Objectivity

# Business Analyst HANDBOOK

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All Business Analysts, UX specialists and designers in Objectivity.

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Our creative translators Ewelina Kiełkowska-Czyż and Tim Clayton.

And many others who shared their knowledge, experience and ideas.

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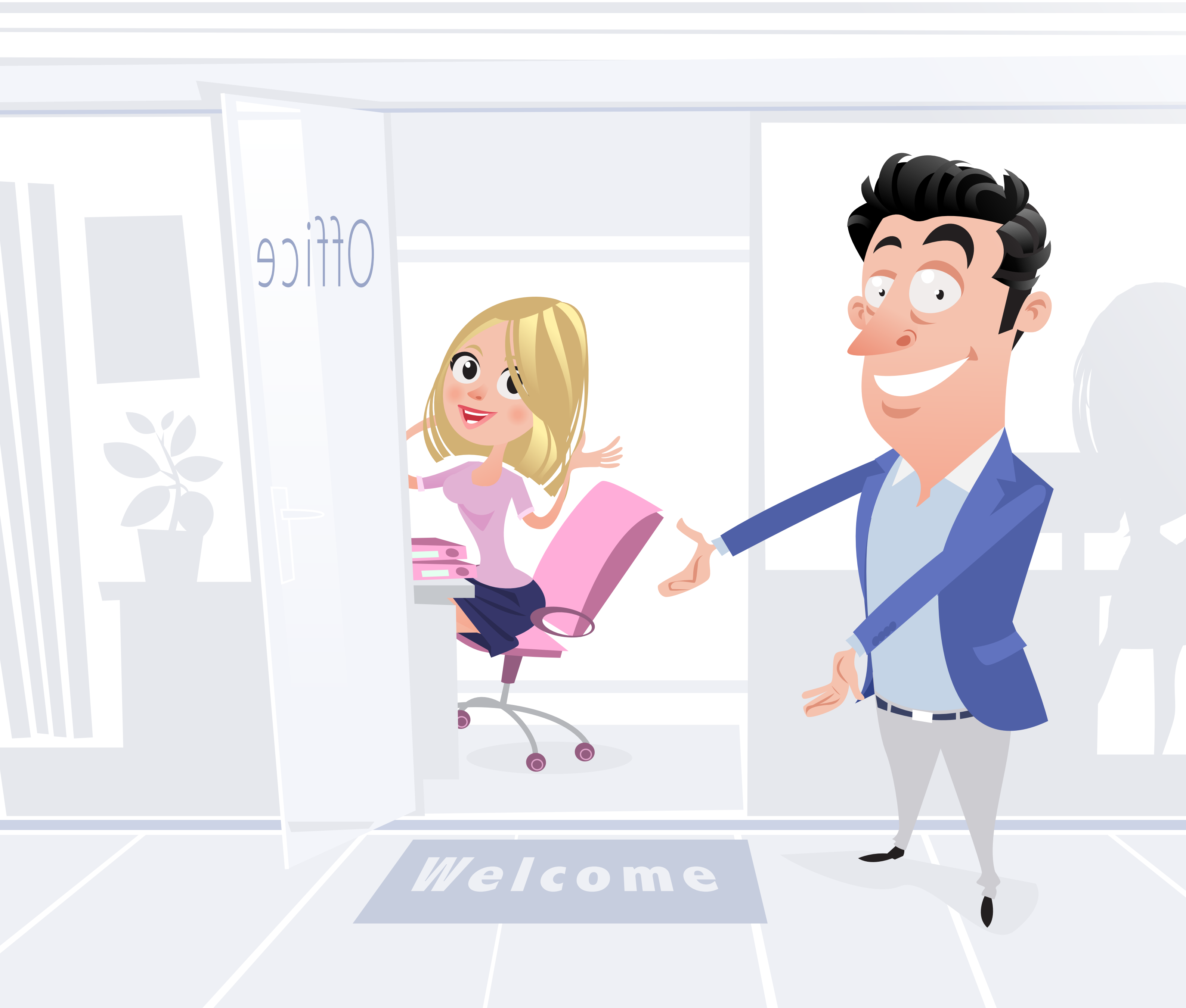
# What`s going on here?

If you’re reading this, it means that you’re applying for a Business Analyst position at our company.  We’re very glad about that and, in order to meet your needs, we’d like to present this handbook to you, to show how we work and who we are. If you join us, you’ll be working for a company, in which people are nice to each other, just as they’re nice to the customer.

## THE ONLY SMALL DIFFERENCE IS THAT…

in this company we communicate mainly through sarcasm and dress as we like; for the customers, we’re a bit more reserved and better dressed.




We try to create a working atmosphere, in which everyone can change the surrounding reality. So, if you feel that we can do something better, just suggest it. If you don't agree with someone in your team or with your manager, argue with them (constructively, of course). In principle, it's important for all of us that we articulate our needs. If there's anything you don't like, we want to know about it as soon as possible so we can try to make the necessary changes.

