The BA/PM Partnership

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An IIBA/PMI Joint Collaboration

At a conference several months ago I sat next to a project manager who observed, "My organization has changed the way we do things. Now it's the business analysts who do a lot of the work that I used to do, such as meeting with the sponsor to uncover the business problems, and determining what we're going to do on the project…I can't believe it. I feel like I'm being treated like a second-class citizen!"

This complaint was indicative of many I've heard in the recent past. Sometimes the frustration is expressed by a project manager (PM) and sometimes by a business analyst (BA). It seems that as organizations realize the importance of business analysis, they recognize that both BA and the PM roles are critical to project success. They also understand that the two roles need to build strong working relationships based on mutual respect and understanding and that a strong partnership between these two roles can significantly increase the likelihood of project success. The question seems to be, however, how can the two best work together?

Joint Collaboration Background. Such confusion triggered a joint effort between the Project Management Institute (PMI) and the IIBA to facilitate a shared understanding of the roles. They formed a committee sponsored by both IIBA (Kevin Brennan) and PMI (Chuck Lage). With a project manager (Larry Goldsmith), three IIBA representatives (Barb Carkenord, Robin Grace, and myself, and three PMI representatives (Chris Cartwright, Jen Skrabak, and Cornelius Vonk), we were a global team from four countries and four continents. We spent about six months together in virtual teams comprised of one PM and one BA.

Our goal was to review both organizations' guides to their bodies of knowledge - IIBA's *BABOK® Guide* Version 2.0 (*BABOK®*) and PMI's The *PMBOK® Guide* – Fourth Edition (*PMBOK®*). Using these bodies of knowledge as a base, the committee looked at knowledge areas, processes, techniques, and handoffs between the PM and BA.

Our first task was to map the *BABOK®'s* knowledge areas and tasks to the *PMBOK®* Process Groups of Initiating, Planning, Executing, Monitoring and Controlling, and Closing. As we mapped tasks to process groups, we uncovered a new process group, wholly in the business analysis domain, which we called pre-initiation. All the Enterprise Analysis tasks in the *BABOK®* fell into this process group.

Potential conflict. Part of our work was to describe how the PM and BA work together on each task. As a result of our analysis we noted four areas of potential overlap and conflict explained below:

1. *Scope Management*. There are two kinds of scope—product (solution) and project. Product scope includes the features and functions of the end product, service, or result. Project scope is the work needed to deliver that product (solution). Potential conflict can arise when the BA identifies additional business requirements that affect the project scope. To avoid conflict BAs need to ensure that although they can recommend scope changes, they cannot make commitments to the business about those changes.

2. *Communication Management*. The goal of business analysis is to recommend solutions that help organizations reach their objectives. To that end BAs works in two domains—the business and the project, sometimes alternating between the two. Because of the relationship with the business and because of the trust established between them, a BA often become aware of project needs before the PM does. As noted above, they cannot make commitments to the business. Instead, the BA needs to communicate those needs to the PM for the effect on the overall project.
3. *Risk management*. As risks are identified and analyzed throughout the project, all the risks, including those related to the product are captured, and strategies to respond to these risks are developed.
4. *Requirements Management*. The *PMBOK®* includes Collect Requirements as a section under the Scope Management knowledge area describing how requirements activities (business analysis) will be planned, tracked, and reported. This section in the *PMBOK®* can be confusing to both BAs and PMs. To avoid conflict both parties need to involve the other in the business analysis planning activities.

The table below summaries the roles and responsibilities that can help avoid conflict.

Potential Areas of Conflict	BA	PM	Both
Scope Management	Defines high-level product (solution) scope during Enterprise Analysis (pre-initiation). Once the project has been authorized, the BA helps facilitate agreement and approval on scope from business stakeholders. The BA focuses on planning and defining the product scope and ensuring that the product deliverables are aligned with the project.	Plans and manages the project scope, which includes integrating the business analysis approach and deliverables into the overall project. PM has the responsibility for managing the project scope.	Both the PM and BA have responsibilities relating to the scope. The BA is responsible for the product (solution) scope. The PM is responsible for the project scope and incorporating the product scope into the project scope.
Communications Management	Works primarily with stakeholders who are directly or indirectly affected by the product (solution) requirements. The BA might also maintain ongoing communications with that organization.	Is accountable for all project-related communication with all project stakeholders. Responsible for communicating to the sponsor about all aspects of the project. .	Stakeholder analysis is completed by both the BA and the PM. The PM needs to know the stakeholders for their project planning, the BA for their business analysis planning, which is incorporated into the project planning.

Potential Areas of Conflict	BA	PM	Both
Risk Management	Identifies and communicates business and business analysis risks to the PM. Assists PM in gaining stakeholder consensus on risk strategies. Reduces overall project risk by assessing implementation and organizational readiness risks.	Responsible for creating the overall project risk management plan and for managing project risks. Responsible for incorporating business and business analysis risks into the project risk management plan.	Both roles identify and analyze project and business risks and get agreement on risk response strategies.
Requirements Management	Responsible for defining, tracing, and creating a requirements management plan for how requirements will be analyzed, documented, and managed throughout the project.	Participates in planning the business analysis work. Incorporates the requirements management plan and the business analysis plans into the overall project management plan.	The BA works with the PM to determine which activities will be done and which deliverables will be produced.

Strategies for collaboration. We identified three critical success factors for effective cooperation between the BA and PM:

1. *Clear, documented, and mutually agreed on roles and responsibilities*. To that end it is essential, as soon as a project is sanctioned and a PM assigned, for the two to discuss and agree on their roles and the nature of their relationship. It is also helpful to discuss the possible points of conflict before the planning processes begin and to decide proactively how to work together.

2. *Constant and open communication*. Even when initial discussions on roles and responsibilities occur, confusion and conflict can arise throughout the project. It is essential for both roles to make a commitment to discuss and resolve disagreements as they occur without waiting for them to disrupt the project.

3. *Active business sponsor engagement*. No matter how fine-tuned the relationship between the BA and PM, an engaged sponsor can make the difference between success and failure.

One final key learning

Both the PM and BA play leadership roles—the PM for leading the team and delivering the solution and the BA for ensuring that the solution meets the business need and aligns with business and project objectives. And both roles, equally, are required for project success.

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