

Best Practices from a Business Analysis Telco Project

April 27 – 28, 2018

***8° International IT Analyst Conference
St. Petersburg – Russia***

Giancarlo Duranti, PMP®, PgMP®, PMI-ACP®, PMI-PBA®, CBAP®, PSM®, IACCM®, COBIT5®, ITIL v3®

Let me introduce myself

- Giancarlo Duranti, PMP, PgMP, PMI-ACP, PMI-PBA, CBAP, PSM, IACCM, COBIT5, ITIL v3
- Program Manager practitioner
- Business Analysis practitioner
- giancarlo@giancardoduranti.com

Biography

- ✓ Telecommunication industry for over 25 years
- ✓ Program Manager per Telecom Italia in America Latina.
- ✓ Project Manager consultant in the United States and in Africa.
- ✓ Involved in a variety of PMI and IIBA activities (e.g. OPM3, BABOK, PMI-PBA development).
- ✓ VP Professional Development PMI Rome Italy Chapter
- ✓ Talks on PM and BA topics.



- What is Business Analysis
- The Business Analyst Role
- The Case Study
- Business Needs Assessment
- Vision and Solution Scope definition
- Requirement Work Plan Definition
- Performing Elicitation Activities
- Requirement Definition and Analysis
- Business Case Preparation
- Conclusions



What is Business Analysis

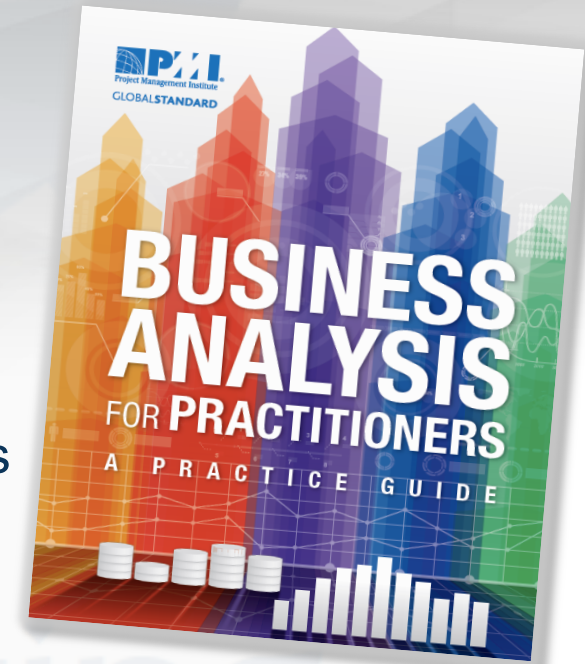
It is the application of knowledge, skills, tools, and techniques to:

Determine problems and identify business needs

Identify and recommend viable solutions for meeting those needs

Elicit, document, and manage stakeholder requirements in order to meet business and project objectives

Facilitate the successful implementation of the product, service, or end result of the program or project

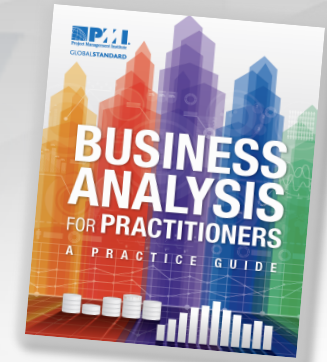


(PMI 2015, BA Practice Guide pg. 3)

In Short ...

*Business Analysis is the set of activities performed to **identify business needs** and **recommend relevant solutions**; and to elicit, document and manage requirements.*

PMI 2015, BA Practice Guide pg. 3



*It is the practice of enabling change in an enterprise by **defining needs** and **recommending solutions** that deliver value to stakeholders.*

IIBA, 2015, BABOK pg. 2



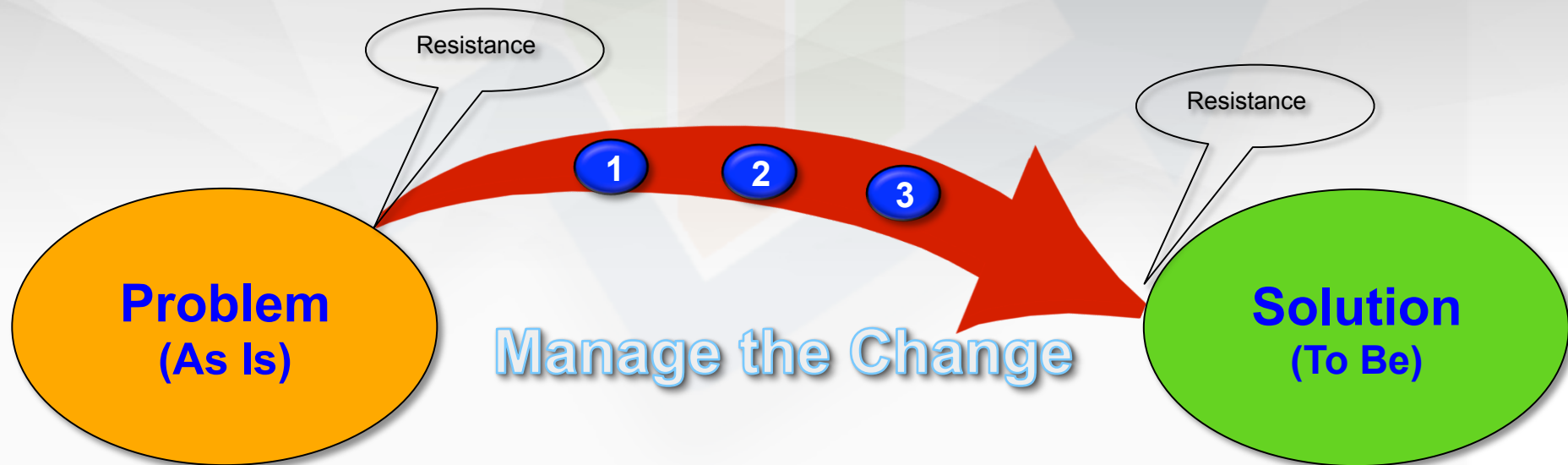
What is Business Analysis

Plan, Elicit, Analyze, Assess, Communicate, Monitor



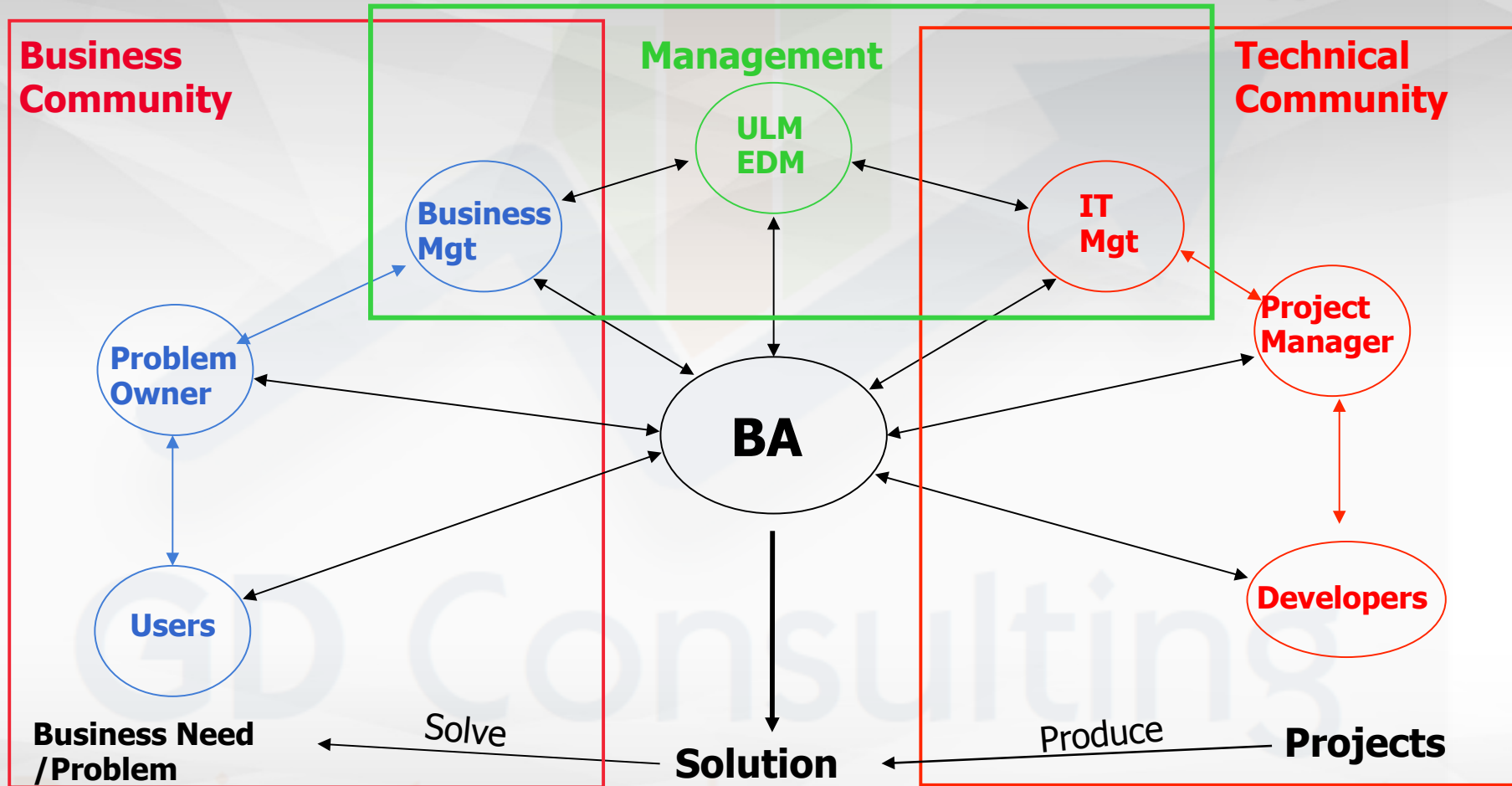
It bridges the gap between strategy and tactics through the use of Business Analysis tools and techniques.