# Who is BA?

In a nutshell, a Business Analyst in Objectivity is a person who is a gateway between Business and IT – someone who translates the customer's needs into IT requirements.

What precisely will you deal with? We'll send you to customers and you will talk with them to understand what problem they want us to solve for them.

# UNDERSTANDING CUSTOMER NEEDS IS THE KEY TO OUR WORK!

Our customers usually know pretty well what they want, but sometimes the BA has to sweat the details in order to understand everything.

We've most likely hired you not because you have domain expertise, but because you're able to quickly understand a customers' needs and their business. We believe that you're able to get to the bottom of things without major communication mishaps. This last sentence clearly lays out our expectations: a BA should quickly define and understand the customer expectations and be able to efficiently establish good communications and a friendly relationship. We believe that this bond will help you to achieve the best possible level of cooperation. Our customers love the fact that, in many cases, we are able to offer solutions which they had not thought of themselves. Sometimes we are able to subtly show the customer that their idea is not the best one and, strangely enough, sometimes they agree with us.

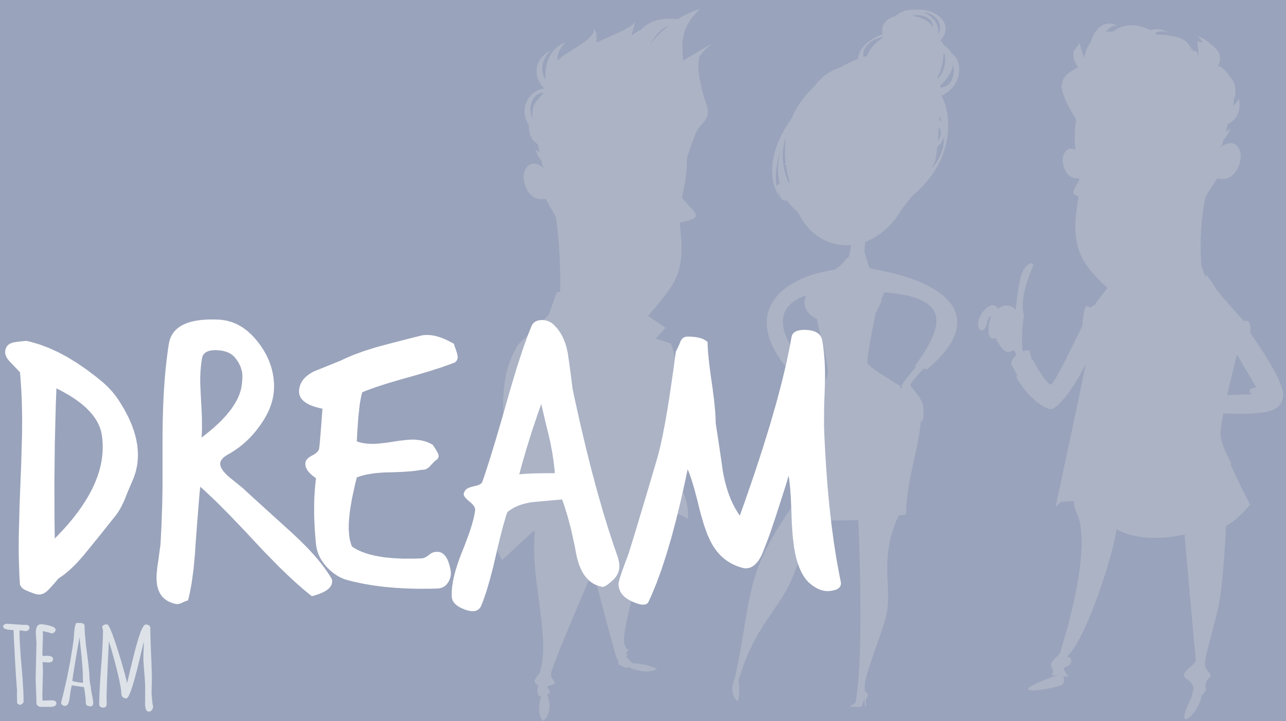
Oh, and flair for selling is very important.
If you feel that you can offer the customer something extra, like an additional module or role in the project, just do it! But it goes without saying that we don't force the issue – we don't want to sell ice to an Eskimo. We take care of our customers and only give them what they really need.

## WELL THEN, THAT MORE OR LESS COVERS THE CUSTOMER...

# AND WHAT ABOUT THE REST OF THE TEAM

You're the one who has to ensure that each member of the team knows just as much as you about the system and the customer.

