

# What's a BA Lead and Who Needs One?

by:

Alessandra Zardo

Marie-Chantal Côté

Sonia Ruffolo

# Agenda

- Who we are?
- Why talk about this?
- Points of discussion



**IMPORTANT NOTE:** *We are aiming to present our thoughts and experiences – we invite you to share yours for a more interactive dialogue.*

# Who Are We?

- Senior BAs and BA Practice Manager @ Sun Life Financial\* in Montreal
- Have a combined 30 year experience as BAs within IT departments in financial organizations
- CBAP designation, IIBA members and members of the Montreal, Canada chapter of the IIBA

**CBAP<sup>®</sup>** Certified Business  
Analysis Professional

\* The content of this article and of the presentation is not endorsed or supported by Sun Life Financial. All of the thoughts described and presented are our own personal thoughts.

# Why Talk About This?

- Business analyst lead role growing in popularity
- Important role
- Development opportunity for Senior BAs
- BABOK
- Other literature & artefacts



# Points of Discussion

- Specific skills and knowledge for the BA lead role
- Accountabilities of the BA lead
- Value brought to a project by the BA lead
- Key differences between a BA lead and a Project Manager

# Skills & Knowledge for BA Lead Role

- In-depth BA skills
- General leadership skills
- High level PM skills
- Development, design and SQA methodologies



# BA Lead Accountabilities - Project

- Overall understanding of the business, its strategy and objectives
- Negotiate the needs and expectations of multiple project participants
- Assist the PM in determining the BA accountabilities
- Participate in the completion of the project risk assessment and in the change management request process.
- Provide periodic BA team status reports



# ...BA Lead Accountabilities - Project

- Advise on any issues/roadblocks to the PM
- May also be called upon to participate in Steering Committee meeting
- Liaise with the technical team and the testing team:
  - to ensure understanding of all the project requirements
  - to provide input and direction into the testing strategy
  - to provide input in the development of the system architecture design

# BA Lead Accountabilities - Team



- Ensure that the BA team is set up for success:
  - motivating, coaching, and mentoring the BA team
  - communicate all project information to the BA team, (i.e. schedules, decisions, business contacts and IT contacts)
  - ensure that any new BA joining the team has a seamless transition
  - ensure that all BAs have the appropriate system access and project time reporting codes



# ...BA Lead Accountabilities - Team

- The BA lead will co-ordinate and participate in periodic BA meetings.
- They will also provide guidance and advice to clients in the use and implications of business analysis templates and processes.



# BA Lead Accountabilities - Requirements

- Manage the business requirements process for the project – has overall accountability for all requirements
- Develop and maintain work plans, schedules, project estimates, resource plans and BA status reports
- Provide requirements templates and instructions for consistency
- Review all BRDs to identify and communicate interdependencies
- Participate in vendor selection process

# What is the Value of Having a BA Lead?

- Co-ordination
- Organization
- Focus



# What is the Value of Having a BA Lead? – Co-ordination

- Co-ordination between the members of the BA team in terms of communication, processes, practices and content
- Ensure that:
  - All BA work is completed in a consistent and efficient manner;
  - All documents are formatted the same way and speak to the same level of detail;
  - No conflicting overlaps or gaps.



# ...What is the Value of Having a BA Lead? – Co-ordination

- Co-ordination with other partners
- Provide a central point of contact to funnel information: having 1 point of contact who understands the end to end requirements helps ensure that the project is being build on a solid foundation.





# What is the Value of Having a BA Lead? - Organization

- As other BAs are buried deep in their tasks of defining, validating and documenting requirements, the lead can deal with the day-to-day administration of the team. For example, the lead will make sure that documents are signed off and filed appropriately so that in the case of an audit, all the paperwork is in order.
- By closely tracking activities against the plan, the lead helps to ensure that the BA deliverables are on time and on budget which helps secure the success of the initiative.

# What is the Value of Having a BA Lead? - Focus

- Provide additional leadership (if needed) to keep the project focused from a reqts standpoint
- Help ensure that the requirements all align with the current scope and manage the expectations of the business partners
- Eliminate a lot of the noise during the requirements gathering and focus on key issues
- Help ensure that the right solution is being developed and tested

# Why Have a BA Lead When We Have a PM?

- The PM manages a project, the BA lead manages a set of BA-related activities
- The PM has accountability over the entire project (including all of the BA-related tasks), the BA lead only has accountability for the BA tasks
- The PM will sometimes focus on milestones in BA deliverables, the BA lead will want to know about granular BA tasks

# Why Have a BA Lead When We Have a PM?

- The BA lead almost always reports to the PM within the project. The BAs almost always report to the BA lead and then to the PM within the project
- The PM has full accountability for the scope, the budget, the timeline and the quality of the project. The BA lead has full accountability for delivering quality requirements that cover the agreed upon scope, are within the agreed upon budget and timeline



# Conclusion

- BA leads add significant value to projects with multiple BAs.
- The role, which is distinct from the PM role, helps to mitigate many risks and to add significant depth to the BA phase and BA deliverables.
- Our experience has always demonstrated that a possible increased cost is mitigated by the decrease in BA rework, requirements defects, communication gaps, etc which themselves generate a decrease in cost in the later phases of the project life cycle.



# Questions



The background of the slide is a dark blue gradient. Overlaid on this is a 3D grid of small, light blue spheres. The spheres are arranged in a perspective view, receding into the distance. They are connected by thin, light blue lines that form a grid pattern. The overall effect is a sense of depth and structure.

# Thank You!

[Home](#) » [Methodology](#)

**User login**

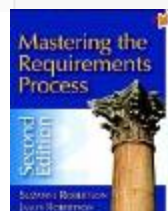
**Username:**

**Password:**

[Log in](#)

- ▶ [Create new account](#)
- ▶ [Request new password](#)

**New forum**



## What's a BA Lead and who needs one?

Submitted by azardo on Mon, 2009-05-18 22:59.

by *Alessandra Zardo, Marie-Chantal Côté and Sonia Ruffolo*

In the last few years, the Business Analyst role and the Business Analyst lead role have both grown and gained in popularity. While there is a lot of literature on the BA role, we have not seen the same amount of formal documentation on the BA lead role.

Alessandra Zardo, Marie-Chantal Côté and Sonia Ruffolo have a combined 30 year experience as BAs within IT departments in financial organizations. They have obtained their CBAP designation, are IIBA members and are members of the Montreal, Canada chapter of the IIBA.

This article gives practical guidance on how a BA lead (a very experienced BA) provides a link between what the BA's are discovering/producing and the decisions the project manager must make. One reason that the BA lead role is necessary is because individual BA's do not have an overall view of what the project manager needs to know. Neither does the project manager have the time to delve into the BA deliverables and to interpret them accurately. The BA lead provides a connection between what the status/progress of the BA's work and the project manager. The BA lead can also act as the communication channel for informing business management of the status of the business analysis. Read this article if you want some insights into how to make a team of BAs more effective.

Suzanne Robertson

**Recent Articles**

- ▶ [The Realities of Surveys within Requirements Gathering](#)
- ▶ [Orchestrating Design Concepting to Envision Application Requirements](#)
- ▶ [IT Portfolio Planning - A Long-Term View for Short-Term Results](#)