BUSINESS ANALYSIS

Get Solutions Right the First Time

Richard Cunningham

About the Author

Richard Cunningham

Richard Cunningham started building apps on the Salesforce platform in 2006, shortly after Salesforce introduced the Appexchange. He developed an event registration app that enjoyed early success on the Appexchange. Later, Coca-Cola engaged Richard's company, Blendery, to design and develop an app suite for its Global Hospitality group. They used the suite to manage guest registration, ticketing, and housing for the company's globally sponsored sporting events such as the Olympics and FIFA World Cup. The app suite was so successful, Coca-Cola Global Hospitality used it for more events than any previous solution.

Richard started the Purposeful Architect blog in 2020 to educate "accidental admins" and others in the Salesforce community about the beginning stages of software development - business analysis and solution architecture. Purposeful Architect helps admins, architects, and others responsible for Salesforce determine what an organization needs from a solution to grow with changing needs. Purposeful Architect made SalesforceBen's list of the top 20 most popular blogs in 2021.

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Introduction

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"Our Org was taken over by keen developers who automated everything, and now we have the world's best self-driving car … with no wheels."

OrgConfessions #42

Have you seen a software project fail because of incomplete or incorrect requirements? Do you wish you knew what users needed in the first place? Do you suspect there must be a better way?

If you answered yes to any of these questions, this book and business analysis are for you.

Business analysis leads to meaningful solutions - those that meet an organization's needs. It discovers these needs among pain points, wish lists, and special interests. Business analysis curates an organization's needs into requirements that get a solution right the first time.

Perhaps you think only large organizations with big development projects need business analysis. You may be surprised to realize that you are already in a business analyst role if you manage user change requests. Investing in your business analysis skills pays off with better solutions, reduced reworks, and rebuilds. It can also broaden your vision of the organization, opening up new career opportunities.

In this book, you'll learn:

- What business analysis is and why it's important
- Common business analysis pitfalls and how to avoid them
- Keys to business analysis success
- Techniques to get business analysis right the first time

With business analysis, you can develop the right solution for your business needs the first time instead of building an elegant self-driving car that goes nowhere.

What is Business Analysis?

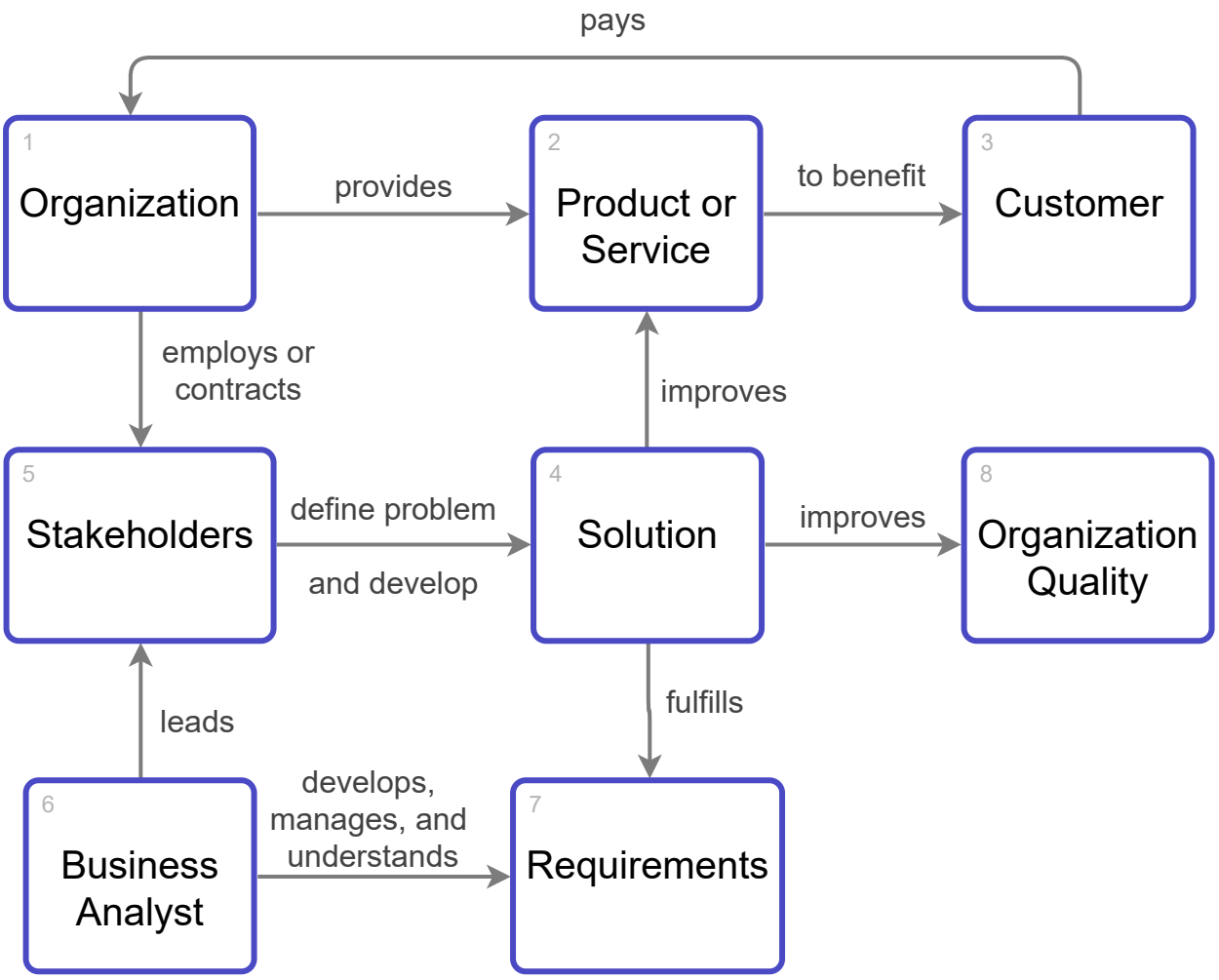
Organizations set goals to improve their offerings to earn and keep customers. Reaching these goals often relies on software solutions. While an organization may have a clear vision of a goal it wants to achieve, it may not know everything it needs from a solution to reach the goal.

Business analysis enables organizational improvement by defining needs and recommending or developing solutions that deliver value to the organization.

Business analysis revolves around discovering what an organization needs from a solution with the *stakeholders* who will use, manage or support it.

Business analysis basic concepts

The concept map below shows the relationship between an organization, a solution, and its stakeholders:



Brief definitions

A solution enables or supports the improvement of an organization's products or services. It can also improve the organization's quality, such as streamlining internal operations or complying with regulations.

Stakeholders are people who affect or represent those affected by a solution. They include users, management, information technology staff, and third-party solution representatives.

A business analyst leads stakeholders to discover and define what they need from a solution to achieve a business goal. Then, they curate the needs into requirements.

Requirements are specific business outcomes expected from a solution.

Why Business Analysis?

Business analysis intends to get a solution right the first time by defining the organization's true needs it should fulfill.

Business analysis is like software quality assurance (QA). Solution development does not require business analysis or QA, but both are essential to meet the organization's needs. Business analysis ensures the solution works as needed and expected by the organization. QA confirms that the solution works reliably.

Both business and QA share the notion of coverage. Business analysis covers what the organization needs from a solution within a specified scope. Insufficient coverage results in an inadequate or unusable solution. QA testing covers the solution's functions to find bugs and have them fixed. Users may tolerate a few bugs in a solution that increases productivity but will not use a bug-free solution that impedes productivity.

To illustrate the importance of coverage, Salesforce requires Apex code to include tests that cover 75% of the code before deploying it to production. The arrow below shows the gap in the development process when developers overlook the required tests.

If the code does not have enough test coverage, the developers need to create and pass tests classes to cover the code. While it delays solution deployment, only the developers need to fix inadequate test coverage. Completing the coverage does not affect how the solution works.

If business analysis does not cover minimum solution requirements, it can take substantial rework to fulfill them. To illustrate, the arrow below shows how omitted needs affect a broad range of the development process.

Filling the gap requires:

- Finding and communicating with stakeholders to discover the capability gap(s).
- Analyzing the impact of gap-filling on the rest of the solution.
- Rescheduling the development team to fill the gaps.

When a solution does not cover essential needs, stakeholders could become concerned about other functional gaps. On the other hand, good business analysis prevents coverage gaps from happening in the first place.

If a business analyst came into a project with functional gaps, they would ask why the gaps came about. For instance, a project team skipped business analysis, and developers built user-requested features without fully defining the problems they attempted to solve. But why would a project skip business analysis? The next section offers some answers.

An Analysis of Business Analysis

Why don’t organizations analyze their needs?