Everyone should know the entire system context and nobody should focus on fragments. You'll see how great it is to work with a team in which everyone knows what to do (thanks to the conversations they have with you, triangle meetings and your documentation). Not only does everyone develop high-quality software, they also propose solutions which you haven't considered before…



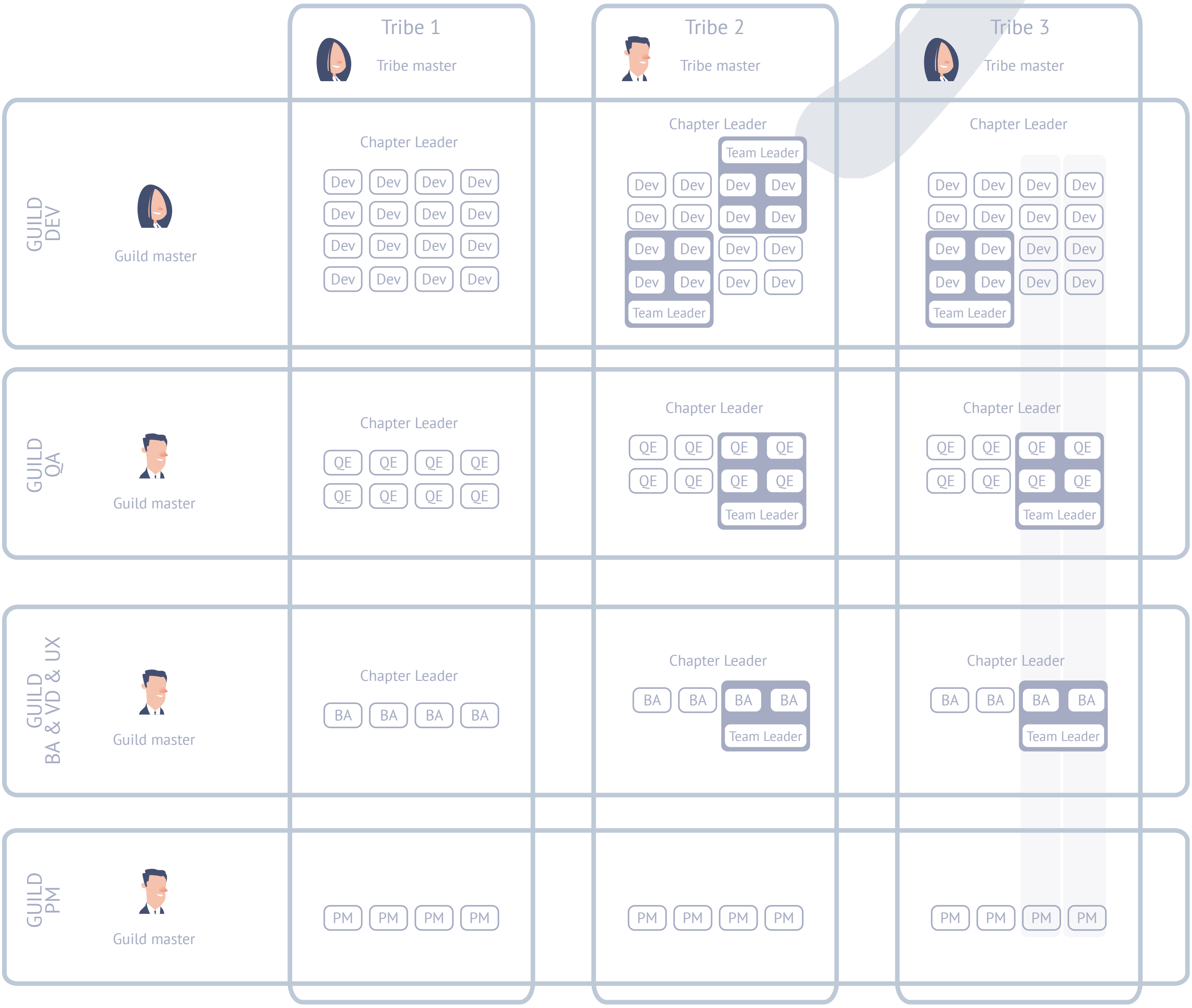
# How do we work?

## Structure

Some time ago, we concluded that we needed to change our structure to meet two requirements:

- **Minimise the number of hierarchical levels**
- **Adapt to specific customers**

A structure based on 'Tribes' achieves both objectives. Each Tribe has fundamental features in common, but also has a large degree of autonomy, enabling a configuration which will allow you to work effectively with the customer.



## Tribe

When we have several projects that are under way for one customer, we call this a Tribe. The Tribe is populated by all those providing services to a particular customer.
The Head of the Tribe is the Tribe Master. Each project within the Tribe is called a Squad. In addition to the developer teams (Squads) comprising developers, testers, UX, analysts, PMs and architects, the Tribe also includes some additional roles like PMOs or assistants. You'll find more information about these roles below. Just remember that almost each of these roles has its leader, who is called a Chapter Leader e.g. Chapter Leader Business Analyst.

