, languages, losses, processes, products, projects, sales, seasons, terminology, technology, weather, and any other element.
• Apply BACCM: Quality and Completeness
  • What are the kind of changes we are doing?
  • What are the needs we are trying to satisfy?
  • What are the solutions we are creating or changing?
  • Who are the stakeholders involved?
  • What do stakeholders consider to be of value?
  • What are the contexts that we and the solution are in?
BACCM IN YOUR OWN WORDS

Business Analysis Key Concepts

- Changes
- Needs
- Solutions
- Stakeholders
- Contexts
- Value
2.2 KEY TERMS

• **Business Analysis**
  • The practice of enabling change in an enterprise by defining needs and recommending solutions that deliver value to stakeholders.

• **Business Analysis Information**
  • Board and diverse sets of information that business analysts analyze, transform, and report.
  • Information of any kind, at any level of detail, that is used as an input to, or an output of, business analysis work.
2.2 KEY TERMS

- **Design**
  - Usable representation of a *solution*.
  - Focuses on understanding how value might be realized by a solution if it is built.

- **Enterprise**
  - A system of one or more organizations and the solutions they use to pursue a shared set of common goals.
  - Organizational capabilities can be processes, tools or information.
  - For business analysis, enterprise boundaries do not need to be confined by the boundaries of a legal entity.
  - May include any number of business, government, or any other type of organization.
2.2 KEY TERMS

- **Organization**
  - An autonomous group of people under the management of a single individual or board, works towards common goals and objectives.
  - Clearly defined boundary.
  - Operates continuous, not an initiative or project team.

- **Plan**
  - Proposal for doing or achieving something.
  - Describes a set of events, dependencies, expected sequence, schedule, results or outcomes, materials and resources required, stakeholders involved.
2.2 KEY TERMS

- **Requirement**
  - Usable *representation* of a *need*.
  - Focuses on understanding what kind of value could be delivered.
  - Representation may be a document, but can vary widely.

- **Risk**
  - Effect of *uncertainty* on the value of a change, a solution, or the enterprise.
  - Collaborate with stakeholders to identify, assess and prioritize.
  - Deal with risks by altering the likelihood of the conditions or events leading to the uncertainty: migrate, remove, avoid, share, accept.
2.3 REQUIREMENTS CLASSIFICATION SCHEMA

- **Business Requirements**
  - Statements of **goals**, objectives, and outcomes describing **why** a change has been initiated.
  - Can apply to the whole of an enterprise, a business area, or a specific initiative.

- **Stakeholder Requirements**
  - Describe the **needs** of stakeholders that must be met to achieve business requirements.
  - Serve as a bridge between business and solution requirements.
2.3 REQUIREMENTS CLASSIFICATION SCHEMA

- **Solution Requirements**
  - **Capabilities** and qualities of a solution that meets the stakeholder requirements.
  - Provide appropriate level of detail to allow for development and implementation.
  - Function requirements: capabilities a solution must have in terms of the *behaviour* and *information* that the solution will manage.
  - Non-functional requirements: describe *conditions* under which a solution must remain effective or *qualities* that a solution must have.

- **Transition Requirements**
  - **Temporary** capabilities a solution must have to facilitate transition from *current* to *future* state.
  - Include: data conversion, training and business continuity.
2.4 STAKEHOLDERS

- Participate in or are affected by execution of tasks:
  - Business Analyst
  - Customer
  - Domain Subject Matter Expert
  - End User
  - Implementation Subject Matter Expert
  - Operational Support
  - Project Manager
  - Regulator
  - Sponsor
  - Supplier
  - Tester
2.4 STAKEHOLDERS

- **Stakeholders**
  - Individuals or group **participate** in the execution of a task for a change initiative or will be **affected** by the change initiative.
  - Business Analysts interact with them directly or indirectly.
  - Any stakeholder can be a source of requirements, assumptions, or constraints.
  - Stakeholder classifications are not exhaustive.
  - Often multiple stakeholder roles can be found in each category; a single individual may fill more than one role.
2.4 STAKEHOLDERS

- **Business Analyst**
  - A stakeholder in all business analysis activities.
  - Responsible, accountable for the execution of the activities.
  - May be responsible for performing activities of other stakeholder roles.

- **Customer**
  - Use or may use products or services of the enterprise.
  - May have contractual or moral rights over the enterprise.