If business analysis is so crucial, why do organizations overlook it or risk inadequate requirements coverage? An organization developing or customizing a solution for the first time might not know about business analysis. So they dive in, trying to solve problems before defining them. They may get lucky by guessing what users need, but the “fire, ready, aim” approach often leads to wasted effort and frustration from reworking the solution.

An organization’s management may know about business analysis but not understand or appreciate its value. For example, they feel like they know what they want and don’t invest time and energy to clarify their organization’s needs. In that case, managers give the development team a high-level description of what they want, perhaps a wish list. Then the team makes incorrect assumptions about what the organization needs and management ends up disappointed with the solution. The stakeholders end up scrambling to fill the gaps.

An organization may have tried business analysis that turned out poorly executed. Perhaps the business analyst didn’t understand the business or took what users asked for at face value. The analyst did not explore what could go wrong with processes or overlooked requirements met by the incumbent solution. As a result, the organization got a solution with too many functional gaps and gave up on business analysis.

Why does business analysis fail?

Business analysis relies primarily on human communication, leaving it vulnerable to several pitfalls:

- Undiscovered needs
- Misunderstood needs
- Scope mismanagement
- Overlooking critical details

Most undiscovered or misunderstood needs result from the business analyst overlooking specific aspects of the needs. The worst question a business analyst can ask stakeholders is, “What do you want?” Instead, the business analyst should ask more specific questions, such as “What do you need from Sales Cloud to increase your lead conversion rate?” This question connects to a business goal - increasing the lead conversion rate.

A real-life example of undiscovered needs comes from an anonymous Salesforce administrator:

> “Had to rewrite a bunch of stories because the person who created them didn’t capture all of the requirements and actually left a bunch of open questions before they were assigned out.”
>
> OrgConfessions #578

The “bunch of stories” refer to user stories, brief descriptions of user-solution interaction. In this case, the stories did not cover enough of the business needs. When the admin reviewed the stories with stakeholders, the admin presumably asked a lot of critical questions. Then, the stakeholders went back to discover the real business needs and rewrote or created new user stories that covered the solution’s scope.

Scope mismanagement happens when analysis does not focus on determining requirements for a solution’s current version. Instead, a business analyst should focus on discovering business needs only within the current version’s scope. They should capture, acknowledge, and defer any other needs. Otherwise, the discovery process has no definition of “done” and can continue indefinitely.

Some business analysts mistakenly believe they have a “high-level” job, gathering requirements from stakeholders, taking them at face value, and leaving details such as exceptions for the development team to figure out. However, a good development team would come back with many detailed questions, and the analyst would have to return to stakeholders for answers. Even in that case, the solution could have functional gaps where the analyst did not discover enough of the organization’s needs or made incorrect assumptions.

Successful business analysis avoids the problems outlined above, producing complete, well-defined requirements based on the organization’s needs within the current scope. The next section outlines the keys for getting business analysis right the first time.

Keys to Business Analysis Success

Successful business analysis requires:

- Management buy-in
- Business goal alignment
- Full stakeholder engagement
- Clear communication
- Thoroughness
- Motivation

Management buy-in

Successful business analysis depends on the organization's senior management understanding and appreciating its value. For instance, managers who have suffered from misfit solutions resulting from little or no business analysis can appreciate its potential.

Managers unfamiliar with business analysis can think of it as getting the solution right as soon as possible. It defines business needs well enough for the development team to fit a solution to the needs.

As an analogy, before an organization moves into new office space, executives and managers typically spend hours with the architect and contractor to ensure the space meets the organization's and employees' needs. Each director scrutinizes the details of the space to ensure it works for their department. The same scrutiny and attention to detail apply to what the organization needs from software solutions.

Business goal alignment

All stakeholders should have a clear understanding of the solution's business goal. They should set aside their interests in other solutions or goals to focus on achieving the solution's goal.

Full stakeholder engagement

Successful business analysis also requires stakeholders representing *everyone* affected by the solution. Also, stakeholders should make themselves available when needed to discover and verify the organization's needs.

Clear communication

Business analysis success depends on clear communication. For instance, stakeholders often include subject matter experts who introduce domain-specific words or phrases into the analysis process. The business analyst should capture the terms and their definitions into a glossary for the stakeholders. They should agree on each definition to avoid confusion.

If discovery reveals many different terms, the business analyst can create a concept map to show the terms and their relationships. The Business analysis basic concepts section of this book provides an example of a concept map for business analysis.

Thoroughness

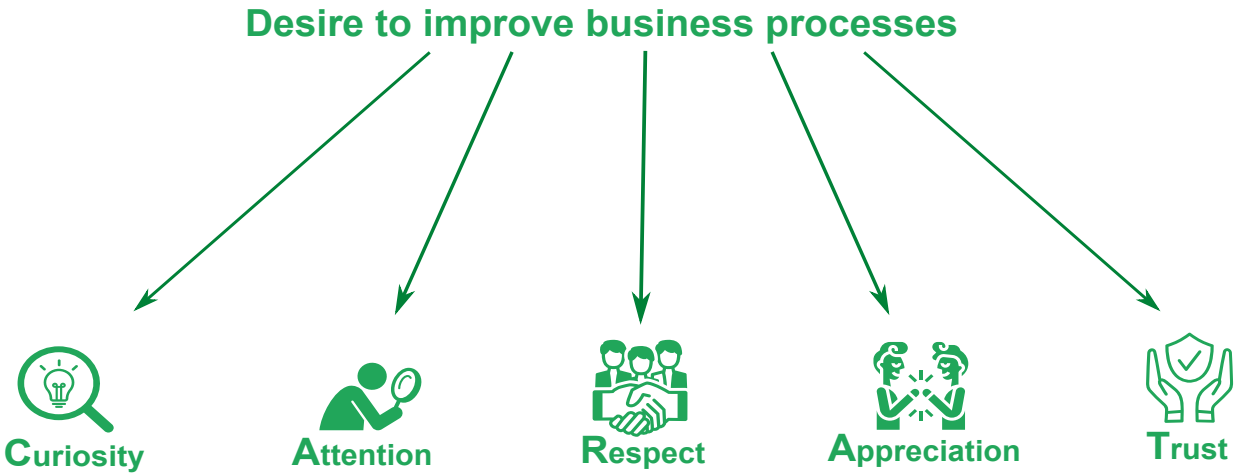
Discovering business needs often starts with stakeholders offering their pain points and wishes for solution features. However, they can easily overlook how a solution would affect processes already in place. Therefore, a business analyst should discover everything stakeholders expect from a solution based on their current practices, even processes they take for granted.

If the proposed solution replaces an older one, the business analyst should understand everything the older solution does, including integrations and automated processes not visible to users.

Once management has bought into business analysis and stakeholders have aligned to the solution's business goal, they are ready to discover business needs. Next, the business analyst needs the motivation to lead discovery.

Business analysis motivators

Business analysts seek to improve business processes with solutions. They start by discovering what the organization needs from a solution.



Thorough business analysis goes beyond asking business stakeholders what they need from a solution to achieve their goal. Discovering needs requires *curiosity*, the primary business analysis motivator. Curious business analysts start by learning about an organization's industry, values, and goals. Then, they focus their curiosity on a solution's goal, discovering processes, alternative paths, business rules, and exceptions to the rules.

While discovering business needs, business analysts maintain clear communication by paying close *attention* to what stakeholders say. In addition, they invest attention in learning the organization, its values, and how it works, creating a context for discovering its needs.

Business analysts treat all stakeholders with *respect*, from an intern to the chief executive officer. Analysts earn stakeholder respect by paying close attention to what they say, acknowledging and clarifying business needs. In addition, the analyst respects a stakeholder's time, realizing that discovering business needs takes time and energy in addition to their day-to-day responsibilities. Business analysts ultimately earn stakeholder respect by understanding what the organization requires from a solution.

Business analysts *appreciate* the value each stakeholder brings to the discovery and development process. They share this appreciation for stakeholder contributions, encouraging further participation by all stakeholders.

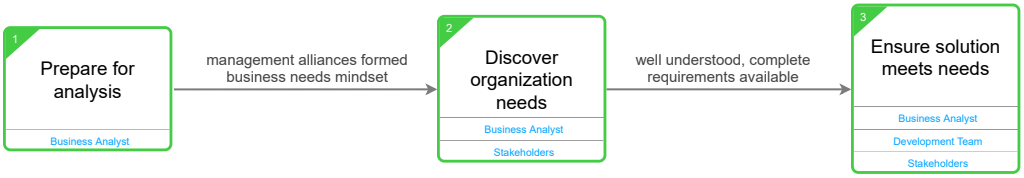
While working as a team, most stakeholders develop *trust* for one another. Business analysts start by giving stakeholders the benefit of the doubt. Then, they do what they say they will do, earning the other stakeholders' trust. As Steven Covey said:

> *When the trust account is high, communication is easy, instant, and effective.*

Once motivated business analysts have the keys to success, how do they get business analysis right the first time? The next section offers some answers.