A capability enabler



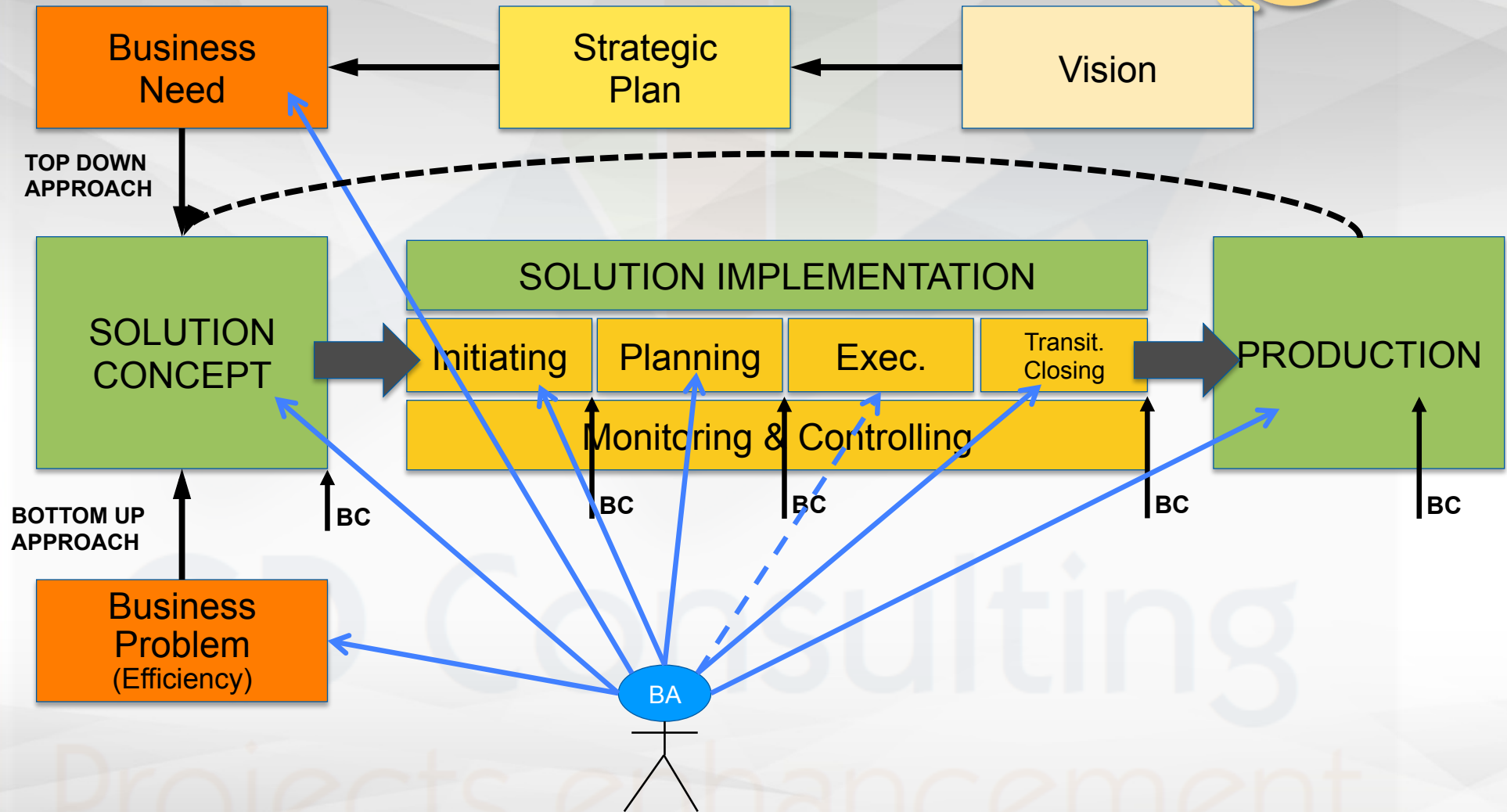
GD Consulting

Projects enhancement



Adapted from Steve Blais, Business Analysis - Best practices for success

BA Role in the Solution Life Cycle



The Case Study - Overview

DigitalTelco is a transformation program which enables a substantial change in the traditional telco operational model.

1 Convergent Company

Objectives

Being excellent with integrated customer experience



Solution Vision

- Enabling a unique integrated customer management as well as a set of multichannel commercial offers

Expected benefits

- Full support of **cross-selling** capabilities
- Customer **satisfaction increase** through the end-2-end customer experience process management

2 OnLine Telco

Customer digital management



- Enabling all current capabilities already implemented on the traditional channels on the brand new digital channels (web, app, social, etc.)

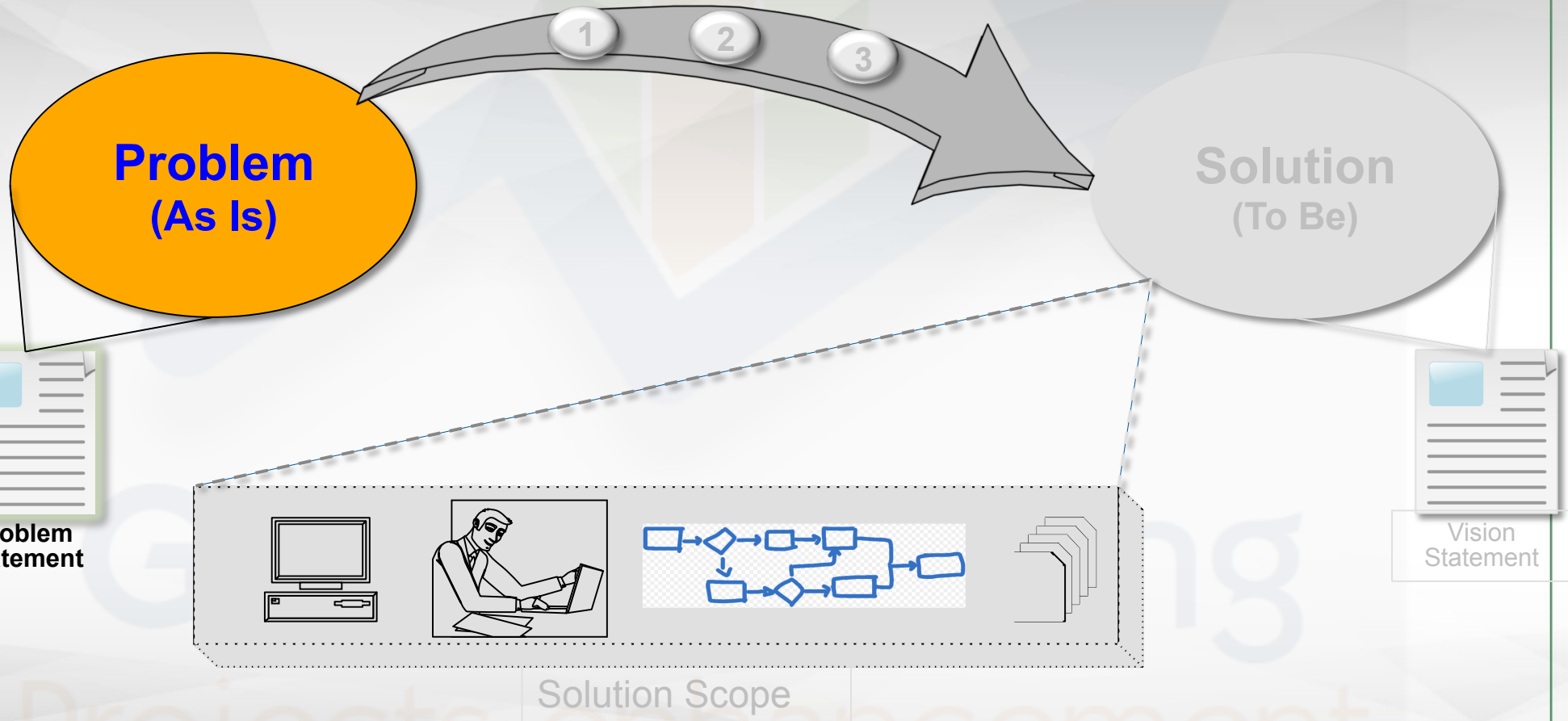
- Increase competitiveness ensuring a **significant 'lower cost-to-serve'**
- Enables operations model transformation towards a **'social online company'**

3 Architecture for tomorrow

Being an agile asset for sales, post-sales and customer care activities



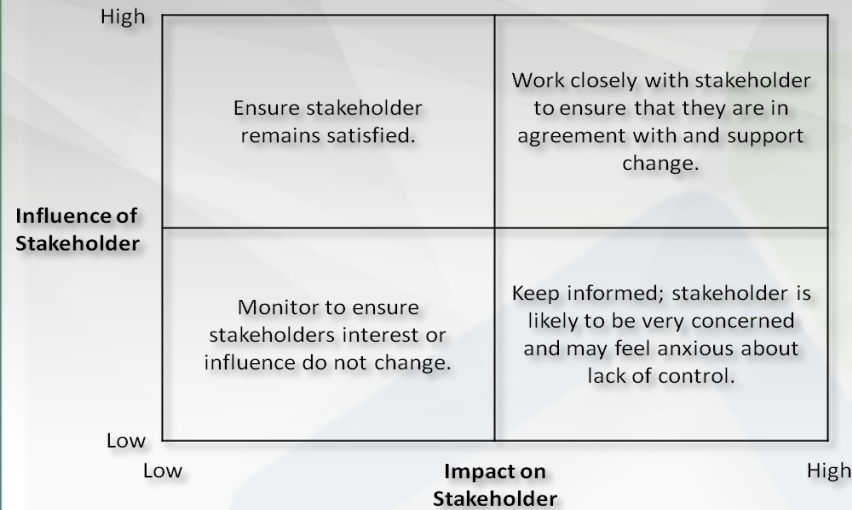
- Leveraging SOA architecture reducing complexity and allowing decommissioning of obsolete IT systems.
- Simplifies service creation and product commercialization (Time to Market + CAPEX reduction)
- Reduces complexity and number of IT systems to manage (OPEX reduction)



