

## **Terms of Reference**

### **Improving Business Analysis Project**

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## Improving Business Analysis Project – Terms of Reference

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### 1. Background

FOR EXAMPLE

{this company} are a specialist provider of ....

Due to internal moves and restructuring, and some business acquisitions and deals, a number of individuals were identified to form a team report to XXX that would perform Business Analysis. Their role is to

- understand client processes and requirements
- understand the scope of {this company} processes and capabilities
- perform gap analysis between the client and {this company}
- agree solutions to the gaps
- manage solutions in to delivery

In addition, there are several other Business Analyst teams totalling 25 associates – please refer to Appendix 1 for a list of associates in scope.

There are no other Business Analysts in this division and no existing common and consistent methodology for performing analysis. There may be a requirement to train others teams in a similar position in other divisions.

XXX's team quickly identified a need to be trained in Business Analysis and to start working in a consistent manner. They researched courses and proposed to their manager a number of options. Their manager has agreed that training is required and has engaged a performance consultant to diagnose the development needs and ensure a best fit solution.

The sponsoring manager has a desire to accomplish the training quickly – ideally starting before the end of September and concluding by the end of the calendar year. The sponsoring manager is also keen to optimise the training such that the analysts will learn what only what they need to learn in order to accomplish their first objectives of being consistent, professional Business Analysts capable of fulfilling the role outlined above.

In order to proceed, the manager of the Business Analyst team will need to propose a Business Case to their manager. It is anticipated that there will be two Business Cases: Firstly, a case for the essential training that is mandatory: If this training is not delivered then the Business Analysts will be unable to fulfil their role.

The second case will be for additional training concerned with all the areas that analysts should be trained in, and accreditations they should hold if they are to be recognised as professional Business Analysts.

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### 2. Problem Analysis

#### 2.1. Drivers

No	Given the desire to...	...it follows that...	...but issues that have arisen are...	...resulting in the problems of
1.	FOR EXAMPLE Train the existing teams in Business Analysis essentials required by their role	i. The scope of the existing team role is defined ii. Training must as a minimum cover the scope of the role that is pertinent to Business Analysis	- There are many Business Analysis roles within {this company} -The BA team role has not been formally defined	- The BA team do not feel they are able to fulfil their role - The full benefits of a Business Analysis function are not being realised - There are expectation misses between what {this company} business expects and what the BAs are able to perform.

#### 2.2. Assumptions and constraints

No	Because	...it follows that...
1.	FOR EXAMPLE This Terms of Reference is concerned solely with the mandatory training requirements for the Business Analysis Teams	<ul style="list-style-type: none"> <li>The second Business case is out of scope. This will be for additional training concerned with all the areas that analysts should be trained in, and accreditations they should hold if they are to be recognised as professional Business Analysts, for example ISEB.</li> </ul>

#### 2.3. Definition of Terms

No	Term	Definition
1.	<i>Business Analysis</i>	There is chain of reasoning that leads from the statement of a problem to a set of solutions. Business Analysis is the process of structuring and documenting the products of that chain of reasoning.
2.	<i>Business Analysis Teams</i>	The team that reports to XXX known as the Business Analysis Team.
3.	<i>Learning Partner or Business Analysis Expertise Partner</i>	A non-{this company} organisation required to deliver certain goods and services in required connection with this project.
4.	<i>BA resource</i>	People, software tools, hardware, techniques, methods – anything required by BAs when performing the BA role

### 3. Vision

***FOR EXAMPLE {this company} Business Analysis Teams operate industry standard Business Analysis tools, methods and techniques to produce consistently high quality products for Clients and {this company}.***

#### 3.1. Goals

FOR EXAMPLE

1. Defined roles and responsibilities for {this company} Business Analysts
2. Training in the essential tools, methods and techniques required by the Business Analysis roles
3. Post training support for trained Business Analysts
4. Formal review of first set of deliverables produced by trained Business Analysts
5. A process for monitoring quality of Business Analysis products
6. Provision of appropriate resources to allow Business Analysts to fulfil their role – specifically software to support analysis but not constrained to
7. Defined entry and exit quality criteria for products in to and out of Business Analysis