Business Analysis Techniques

Successful business analysis executes the steps shown in the process diagram below.



Those new to business analysis often skip the “Prepare for analysis” step, anxious to discover what the organization needs from a solution. However, investing time and energy in preparation pays off by saving and respecting stakeholders’ time.

Prepare for Analysis

The process diagram below shows the steps to prepare for analysis:

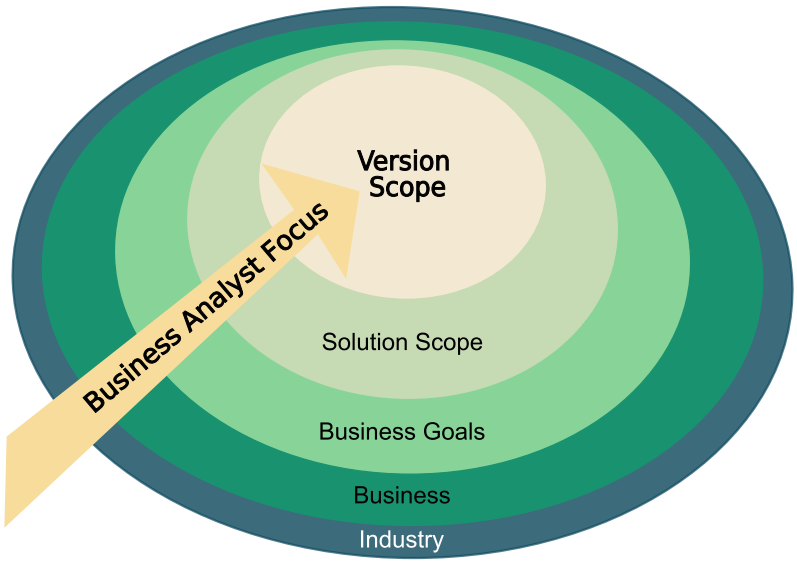
Understand the business goal

Prepared business analysis starts with understanding the organization, its industry, values, and goals.

- What differentiates the organization from others in its industry?
- What are its key values?
- How do its goals fulfill those values?

The answers to the questions provide a context for discovering business needs and what’s most important when dealing with the details from the discovery process.

The organization needs a solution to help it meet a goal. The stakeholders start by agreeing on a scope containing only the organization's needs to reach the goal. Then, the business analyst continues negotiations to establish a version scope focusing on urgent and important needs.



Form management alliances

Business analysts need management allies to deal with issues throughout the discovery and development processes. Each alliance should help them overcome obstacles and conflicts, keeping the discovery process moving forward.

A director or manager most impacted by a solution, such as a project sponsor, makes an excellent internal ally for business analysts or architects. Management allies provide insight into the solution's impact on the organization. Also, they should have the necessary understanding and authority to resolve client stakeholder conflicts. Finally, management allies can help negotiate the solution and version scope by ranking solution needs.

When discovering needs, business analysts and architects often work with specialists known as subject matter experts. Business analysts and architects often have questions about each subject matter expert's processes. If documentation exists for the processes, it may assume domain expertise a business analyst or architect doesn't have. An alliance with the subject matter expert helps fill those gaps.

In some cases, a department can "go rogue," hiring an outside firm to develop a solution without involving its Information Technology (IT) Department. The department manager usually justifies this by saying IT is not responsive or too slow (backlogged). In this case, good business analysts and architects create an alliance between the department and IT by acting as a liaison.

Develop a business needs mindset

System administrators or architects taking on a business analyst role often find it challenging to set solution implementation aside and focus on business needs. For example, they start solving a problem as soon as they hear about it, rather than first discovering all the problems a solution should solve.

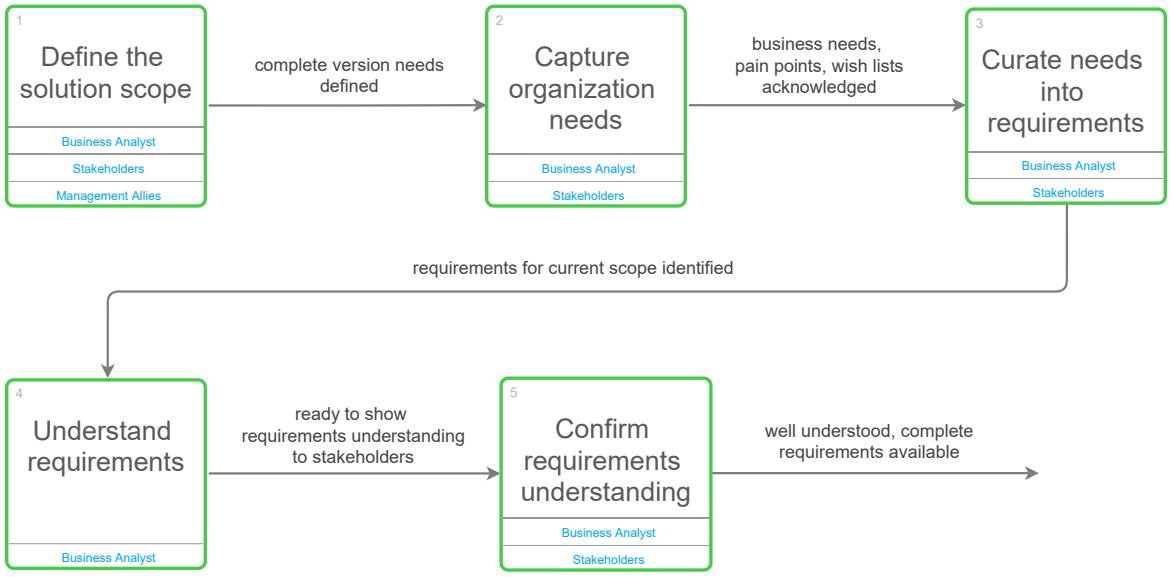
Once a solution project has been approved, pressure mounts to deliver the solution. Developers want to start coding, users want the solution's benefits, and management wants to see its results. A business analyst advocates completely defining the problems before proceeding with implementation. A management ally can help by outlining a complete picture of what the organization needs.

Attention to detail applies to discovering business needs as much as it does in developing a solution. Good architects and developers resist the temptation to cut corners in design and development. Good business analysts pursue all of the business needs a solution will fulfill, realizing that cutting corners can result in an unusable solution from overlooked needs.

Once a business analyst understands a solution's goal, has a management ally, and has a thorough discovery mindset, they are ready to lead the stakeholders to discover what the organization needs.

Discover Organization Needs

A business analyst leads stakeholders through the discovery of the organization's needs to reach a goal. First, the stakeholders, including the analyst, define the scope to keep the discovery focused. Next, the analyst captures and acknowledges each need, asking follow-up questions to define it completely. Finally, having captured all the needs, they curate them into well-understood requirements and confirm their understanding with the stakeholders.
The process diagram below illustrates the discovery steps:



Define the solution scope

Discovery should focus on a solution's purpose - delivering value to the organization by achieving a specific business goal. The stakeholders agree to consider only the business needs to achieve the goal. These needs fall within the version *scope*. If out-of-scope needs arise, the analyst captures and defers them. Discovery concludes when all needs are well-defined within the scope.

Capture organization needs

A business analyst captures business needs from stakeholders in the context of the solution fulfilling its goal. The stakeholders may already have some needs in mind, but it doesn't stop there. The analyst drills down to a level of detail that completely defines the needs.

For example, a business aims to improve sales efficiency, with a specific objective to increase its lead conversion rate. The analyst asks several questions:

- Where do leads come from?
- On what basis are leads assigned to sales reps?
- What happens to unassigned leads?
- What qualifies a lead to become a contact?
- What's the next step for a new contact?
- What happens to leads not converted into contacts?

The business stakeholders may not have immediate answers to questions like these. In that case, they work out how they want the process to work with the new solution. Once they do, the analyst asks follow-up questions to clarify the stakeholders' expectations.

When analysts capture and record a business need, they acknowledge it to the requesting stakeholder(s). However, the acknowledgment only confirms the analyst captured the need correctly. It is not a commitment to fulfill it in the current solution version.

Stakeholders may introduce solution ideas during discovery. If the idea falls within the version scope, but the business need isn't clear, the analyst asks the stakeholder what problem the idea would solve. If the idea falls out of scope, the analyst records it, defers it, and acknowledges the deferral to the requesting stakeholder(s).

Curate needs into requirements

Pain points, solution ideas, and wish lists emerge from discovery along with business needs. Business analysts determine the needs that fully cover the scope and curate them into requirements. A requirement specifies a business outcome, focusing on understanding the value its fulfillment delivers.

