

Next Generation Business Analysis Immersion Training

EMPOWERING STRATEGY
THROUGH LEARNING
ACTIVATION

COURSE OUTLINES



THE ESSENTIAL TRAINING PROGRAM FOR ALL REQUIREMENTS PRACTITIONERS

Business Analyst is an umbrella term related to a wide variety of professionals who focus on requirements mining and management at all levels of the enterprise and throughout the life cycle of business solutions. These requirements practitioners include, but are not limited to the following:

- **Business Analyst** – The most widely used and generic title, business analysts may be focused on projects at strategic, tactical or operational levels.
- **Enterprise Business Analyst / Enterprise Business Consultant** – works at the enterprise, program and portfolio level, providing strategic insight into the alignment of organizational infrastructure with strategic direction and goals
- **Business Architect** – models the business at increasing levels of granularity regarding goals, process, business information and technology
- **Management Consultant** – assists organizations on requirements and solutions selection for specific initiatives, often on a contract basis
- **Data Analyst** – creates high level and detailed logical data models representing the information maps of a business area, often as the first step in the design process for automated data management solutions
- **Business Systems Analyst** – focuses on that part of the business solution that has been selected for automation, creating an elaborated subset of business requirements towards the creation of software / system / technical requirements.
- **Business Process Analyst / Business Methods Analyst** – focuses on business process engineering to optimize process efficiency and efficacy, and align business processes with key business functions.
- **Usability Analyst** – focuses on human factors and ergonomic issues related to human-to-system interface and generated reports.

Many business analysts are engaged in activities that span several of these roles. All have the same foundation skill sets. Our program is geared to providing core skills needed by all requirements practitioners, regardless of their specific job designation.

FRONT AND CENTER TRAINING: IMMERSION AND ACTIVATION

ACHIEVEBLUE™ Front and Centre Training (*FACT™*) courses are designed from the ground up to give you all of what you will actually use, and nothing that you don't. Just the facts. Theory is mapped directly to activating professional ways of thinking and doing. Knowledge areas, tasks, techniques and tools are evaluated and presented based on their value. So you can select, apply and succeed. Bottom line: you get the right things right, the first time, where it really matters.

CERTIFICATION FOR THE REAL WORLD



With over 12,000 members worldwide, the International Institute of Business Analysis® (IIBA®) has established global standards in business analysis principles and practice, chiefly through its Guide to the Business Analysis Body of Knowledge® (BABOK®). The IIBA®'s Certified Business Analysis Professional® designation represents the gold standard in business analysis certification. It has supplanted the old vendor certifications in real world value.

As an IIBA® Endorsed Education Provider™, ACHIEVEBLUE™ has built our entire immersion program in alignment with the knowledge areas of the BABOK®.

THE PROGRAM

- BA001: Project Management Essentials for Business Analysts – 1 day
- BA002: Foundation Class in Requirements Analysis and Modeling – 2 days
- BA003: Establishing Clarity and Precision in Project Requirements – 1 day
- BA004: Foundation Class in Business Process Modeling Notation – 1 day
- BA005: Foundation Class in User Centered Requirements Analysis – 1 day
- BA006: Planning and Executing Effective Requirements JAD Sessions – 1 day
- BA007: Developing Business and System Use Case Diagrams and Descriptions – 1 day
- BA008: Modeling Business Process Workflow with UML Activity Diagrams – 1 day

HAVE IT YOUR WAY

The complete program can be delivered in multiple formats, including facilitated e-learning, blended learning and instructor-led cohort. For dedicated client sessions courses can be customized to accommodate your specific requirements taxonomy, templates and workshop needs. Contact us for details.

STRAIGHT A'S: THE ACHIEVEMENT EQUATION AND LEARNING ACTIVATION

Achieveblue™ courses are immersion learning interventions, designed around the Achievement Equation™:

$$\text{Achievement} = \text{Awareness} + \text{Acquisition} + \text{Activation}$$

This states that performance requires skills activation, either during the training session or back on the job. Based on client requirements, the instructional design of a particular course will apply this equation to the amount of coverage and hands-on practice of various topics as follows:



Awareness – General knowledge level. No hands on application during training session.

Acquisition – Detailed theoretical knowledge level. No or limited hands on application during training session.

Activation – Detailed theoretical knowledge with hands on application during training session.

Every ACHIEVEBLUE™ course maximizes learning activation during the training session through a minimum of 50% of time spent on structured, hands-on workshops at both the individual and team levels.

OUR CREDENTIALS

The ACHIEVEBLUE™ executive team developed the first comprehensive business analysis curriculum in Canada, delivered to thousands of students worldwide. We are a trusted source for turnkey business analysis course development for clients including TELUS, Royal Bank of Canada and Bank of Montreal.

Jason Questor, our EVP Learning Systems, oversees all ACHIEVEBLUE™ business analysis offerings. Jason has over 25 years experience in business analysis, project management, business solutions development and professional skills training. Jason is the founding president of the Toronto Chapter of the International Institute of Business

Analysis™ (IIBA™) and served as editor for the newest release of the Guide to the Business Analysis Body of Knowledge®. Jason is a regular speaker at industry and client conferences.

COURSE BA001: PROJECT MANAGEMENT ESSENTIALS FOR BUSINESS ANALYSTS – 1 DAY

Intended Audience

This course is designed for anyone who needs to understand and apply the basic principles of project planning and management. This includes those beginning a career in project management, business analysts, systems analysts, software developers, quality analysts, implementation analysts, project stakeholders and end users. The course includes particular focus on stakeholder analysis, the development of product scope and its elaboration into formal requirements documentation as a critical success factor for projects. It therefore provides an important introduction to working within a project environment for business analysts and other requirements practitioners.

Prerequisites

There are no formal technical requirements for this session. Business level fluency in verbal and written English is required.

Positioning

Increasingly organizations in all kinds of industries are using project management tools and techniques for a variety of purposes. Rapid changes in technology, business needs and market characteristics are leading organizations to turn to formalized project management and business analysis to increase the speed, efficiency and effectiveness with which new or enhanced products and services are developed, business problems are solved and internal changes are managed. Yet many of those who are responsible for the management of projects, who must support or sponsor projects or who must serve as project stakeholders lack the knowledge and experience necessary to complete projects on time and within budget.