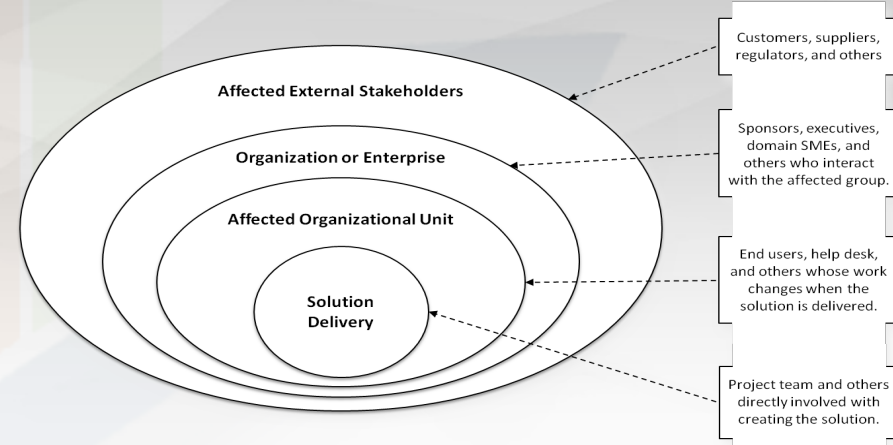
Identify Stakeholders

- Sponsor who is initiating and responsible for the project
- Who will benefit from an improved program or project
- Who will articulate and support the financial or other benefits of a solution
- Who will use the solution
- Whose role and/or activities performed may change as a result of the solution
- Who may regulate or otherwise constrain part or all of a potential solution
- Who will implement the solution
- Who will support the solution





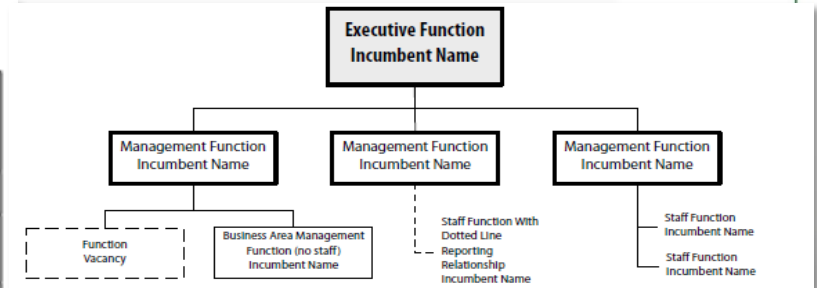
Stakeholder Matrix



Onion Diagram

Table 2-1. Example RACI for Assessing Business Need

	Sponsor	Product Manager	Business Analyst	Product Development Team	Mobile Technical Team	Project Manager
Identify problem or opportunity	A	C	R	C	C	
Assess current state of the organization	A	I	R	C	C	
Recommend action	I	A	R	C	C	C
Prepare business case	I	A	R	C	I	I



Organizational Modeling

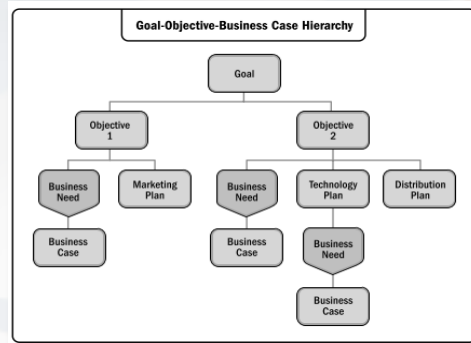
Investigate the Problem or Opportunity

- Focus on the problem
- Analyse the environment
- Understand the context
- Avoid complete Requirement Analysis

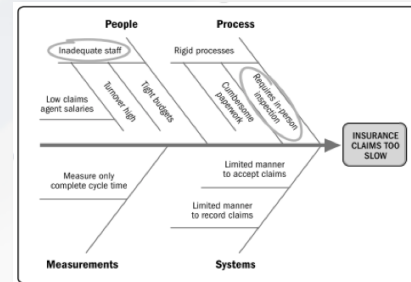
Techniques:



Interview



Organizational goals and objective assessment



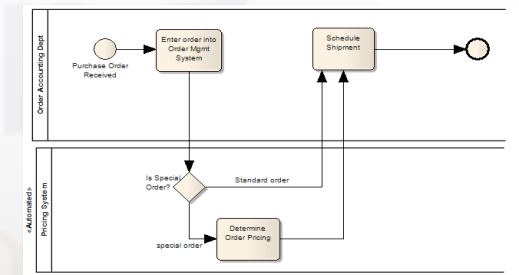
Root Cause Analysis



Benchmarking



Document Analysis







Process Modeling

The Case Study – Key Drivers

Key IT drivers

Key business drivers

-  Operational costs reduction
-  Processes consistency and cross channels data integrity
-  Technical obsolescence overcoming through systems decommissioning
-  Company resources skills enhancements and competency model transformation

-  Unique customer model management
-  Convergence and new commercial offer models
-  Increase selling functionalities and adopting multichannel capabilities
-  «Full Digital» customer management
-  Simplification and Usability

What is a Vision?

A vision is a foresight. That is, the capacity to envisage a future scenario typically used in economics to represent market trends and plan accordingly.



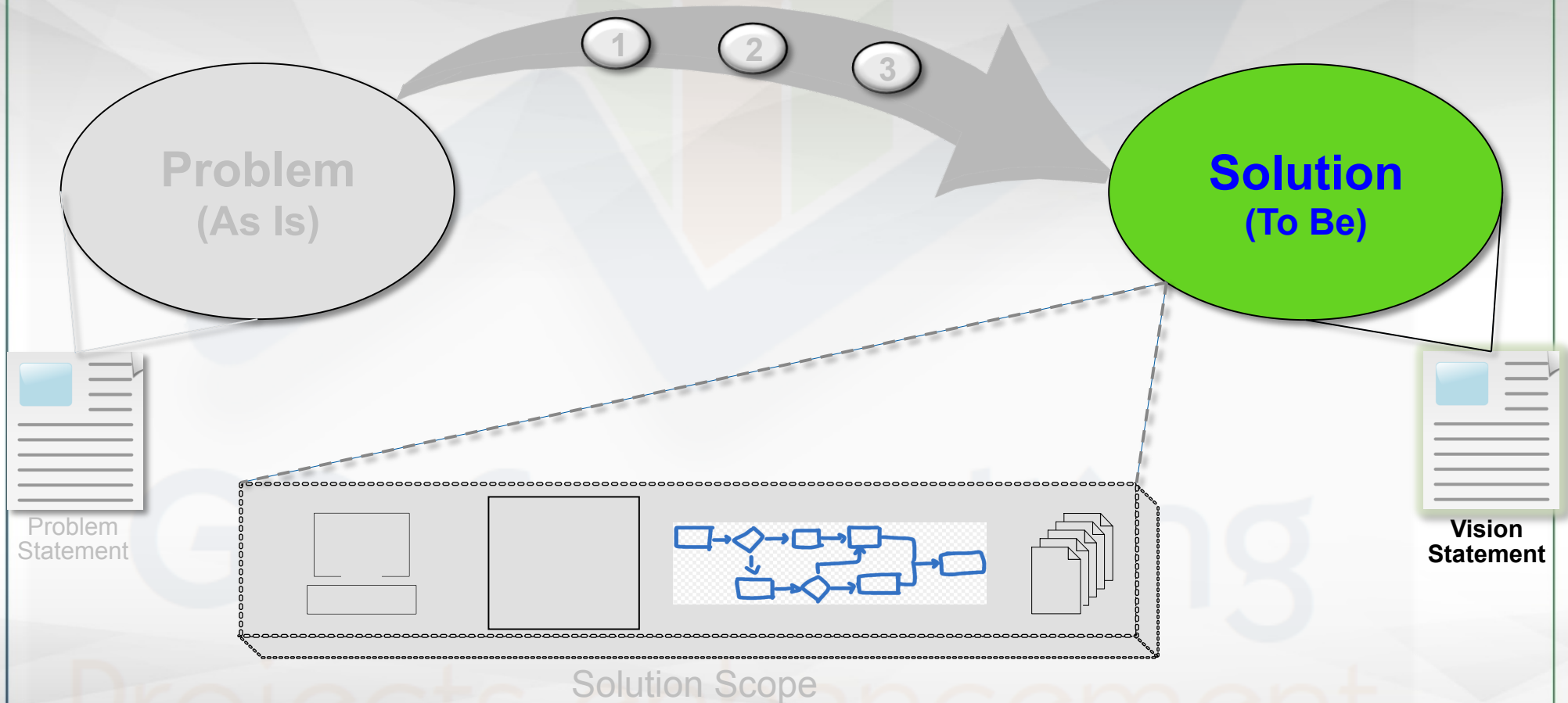
Wikipedia, 20

Bill Gates: "Over the next 10 years, the computer will be used by more people than ever before. Microsoft software is the key to success in each one of these areas."

PMI: "Worldwide, organizations will embrace, value and utilize project management and attribute their success to it"

access

The Solution Vision



1 Convergent Company



Solution Vision Statement

- Enabling a unique integrated customer management as well as a set of multichannel commercial offers

2 OnLine Telco



- Enabling all current capabilities already implemented on the traditional channels on the brand new digital channels (web, app, social, etc.)

3 Architecture for tomorrow



- Leveraging SOA architecture reducing complexity and allowing decommissioning of obsolete IT systems.