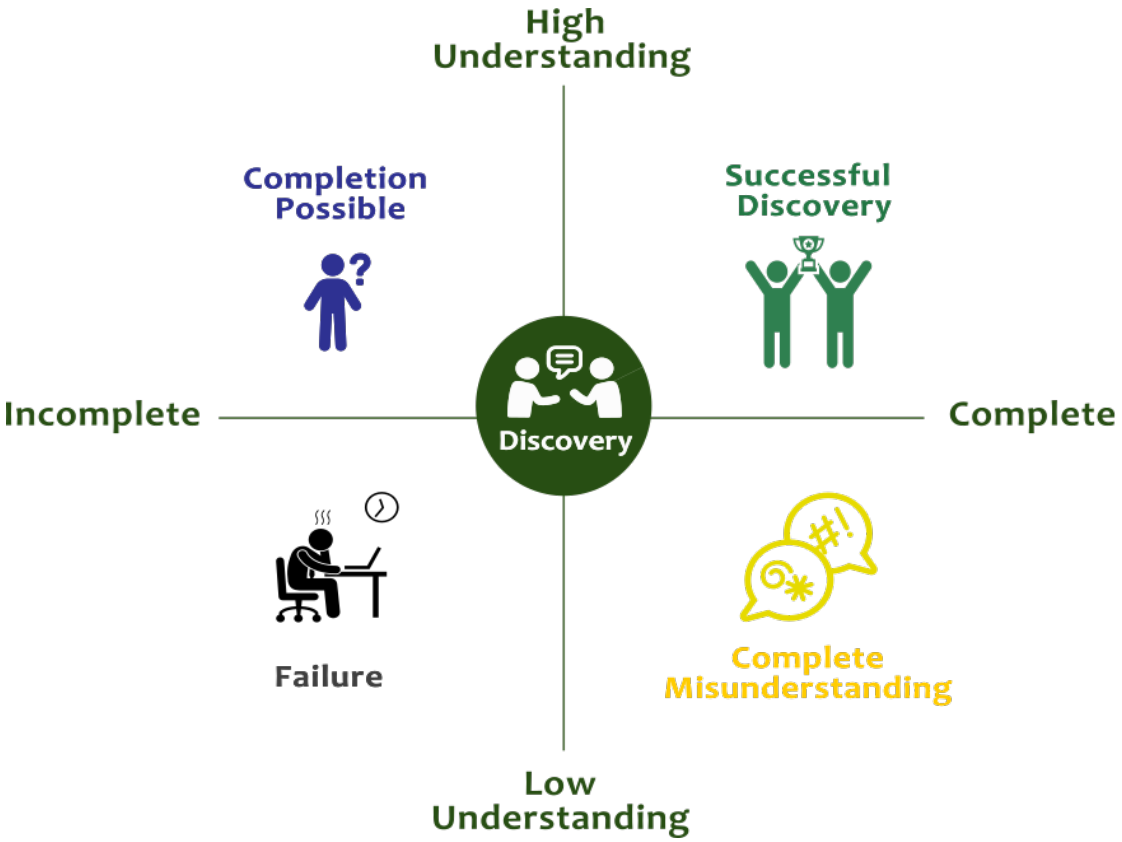
For example, a business needs to improve its lead conversion rate. After learning more about the need, a business analyst curates it into three requirements:

- Optimized lead assignment
- Improved lead qualification
- Streamlined lead conversion

The business analyst focuses on understanding these requirements, including the details of how they'll deliver value.

Understand requirements

Successful solution development depends on the business analyst and architect's understanding of all requirements. The diagram below shows the balance between requirements understanding and thoroughness.



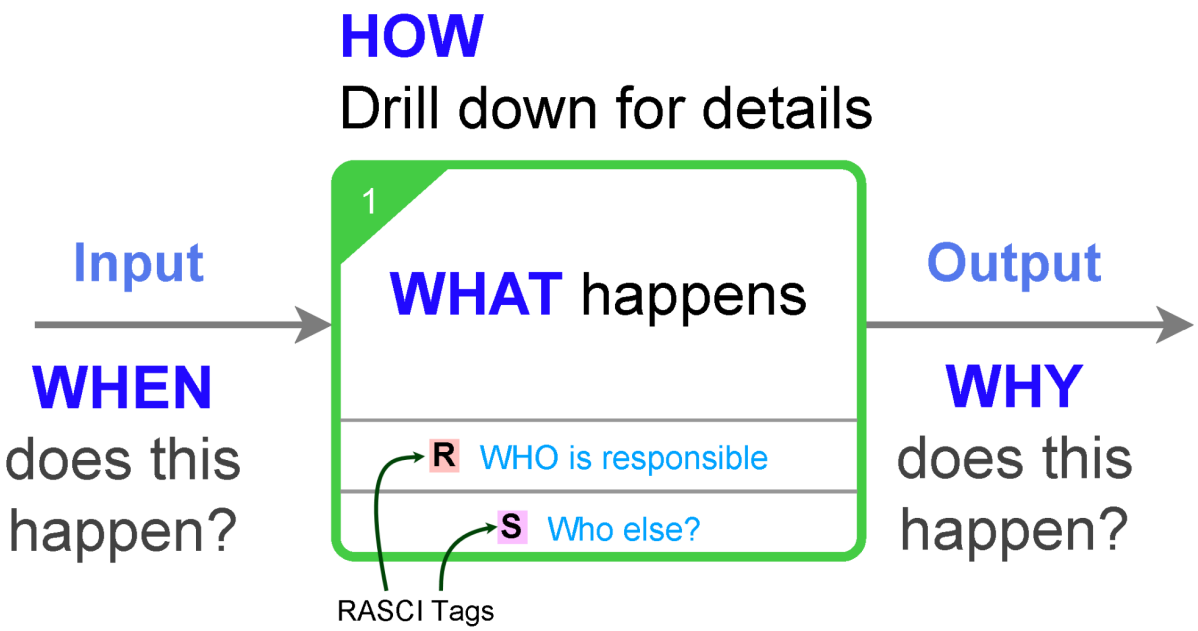
A business analyst or architect who does not understand the requirements puts the solution project on a course to failure, shown in the lower half of the diagram. On the other hand, when they understand the requirements, they set their projects on a trajectory to success. They can even recover incomplete requirements with enough understanding.

Confirm requirements understanding

Complex processes often emerge from an organization's needs. Breaking these processes down into simpler steps has the following benefits:

- Stakeholders review and understand a process more easily as a sequence of steps.
- Reviewing the steps can reveal gaps in the process.
- Filling gaps between the steps makes understanding the process more complete.

A *process diagram* shows steps as boxes connected with arrows. Universal Process Notation (UPN) provides a simple yet powerful way to create and understand process diagrams. It connects activity boxes with arrows labeled to show activities' inputs and outputs, as shown here:

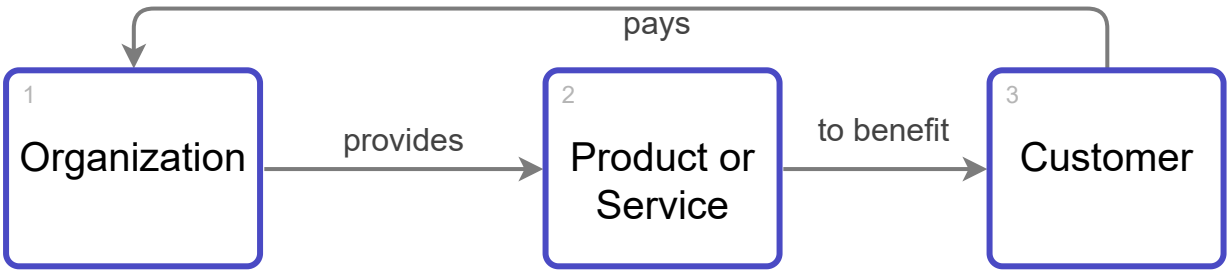


The Business Analysis Techniques section of this book uses process diagrams to illustrate the analysis process.

Any activity in a UPN process diagram can drill down to another diagram showing the activity's steps in detail. The drill-downs organize the diagrams into a hierarchy, which forms a *process map*. A process map can have as many drill-down levels as needed to clarify ambiguity.