## AN EXCEPTION IS THE INCUBATOR TRIBE...

...and Alpha tribe, and Bravo tribe, and others 12. As you'll notice soon, our company is driven by pragmatism, and this also applies to our organisation structure.

When we realise a small project for a customer, there is no need to create a dedicated tribe for it. Instead, we group these different squads into a single Tribe and one Tribe Master is responsible for all of them. Each of these Squads has its own PM and a full team but most of them work for different customers.

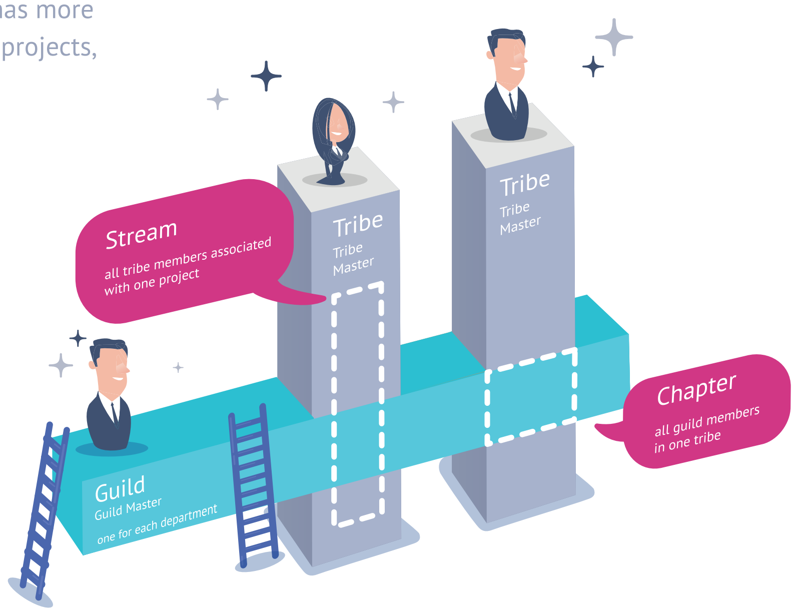
The Incubator is kind of special, because it has more than one Tribe Master and runs our internal projects, so it has a special place in our hearts.

## Chapter

Since there are many dependencies between the projects assigned to different Squads in a single program on which a Tribe is working, we need to share information. Therefore, an association of people dealing with the same task come together as something called a Chapter, which shares knowledge at their meetings.

## Guild

A guild is something like a craft guild. In general, Guilds hire their specialists for Tribes. Thus, a Guild is responsible for recruitment and development of appropriate roles and the provision of high-quality services. For example, a Guild recruits the testers and ensures that the Tribes have all types of testers (functional, automatic and performance) available. It's similar for the BA, developer, PMO and PM Guilds. Whenever the Tribe Master needs people, it turns to the respective Guild.
The most important difference between the Guild and the previously-described Chapter is the type of role it plays. A Guild takes care of its people and their development, organises training and initiatives that raise qualifications. A Guild's responsibility is to be up to date with trends in the market and the Guild Master, though their relationship with customers, ensures that the direction of Guild development is in line with the future needs of Objectivity's customers.



# Who's who at Objectivity?


We try to make the structure of our company as flat as possible. It's important that we're all colleagues who, in addition to providing decent software to the customer, have fun in an atmosphere based on partnership. We do not emphasise hierarchical levels; we do not establish unnecessary divisions.

# OUR STORY

## ONE RAINY ENGLISH EVENING, ROB HELLE WAS DOING NOTHING MUCH OF ANYTHING AT ALL WHEN A BRILLIANT IDEA FLASHED ACROSS HIS MIND:

To set up a company using new technologies.

Rob, a software developer, called his friend Sush (then an IBM employee) and they decided that they would start a company. And so it went. The company was founded in Coventry as a common child that would be raised well and grow up to be great.

Greatness is not easy to achieve, so Rob invited Peter Brookes-Smith to cooperate with them and, just six months later, he became one of the co-owners of the company. Unfortunately, their business was hit by crisis, so they began to look for other options of development. They went away to study maps and decided to meet after some time to agree the location of a new headquarters. Rob Helle was drawn to Eastern Europe; he had a friend in Wroclaw and decided that it was as good a place as any to start. He went to the Market Square, chatted with his friend, and found that he simply could not leave Wrocław. Some believe that Rob's prescient powers helped him predict the migration of the population from Poland to England and the development of the air links between the two countries.

When the company was growing, the guys decided that every employee should always have a clear direction. Some guidelines that, even in the darkest of times, would remind every Objectivity employee of the true power and identity of the company. These guidelines were divided into four core values driven by our Win-Win ethical framework:

**PEOPLE,** because this is our greatest asset. We do not have any off-the-shelf product, all we have is really smart people and guess what - with such people success is inevitable.