Successful project management depends, in part, on the ability to

- Identify and organize tasks in a practical and efficient way
- Create and manage project schedules, timelines, critical path dependencies and lead/slack time
- Create and manage realistic time and cost estimates
- Identify, communicate, delegate and manage project roles and responsibilities
- Create an effective project communication plan that includes efficient use of formal documentation, informal communication (such as email), and planning and status meetings
- Work within the time and resource constraints of the organization and key individuals / groups.

Learning Activities

Morning Session – The Project Management Challenge

The morning session is comprised of a two hour simulation exercise that incorporates individual, team and cohort learning activity, supported by facilitator lecture and coaching.

The Project Management Challenge™ provides participants with an opportunity to create a step-by-step plan for managing complex projects within a matrix organizational structure. Participants are presented with 24 activities that should be carried out in defining, planning, implementing and completing a project. Participants are challenged to find the optimal sequence for carrying out these activities. Solutions to the exercise are developed first on an individual basis and then by groups. These solutions are then compared to a recommended solution.

The session facilitator then reviews each of the steps in detail, providing background information, explaining the value proposition of each step and how the entire structure fits together with regards to dependencies and the creation of interim and final project deliverables. Participants are provided with a Learning Journal that includes support documentation for the lecture.

Afternoon Session – Tips, Traps and Project Realities

The afternoon session leverages the morning's learning experience to pinpoint specifics regarding the logistics and practical aspects of running projects. Using a combination of lecture, examples, stories and discussion, the facilitator leads the group through the following topics:

- Initiating and scoping a project through inception and the business case
 - Establishing project and product scope
 - Managing requirements change
 - Managing Scope Creep
- Building the project team: key roles, key stakeholders and keys to successful delegation
 - Stakeholders who are internal to the business area
 - Stakeholders who are external to the business area
 - Stakeholders who are external to the organization
- Meeting management meets conflict management: pre-empting conflict through clarity, precision and communication
- Managing the triple constraints of time, cost and scope
- Defining project relationships by deliverables
- Successful time, cost and resource estimating and scheduling through work breakdown analysis
- Choosing the correct project management methodology: waterfall, iterative, agile
- Project phases, milestones and gate processes
- Dealing with the realities of time and resource commitments: how to configure personnel availability for maximum value, how and when to use voting and non-voting proxies and working with distance teams
- Rightsizing your project documentation set: how to configure your process for iterative, timely and stress-reduced review and sign off
- Managing the solution acceptance process and closing the project
- Application Release Management: What happens after the project; dealing with the next; preventing the rolling release.

COURSE BA002: FOUNDATION CLASS IN REQUIREMENTS ANALYSIS AND MODELING – 2 DAYS

Intended Audience

This course has been configured for business analysts and business systems analysts. It will also provide value for other project and business personnel who need a high level of understanding regarding software requirements analysis, modeling and documentation.

Prerequisites

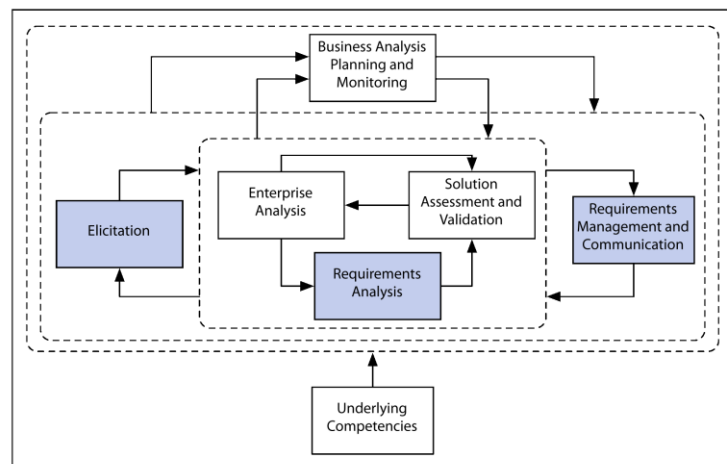
The course is delivered in English. Business level proficiency in verbal and written English is required.

Positioning

BA002 is designed to provide a basic understanding of analyzing and documenting requirements. It is not expected that this overview course will provide the depth of knowledge for the participant to be fully competent at the various modeling techniques, but rather to understand their value and have sufficient knowledge to create effective models using foundation syntax, read and analyze complex models created by others and produce text based business and software requirements documentation independently.

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication.



Performance Outcomes

Upon successful completion of this course, you will be able to:

- Produce text-based requirements documentation with precision and clarity
- Create requirements models based on the modeling technologies presented in the course
- Describe and apply the unique perspectives and value propositions of various modeling technologies with regards to:
 - Selection of appropriate models based on project requirements
 - Configuration of the requirements documentation set using standard templates and requirements taxonomies.

Approach

All topics are covered using the following criteria:

- Requirements reusability

- Selection of model(s) to better communicate the requirements to fit the project: when each technique should be used and the aspects it addresses
- When should each technique to be used:
 - Choosing the appropriate techniques – considerations based changes addressed by the project
 - Business process changes only
 - Business and software changes
 - Software changes only
- Choosing the appropriate techniques – environment considerations
 - Transactional Environment (handle business processing e.g. operations, administration, order processing)
 - Structural Domains (store and analyze data e.g. query and report generators, data mining)
 - Dynamic Domains (respond to changing events to store and act upon data e.g. policy adjudication, real time operations like ATM)
 - Control-Oriented Domains (test for conditions and take action e.g. logistics, fraud detection)
- Choosing the appropriate models – project type
 - New development, enhancement/ maintenance, migration, fixes, commercial off the shelf.