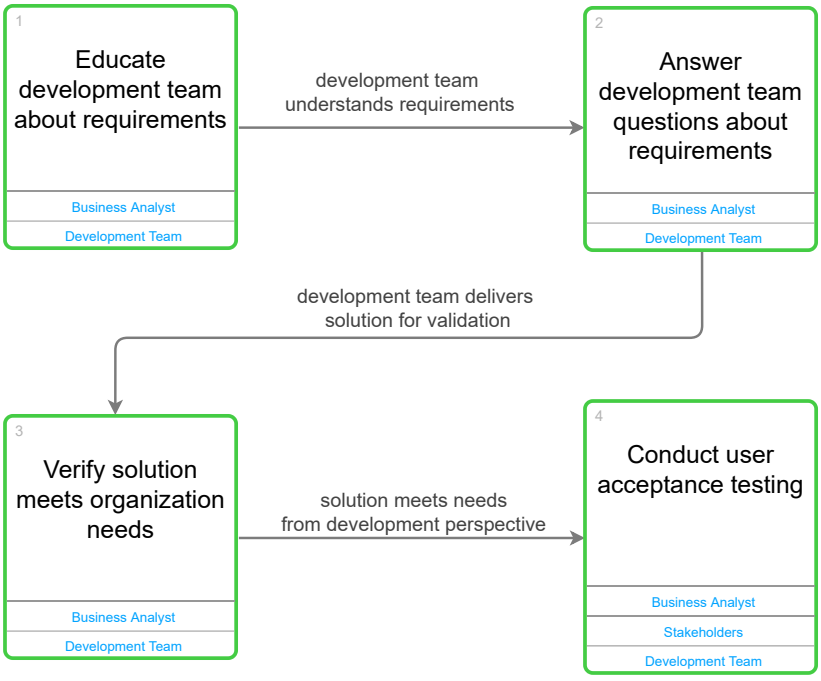
Suppose any stakeholders, including the business analyst, are unfamiliar with words, phrases, or concepts introduced by other stakeholders. In that case, the business analyst should add these terms to the glossary.

If a need arises to review organization-specific terms, a business analyst can create a *concept map*. It shows the terms in boxes connected by arrows, like a process diagram. In a concept map, the arrow labels show the relationships between concepts, and each arrow shows the order to read the concepts.
For example, the concept map below shows that an Organization provides a Product or Service to benefit a Customer who pays the Organization.



Ensure the Solution Meets Needs

Business analysts ensure a solution meets the organization's needs with these steps:



Educate the development team about requirements

Once a business analyst or architect understands the requirements, they share that understanding with the development team. The more a team member works with business stakeholders, the better they should understand the requirements.

Answer development team questions about requirements

Requirements include user stories for agile development or functional requirements specifying how users expect a solution to work. A business analyst should anticipate development team questions about the stories or specifications. Then, an analyst or architect takes the team questions they cannot answer and follows up with the business stakeholders for clarification.

Verify solution meets organization needs

A development team typically starts by developing a prototype solution with only mandatory features for stakeholders to evaluate. Next, a business analyst or architect demonstrates the prototype to stakeholders, eliciting their feedback. Eventually, stakeholders can try the prototype themselves to provide more detailed feedback.

Business analysts should validate a solution before releasing it for user acceptance testing. They start by checking the solution against user stories or functional requirements, ensuring it fulfills the organization's needs within the version scope. If an analyst finds gaps between the requirements and the solution, they record the gaps. Then, they negotiate with the development team on closing the gaps.

Conduct user acceptance testing

Once business analysts have validated the solution, they lead user acceptance testing. At a minimum, users ensure the solution works the way they expect, covering all the requirements. Ideally, the testing users will try cases that stress solution functions. For example, a user tests converting a lead to a contact, but converts the wrong lead. How would the user undo the conversion?

If user acceptance testing uncovers gaps between the organization's needs and the solution, a business analyst captures all of the gaps. Then, they negotiate which gaps the development team must close for user acceptance. Finally, the team closes those gaps at a minimum.

Well-managed user acceptance testing provides the ultimate metric for business analysis success. If gaps emerge in the testing, a business analyst determines where communications broke down to create the gap. For instance, a discovery oversight provides an opportunity for the analyst to improve future discoveries. Likewise, if the development team overlooked a requirement, the analyst takes the opportunity to improve team communications to prevent future gaps.

Discovering and closing solution-requirement gaps informs improvement of the next business analysis cycle.

Key Points

- Business analysis ensures a solution meets an organization's needs by discovering and defining those needs.
- Successful business analysis requires:
    - Management buy-in and alliances
    - Stakeholders fully engaged and aligned to a business goal
    - Clear communication among all stakeholders
    - Attention to the right details
- Develop a business needs mindset, postponing solution implementation details
- Focus on the current version's scope
- Curate the organization's needs into requirements that achieve the business goal
- Understand the requirements thoroughly
- Show stakeholders process and concept maps to confirm understanding
- Share requirements understanding with the development team
- Lead user acceptance testing to:
    - Confirm the solution meets its requirements
    - Discover gaps between the solution and its requirements
    - Learn how to avoid future gaps

Business Analyst and Architect on Demand

Need help realizing these ideas in your organization?

Perhaps you like the ideas presented here but feel uncertain about how they would apply to your organization. For example:

- How do I promote business analysis to management?
- How do I motivate stakeholders to focus on problems, not features?
- How do I make sure the requirements cover all the business needs?

Blendery, Purposeful Architect's owner, provides consulting services to realize these ideas in your organization.

Blendery works with you to get to the heart of what your business needs. We clarify your requirements and develop a deep understanding of how a solution meets your company goals. We can then work with you to deliver your solution as efficiently as possible, avoiding common development pitfalls.

Similarly, if you have a stalled project or a disappointing solution dragging down your productivity, we'll troubleshoot the situation to get you back on track.

By working with Blendery, you will get solutions right the first time - saving you time, money, and sanity.

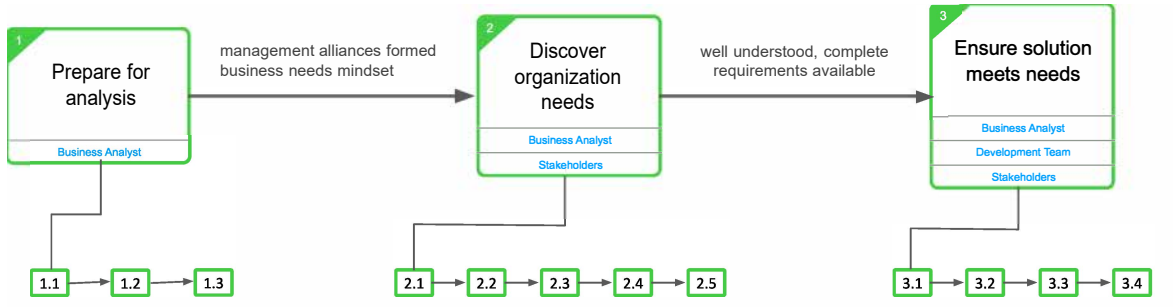
Visit Blendery.com or email us at richardc@blendery.com.

Business Analysis Knowledge

Here is an overview of reference information in this part of the book. The Discovery Concepts Map and Concept Index link to concept pages defining key business analysis concepts.

Business Analysis Process Map

The Business Analysis Process Map has the four business analysis process diagrams used in this book in one place.



Discovery Concepts Map

The Discovery Concepts Map shows the relationships between discovery concepts, organized into three categories:

- **Motivators** that drive and sustain the discovery process
- **Techniques** for discovering business needs
- **Deliverables** that convey an understanding of requirements

Each concept on the map links to a concept page with a definition and concept examples.

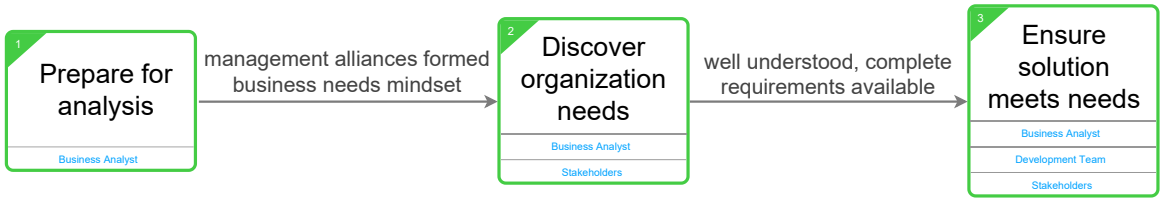
Concept Index

The Concept Index links to all concept pages. It includes the categories from the Discovery Concepts Map plus these categories:

- **Fundamental** concepts which form the foundation of business analysis
- **People** who play key business analysis roles