The solution Scope

The solution scope is the set of capabilities a solution must deliver in order to meet the business need.

(IIBA, 2015, p. 453)



Documents
the boundary
of the solution

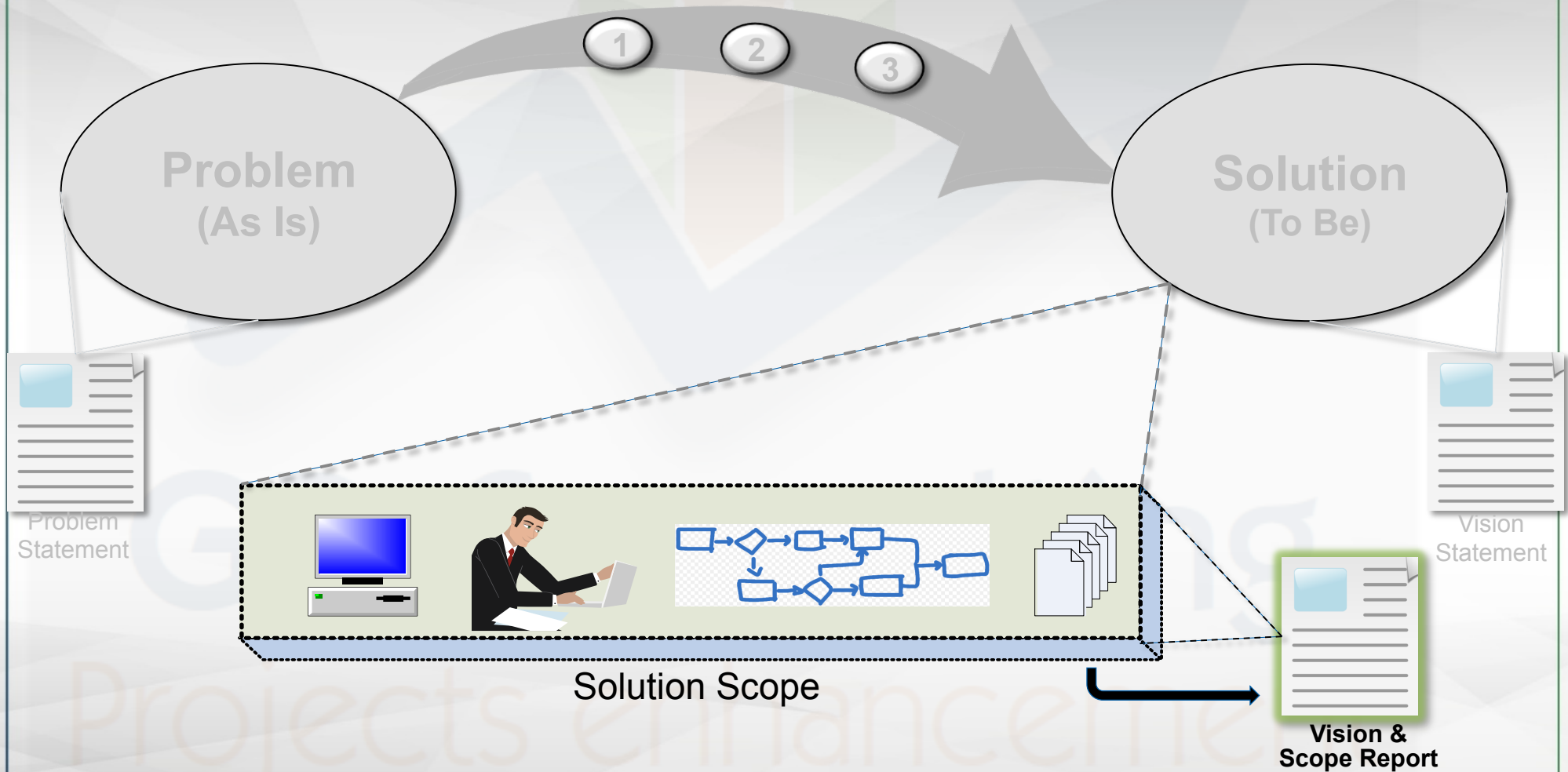
Each solution
component
encompasses a
capabilities.

Defines the
solution
components
needed

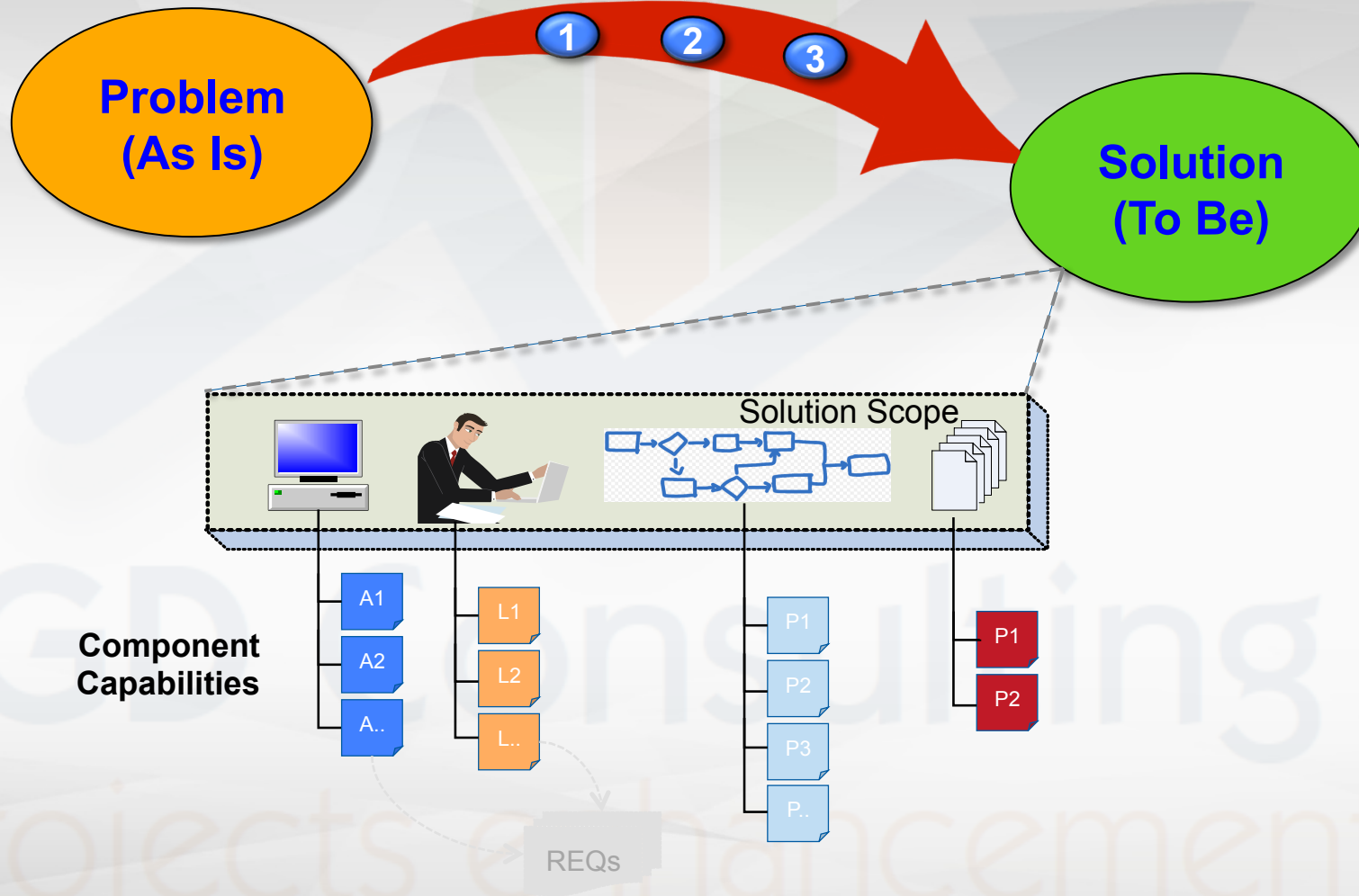
First level of
functional
decomposition

The whole set
of capabilities
determines the
solution scope.