Topical Outline

Unit 1: Context Overview

- The current context of requirements modeling and the Business Systems Analyst role within the project environment
 - Basic Definitions and Distinctions
 - Requirements versus design specifications and solutions
- Overview of standard requirements taxonomies
- The components of a requirements model: value propositions, limitations and application to requirements documentation
 - Diagrams and illustrations
 - Tables
 - Plain text
 - Data
 - Metrics
 - Rules
- The relationship between business functions and business processes
- Legacy and Contemporary Perspectives
 - Structured analysis: concepts and tools
 - Object oriented analysis and the unified modeling language : concepts and tools
 - Static / structure versus dynamic / behaviour focused process modeling

Unit 2: Modeling With Diagrams

- The triple constraints as they relate to business systems analysis and requirements
- Getting the big picture on scope
- Primary delegates for project and product scope
- The impact of effective scoping on vertical and lateral traceability
- Diagrams and product scope
- System Context Diagrams
 - When to use them
 - External agents

- Inputs and outputs
 - Things to watch for: black holes, gray holes and miracles
- System Use Case Diagrams
 - When to use them
 - Comparison with system context diagrams
 - The subject
 - Actors: primary and secondary
 - System use cases
 - Associations
 - Structure and behaviour perspectives
 - Staying focused on structure
 - Staying focused on requirements, not design specifications
 - The include and extend directed relationships
- Activity Diagrams
 - When to use them
 - Activity frame
 - Activity partitions
 - Starting and stopping
 - Task steps and child diagrams
 - Edges / Flow lines
 - Decisions and guards
 - Repeated steps and guards
 - Parallel activity
 - Indicating business objects and deliverables
- State Machine Diagrams
 - When to use them
 - Indicating life cycle object states and transitions
 - State machine / activity diagram comparison
 - Decisions and guards

Unit 3: Modeling With Text

- The KISS and Tell principle
- The demand for quantifiable quality
- Metrics and testability
- User Centered Requirements Analysis and The Total User Experience
- Process workflow and non-functional requirements
- Key non-functional requirements related to solution behavior
- Linking business and software non-functional requirements
- Process workflow and user interface and information architecture requirements
- Declarative Text
 - When to use declarative text
 - Requirements and technical writing
 - Seventeen guidelines for establishing requirements clarity and precision using text
 - Advantages and disadvantages of declarative text
 - Suggested headings when using declarative text for processes
- System Use Case Descriptions
 - When to use system use case descriptions
 - System use case descriptions and user centered business analysis
 - Documenting system use case descriptions
 - one to many relationship with system use case diagrams

- overview
- actors
- preconditions
- basic flow of events
- writing style structural hints
- alternative scenarios
- post conditions
- Assumptions, related information and related artifacts
- Advantages and disadvantages of system use case descriptions

Unit 4: Business Rules, The Business Data-Information Relationship and Messages

- Business Rules
 - Revisiting and refining the nature of business rules
 - Clever impostors to business rules
 - Business rules versus functional and non-functional requirements
 - Business rules and governance
 - Sources of business rules
 - Key words that may indicate the presence of business rules
 - Using business events to uncover business rules
 - Business rule validation and restriction
 - How to reference business rules that relate to requirements
- Data and information requirements
- Messages and communication
- Making messages meaningful
- Initial logical data modeling concepts
 - Entities / Classes
 - Attributes and the Unique Identifier
- Integrating logical data modeling into requirements elicitation and documentation

COURSE BA003: ESTABLISHING CLARITY AND PRECISION IN PROJECT REQUIREMENTS – 1 DAY

Intended Audience

This course is designed for anyone who needs to create or contribute to writing project requirements. This includes business analysts, systems analysts, project stakeholders and end users. This course may also be appropriate for individuals who manage business analysts or those who work with requirements documentation and need a more in-depth understanding of the process and techniques of technical writing.

Prerequisites

Those registering for this course should have attended course BA002: Foundation Class in Requirements Analysis and Modeling (or equivalent training), or have at least 1 year experience in requirements elicitation, analysis, and documentation using structured techniques. Practical experience in the creation of requirements documentation (such as a Business Requirements Document), and business level fluency in verbal and written English are also required.

It is further recommended that participants have fundamental knowledge and practical experience in:

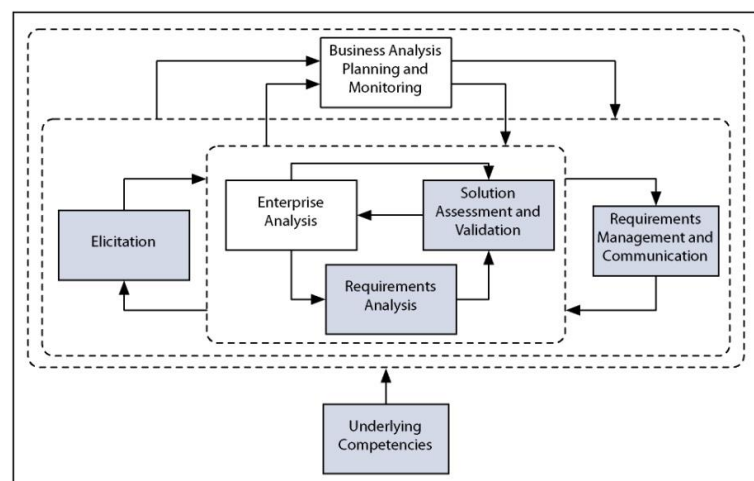
- Process modeling with business and system use cases (diagrams and scenarios)
- Workflow modeling with Unified Modeling Language Activity Diagrams (preferred), IBM® LOVEM® or ANSI flowcharts
- Data modeling with Unified Modeling Language business object definition using Class and State Chart diagrams (preferred) or relational modeling using Entity Relationship Diagrams
- Practical experience using project tools, templates and methods.

Due to the 1 day nature of the course, topical coverage will be limited to the essentials. It is understood that each topical area represents a knowledge area of significant breadth and depth. For this reason, this course is not recommended for those who are totally unfamiliar with or new to the principles and practices of Business Analysis and, to a lesser degree, Project Management.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Solution Assessment and Validation
- Underlying Competencies
- Requirements Management and Communication



How many times have you been faced with having to repeatedly revisit requirements before everyone agrees they have something usable? Who has the luxury of this kind of time? Projects exist to solve business problems. Without effective requirements documentation, everything falls apart.

Business professionals ask “what does the technical team want from us?” Developers ask “why can’t the business tell us what they need so we can give them some options and build or buy something?” Business analysts ask “how can I get maximum value from everyone’s very limited available time?” Back and forth over the wall goes the documentation.

In today’s reality, business professionals from marketing, product development, finance, human resources, sales and elsewhere are often called upon to document their own requirements to some degree. Business analysts are faced with ever tighter deadlines coupled with larger and more complex requirements sets. Regardless of whether or not you have the title, if you are documenting requirements you are assuming the role of Business Analyst. The business analyst role requires strong technical writing capabilities in order to be an effective liaison among business stakeholders, the project team and solution developers.