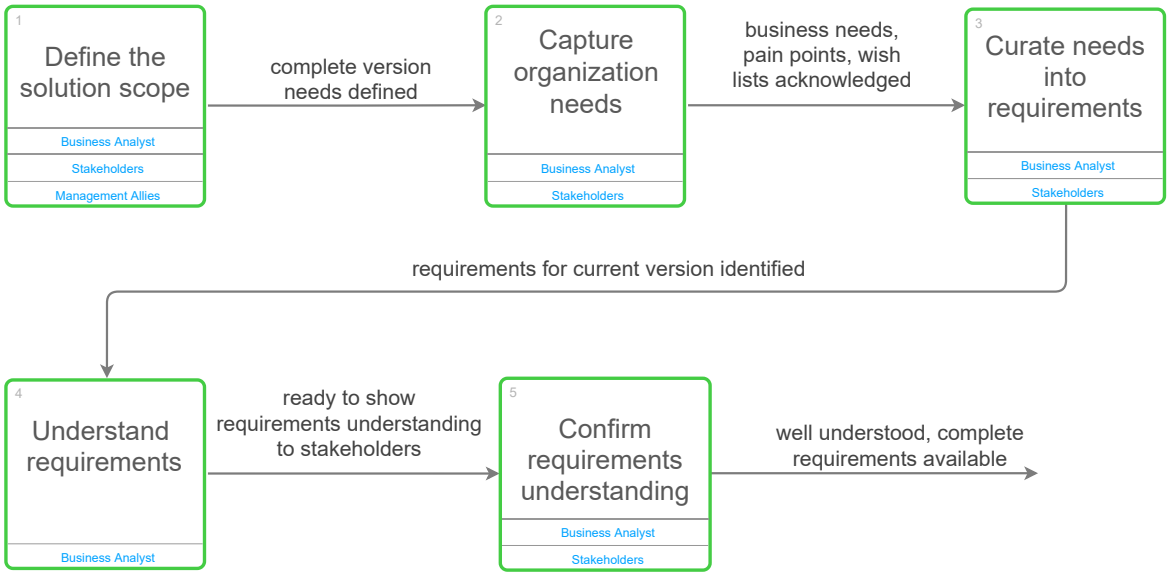
Business Analysis Process Map

Top-Level Overview

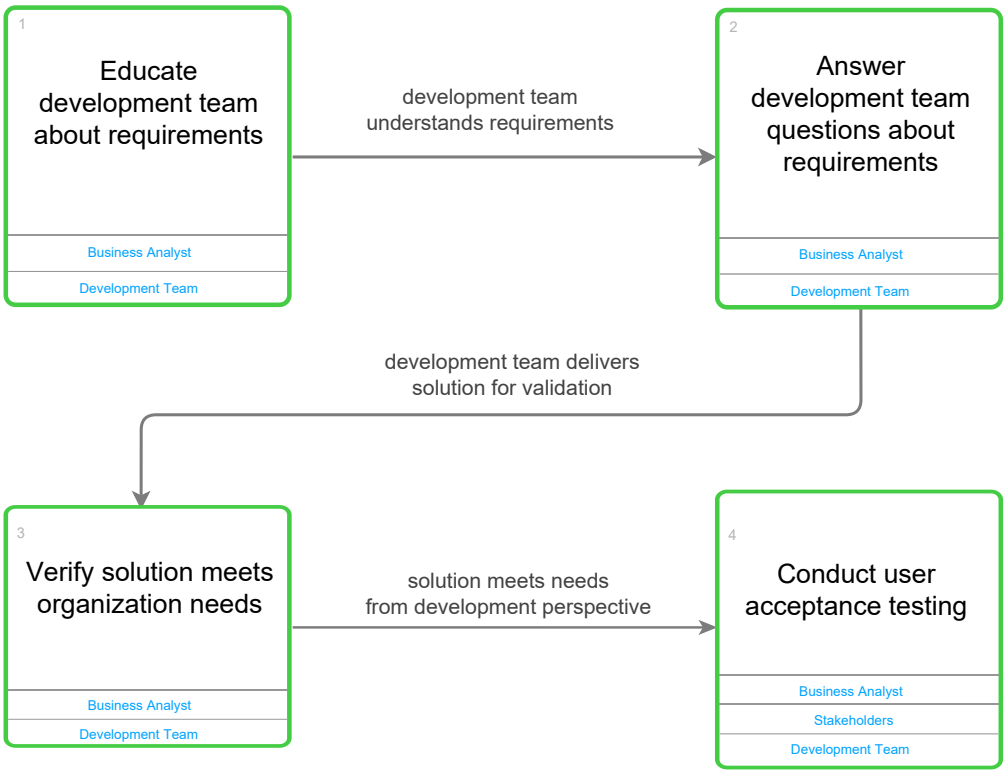


1. Prepare for Analysis

2. Discover Organization Needs



3. Ensure the Solution Meets Needs

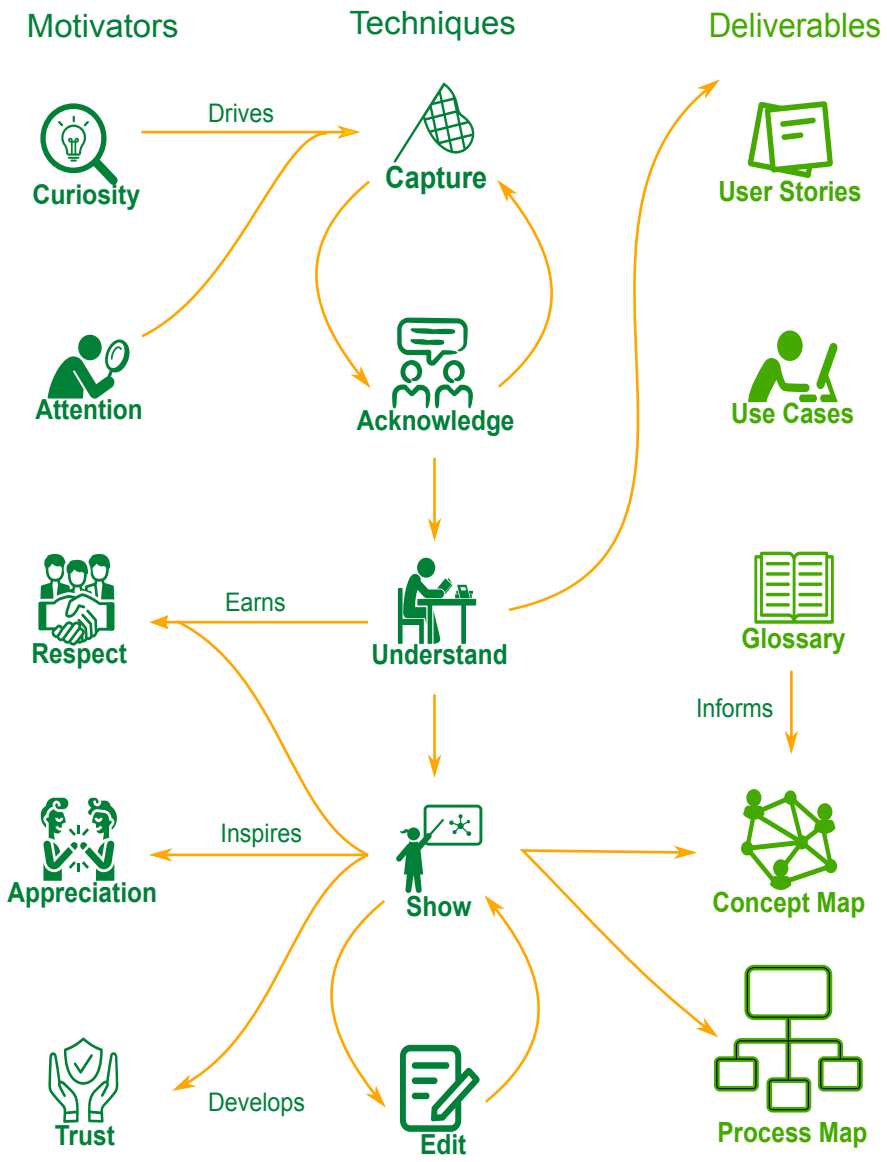


Discovery Concepts Map

The map below shows three categories of business analysis discovery concepts and their relationships:

- **Motivators** that drive and sustain the discovery process
- **Techniques** for discovering business needs
- **Deliverables** that convey an understanding of requirements

Click any icon to see more information on its concept page.



Concept Index

The lists below contain all business analyst concepts grouped by:

- **Fundamental** concepts which form the foundation of business analysis
- **People** who play key business analysis roles
- **Motivators** that drive and sustain stakeholder interactions
- **Basic Techniques** for discovering business needs
- **Deliverables** that convey an understanding of requirements

Click any concept to see its page with more details.

Fundamental • Purpose • Scope • Coverage • Organization • Solution	**People** • Stakeholder • Business Analyst • Architect
Motivators (CARAT) • Curiosity • Attention • Respect • Appreciation • Trust	**Basic Techniques (CAUSE)** • Capture • Acknowledge • Understand • Show • Edit
Deliverables • Glossary • Concept Map • Requirements • Process Diagram • Process Map • User Story • Use Case	

Purpose

An intention fulfilled by reaching a well-defined goal

A project's *purpose* determines its goal and direction.

Examples

A business has the *purpose* of delivering value to its customers.

A solution delivers value to an organization as its *purpose*.