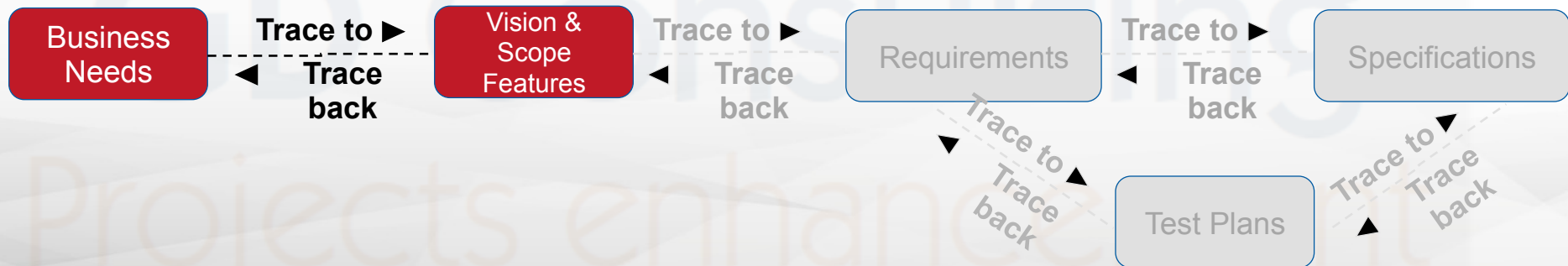
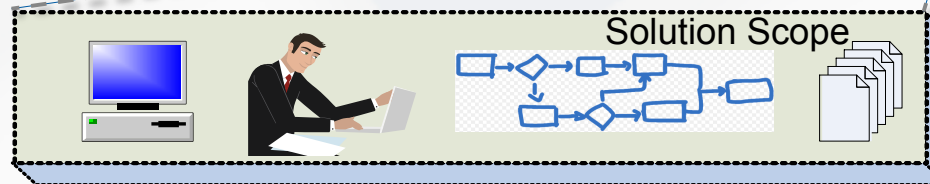
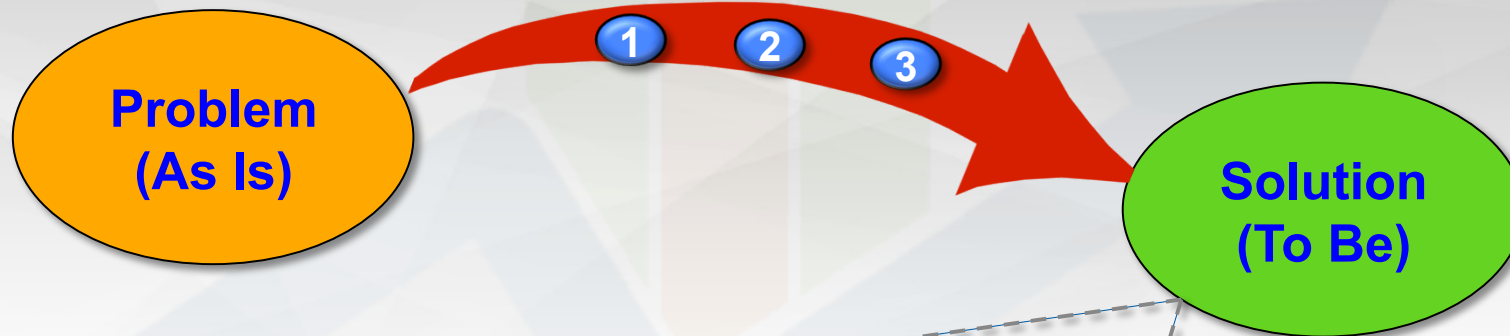
The Solution Scope



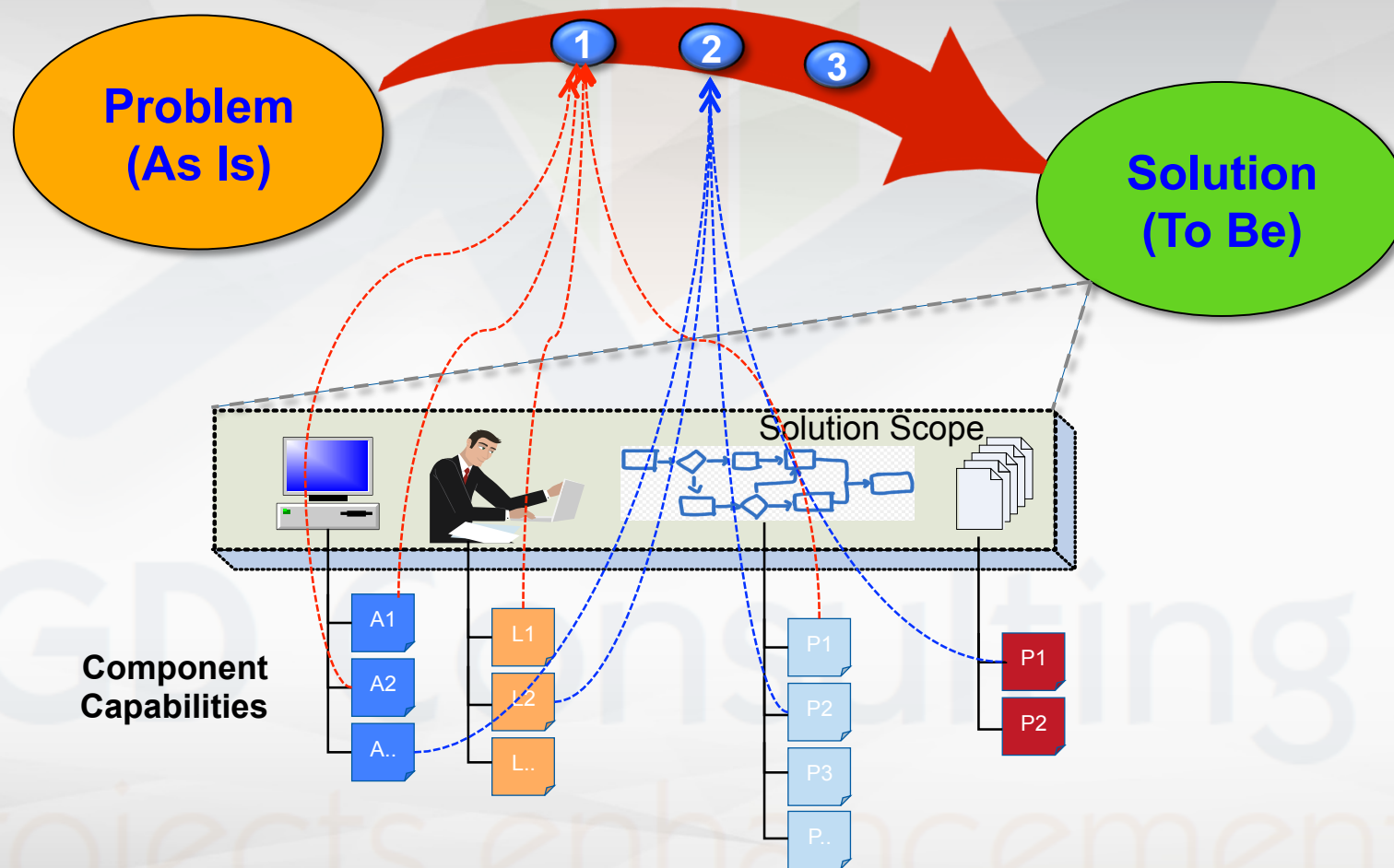
The Solution Scope



The Traceability Check



The Solution Roadmap



Unique customer model management



1. Managing the customer as a unique entity to which refer a multitude of products and services
2. Groups management as customers aggregations (e.g. family, communities, etc.) and roles (subscriber, payer, user)
3. Customer profiling management
4. Customer identification and caring from all the channels

Convergence and new commercial offer models



1. Commercial offer models, e.g.:
 - Convergent (Fix/Mobile/OTT)
 - Value Added Services
 - Multi-line/multi-device
2. Offer catalogue:
 - Only one offer structure Fix/Mobile, available from all the channels
 - Offer structure commercialization oriented able to overcome current land line complexity
 - Centralized commercial rule engine to manage selling rules and improve configurability

- Is the project plan for the business analysis activities
- Done by the BA in strict collaboration with the project/program manager
- Is a tool for communication and negotiation of resources with the sponsor
- It represents the baseline for requirements management activities
- It is a powerful tool for risk analysis and management.



It ensures:

- all requirements activities are captured
- appropriate elicitation and analysis method are selected
- expectations with stakeholders are set
- the whole project team has a common understanding of the requirements elicitation process
- resources are available when needed
- risk strategies are in place
- elicitation is coordinated with other project tasks



WBS	Task Name	Baseline Start	Baseline Finish	Start	Finish	Duration
	DigitalTelco	19/02/2014	24/06/2014	19/02/14	25/06/14	91d
1	Kick Off	19/02/2014	19/02/2014	19/02/14	19/02/14	0d
2	Priorità e obiettivi	19/02/2014	07/03/2014	19/02/14	07/03/14	13d
3	Steering committee	24/02/2014	18/06/2014	24/02/14	18/06/14	83d
4	Simplification & Innovation Board	24/02/2014	24/06/2014	24/02/14	25/06/14	88d
5	Ciente	26/02/2014	30/05/2014	26/02/14	15/06/14	78d
6	Offerta	03/03/2014	23/05/2014	03/03/14	15/06/14	76d
7	Sales	26/02/2014	16/05/2014	26/02/14	15/06/14	79d
8	Post Sales	14/03/2014	30/05/2014	14/03/14	15/06/14	67d
9	Caring	03/03/2014	24/04/2014	03/03/14	15/06/14	76d
10	Definizione Architettura TARGET	03/03/2014	13/06/2014	03/03/14	13/06/14	75d
11	Roadmap	15/04/2014	30/05/2014	15/04/14	30/05/14	34d
12	Strategia di deployment & roll-out	24/03/2014	30/05/2014	05/05/14	30/05/14	20d
13	Requisiti Non Funzionali	14/04/2014	16/05/2014	02/05/14	16/05/14	11d
14	Business Case	26/02/2014	13/06/2014	26/02/14	13/06/14	78d
15	Check esaustività/ integrazione	17/03/2014	30/05/2014	17/03/14	30/05/14	55d