Writing effective requirements does not require magic, but it does require activating very learnable skills and knowledge. This begins with understanding what a requirement is, and what it is not. Beyond the Business Requirements Document, business analysts and those who “wear the hat” are often called upon to create or contribute to an expanded set of requirements related documentation that includes Opportunity Analyses, Vision and Scope Reports, Business Cases and Requests for Proposal. Day to day requirements communication, including email, presentations and meeting reports, must also be handled with care. Finally, business analysts must understand and be able to maximize the value of documentation as a component of requirements modeling.

Performance Outcomes

Upon successful completion of this course you will be able to:

- Apply the principles of structured technical writing to documenting effective requirements
- Adjust the level of detail and tone of requirements documentation to differing requirements documents and project situations
- Create appropriate levels of documentation within requirements models
- Create professional grade requirements documentation sets for projects of any size, level of complexity or duration.

This hands on immersion lab gives you all the fundamentals you need to get you started immediately.

Topical Outline

Unit 1: Introduction

- How much do you already know?
- The nature and limitations of requirements
- The nature of technical writing
- The project requirements documentation set.

Unit 2: The Basics of Technical Writing in English

- The parts of speech and their place in technical writing
- The importance and application of voice, person and tense
- Foundation principles of document information architecture
- Applying the rules of structured English to technical writing
- How technical writing differs from other types of writing

- How to adjust your technical writing for different situations:
 - Writing for information transfer
 - Writing for action by the reader
 - Writing for discussion
 - Writing for decision support
- Diagnosing and correcting twenty five common requirements documentation errors
- The KISS and Tell principle in practice

Unit 3: Documenting Requirements

- Categorizing requirements according to a taxonomy built from the perspective of business
- Why should requirements be categorized?
- Who uses each category?
- The International Institute of Business Analysis® Requirements Taxonomy
- The Enterprise Perspective: how senior management views requirements
- The Zachman Framework for Enterprise Engineering™
- What different people need to know: scope, granularity, inclusion and exclusion
- Injecting science into art: applying diagnostic modeling into requirements analysis and documentation
- The importance of quantifying quality in all requirements, including the application of precision, tolerances, acceptable variance, targets and thresholds
- The importance of defining all business relationships in terms of specific, visible and measurable deliverables
- How to establish solution lifecycle traceability with requirements
- Special case documentation tips and traps:
 - Formal requirements documentation
 - Informal requirements documentation
 - Special considerations for documenting models
 - Special considerations for creating presentations
 - The meeting agenda as a working brief
- How to evaluate and choose from options for packaging requirements based on business needs, stakeholder demographics and the nature of your solution provider.

COURSE BA004: FOUNDATION CLASS IN BUSINESS PROCESS MODELING NOTATION – 1 DAY

Intended Audience

This course is designed for business analysts who need practical working knowledge in Business Process Modeling Notation within a project requirements context. This course will also be of value to systems analysts, technical solutions developers, quality assurance and testing personnel and business stakeholders who are required to provide input to or review Business Process Modeling Notation models.

Prerequisites

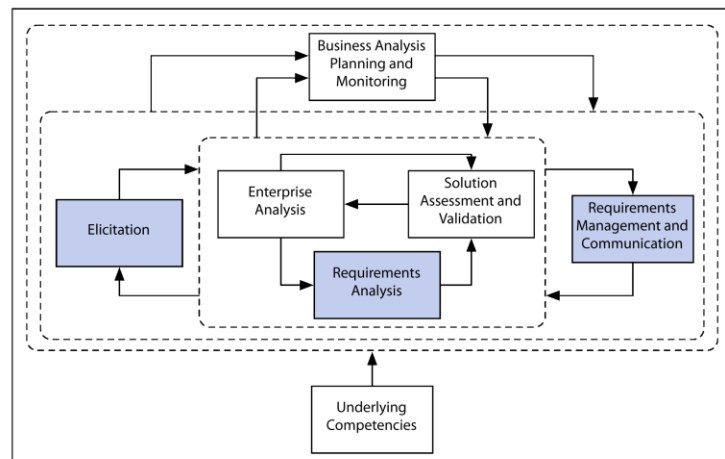
Due to the immersion nature of this session, we recommend that participants have at least a basic level of understanding and practical usage skills with other process workflow technologies such as ANSI flowcharting, UML Activity Diagrams or IDEF3.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication.

How often have you had to add huge reams of text to your process and workflow diagrams in order to make them understandable for non-technical project stakeholders, and for the models to give you a complete picture of process-based requirements?



Since the earliest days of business information technology, modeling the workflow details of business processes has been accomplished largely through repurposing diagrams originally designed for software development. This can lead to frustration when attempting to detail the nuances of manual process task flow due to the in-built technology bias of the diagrams. In response, Business Process Modeling Notation was created by the **Business Process Management Initiative (BPMI)**. BPMN is now governed and endorsed by the Object Management Group, the same organization that governs the Unified Modeling Language.

The first goal of BPMN is to provide a notation that is readily understandable by **all** business users. This includes:

- Business professionals who manage and monitor processes within the business environment
- Business Analysts who create requirements documentation
- Software Engineers who implement the technology that manages the automated portion of business processes
- Software vendors who need to map their product offerings to unique business needs.

BPMN creates a standardized communications bridge between business process design and process implementation.

The second goal of BPMN is to ensure that XML languages designed for the automated execution of business processes, such as **BPEL4WS** (Business Process Execution Language for Web Services), can be visualized with a business-oriented notation.

The **Business Process Diagrams** (BPD) created through BPMN take advantage of lessons learned over the years, including iconography and best ideas from UML Activity Diagrams[®], UML EDOC Business Processes[®], IDEF3[®], ebXML BPSS[®], Activity-Decision Flow (ADF) Diagrams[®], RosettaNet[®], LOVeM[®], and Event-Process Chains (EPCs)[®].

Performance Outcomes

This session focuses on practical application of BPMN to business process workflow. No time is spent justifying the adoption of BPMN or debating comparative advantage of BPMN versus other modeling technologies. The session is a maximum hands on immersion lab that gives you all the fundamentals you need to get you started immediately with BPMN. Upon successful completion of this session you will be able to:

- Describe and comply with the BPMN Conformance Standards
- Differentiate between and align process models with workflow models
- Create Business Process Diagrams using BPMN
- Identify the correct level of text documentation needed to augment Business Process Diagrams.

This session focuses on the “80-20” principle, providing coverage of the 20% of BPMN iconography that is used 80% of the time. The workshops focus on incrementally building a model using the symbols and constructs as they are presented. Brief coverage of the remaining advanced symbols is provided.