**INTEGRITY,** because we always have our customers in mind. We are not painting the grass green and our customers can always count on our genuine challenge and feedback.

**EXCELLENCE,** because we love what we do and, as you surely know, if you love something you can be fantastic at it.

**AGILITY,** because we do understand, we do care and we can adapt. We understand that while we are delivering projects inside the customer's organisations, something may happen. The direction may change, the priorities may be turned upside down. Do we like it? Well sometimes it hurts, but we do understand and we know that we can adapt with the least risk to the customer.

“

Being values driven isn't always easy, but we believe it's the best philosophy for successful, long term relationships.

As Peter once said

# Who's going to take care of you?

Remember that you can always get help from anyone working at Objectivity. Even though we support Coventry City FC, the Liverpool FC anthem "You'll never walk alone" suits us down to the ground. Below you'll find a brief description of the roles which will always support you.

## Guild Master, formerly Head

Like the head of the body, the head is turned by the neck. The Guild Master is the head of the department, and the neck is their assistant. There's no doubt that the Head of the department is the person without whom the Assessment Centre would not exist; so if you've joined us, you've already met them. Each CV is pierced by their penetrating eye. Sometimes there is more than one Guild Master, which makes it kind of like hydra.

This is the person who will first welcome you to our department and will present you to your leader and your team. Our company has no rigid hierarchy; therefore, the Guild Master is as available as any other employee and, most likely, has already passed through the same procedures as you.

It's hard to capture a day in the life of a Guild Master, because they're involved in many things at once. The Guild Master represents us with new customers and manages the work of the whole group, anticipating the future and embracing the here and now at the same time. They assign analysts to projects as well as making decisions about employment, training, conferences and shopping. They have ideas that cover varying degrees of craziness which we, as a group, sometimes try to implement in life – and sometimes we politely nip in the bud.

If you have problems getting hold of the Guild Master, it's probably because they are involved in several things at once. That's why a lot of things happen with the participation of their irreplaceable assistant.

Hint: The fastest way of getting in touch with your Guild master is to call their mobile.


There are more and more of us in our company, hence you'll meet the successive roles which help to support the Guild Master at different levels of activity. You'll be supported by the leader, mentor, HR team or assistants, as well as the Chapter Leader.

## Chapter Leader / Leader

This is your line manager. If you think of a manager as a person who does no more than pass judgment on your work, you will be surprised.

At Objectivity, the role of the leader is much broader and based more on partnership. It's someone who'll always give you a helping hand and will help you remove any stumbling blocks in your way.

If you're wondering how your growth in the company should look and what your prospects are, the leader is the person who'll help you make the right decisions.

Because we believe that the best way to help people grow should be based on their work results, your leader will collect feedback about you from people you work with – both in our company and on the customer's side. It's definitely not digging up the dirt on you; the leader will just tell you what you're doing well and what you're not. Not everyone is able to determine such things straight away and it's good to have this knowledge, hence the idea that the leader should gather this information. The fact that you've joined our ranks means that you know what you're doing. We want to support you and help you grow.

## Mentor

This is the person who'll induct you into the mysteries of the project in which you are going to work. They'll make sure to provide you with all the relevant business knowledge and customer information. They'll tell you how to work with the customer and about the people with whom you'll be in touch. It may be a BA who is already in this project or (possibly) a person who performs a different role in the project. Of course, such an approach makes sense only if the project is already underway. If you happen to join a new project, your role will be to acquire this information on your own. But don't be afraid, the rest of the people working with you will be happy to help you.

## Tribe Master

This is the main guardian of the customers' interests in our company and, at the same time, the head of all heads in the program. They usually deal mainly with policy and ensure that the best things happen in the program. They're interested in the high level of what is happening in the projects. They make strategic decisions on which the well-being of the program and our people depend.

## Human Resources

They are our good spirits. They take care of you quite comprehensively. First of all, you can go to them with any and every problem. Even though they are quite chatty and seemingly chaotic, you can rely on their discretion and they're able to professionally deal with any subject entrusted to them. The scope of their tasks is extremely broad:

- Induction
- Recruitment
- Soft training
- Coordination of technical training
- Coaching – if you want to work on yourself or your attitude to the world
- Salaries, contracts and all formalities
- Providing a family atmosphere
- And others

## PMO (Project Management Office)

The PMO supports the project. The name suggests that they help PMs, but do not treat them only as a PM aid. They are also an assistance for you! PMO handles all issues related to reporting of time and reports for the customer; they're responsible for messages concerning the progress of work and delays. They take care of improving the work of the team, which means all boards, minutes from important meetings and organization of customer visits. They are sometimes also responsible for the organisation of meetings. So go ahead and ask them to help you in the organisation of planning, retrospectives and other project meetings.