WBS	Task Name	Baseline Start	Baseline Finish	Start	Finish	Duration
	DigitalTelco	19/02/2014	24/06/2014	19/02/14	25/06/14	91d
1	Kick Off	19/02/2014	19/02/2014	19/02/14	19/02/14	0d
2	Priorità e obiettivi	19/02/2014	07/03/2014	19/02/14	07/03/14	13d
3	Steering committee	24/02/2014	18/06/2014	24/02/14	18/06/14	83d
4	Simplification & Innovation Board	24/02/2014	24/06/2014	24/02/14	25/06/14	88d
5	Cliente	26/02/2014	30/05/2014	26/02/14	15/06/14	78d
5.5	Consolidamento modello Cliente Interno	04/04/2014	04/04/2014	04/04/14	04/04/14	0d
5.6	Consolidamento modello Cliente con LU	18/04/2014	18/04/2014	18/04/14	18/04/14	0d
5.7	Tuning Modello Cliente	04/04/2014	30/05/2014	04/04/14	30/05/14	41d
6	Offerta	03/03/2014	23/05/2014	03/03/14	15/06/14	76d
6.1	Analisi Offerte AS IS	03/03/2014	28/03/2014	03/03/14	28/03/14	20d
6.2	Definizione modelli di offerta TARGET	03/03/2014	18/04/2014	03/03/14	30/04/14	43d
6.3	Consolidamento modello Offerta Interna	04/04/2014	04/04/2014	04/04/14	04/04/14	0d
6.4	Consolidamento modello Offerta con LU	18/04/2014	18/04/2014	18/04/14	18/04/14	0d
6.5	Migrazione sull'offerta target	07/04/2014	16/05/2014	07/04/14	16/05/14	30d
6.6	Consolidamento Catalogo target	16/05/2014	16/05/2014	16/05/14	16/05/14	0d
6.7	Solution design definitiva			11/04/14	15/06/14	47d
6.8	Consolidamento Catalogo target con LU	16/05/2014	23/05/2014	16/05/14	23/05/14	6d
7	Sales	26/02/2014	16/05/2014	26/02/14	15/06/14	79d
7.1	Analisi Processi AS IS (in scope a Use Case)	26/02/2014	21/03/2014	26/02/14	24/03/14	19d
7.2	Identificazione del piano di dettaglio analisi Use Case	21/03/2014	21/03/2014	21/03/14	21/03/14	0d
7.3	Analisi Use case di dettaglio prioritari	24/03/2014	30/04/2014	18/03/14	15/06/14	65d
7.4	Chiusura UC di dettaglio prioritari	30/04/2014	30/04/2014	13/05/14	13/05/14	0d
7.5	Analisi Use case di dettaglio Il Gruppo	27/03/2014	16/05/2014	14/04/14	15/06/14	46d
7.6	Chiusura UC di dettaglio Il gruppo	16/05/2014	16/05/2014	16/05/14	27/05/14	8d
7.7	Analisi complemento scope rispetto agli use case	03/03/2014	16/05/2014	03/03/14	15/06/14	76d
8	Post Sales	14/03/2014	30/05/2014	14/03/14	15/06/14	67d
8.1	Analisi Processi AS IS (in scope a Use Case)	17/03/2014	04/04/2014	17/03/14	04/04/14	15d
8.2	Identificazione del piano di dettaglio analisi Use Case	04/04/2014	04/04/2014	04/04/14	04/04/14	0d
8.3	Analisi Use case di dettaglio	04/04/2014	16/05/2014	04/04/14	15/06/14	52d
8.4	Chiusura UC di dettaglio prioritari	16/05/2014	16/05/2014	16/05/14	16/05/14	0d
8.5	Analisi Use case di dettaglio Il Gruppo	22/04/2014	30/05/2014	22/04/14	15/06/14	40d
8.6	Chiusura UC di dettaglio Il gruppo	30/05/2014	30/05/2014	30/05/14	30/05/14	0d
8.7	Analisi complemento scope rispetto agli use case	14/03/2014	30/05/2014	14/03/14	15/06/14	67d

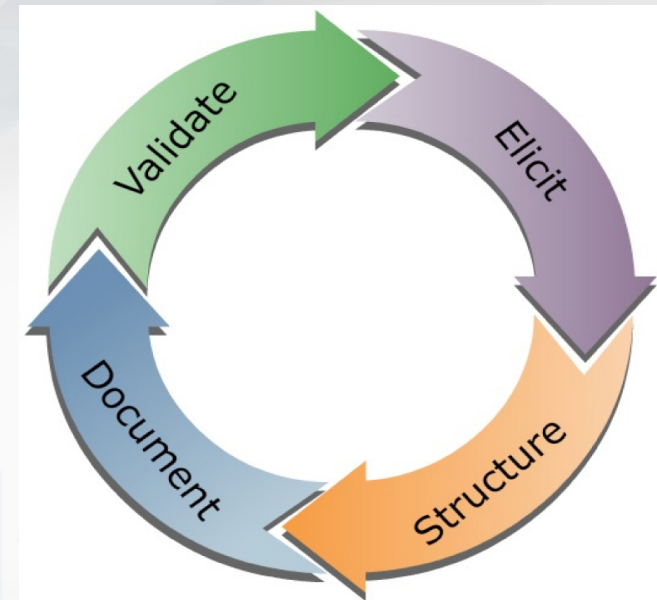


WBS	Task Name	Baseline Start	Baseline Finish	Start	Finish	Duration
7	Sales	26/02/2014	16/05/2014	26/02/14	15/06/14	79d
7.1	Analisi Processi AS IS (in scope a Use Case)	26/02/2014	21/03/2014	26/02/14	24/03/14	19d
7.1.1	Event Trace CO Fisso	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.2	Front end (GUI-Step-Controlli) CO Fisso	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.3	Event Trace CO Mobile	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.4	Front end (GUI-Step-Controlli) CO Mobile	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.5	Event Trace BU Fisso	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.6	Front end (GUI-Step-Controlli) BU Fisso	26/02/2014	21/03/2014	26/02/14	21/03/14	18d
7.1.7	Event Trace BU Mobile	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.1.8	Front end (GUI-Step-Controlli) BU Mobile	26/02/2014	21/03/2014	26/02/14	24/03/14	18d
7.2	Identificazione del piano di dettaglio analisi Use Case	21/03/2014	21/03/2014	21/03/14	21/03/14	0d
7.3	Analisi Use case di dettaglio prioritari	24/03/2014	30/04/2014	18/03/14	15/06/14	65d
7.3.1	Use Case 13: Acquisto NIP offerta ADSL	24/03/2014	30/04/2014	25/03/14	02/04/14	7d
7.3.2	Use Case 14: Acquisto offerta fibra con rientro da altr			25/03/14	02/04/14	7d
7.3.3	Use Case 15: Attivazione SIM	24/03/2014	30/04/2014	18/03/14	26/03/14	7d
7.3.4	Use Case 16: Attivazione offerta mobile con MNP			18/03/14	26/03/14	7d
7.3.5	Use Case 17: Acquisto offerta con terminale rateizzato	24/03/2014	30/04/2014	01/04/14	09/04/14	7d
7.3.6	Use Case 18: Acquisto offerta composita			08/04/14	16/04/14	7d
7.3.7	Use Case 21: "propositività continuativa"			14/04/14	22/04/14	7d
7.3.8	Use Case 26: Acquisto abbonamento con device			01/04/14	09/04/14	7d
7.3.9	Use Case 28: Gestione offerte microbusiness nel mon			01/04/14	09/04/14	7d
7.3.10	Use Case 32: Acquisto offerta fixed con apparato			01/04/14	09/04/14	7d
7.3.11	Analisi architetturale pro Solution Design	24/03/2014	30/04/2014	24/03/14	30/04/14	28d
7.3.12	Definizione della soluzione tecnica	24/03/2014	30/04/2014	24/03/14	15/06/14	61d
7.4	Chiusura UC di dettaglio prioritari	30/04/2014	30/04/2014	13/05/14	13/05/14	0d

Elicitation is an iterative process

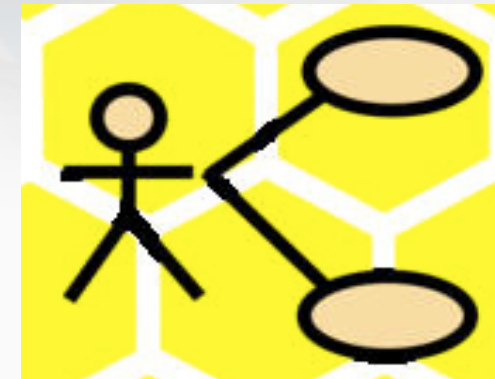
Pay attention to:

- Do not expect to capture requirements in a single pass.
- Involve stakeholders throughout the process.
- Ensure that all requirements can be traced back to business goals.
- Ensure that all requirements can be measured or decomposed into measurable requirements.
- Ensure that all requirements have an “owner”.