Participants are provided with:

- Session participant guide
- BPMN Essentials Syntactical Reference
- BPMN Complete Syntactical Reference

Topical Outline

- Coverage of business process modeling principles and concepts
- Business functions versus business processes
- Coverage of core BPMN notation with examples and workshops
 - Gateways: data based exclusive OR, parallel gateway (AND gate), inclusive OR,
 - Activities: task, loop activity, ad hoc subprocess, collapsed subprocess, expanded subprocess
 - Flow: sequence flow
 - Data: data objects, associations (undirected, directed, bidirectional)
 - Events: plain (start event, stop event)
 - Swimlanes: business area pools, collapsed pools, business role lanes
 - Documentation: logical groups, text annotations
- Presentation of advanced BPMN notation with examples (no workshops)
 - Gateways: event based exclusive gateway, complex gateway
 - Activities: multiple instance
 - Flow: conditional flow, default flow
 - Events: compensation, event types (plain intermediate event, message, timer, error, cancel, compensation, signal, multiple, link), catching and throwing
 - Transactions: basic transactions, transactions with intermediate cancel events and compensation.

COURSE BA005: FOUNDATION CLASS IN USER CENTERED REQUIREMENTS ANALYSIS – 1 DAY

Intended Audience

This course is targeted for business analysis professionals who need to incorporate the principles and practices of User Centered Requirements Analysis into their project activities. The course will also provide value for other project and client personnel who will oversee or participate in these activities.

Prerequisites

Those registering for this course should have attended course BA002: Foundation Class in Requirements Analysis and Modeling (or equivalent training), or have at least 1 year experience in requirements elicitation, analysis, and documentation using structured techniques. Business level fluency in verbal and written English is required. It is further recommended that participants have fundamental knowledge and practical experience in:

- Process modeling with business and system use cases (diagrams and scenarios)
- Workflow modeling with Unified Modeling Language Activity Diagrams (preferred), IBM® LOVEM® or ANSI flowcharts
- Data modeling with Unified Modeling Language business object definition using Class and State Chart diagrams (preferred) or relational modeling using Entity Relationship Diagrams.

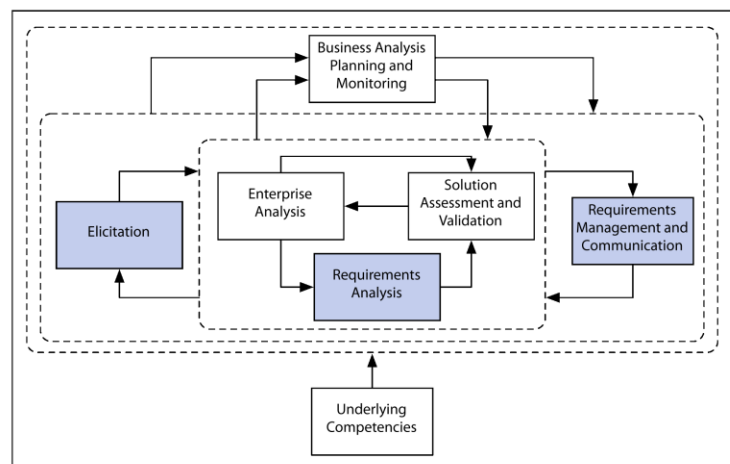
Note: Due to the 1 day nature of the course, topical coverage will be limited to the essentials. It is understood that each topical area represents a knowledge area of significant breadth and depth. For this reason, this course is not recommended for those who are totally unfamiliar with or new to the principles and practices of Business Analysis and, to a lesser degree, Project Management.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication.

User Centered Requirements Analysis is a subset of the larger discipline of User Centered Design and Development, a philosophy and a set of practices that pivots on the needs, wants, and limitations of the end user throughout the development and deployment of a business solution. The primary difference from other solution development philosophies is that User Centered Design and Development attempts to optimize the user interface and experience with business process and automated systems based on how people can, want, or need to work, rather than forcing them to change how they think and work to accommodate existing or planned systems or the constraints imposed by commercial software.



User Centred Requirements Analysis forms the critical first step in User Centred Design and Development. It requires the Business Analyst to integrate consideration for what is known as the Total User Experience throughout the Requirements Analysis and documentation process.

These factors will influence how the Requirements Analysis will be planned and executed, including the selection of elicitation techniques employed and the structure of the Business Requirements Document.

Performance Outcomes

Upon successful completion of this course you will be able to:

- Plan for and manage project requirements analysis activities according to the principles of User Centered Design and Development
- Elicit, structure, document and validate business solution requirements using user centered best practices
- Assist in the planning and the quality of work in subsequent project phases
- Assist in the planning and the quality of post project satisfaction assessment and application release scheduling.

Topical Outline

Unit 1: Foundation Principles of User Centered Requirements Analysis

- Principles of User Centred Design and its applicability to requirements management
- User Centred Design and Service Oriented Architecture
- The Business Analyst as User Advocate and Ambassador within the context of User Centred Design and Development

Unit 2: Impact of and Techniques for User Centered Requirements Analysis

- User Centred Requirements Analysis impact on and recommended techniques for:
- Requirements Planning And Management
- Profiling Stakeholder and User Demographics:
 - This includes change impact on roles, authorities, accountabilities and business system interactions, as well as diversity variables such as level of experience and job function variance.
- Planning For And Obtaining Stakeholder And User Time And Input Commitments
- Elicitation Technique Selection And Deployment
- Establishing User Centered Process Requirements:
 - This includes base lining legacy business process and systems in their as-is state, in order to establish improvement metrics and key indicators
- Establishing User Centered Functional Requirements:
 - This includes the increased importance of Unified Modeling Language techniques including business and system use case analysis and the identification and definition of business objects for class and state modeling
- Establishing User Centered Non Functional Requirements:
 - This includes the increased importance of maximizing clarity and precision regarding system capacity, security and access control, availability, archiving, scalability and interoperability requirements
- Establishing User Centered Interface Requirements:
 - This includes visual, tactile and auditory usability and speed of response requirements
- Establishing User Centered Information Requirements:

- This includes data translation, information and report formatting, information accessibility and support for near line and offline business information
- Establishing User Centered System/Technical Requirements:
 - This includes analyzing optimized business process in order to identify where automated systems can be used to best advantage to support the Total User Experience
- Establishing System Integration And Migration Requirements That Accommodate User Centered Design And Development:
 - This includes full and partial integration with manual and semi-automated processes in order to maximize ease of use across system and organizational boundaries
- Establishing User Centered Training and Professional Development Requirements:
 - This includes capturing timing and staging requirements for training that will result from the implementation of new business processes, automated systems, business area realignment and modified job descriptions
- Validating Requirements:
 - This includes validation and authorization of requirements at the End User and Client Acceptor levels.
- Structuring The Requirements Document Set:
 - This includes planning for and creating the Business Requirements Document and supporting documentation

Unit 3: Supporting the Entire Project with User Centred Requirements Analysis

- Business Case Development and Defence:
 - This includes assisting the Project Manager and Financial Analyst in the development of the business case
- Design Phase:
 - This includes assisting systems analysis solution design and product selection
- Development Phase:
 - This includes assisting developers in designing for the Total User Experience
- Testing Phase:
 - This includes assisting in the development of the Quality Assurance and Test Plan
- Implementation Phase:
 - This includes assisting in the planning for solution deployment
- Post Implementation Support and Application Release Management:
 - This includes planning for post implementation user satisfaction assessment and next-release initial requirements gathering

Unit 4: Considerations for Program, Portfolio and Enterprise Business Analysis

- Considerations for Program and Portfolio Management level Business Analysis
- Considerations for Enterprise level Business Analysis
- Barriers and Opportunities Regarding the Adoption of User Centered Requirements Analysis and User Centered Design and Development
- Cost-Benefit-Risk Analysis for User Centered Requirements Analysis and User Centered Design and Development.

COURSE BA006: PLANNING AND EXECUTING EFFECTIVE REQUIREMENTS JAD SESSIONS

Intended Audience

This course is designed for anyone who needs to create or contribute to writing project requirements. This includes business analysts, business systems analysts, project stakeholders and end users. This course may also be appropriate for individuals who manage business analysts or those who work with requirements documentation and need a more in-depth understanding of the process and techniques of Joint Application Development as it applies to requirements analysis.

Prerequisites

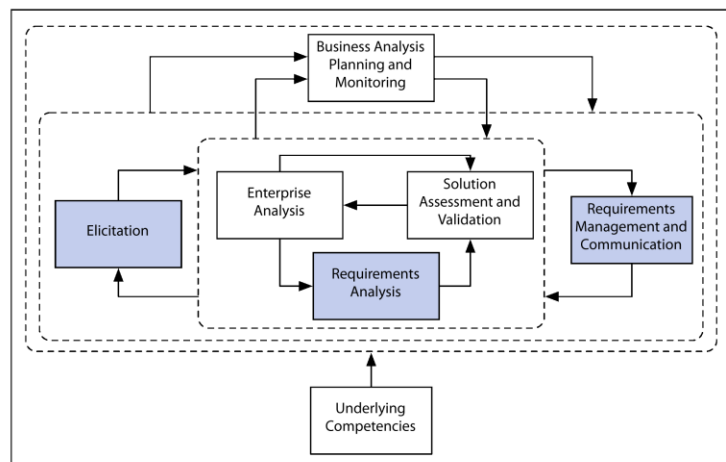
Those registering for this course should have attended course BA002: Foundation Class in Requirements Analysis and Modeling (or equivalent training), or have at least 1 year experience in requirements elicitation, analysis, and documentation using structured techniques. Business level fluency in verbal and written English is required. It is further recommended that participants have fundamental knowledge and practical experience in:

- Process modeling with business and system use cases (diagrams and scenarios)
- Workflow modeling with Unified Modeling Language Activity Diagrams (preferred), IBM® LOVEM® or ANSI flowcharts
- Data modeling with Unified Modeling Language business object definition using Class and State Chart diagrams (preferred) or relational modeling using Entity Relationship Diagrams.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication



When IBM's Chuck Morris of Raleigh and Tony Crawford of Toronto developed Joint Application Design in the latter part of the 1970's, the concept was fairly straightforward. Let's bring developers and users together in an environment that is creative and constructive in order to expedite the capture of high quality requirements and specifications. Sounds simple enough. But JAD has been both highly praised and widely maligned in the world of solution development ever since. The problem is not in the theory but in the application reality of JAD. Much of this results when project teams attempt to use JAD with no knowledge of the technique beyond the definition. Poorly planned and executed, JAD can create a very high pressure environment that brings out the worst in people, especially if expectations are not managed and the scope of the effort is not clearly understood up front.

In addition, the acronym JAD has been variously interpreted, with the D representing everything from design to development to decision making. Often, teams speak of R-JADs when the sole focus is requirements and Q-JADs when the collaboration is limited to quality assessment and testing. With iterative project management's latest incarnation of Agile development making press, JAD has once again become a topic of interest.

This course focuses on the JAD approach as applied to requirements elicitation, analysis, communication, verification and approval. It provides essential information and skills needed to integrate JAD sessions into your project requirements gathering strategy. Step by step comprehensive checklists, templates and workshops guide you through every step of the process. As with any tool, JAD mastery can come only through experience. This workshop gives you everything you need to get started immediately with JAD, taking advantage of best practices and avoiding the many costly and serious mistakes related to JAD.

Performance Outcomes

Upon successful completion of this course you will be able to:

- Identify the various applications for Requirements JAD, and know when to avoid it. This includes understanding how Requirements JAD stacks up against and integrates with other requirements management techniques and deliverable quality assurance techniques
- Make effective use of supplied tools and templates to assist in the planning and executing of Requirements JAD sessions
- Create a pre-JAD work plan that incorporates scoping, team delegations, timelines, deliverables and managing expectations.