## Assistants

They are people, who assist those managing larger teams. At the time of writing, they usually support Tribe Masters and Guild Masters. Without them, both of these roles would be absolutely blocked. They take on all the administrative work and help quickly solve burning and sometimes unusual problems, such as: changes to the team's equipment, organization of a trip, training. Furthermore, they manage the calendars of their managers. If you want to chat with your Tribe or Guild Master, the easiest way to do it is to catch them via the assistant.They usually know where to look for someone, or when someone simply cannot be found.

# How are you going to be inducted?

You will be inducted by several people: Leader, Mentor and the team. You already know two of these roles from the descriptions above and you'll learn about the others from the following pages. Knowing these roles will help you get started.

## YOU SHOULD HAVE RECEIVED AN INDUCTION PLAN.

If not, please remind your leader about it. Thanks to this plan, the people inducting you will remember what to tell you and you'll know what to require from them. And do not be afraid to force them to cover all items on the list.

# FOR THE TIME BEING, IT'S IMPORTANT TO KNOW, WHO EACH OF THESE PEOPLE IS:

## LEADER, MENTOR, TEAM

The Leader and the Mentor will support you on an ongoing basis; remember that you can always go to them and chat as often as you like. The Leader should have a One to One meeting with you at least once a month, during which you'll talk about how you feel in the company and how you're perceived. You'll tackle the following issues:

- How you see yourself in the company
- How you can develop
- What you like in the company and what irritates you
- How you are perceived by others
- And anything else you want to cover

# The one to one meeting with your leader is your opportunity to talk about what's important to you in your work.

For the Leader it is an opportunity to listen to you and to convey the perspective of the people with whom you have contact every day. On average, a One to One meeting is held once a month. The main objective is to solve your current problems, to set mutual expectations with the leader and to give you feedback about yourself. Do not wait for a One to One to share feedback, ask for help or talk about any other issue – your leaders love to address things like these immediately. We want you to be able to grow and One to Ones are one of the tools at your disposal.

The Leader will try to find out about your well-being in the project and sometimes about the challenges, problems, or blockers which you encounter; they'll offer a different point of view to help you cope with these difficulties and, if necessary, help in solving them. Just a few questions from your manager are sometimes enough to get to the bottom of what you should do; other times the issue must be taken further and discussed with your team or the Tribe or Guild Master. Treat these meetings as an opportunity to chat about what you're interested in or what nags you.

The role of the Leader is also to build a fair picture of your position in the team and your competence. We expect the Leaders to gather feedback about you and present it to you during One to One meetings, just to make you aware of how the others feel about working with you, what you're appreciated for and what is worth improving in your working style.

Please remember that this is not about punishing, this is just having a sincere discussion about the needs of your team and about the direction of your development. If you have an idea of what sort of training you'd like to undergo, or any reflections on your relationship with your colleagues, these are also great topics for the One to One.

# ONE TO ONE
## MEETINGS

# How does your team look like?

## Project Team

You need to know that you don't work alone as a BA . Okay, you often collect requirements alone and conduct interviews with the customer. However, whenever you want to confront your vision of the world with someone else, remember that you can count on other members of your team.

# WHAT IS YOUR PLACE IN THE TEAM?

Quality Engineer

Errors will not slip her eyes.

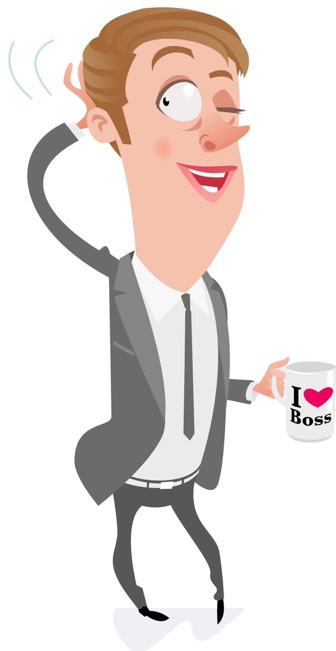
UX Specialist


Won't compromise on usability

Developer

Pure genius – he makes things happen.