Business analysis has the primary *purpose* of discovering and understanding what an organization needs from a solution.

Purpose in this Book

"Understand the business goal" describes how an organization's *purpose* provides context for discovering what it needs from a solution.

Purpose in Purposeful Architect

Maps

Motivated Discovery

Articles

Purpose: Delivering Value (Key Story)

Motivating Specific Requirements

Scope

A range of business needs defining boundaries for requirements

Scope focuses solution discovery and development processes on meeting specific organization needs, with a clear definition of completion.

Example

Stakeholders negotiate the *scope* of an organization's needs that a solution's version will fulfill.

Scope in this Book

"Define the solution scope" describes *scope's* importance in defining "done" for a solution's version.

Scope in Purposeful Architect

Maps

Motivated Discovery

Articles

Scope: Are We Done Yet? (Key Story)
Coverage: How Much is Enough?

Coverage

The percentage of organization needs captured or fulfilled within a scope

Coverage measures the percentage of an organization's needs covered by requirements within the scope.

Examples

Ideally, requirements should cover all organization needs within a scope. However, if some requirements cost too much, stakeholders negotiate to satisfy them another way. For example, they may choose to perform some processes manually because they don't justify automation.

Discovery completes when requirements cover 100% of the needs within scope.
Development completes when a solution covers 100% of the requirements within scope.

Coverage in this Book

"Why Business Analysis?" compares covering business needs with Apex test *coverage*.

Coverage in Purposeful Architect

Maps

Motivated Discovery

Articles

Coverage: How Much is Enough? (Key Story)

Organization

A business or nonprofit delivering value to customers or beneficiaries

An *organization* consists of people and systems working to realize its value delivery goals.

Examples

A business *organization* delivers products or services to customers in exchange for payment.
A nonprofit *organization* delivers benefits to those in need, financed by donors.

Organization in this Book

"Business analysis basic concepts" shows the *organization* concept's relationship with other concepts.
Why don't organizations analyze their needs?
Discover Organization Needs

Organization in Purposeful Architect

Articles

Most Purposeful Articles refer to *organizations*.

Solution

A process or system change that improves an organization

A *solution* improves an organization's products, services, or quality. Organizational quality includes internal operations and compliance.

Examples

Salesforce offers a variety of *solutions* for organizations to reach their customer relationship management goals:

- Sales Cloud
- Marketing Cloud
- Service Cloud

An organization using Salesforce to improve its customer relationship management quality can build custom *solutions* on the Salesforce platform. For example, they can build a portal where customers can access their account and order information online.

Solution in this Book

"Business analysis basic concepts" shows the *solution's* relationship with other concepts.
Ensure the Solution Meets Needs

Solution in Purposeful Architect

Articles

All Purposeful Articles refer to *solutions*.

Stakeholder

A person involved with the development, management, or use of a solution

Anyone involved with a solution directly or indirectly can be a *stakeholder*.

Examples

Business *stakeholders* typically work for the organization and include:

- Domain or subject matter experts
- End users or their representatives
- Project sponsor or product owner

Project *stakeholders* assume the following solution development roles:

- Business analyst
- Architect
- User experience designer
- Developers
- Testing (quality assurance)
- Project manager
- Operations support, such as DevOps

Third-party *stakeholders* work outside the organization and include:

- Vendors of products or services related to the solution
- Regulators

Stakeholder in this Book

"Business analysis basic concepts" shows the *stakeholder's* relationship with other concepts.
Full stakeholder engagement

Stakeholder in Purposeful Architect

Articles

All Purposeful Articles refer to *stakeholders*.

Business Analyst

A stakeholder responsible for determining a solution's requirements.

A *business analyst* leads stakeholders to discover what they need from a solution, curate the needs into well-understood requirements, and confirm their understanding with other stakeholders.

Examples

Business analysts learn about organizations' goals and values to curate requirements. They have a business needs mindset, deferring solution ideas until they understand all the requirements. They share this understanding with the development team, especially the architect.

Business Analyst in this Book

"Business analysis basic concepts" shows the *business analyst's* relationship with other concepts.
Keys to Business Analysis Success

Business Analyst in Purposeful Architect

Articles

All Purposeful Articles refer to a *business analyst*.

Architect

A stakeholder responsible for designing a solution

Architects translate well-understood requirements into solution designs and specifications.

Examples

Architects collaborate with business analysts to understand requirements, make design decisions and share those decisions with stakeholders, mostly through diagrams.

Architect in this Book

"Form management alliances" mentions architects as subject matter expert allies.
"Understand requirements" points out architects should understand requirements since they often meet with business stakeholders.
"Answer development team questions about requirements" includes architects as liaisons between business stakeholders and the development team.

Architect in Purposeful Architect

Articles

Business Analyst and Application Architect Roles (Key story)

Curiosity

A need for knowledge and understanding

Curiosity drives the Business Analyst's discovery of an organization's needs.

Examples

When business analysts start on a project, they become *curious* about the organization, its values, goals, and needs from solutions. The organization's values, goals, and needs create the context for their *curiosity* about the deeper needs.

Curiosity in this Book

Business analysis motivators

Curiosity in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Your First Deliverable: Curiosity (Key Story)
Business Analyst Motivation

Attention

Astute awareness of communicated information

Attention expresses curiosity and a focus on an organization's solution needs. It improves the coverage of those needs.

Examples

Discovering what an organization needs from a solution demands extra time and *attention* from its stakeholders. Business analysts pay close *attention* to stakeholders to get their needs right the first time.

Attention to detail in design and development increases the value of the solution to the organization.

Attention in this Book

Business analysis motivators

Attention in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Your Second Deliverable: Attention (Key Story)
Business Analyst Motivation

Respect

High regard for a person's abilities, effort, attention, and time

Respect recognizes the value of stakeholders in developing a solution to meet their organization's needs.

Examples

Business analysts *respect* all stakeholders, independent of their rank or responsibilities in the organization. Often, they earn the stakeholders' *respect* by caring about their needs.

Respect in this Book

Business analysis motivators

Respect in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Your Third Deliverable: Respect (Key Story)
Business Analyst Motivation

Appreciation

Gratitude for a person's contributions

Appreciation of effort motivates stakeholders to overcome obstacles and fit a solution to their organization's needs.

Examples

Business analysts *appreciate* the time, energy, and attention stakeholders put into discovering their organization's needs and ensuring solutions meet those needs. Likewise, stakeholders *appreciate* solutions that meet or exceed their organization's needs.

Appreciation in this Book

Business analysis motivators

Appreciation in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Recognize Value with Appreciation (Key Story)
Business Analyst Motivation

Trust

Confidence in the ability, honesty, and reliability of a person

Trust makes solution development more efficient and valuable as stakeholders require less explanation and verification in their communication.

Examples

Trust develops between stakeholders as they experience each other's ability to do what they say they will do, on time and to a high standard.

Trust in this Book

Business analysis motivators

Trust in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Develop Trust While Developing a Solution (Key Story)
Business Analyst Motivation

Capture

Elicit business needs from stakeholders

Business analysts interview stakeholders to *capture* business needs.

Examples

Business analysts get pain points, wish lists, and business problems from stakeholders in the discovery process. Then, they ask stakeholders questions about each problem, feature, or idea to *capture* the true business need.

Capture in this book

Capture organization needs

Capture in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Discovery with a C.A.U.S.E. (Key Story)

Acknowledge

Reflect the capture of information

Business analysts *acknowledge* stakeholders' needs and ideas to confirm they captured what the stakeholders meant.

Examples

When capturing pain points, business problems, and ideas from a stakeholder, a business analyst *acknowledges* the captured information back to the stakeholder. *Acknowledgment* confirms to the stakeholder that the business analyst captured what the stakeholder intended. It also allows the stakeholder to clarify what they said.

Acknowledge in this book

"Capture organization needs" points out that *acknowledgment* should follow capture.

Acknowledge in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Discovery with a C.A.U.S.E. (Key Story)

Understand

Comprehending requirements in the context of a business and its goals

Business analysts make *understanding* requirements the primary goal of the discovery process.

Examples

Understanding business needs starts with learning about the organization, its goals, and processes to establish context for a solution. Clear communication enables stakeholders to gain insight into the problems and opportunities they want the solution to manage. Then, business analysts use these insights to curate and *understand* requirements.

Understand in this Book

Understand the business goal
Understand requirements

Understand in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Understanding Customer Requirements (Key Story)
Discovery with a C.A.U.S.E.

Show

Demonstrate an understanding of requirements to stakeholders

Business analysts confirm, clarify and correct their understanding of requirements by *showing* diagrams to stakeholders.

Examples

Business analysts use diagrams and maps to *show* stakeholders their understanding of requirements. Stakeholders then get an opportunity to clarify and correct their insights from the discovery process.

