



# Scope Your Area of Analysis

Subset of *Essential Skills for Business Analysis: Part 2*

1 Day | Virtual or Onsite

Scoping is the process of defining the boundaries of a product, program, project, or iteration. Depending on your viewpoint and your involvement in the project, the components within the scope you're analyzing may be slightly different; i.e. budget, time, resource, quality or features and functions; or stakeholders, interfaces, data flows, and processes. For purposes of this class, the viewpoint considered is from the business analysis perspective to identify the stakeholders (external agents or actors), interfaces, data flows, and high-level processes of concern in order to effectively determine the area for which analysis needs to be performed.

This course covers scoping techniques and best practices to ensure that you are eliciting and analyzing the right requirements based on the problem statement and that you have a framework for staying within the boundaries of the project. It also provides a technique to facilitate enough analysis so that requirements aren't missed, but aren't overdone either. The scope diagram provides a baseline and a primary reference for measuring all future project changes and project performance.

Interactive workshops allow students to practice the techniques as they learn. It supports the standards outlined in the IIBA BABOK® Guide V3.0. This course can be taken either stand-alone or as part of the 4-day *Essential Skills for Business Analysis* course.

## Learning Objectives

- Identify why the project is being done (business drivers) in order to ensure the right analysis effort is being performed and so that requirements efforts can be appropriately prioritized
- Practice an approach to ensure that the problem your project is supposed to address is clearly understood
- Analyze and scope the area of analysis, collaboratively with project managers and business stakeholders, to clarify the level and complexity of the business analysis effort needed for the project
- Get an introduction to enterprise analysis in order to understand the project in the context of the greater organization's strategic goals
- Create a context data flow diagram to identify interfaces, data flows, and high-level processes associated with the project, that is valuable both for planning and communications purposes

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## Intended Audience

This course is designed for individuals of any discipline who are performing scoping activities; business analysts, project managers, business systems analysts, product managers, product owners, system architect, process engineers, requirements engineers, or any other project team member.

## Prerequisites

None

## Learning Topics

| Topic   | Time      |
|---|-----------|
| <b>Introduction</b>   | .5 hour   |
| <ul style="list-style-type: none"><li>• Define solution scope and explain its applicability and purpose</li><li>• Differentiate between solution scope and project scope</li><li>• Identify the components of scope and explain the purpose of a project initiation document</li><li>• Describe the value of scoping your area of analysis</li></ul>  |           |
| <b>Define Project Context and Purpose</b>   | 2.5 hours |
| <ul style="list-style-type: none"><li>• Survey the Project<ul style="list-style-type: none"><li>○ Explain how to assess a project within the larger context of the enterprise</li><li>○ Identify the documents and information valuable to establishing project context</li></ul></li><li>• Document Project Purpose<ul style="list-style-type: none"><li>○ Differentiate business drivers from problem solutions</li><li>○ Study problems and opportunities in the organization</li><li>○ Clearly state business objectives</li><li>○ Define project approach</li><li>○ Compose a well-defined problem statement</li><li>○ Construct a project glossary and illustrate its value</li></ul></li></ul> |           |
| <b>Depict Other Key Scope Parameters</b>  | 1 hour    |
| <ul style="list-style-type: none"><li>• Distinguish and express key scope parameters and explain their importance<ul style="list-style-type: none"><li>○ Risks</li><li>○ Assumptions</li><li>○ Constraints</li><li>○ Dependencies</li></ul></li><li>• Plan for detailed scope elicitation</li></ul>   |           |
| <b>Scope Your Area of Analysis</b>  | 1 hour    |
| <ul style="list-style-type: none"><li>• Express scope with graphical representation (Context Data Flow Diagram)<ul style="list-style-type: none"><li>○ Illustrate components of graphical scope &amp; order of definition<ul style="list-style-type: none"><li>▪ Identify external agents</li><li>▪ Analyze and identify data flows</li><li>▪ Distinguish project boundary</li><li>▪ Formulate purpose-driven name</li></ul></li></ul></li><li>• Complete scope with text representation<ul style="list-style-type: none"><li>○ Detect stakeholders from scope context</li></ul></li></ul>  |           |

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|  |           |
|--|-----------|
| <ul style="list-style-type: none"> <li>○ Analyze scope parameters for impacts on analysis planning</li> </ul>  |           |
| <b>Finalizing Scope</b>  | 1.5 hours |
| <ul style="list-style-type: none"> <li>● Evaluate and prepare scoping results <ul style="list-style-type: none"> <li>○ Indicate newly identified project information</li> <li>○ Identify important actions performing a final quality check</li> <li>○ Produce formal context DFD (scope diagram)</li> </ul> </li> <li>● Validate Scope with Stakeholders <ul style="list-style-type: none"> <li>○ Explain process of validating your area of analysis</li> <li>○ Describe considerations when planning communications about scope and impacts</li> <li>○ Explain the importance and describe an approach to gaining stakeholder agreement on scope</li> </ul> </li> <li>● Baseline the scope <ul style="list-style-type: none"> <li>○ Define a baseline</li> <li>○ Describe the value and purpose of baselining the results of the scoping effort</li> <li>○ Describe next steps for business analysis after scoping</li> <li>○ Identify the transition to requirements management</li> <li>○ Identify options for requirements analysis and elicitation</li> <li>○ Explain how scope is used throughout the project</li> </ul> </li> </ul> |           |
| <b>Course Summary</b>  | .5 hour   |
| <ul style="list-style-type: none"> <li>● Bringing it all together</li> <li>● Develop an <b>Action Plan</b> with next steps on the student’s current project</li> </ul>   |           |
| <b>Appendix – Job Aids</b>   |           |
| <ul style="list-style-type: none"> <li>● Tips for Ensuring Quality in the Context DFD</li> <li>● Risk Responses and Planning</li> </ul>  |           |