Technical Architect



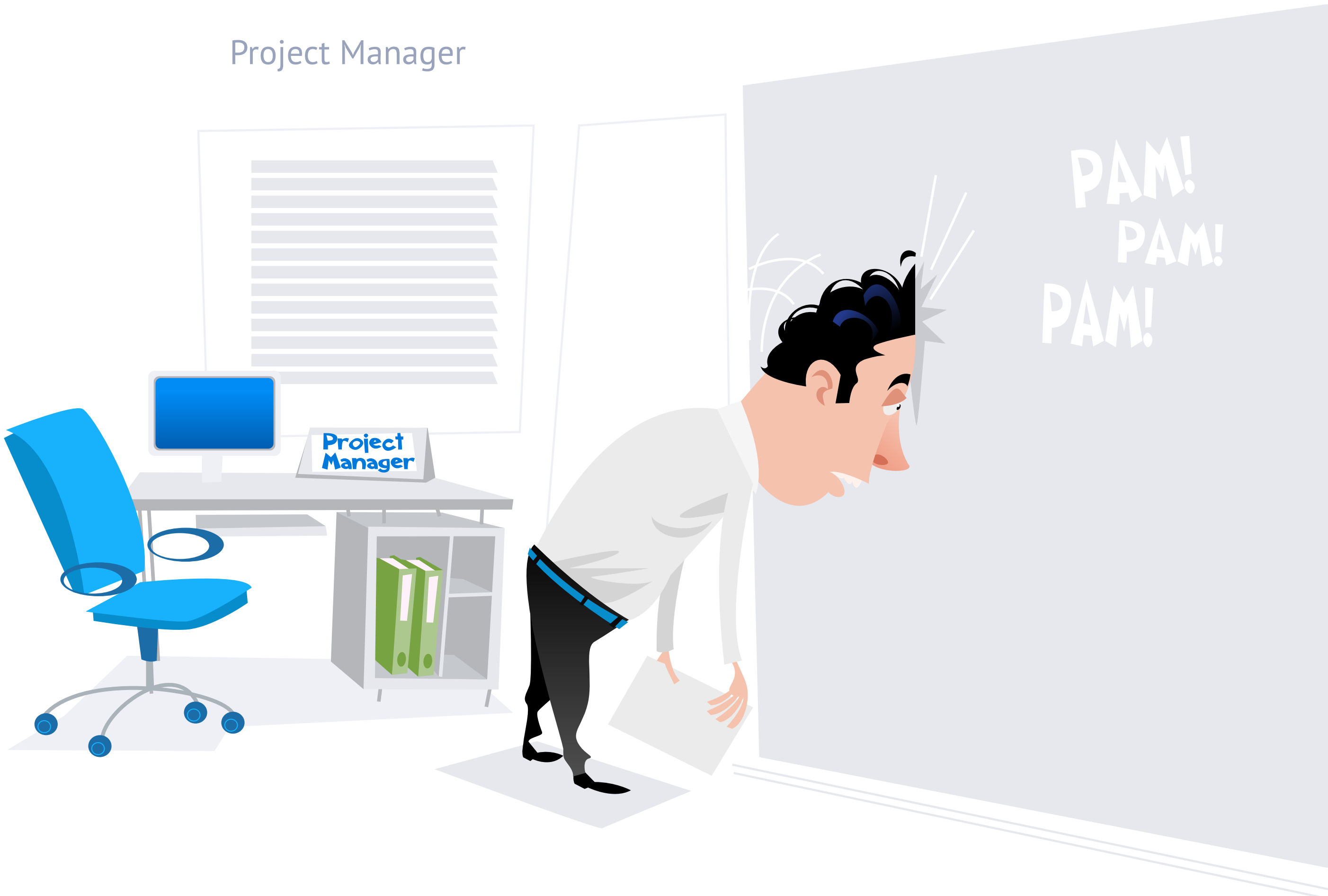

He is a technical guru with a "bigger-picture" of the system.

They all have considerable experience in IT and often perceive the world in a completely different way to you.

Brainstorming, in which they participate, often allows one to approach the problem from a completely different perspective and usually helps solve it quite effectively.

It's important to know who you're going to deal with in your daily work. Therefore, the roles are listed below. Some probably sound a little exotic but most will be encountered in your project.

## Project Manager



## Project Manager

It's really just a person that's a human being underneath it all – sometimes tired but always trying to strengthen their team as best as they can. Dedicated to the team and often defending the team, but also defending the customer. The PM plays both sides and it's a bit of a political animal, but our PMs are normal and honest people. They also undergo the Assessment Centre, so they're cool, communicative, funny, human and very much our own. Remember that they are also your support when you are in contact with the customer. If you have a problem, you need to push something through or just raise an issue, don't be afraid to go to them. PMs treat us as partners at the meeting with the customer and with the team. Investing in a good contact and exchange of information will help you avoid a lot of frustration.

## Quality Engineer

I'm sure you already know that... we design software. We want to make our customers happy with what we do. We want to satisfy their needs and we want our customers to recommend us to others. That's why we test what the developers come up with. You're responsible for understanding the customers' needs. The developers do the physical work and the testers check that they do not let any errors slip through the net. You need to know that we have the best developers out there, but they can be unruly beasts who sometimes like to add something to the code on their own. As eagerly as they check the code, our testers will reference the requirements which you noted down. Go ahead and give them your documents for review before you make them available to the entire team. For their part, the testers will just as willingly give you the test cases to check if they understood the requirements.