Business analysts *show* their requirements understanding through artifacts such as:

- Glossary of terms
- Concept maps
- Process maps
- User stories
- Use cases

Show in this Book

Confirm requirements understanding

Show in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Discovery with a C.A.U.S.E. (Key Story)

Edit

Change requirements content to reflect improved understanding

Editing requirements and related content reflect stakeholder clarifications and corrections.

Examples

When business analysts show their understanding of requirements, they capture stakeholder feedback to improve their understanding. Then, they edit requirements, diagrams and other related content to reflect the improved understanding.

Edit in this Book

"Confirm requirements understanding" includes *editing* requirements documents and diagrams based on stakeholder feedback.

Edit in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Discovery with a C.A.U.S.E. (Key Story)

Glossary

A list of terms or concepts captured and defined during discovery

The *glossary* defines organization-specific terms and concepts so that all stakeholders "speak the same language" about the organization's needs.

Examples

A stakeholder maintains a list of unfamiliar terms and concepts. The stakeholders agree on each term's definition to minimize ambiguity when the terms or concepts arise in discovery.

Glossary in this Book

The Concept Index lists business analysis concepts grouped into categories.

Glossary in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Coming to Terms (Key Story)

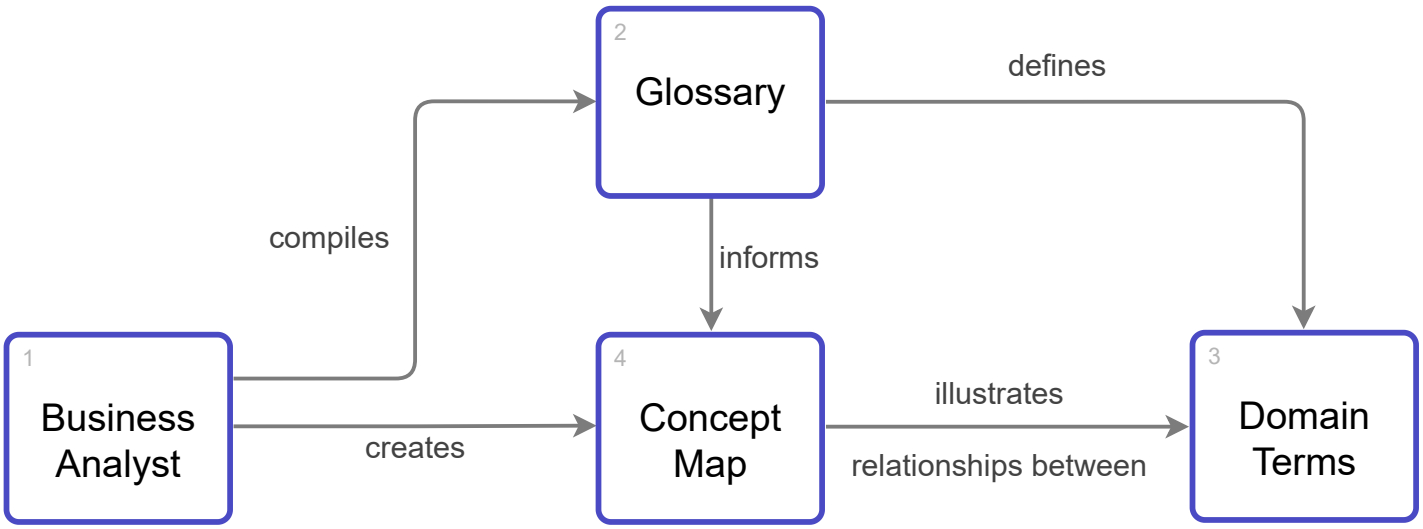
Concept Map

A diagram showing the relationships between an organization's concepts

A *concept map* shows stakeholders an understanding of an organization's concepts in the scope of a solution.

Examples

The *concept map* below shows relationships between a *concept map*, glossary, and business analyst.



Concept Map in this Book

"Business Analysis Concepts" illustrates business analysis terms with a *concept map*.
"Confirm requirements understanding" includes *concept maps* as a way to align stakeholders around the meaning of organization-specific terms.

Concept Map in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Showing Customer Concepts (Key Story)

Requirements

Specific business outcomes expected from a solution

Requirements cover business needs within a version scope. Each need has at least one *requirement*.

Examples

Business analysts curate captured business needs into *requirements*. Then, they show stakeholders their understanding of the *requirements* and edit them based on feedback. Finally, they pass their understanding to the development stakeholders.

Requirements in this Book

Curate needs into requirements
Understand requirements
Confirm requirements understanding

Requirements in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Curating Business Needs Into Requirements
Understanding Customer Requirements
Diving Deeper Into Requirements
Getting Your Requirements in Order

Process Diagram

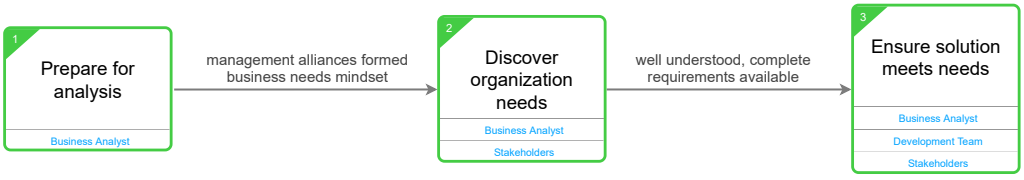
An illustration of process steps

A *process diagram* shows steps as labeled boxes connected by arrows.

Examples

Each box in a *process diagram* has a short label starting with a verb describing its activity. It can also show who performs the step. The connecting arrows also have labels indicating the output of the previous step or the input or condition for the next step.

For example, this process map shows an overview of the discovery process:



Process Diagram in this Book

"Business Analysis Techniques" includes a *process diagram* showing the top-level business analysis process.
"Prepare for Analysis" has a second-level process diagram illustrating preparation activities.
"Discover Organization Needs" includes a second-level process diagram showing discovery activities.
"Confirm requirements understanding" defines how process diagrams can show requirements understanding.
"Ensure Solution Meets Needs" has a second-level process diagram with knowledge transfer, validation, and user acceptance testing activities.

Process Diagram in Purposeful Architect

Articles

Process Mapping the Big Picture
Leveling Process Maps
The Art of Connecting Process Steps

Process Map

A hierarchy of diagrams illustrating a complete process

A *process map* contains process diagrams with steps that drill down to more detailed diagrams.

Examples

A *process map* engages stakeholders to visualize and quickly understand what a process does, preventing miscommunications and possible solution reworks.

Process Map in this Book

"Confirm requirements understanding" defines how a *process map* can show requirements understanding.
"Business Analysis Process Map" groups the business analysis process diagrams together as a *process map*.

Process Map in Purposeful Architect

Maps

Process Mapping Overview
Discovery Journey to Understand Requirements

Articles

Mapping Out Complexity (Key Story)
Process Mapping the Big Picture
Leveling Process Maps
The Art of Connecting Process Steps

User Story

A summary of a specific task performed by a user

A *user story* specifies what a user does with a solution and for what purpose.

Examples

User stories introduce requirements details in a meaningful way to development stakeholders.

A *user story* typically follows this template:

> As a {person in a role}, I need to {perform a task} so that I can {fulfill a purpose}.

For example: As a business analyst, I need to create process diagrams so that I can show my understanding of a process to stakeholders.

User Story in this Book

"Educate the development team about requirements" highlights *user stories* to communicate requirements to the development team.
"Verify solution meets organization needs" features *user stories* to verify a solution meets its requirements.

User Story in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

What's the Story? (Key Story)

Use Case

Detailed steps for testing and using a solution

Use cases provide development stakeholders with user interaction steps to accomplish a task in a solution. Each step has enough detail to verify the *use case* meets its requirement.

Examples

A *use case* for a business analyst creating a process diagram:

1. Create a process diagram. A blank canvas appears.
2. Put one or more boxes on canvas representing tasks.
3. Label boxes with text.
4. Draw an arrow from a box, optionally to another box.
5. Label any arrow with text.
6. Move a box, maintaining linkage(s) with the box and its connecting arrow(s)
7. Drill down from a box to create a new diagram with step details.
8. Save the process diagram for later editing or display.

Use Cases in Purposeful Architect

Maps

Discovery Journey to Understand Requirements

Articles

Making the Cases for a Solution (Key Story)

Congratulations!

You made it to the end. Now, you can apply the ideas and tools you've learned at work. If someone asks, “what do we need business analysis for?” you can show how it enables your organization to develop solutions right the first time.

If you’d like ongoing insights on business analysis, follow my blog on Purposeful Architect.

I hope you enjoyed the book and would love to hear how you use these concepts in your professional life. Feel free to email me at richardc@bendery.com.

Thanks for Reading!

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