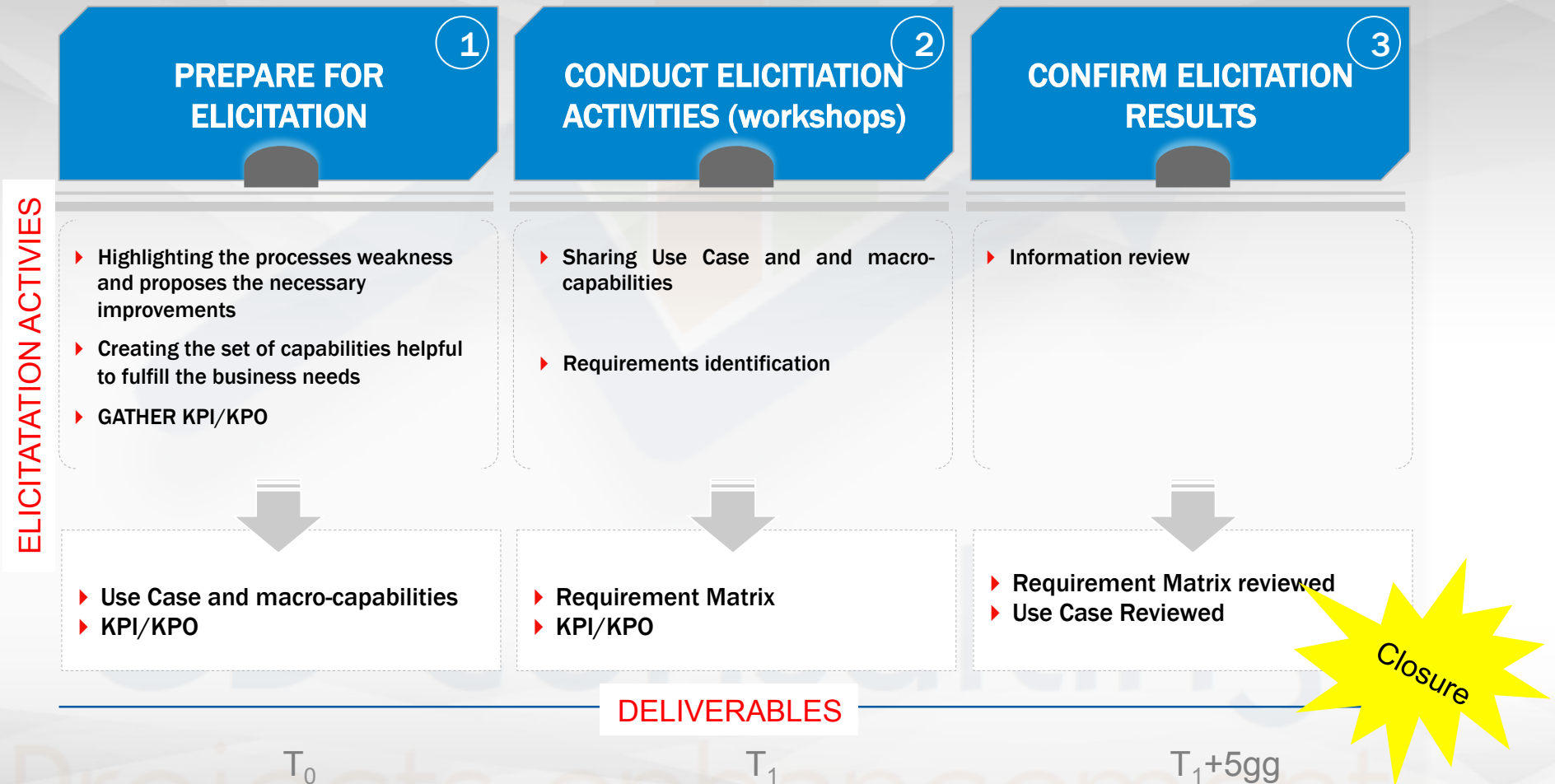


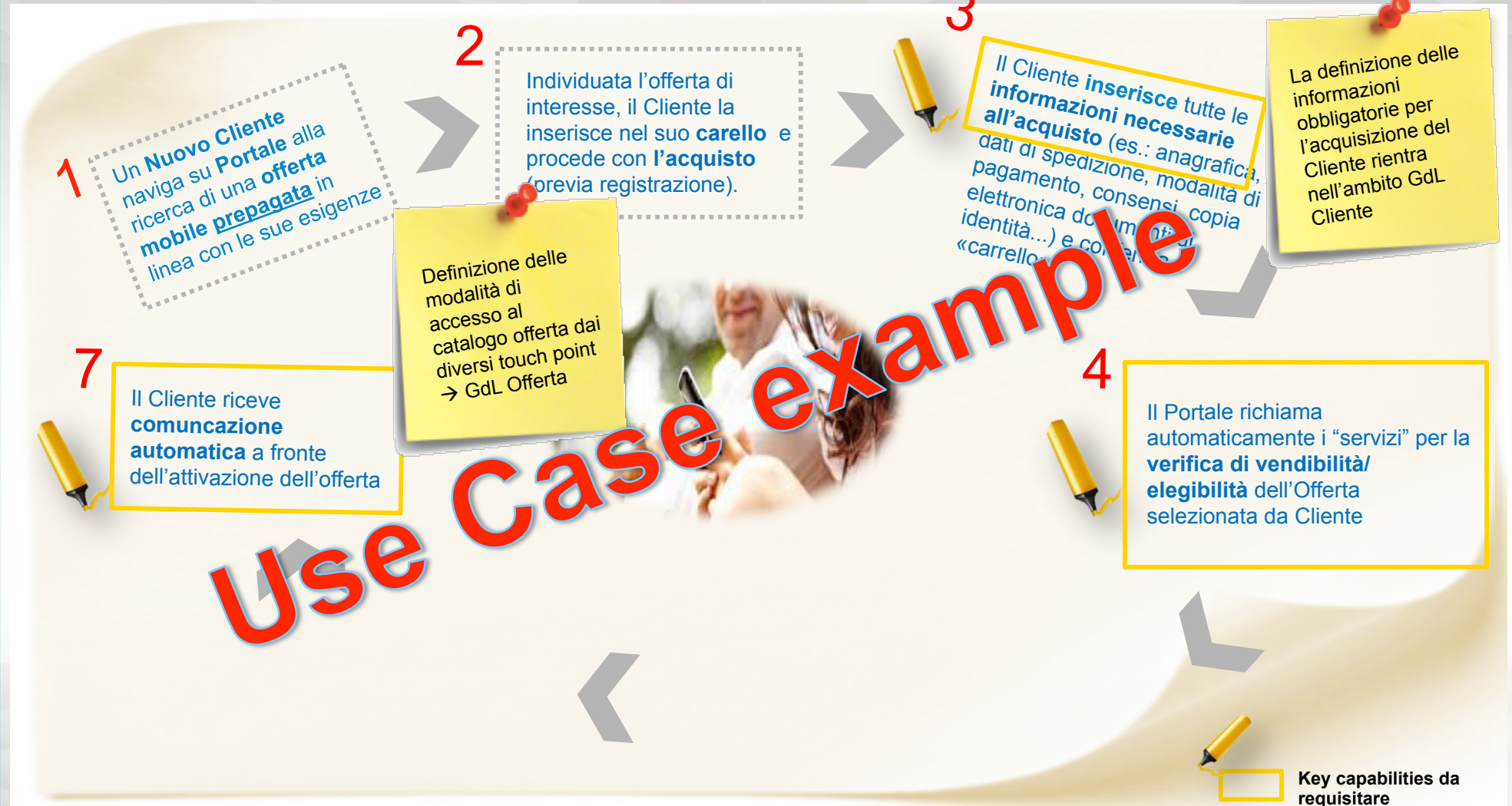
Use Case Objectives:

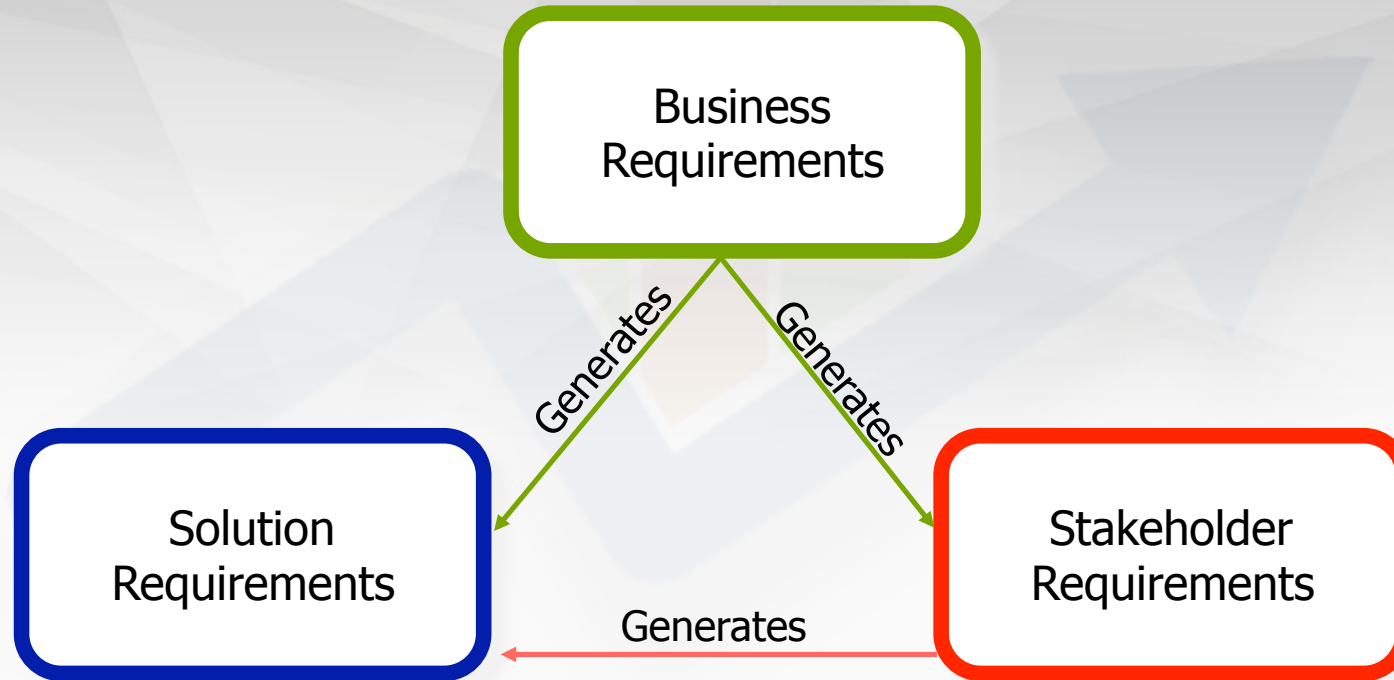
- Sharing the use case scenario with the aim of streamlining the user and customer experience
- Gather requirements information helpful to define functional requirements
- Gather KPI/KPO information to define metrics to validate the solution



Standard Elicitation Process







Type of Requirement

- Functional
- Non Functional
- Transition

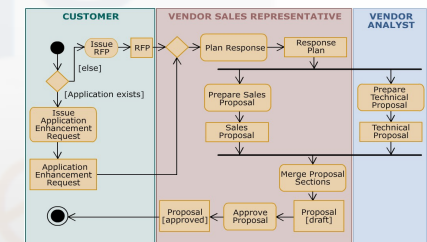
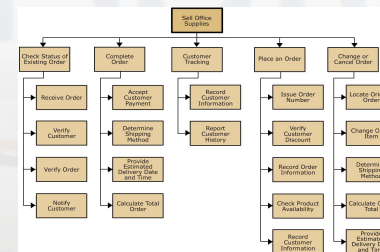
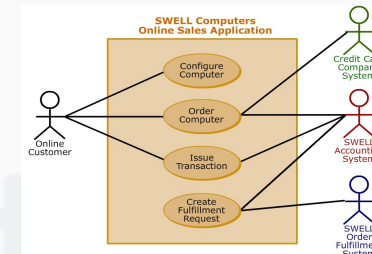
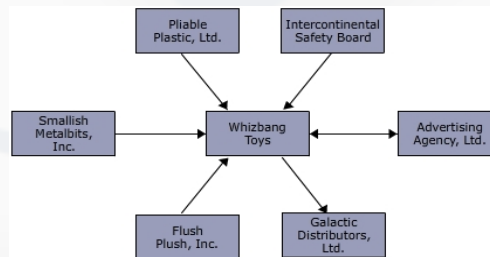
Relationship Analysis