Topical Outline

Unit 1: Requirements JAD and Project Requirements

- Orientation: JAD Origins and Applicability
- The four underlying principles of JAD
- JAD subtypes
- Project Management Methodology implications for JAD
 - Waterfall
 - Iterative
 - Agile
- Timeboxing and the Triple Constraints
- In-house and Outsource implications for JAD
 - Product and Application Release Management implications for JAD
 - Human Resource and project team structure implications for JAD
 - Requirements JAD and Process Engineering
 - Requirements JAD and System Functional Requirements
 - Requirements JAD and Non-functional Requirements
 - Requirements JAD and the potential for high benefit
 - Requirements JAD and the potential for high risk
 - Requirements JAD Cost-benefit-risk analysis within projects
- Comparative Analysis: Requirements JAD and other requirements capture and analysis techniques:
 - Requirements JAD versus focus groups
 - Requirements JAD versus facilitated sessions
 - Requirements JAD versus interviews
 - Requirements JAD versus surveys and questionnaires

- Comparative Analysis: Requirements JAD and other requirements verification and quality techniques:
 - Requirements JAD versus desk checking with checklists
 - Requirements JAD versus structured walkthroughs
 - Requirements JAD versus peer reviews
 - Requirements JAD versus formal positive and negative testing

Unit 2: Requirements JAD Planning and Preparation

- Orientation: Requirements JAD Planning and Preparation Templates, Checklists and Tools
- How to scope and configure Requirements JAD Session Sets
- How to define Requirements JAD deliverables and critical success factors
- How to identify Requirements JAD participants according to clearly defined roles
 - Executive Sponsor / Client Acceptor / Decision Maker
 - R-JAD Facilitator (Business Analyst or Business Systems Analyst)
 - Project Manager
 - Scribe and Timekeeper
 - Observers – Systems Analyst, Technical Lead, Quality Analyst, Implementation Analyst
 - Participants – Subject Matter Experts, Stakeholders and End User Delegates
 - How to work with proxies
 - Special considerations for when consultants and vendors are involved
- Preparing your Requirements JAD session preparation material:
 - Pre-workshop participant activities
 - Serial activities for incremental build
 - Parallel activities for independent focus
 - High intensity activities towards decision
 - Low intensity activities fostering detailed discussion and analysis
 - Convergence and move forward activities
 - The R-JAD Agenda as a Working Brief
- Delivering the pre-JAD briefing
- Identifying and managing the logistics

Unit 3: Managing and Facilitating the Requirements JAD Sessions

- Orientation: Templates, Checklists and Tools for Use During the Requirements JAD Sessions
- Starting the session correctly: tips and traps
- Running the Requirements JAD as a self contained project
- In-stream recording of progress
- Maintaining role clarity and conformance
- Proactive conflict item identification and management
- Consensus building
- Maintaining the focus on decision making and accountability
- Maintaining the focus on deliverables
- Facilitating in-stream verification of requirements
- Facilitating serial discovery, discussion and decision making activities
- Facilitating parallel activities with breakout groups and convergence tracking
- Staying on track: dealing with tangents and off-topic crusades
 - Diagnostic modeling
 - Investigative process
- Building an action plan

Unit 4: Post Requirements JAD Documentation and Communication

- Integrating Requirements JAD findings within the formal requirements documentation set
- Tracking actionable items
- Executing the requirements analysis communication plan for:
 - Decision makers
 - Influencers
 - FYI personnel
 - DND personnel
- Scheduling Next Steps:
 - Within the Requirements JAD session set
 - For non-JAD requirements analysis techniques

COURSE BA007: DEVELOPING BUSINESS AND SYSTEM USE CASE DIAGRAMS AND DESCRIPTIONS – 1 DAY

Intended Audience

This course is intended for business analysts who need to diagram and create text descriptions for manual and automated business processes, towards the development of functional and non-functional requirements documentation. This includes the need to identify context, access rights and direct interaction with people, other systems and business events. The course will also provide value for other project and business stakeholder personnel who are involved in reading, vetting, and / or approving business and system use case diagrams and descriptions.

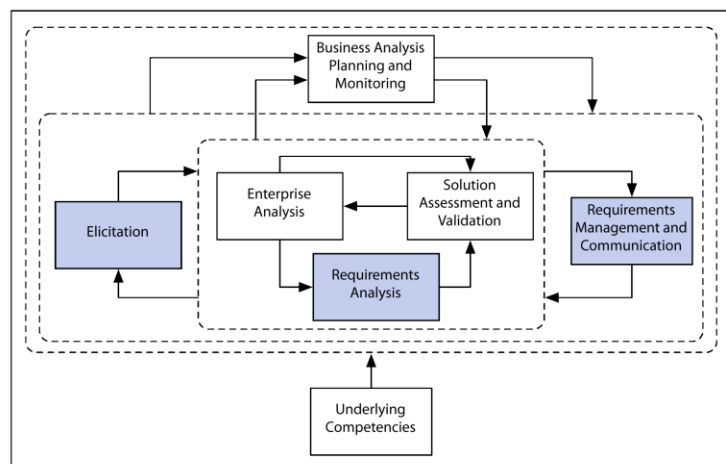
Prerequisites

While there are no formal course prerequisites for this course, it is recommended that participants have at least 1 year experience working within a project environment, either as a requirements practitioner or as a business stakeholder. Business level fluency in verbal and written English is required.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication



The Unified Modeling Language represents the most popular and comprehensive set of diagrams for the development of automated business solutions. Created by and primarily for software developers, UML diagrams have been adapted for use by business analysts as a means to capture requirements in a manner that facilitates communication with business stakeholders and systems development personnel.

With the increasing emphasis on the principles of user centered design and the modeling of the Total User Experience, UML-based Use Cases have become an indispensable tool in understanding the context and functionality of both manual and automated business processes. While the UML focuses on the diagramming portion of analysis, with a strong bias towards the automated segment of the business system, business requirements practitioners have expanded the scope of use cases through the development of best practices for capturing requirements for the total business solution. This includes applying process engineering principles that position automated systems within the larger business context, and full text-based elaboration of usage descriptions centred on the desired user experience with the business solution.

Performance Outcomes

Upon successful completion of this course you will be able to:

- Model and diagram business processes in a manner that correctly positions automated systems within the total business solution context
- Vet manual and automated AS-IS and TO-BE business processes for efficacy and efficiency in the production of business deliverables and desired outcomes
- Determine the level of elaboration required for the documentation of optimal success path, alternative success path, recoverable error and fatal error process descriptions
- Leverage use case artifacts towards the creation of in-built quality metrics and the accelerated development of test scenarios.