- **Domain Subject Matter Experts**
  - Any individual with in-depth knowledge of a topic relevant to the business need or solution scope.
  - Example: end users, managers, process owners, legal staff, and others.
2.4 STAKEHOLDERS

- **End User**
  - Stakeholders directly interact with the solution.
  - Can include all participants in a business process or those use the product or solution.

- **Implementation Subject Matter Expert**
  - Stakeholders with specialized knowledge regarding the implementation of one or more solution components.
  - Example: project librarian, change manager, configuration manager, solution architect, developer, database administrator, information architect, usability analyst, trainer, organizational change consultant, etc.
2.4 STAKEHOLDERS

- **Operational Support**
  - Responsible for the day-to-day management and maintenance of a system or product.
  - Example: operations analyst, product analyst, help desk, release manager, etc.

- **Project Manager**
  - Responsible for the work to deliver a solution that meets a business need while balancing the project factors including scope, budget, schedule, resources, quality, and risk.
  - Example: project lead, technical lead, product manager, team leader, etc.
2.4 STAKEHOLDERS

- **Regulator**
  - Responsible for define and enforcement of standards.
  - Standards may be imposed via legislation, corporate governance standards, audit standards, or standards defined by organizational centers of competency.
  - Alternate roles: government, regulatory bodies, and auditor.

- **Sponsor**
  - Responsible for initiating the effort to define a business need and develop a solution.
  - Authorizes the work and controls budget and scope.
  - Alternate roles: executive and project sponsor.
2.4 STAKEHOLDERS

• **Supplier**
  - Outside the boundary of a given organization or unit.
  - Provides products & services to the organization.
  - May have contractual or moral rights and obligations.
  - Alternate roles: providers, vendors, and consultants.

• **Tester**
  - Responsible for determining how to verify that the solution meets requirements.
  - Conducts the verification process.
  - Ensures the solution meets applicable quality standards, and risks of defects or failures is understood and minimized.
  - Alternate roles: quality assurance analyst.
2.5 REQUIREMENTS AND DESIGN

• Business Analysis Involves Design
  • Other than eliciting, analyzing, validating, and managing requirements, Business Analysts are also responsible for the definition of design.
  • The level of design responsibilities varies based on the perspective.

• Requirements vs. Design
  • Requirements are focused on the need; design are focused on the solution.
  • The distinction between the two is not always clear
  • The same techniques are use to elicit, model and analyze both.
  • A requirement leads to a design may drive the discovery and analysis or more requirements.
  • Shift in focus is often subtle.
• **Requirements vs. Design**
  • Classification as a requirement or a design may become less significant as work progress to eventual fulfillment of the need.
  • Business analysis can be complex and recursive.
  • Requirements and design may be further elaborated after they are handed off for implementation.
  • Business Analysts often review the final designs to ensure that they align with requirements.
## 2.5 REQUIREMENTS AND DESIGN

### Business Analysis Key Concepts

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<th>Design</th>
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<td>View six months sales data across multiple organizational units in a single view.</td>
<td>A sketch of a dashboard.</td>
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<tr>
<td>Reduce amount of time required to pick and pack a customer order.</td>
<td>Process model.</td>
</tr>
<tr>
<td>Record and access a medical patient’s history.</td>
<td>Screen mock-up showing specific data fields.</td>
</tr>
<tr>
<td>Provide information in English and French.</td>
<td>Prototype with text displayed in English and French.</td>
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Exercise
CHAPTERs 1 & 2

Group Practice

Watermark Online Exam
Chapter 1 – Introduction

• Explain your role (what you do in your job) as a business analyst. Remember to apply BABOK concept/definition of business analysis.

Chapter 2 – Business Analysis Key Concepts

• Use an example from your work to explain the BACCM (the concepts and their interconnections)
  • Change
  • Need
  • Solution
  • Stakeholder
  • Value
  • Context
RESOURCES

  - Application Guide
  - Handbook
  - FAQ
  - Walk Me Through feature (requires login)
- Vancouver Chapter – Study Sessions Downloads [https://vancouver.iiba.org/download-presentations-slides-and-other-material-certification-study-sessions](https://vancouver.iiba.org/download-presentations-slides-and-other-material-certification-study-sessions)
  - Study sessions
  - Experience calculator
  - Technique matrix
- Books and study guides/prep books