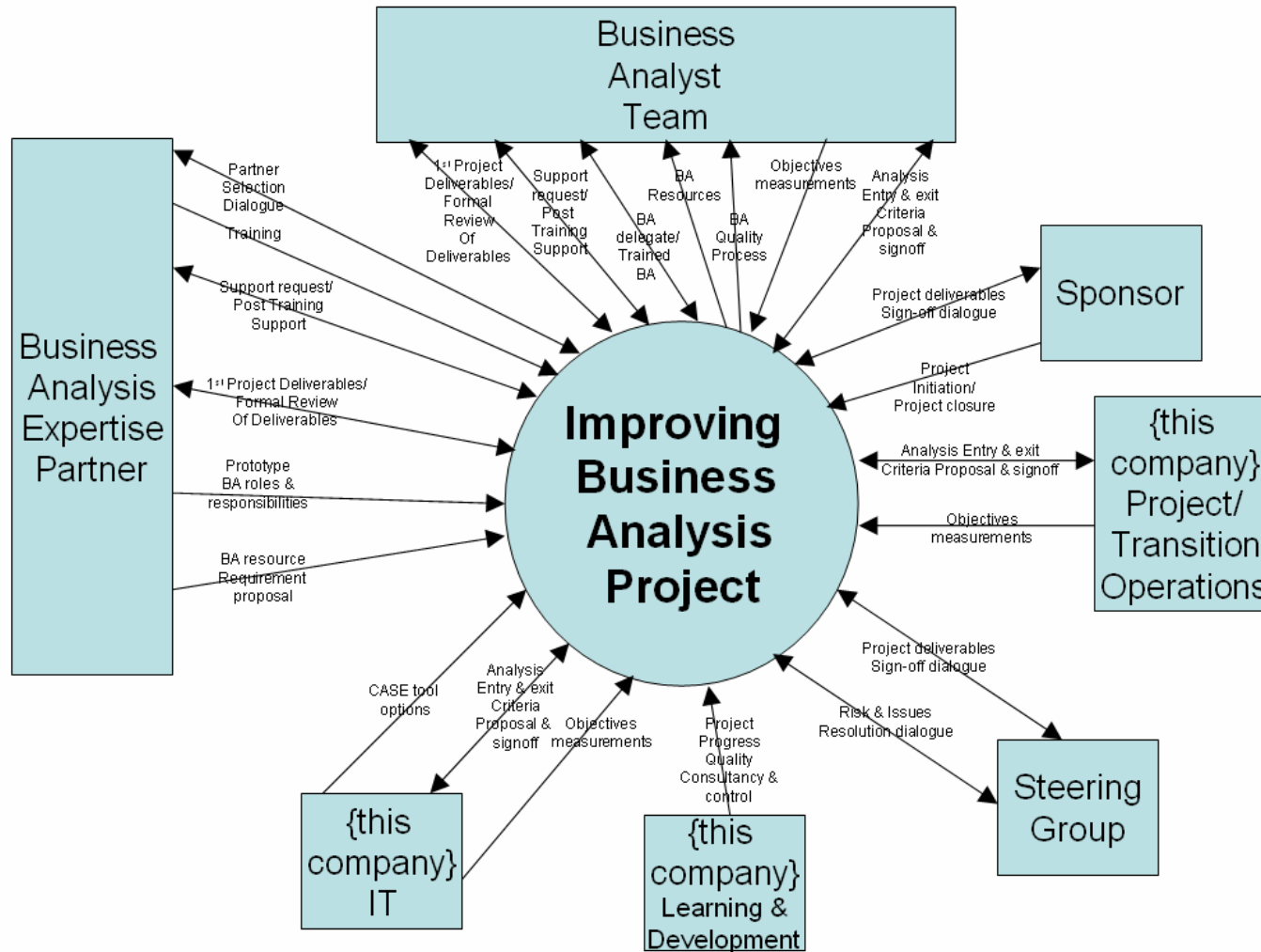
#### 3.2. SMART Objectives

No	EXAMPLE Objectives	Target Value
1.	Reduction number of analysis errors found after the design phase	By 50%
2.	Reduction in transition cost of analysis to {this company }	By 30% on analysis team time
3.	Adoption by Business Analysts of the new ways of working	100%
4.	Improved quality of Business Analysis products	95% of projects exit analysis phase successfully on their first attempt as measured against exit criteria and all entry criteria have been met (delivery to time was not included in the measure as the negotiation around this will form part of the entry criteria setting)
5.	Quality of products handed over to all customers inc. Operations by Business Analysts	Exit criteria met 100%

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### 4. Scope

#### 4.1. Context model



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### 4.2. Functional Areas within the Project

No	Functional Area	Maps to Objective
1.	Define Business Analysis role	1,2,8
2.	Select Business Analysis Expertise Partner	2, 3,4,5,6,7,10
3.	Train Business Analysts	2,3,4,5,6,7,8,9,10
4.	Provide Post-Training support for Business Analysts	4,5,6,7,10
5.	Formal review of 1 <sup>st</sup> set of BA deliverables	3,4,5,6,10
6.	Resource Business Analysts	4,5,6,7,8,10
7.	Monitor objectives measurements	All
8.	Post project review & identification of further requirements for Business Analysis development	NONE
9.	Define the entry and exit criteria for Business Analysis function	7,8,9
10.	Educate impacted stakeholders – e.g. line managers and projects sponsors	9

### 4.3. Functional area descriptions

#### 4.3.1. FOR EXAMPLE Train Business Analysts

1. Scope the training required - the Business Analyst role will be used to confine scope.
2. Proposed courses will be assessed against the scope and any agreed modifications made.
3. Candidates will be selected for training.
4. Training will be conducted.
5. 2 way feedback (from the delegates and from the trainers) on training will be recorded.
6. Record future training requirements

#### 4.4. Specifically out of scope

No	Item	Justification
1.	FOR EXAMPLE Verifying that the {this company} business process for processing projects and transitions works end to end	The scope of this work is constrained to the activities and dependencies on and of the Business Analysis team

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### 5. Principles

The **principles** are the rules that it is *desirable* to keep to in the interests of quality and strategy.

No	Principle
1.	In order to achieve consistency it is desirable to encompass all Business Analysts within {this company} regardless of organisational unit they operate out of.

### 6. Dependencies

The **dependencies** define all the events over which this programme has no direct control but on which it is in some way dependent. These may be internal or external to {this company}.

No	Dependency	Notes
1.	Training scope can not be defined until BA roles and responsibilities has been signed off	

### 7. Key roles and responsibilities

Role	Name	Accountable for
FOR EXAMPLE Sponsor		Starting and closing the Project Agreement of Project Terms Of Reference and Business Case Accepting deliverables Provision of adequate resources to the project