- Subsets
- Implementation
- Benefits or Value

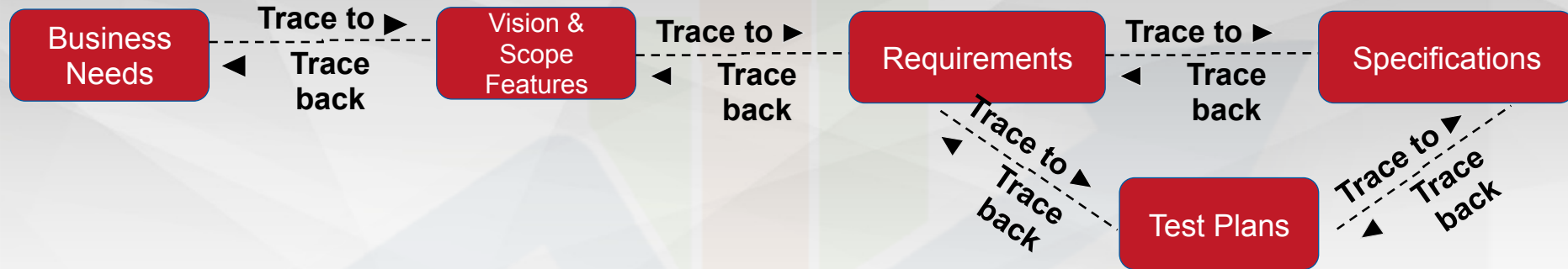
Modeling Requirement

Priority

- Must Have
- Should Have
- Nice to Have
- Won't Have



Trace Requirements



	A	B	C	D	E	F	G	H	I
1	REQUIREMENTS TRACEABILITY MATRIX								
2	Project Name:		<optional>						
3	Cost Center:		<required>						
4	Project Description:		<required>						
5	<i>ID</i>	<i>Associate ID</i>	<i>Requirements Description</i>	<i>Business Needs, Opportunities, Goals, Objectives</i>	<i>Project Objectives</i>	<i>WBS Deliverables</i>	<i>Product Design</i>	<i>Product Development</i>	<i>Test Cases</i>
6	001	1.0							
7		1.1							
8		1.2							
9		1.2.1							
10	002	2.0							
11		2.1							
12		2.1.1							

(BA Practice Guide pag. 141)

			A FUNZIONALE								
ID Req.	Stream	Team	Ambito	ID Use Case	Use Case	Macro funzionalità	Requisito/Funzionalità	Descrizione	Canale	Classificazione Req (AS IS vs New)	Impatti altri stream
RTM_005	Processi	Sales/Post-Sales	Sales	UC_15	Attivazione SIM	Gestione Ordine	Gestione Indirizzo di spedizione	<p>Il sistema dovrà consentire l'inserimento di un Indirizzo di Spedizione Merci. L'operatore dovrà avere la possibilità di impostarne uno sia selezionandolo dalla lista di indirizzi associati al cliente sia inserendone uno completamente nuovo. Se inserito ex-novo, tale indirizzo dovrà essere poi censito tra gli indirizzi del cliente.</p> <p>In caso di acquisizione da canale Self, l'indirizzo sarà specificato direttamente dal cliente.</p> <p>L'indirizzo di spedizione dovrà essere obbligatorio nel caso in cui l'Ordine prevede consegna merce vs il cliente (in modalità standard o tramite postino intelligente)</p>	Cross	AS IS	NA
RTM_006	Processi	Sales/Post-Sales	Sales	UC_15	Attivazione SIM	Gestione Ordine	Gestione Referente di spedizione	<p>Il sistema dovrà consentire l'inserimento di un Referente di Spedizione Merci. L'operatore dovrà avere la possibilità di impostarne uno sia selezionandolo dalla lista di referenti associati al cliente sia inserendone uno completamente nuovo. Se inserito ex-novo, tale referente dovrà essere poi censito tra i referenti del cliente.</p> <p>In caso di acquisizione da canale Self, il referente sarà specificato direttamente dal Cliente</p> <p>Il referente di spedizione dovrà essere obbligatorio nel caso in cui l'Ordine prevede consegna merce vs il cliente (in modalità standard o tramite postino intelligente)</p>	Cross	AS IS	NA
RTM_007	Processi	Sales/Post-Sales	Sales	UC_15	Attivazione SIM	Gestione Ordine	Gestione documentazione allegata	<p>Il sistema dovrà consentire di allegare documentazione all'Ordine. Tale documentazione dovrà essere poi inviata al sistema documentale per l'indicizzazione e la memorizzazione del documento ricevuto.</p> <p>La funzionalità di gestione documentazione dovrà consentire di:</p> <ul style="list-style-type: none"> - Allegare ad un ordine più file - Eliminare gli allegati relativi ad ordini non ancora emessi - Visualizzare l'allegato 	Cross	AS IS	NA

The BRD is the synthesis of all information that has been elicited and documented to date

- Executive Summary
- Approvals
- Purpose
- Solution Scope
 - Regulatory Req.
 - Business Req.
 - Stakeholder Req.
 - Assumptions
 - Dependencies
 - Constrains
- Functional Req.
- Non Functional Req.
- Transition Req.
- Traceability Matrix
- Risks
- Revision log
- Glossary
- Appendix

A documented economic feasibility study used to establish the validity of the benefits of a selected component lacking sufficient definition and used as a basis for the authorization of further project management activities.

(BA Practice Guide pag. 184)

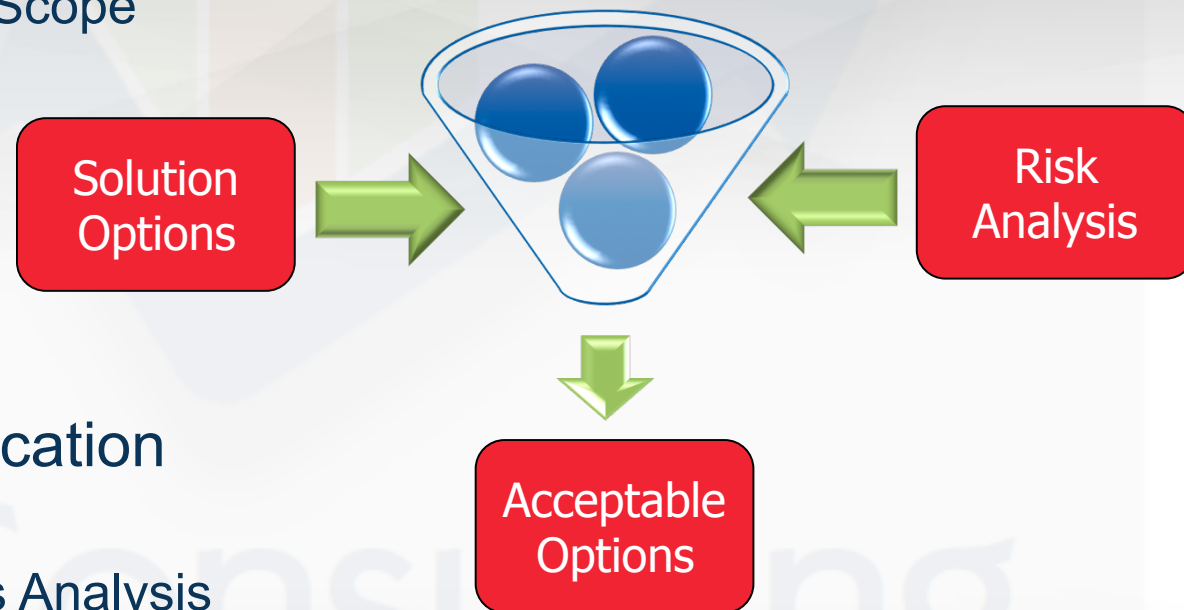


1. Create the Problem Statement
2. Create the Vision Statement
3. Define the Business Objectives
4. Define the Technical Objectives
5. Identify constraints
6. Define Assumptions



7. Feasibility Study

- Define Solution Approach
- Define Solution Scope



8. Qualitative Justification

- SWOT Analysis
- Costs & Benefits Analysis

9. Quantitative Justification

10. Assemble the Business Case

- Perform Business Assessment
- Define Recommendations
- Packaging Information
- Delivery & Request for Approval



An effective Business Case should

- Define the problem and objective to be achieved to consider the problem solved
- Describe business and technical assumptions and also alternative solutions
- Provide estimations about time, cost, resources
- Report risks related to program implementation and solution operations
- Quantify tangible benefits and describe intangible benefits
- Provide estimation about economical benefits



To understand how the business evolves outside the organization and within it

Its role is central

During the solution life-cycle it is the only one owning a cross view across the three communities (Business, Technical, Management)

While the project is done the business analysis work is still running

Ultimately, it acts as a representative of the Business Community

The business analyst as the orchestrator of all relations between the three communities



Conclusion

Having a BA team helped to focus on the business problem and define the appropriate solution

All discussions focused on the capabilities needed (**Solution Scope**) having well-defined in mind the **Vision Statements**

Capabilities **traced back to the Business Needs** to ensure they were part of the solution scope

The Technical Community perceived the added value of this new approach, supporting the BA team with effective solution options



Спасибо!



For any further info pls find me at
giancarlo@giancarloduranti.com

Giancarlo Duranti, PMP®, PgMP®, PMI-ACP®, PMI-PBA®, CBAP®, PSM®, IACCM®, COBIT5®, ITIL v3®