Topical Outline

Unit 1: Use Cases and The Total Business Solution

- Understanding business processes
 - Processes versus functions
 - Essential business processes
 - The business process as a transaction
 - The 5 key parts of a process
- Scoping Essentials for Use Case Development
 - What is the Total Business Solution?
 - What is the Total User Experience?
 - Identifying the business area
 - Identifying and sizing the business problem
 - Identifying the stakeholders
 - Mapping the current state
 - Mapping what is changing
 - Documenting product scope for goods and services
- The Key Components and Value Propositions for Use Cases
 - The business use case diagram
 - Business use case descriptions
 - The system use case diagram
 - System use case descriptions
- Use cases and functional requirements
- Use cases and non-functional requirements

Unit 2: Business Use Case Diagrams

- When to use business use case diagrams
- Iconography and Usage
 - The business actor
 - The business worker
 - The business use case
 - The use of a system actor in a business use case diagram
 - Association and communication
 - Indicating the scope of the automated portion of the business solution in a business use case diagram

- Packages

Unit 3: System Use Case Diagrams

- When to use system use case diagrams
- Iconography and Usage
 - Indicating the automation boundary with the Subject
 - System actors
 - Human actors
 - Non-human actors
 - Conceptual actors
 - System use cases
 - Associations
 - Packages
 - Directed relationships
 - The <<include>> relationship
 - The <<extend>> relationship
 - Generalization, specialization, abstraction and concreteness
 - Common elaborations, aberrations and just-plain-wrongs regarding the UML standard

Unit 4: Business and System Use Case Descriptions

- When to use business and system use case descriptions
- The use case description as a transactional dialog within the Total User Experience
- Essential components for a use case description
- Best practice linguistics
- Concepts and common misconceptions related to
 - Preconditions
 - Post conditions
- Application and extension of the Pareto principle for business value use cases
 - Determining and documenting the one optimal success path
 - Determining and documenting alternative success paths
 - Determining and documenting recoverable error paths
 - Determining and documenting fatal error paths
- How to reference <<include>> and <<extend>> relationships in use case descriptions
- Use case descriptions and workflow diagramming using the UML Activity Diagram.

COURSE BA008: MODELING BUSINESS PROCESS WORKFLOW WITH UML ACTIVITY DIAGRAMS – 1 DAY

Intended Audience

This course is intended for business analysts who need to diagram manual and automated process workflow towards the development of functional and non-functional requirements. This includes the need to establish context, access rights and direct interaction with people, other systems and business events. The course will also provide value for other project and business stakeholder personnel who are involved in reading, vetting, and / or approving process workflows.

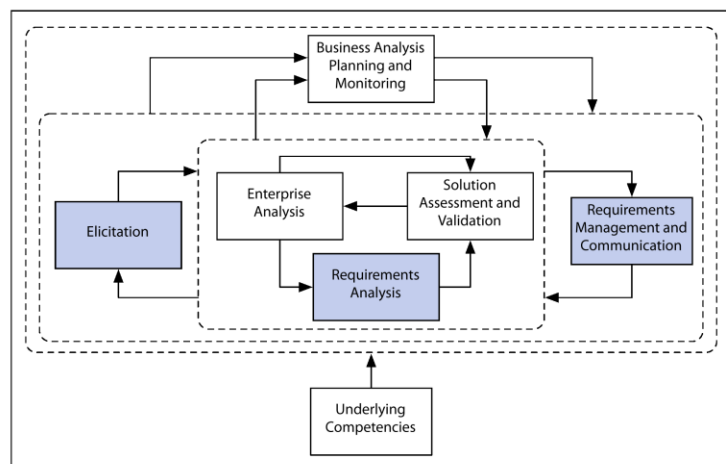
Prerequisites

While there are no formal course prerequisites for this course, it is recommended that participants have at least 1 year experience working within a project environment, either as a requirements practitioner or as a business stakeholder. Successful completion of course BA007: Developing Business and System Use Case Diagrams and Descriptions is highly recommended. Business level fluency in verbal and written English is required.

Positioning

This course aligns with and provides topical coverage for the following knowledge areas within version 2.0 of the IIBA® Business Analysis Body of Knowledge®:

- Elicitation
- Requirements Analysis
- Requirements Management and Communication



The Unified Modeling Language represents the most popular and comprehensive set of diagrams for the development of automated business solutions. Created by and primarily for software developers, UML diagrams have been adapted for use by business analysts as a means to capture requirements in a manner that facilitates communication with business stakeholders and systems development personnel.

With the increasing emphasis on the principles of user centered design and the modeling of the total user experience, UML-based Activity Diagrams have become an indispensable tool in modeling business workflow for both manual and automated business processes. Activity Diagrams provide immense benefits for both technical solutions developers and business stakeholders for understanding the strengths and weaknesses of current business process regarding:

- missing, redundant, badly sequenced and low value steps
- interface points between automated systems and people

- integration points between automated systems.

In addition, the foundation iconography of Activity Diagrams is understandable by those with little or no training, making them extremely approachable and useful for business analysts working with non-technical business managers and end users.

Performance Outcomes

Upon successful completion of this course you will be able to:

- use Activity Diagrams to diagram and optimize manual and automated business process workflow
- use Activity Diagrams to isolate and track the creation and staging of interim and final deliverables created within a business process
- apply the principles of design elegance to facilitate the go-forward activities related to software development and business process engineering.

Topical Outline

Unit 1: Activity Diagrams and Business Process Workflow

- Understanding business processes
 - Processes versus functions
 - Essential business processes
 - The business process as a transaction
 - The 5 key parts of a process
- Transitioning from Use Cases to Activity Diagrams
- Foundation Concepts for Process Workflow Modeling
 - The Total Business Solution Context
 - Isolating the automated portion of the business solution
 - The Primary Control Structures
 - Sequence
 - If-then-Else
 - Do-while
 - Control Structure Elaboration and Adaptation
 - Nesting control structures
 - Parallel processing
 - Elegance

Unit 2: Basic Iconography and Usage

- Process scoping with the activity frame
- Identifying actors and handoff points with activity partitions (swimlanes)
- Core components
 - Actions
 - Activity nodes
 - Flows
 - Object values
- Starting and stopping
 - Activity initial nodes
 - Activity final nodes

- Flow final nodes
- Sequence flow
- Modeling conditional processing with guards
- Modeling decisions with branching and merging
- Modeling loops
- Modeling parallel and non-sequenced actions with forks and joins
- Modeling object flows
 - Integration with task step activity flow
 - Indicating state change

Unit 3: Advanced Iconography and Usage

- Indicating sub processes and repeated steps with child diagrams
- Performing set operations with expansion regions
- External and Internal Events
- Messages and signals
 - Call events
 - Time and change events
 - Sending and receiving events

Unit 4: Optimization

- When to re-think your Activity Diagram: common syntactical and usability violations
- Using the principles and practices of elegance to optimize:
 - Communication and validation with users
 - Business process efficiency
 - Communication and design transition with software developers