## User Experience Sepcialist

The User Experience Specialist is a person with whom you'll quickly make friends. UX people are creative and focused on the user and their needs. They must also take into account the business area and market area. If cooperation with UX is something new for you, it is important to remember that they are one of your closest allies. Thanks to their understanding of the users' perspective, UX specialist can help you in the process of defining requirements and propose proper solutions to meet both business and user requirements and needs. You should also remember that UX will closely cooperate with you and with the Visual Designer.

UX leads workshops with the client using Design Thinking, Design Sprint, Service Design and Product Design methodologies. You may think that those are buzz words but in general they help with resolving client challenges. We shouldn't forget about mock-ups and prototypes, designed by UX, that can be used as the early versions of the draft GUI. He or She tries to get to know the end-user and tries to design the solution in a way most convenient for a particular user. Close cooperation with UX makes a BA's life much easier!

## Visual Designer

VD is the solver of design problems. The Visual Designer explains the work done by UX and Business Analytics specialists on the user interface. He or she does not only create a beautiful project but can also explain design concepts and design decisions. The VDs main goal is to create user-friendly and visually attractive network, mobile and native applications.

The Visual Designer participates in the process of creating low-fidelity mock-ups as a consultant for UX specialists. Based on customer branding or after creating a new one, VD transfers mock-ups into high-fidelity designs. At this stage, they can verify all previous assumptions and see if the project can be converted to a real product. That's why it's so important that visual designers have a solid basis in user interface technologies. VD also provides all resources from design projects to the user interface developers. He or She checks whether the final products are compatible with our designs.

Finally, in cooperation with UX Specialists and Business Analytics, Visual Designers take part in the product improvement processes, which should always be based on statistics and research.

## Technical Architect

A technical guru and the person who has all the knowledge about the architecture of the proposed solution, they oversee the so-called "big picture" of the system from the technical side. If you have any doubts or general technical questions, the Architect should be the first person you talk to. Due to cooperation between the BA and the TA, we get a consistent look of the system both from the technical and business perspective.

## Developer

The person doing the actual work. As you've probably noticed, our company differs from the others because of the people who work here. So, don't count on it that the developer is an introverted creature who just creates the code. They are cool but (sometimes) grumpy beings who'll be screaming that something is not possible. The battle over the interests of the customer and emotions will be a feature of many project meetings. Without such conflicts our daily stand ups, project meetings and even integration events would not be the same. Appreciate their humour, and they'll encourage you to explain something just a few times more.

# AS YOU'VE PROBABLY NOTICED, WE ARE VERY AGILE. HENCE, YOU'LL MEET PEOPLE IN ROLES SUCH AS:

## Product Owner

The Product Owner is a person with whom you'll very often meet. The Product Owner makes all the key decisions regarding changes in the projects. Their main task is to maintain a coherent vision and ensure the product delivery will respond to the needs of the business. It is often the case that there's no dedicated PO and then this role is assigned to you. Then, you manage the priorities in the backlog and you decide on changes and what to discard from the backlog when the customer requires something new.


PROBLEM
!!!
BAM!
SOLUTION
MASTER
MASTER

## BA Team

Now, you're already a member of the analyst team. In one of the previous paragraphs we described what we expect from you. Now, it's time to let you know how the other BAs treat one another; it's more than just knowing that it's worth treating each other in a way that makes everyone happy.

In addition to the fact that we get along as a team, we have the following characteristics, which promote cooperation:

- **We trust each other**
  We speak openly about everything that hurts us or we don't like. We wash any dirty linen in public, because we don't fear that someone will use it against us.

- **We discuss things**
  However, when we provoke a discussion, we try to give it a specific purpose.

- **We are not afraid of heated debates which are, in fact, edifying**
  We should not dread conflicts.

- **If we decide to do something then we work together to ensure that the objective is achieved**
  It's sometimes necessary to help a person who has taken on too much – and to occasionally light a fire under someone who is slacking off.

- **Together we invent the best practices**

- **The group of analysts is growing as the number of customers for whom we work is increasing**
  Everyone, just like you, comes with different baggage resulting from their own life experience and the work they've done. We share this experience in the team and talk out loud about our observations regarding what we liked and what not.

- **We try to work out the best practices to follow, keeping in mind that we adopt an agile but not fanatical approach.** What works in one team and for a particular customer, doesn't necessarily work elsewhere, but it's good to have some patterns that act as a default in a given situation. We are not a corporation and we do not have a process for everything. We appreciate that we are constantly evolving the company and turning our good ideas into best practice.

- **We help each other when needed**

- **During your daily work you may have moments of doubt, hesitation, ignorance, or simply a lack of ideas**
  This happens even in the best projects; the trick is not to close up and suffer in silence. In our company you'll find a whole team of people who want to help you; they'll spend their time and energy doing just that. We're not afraid to take any challenge.

# BASICALLY, WE ARE A GOOD TEAM.

A fundamental objective, when creating a BA community in Objectivity, was that everyone could count on the help of others in any matter, especially an analytical one. Because not all of us work together in projects on a daily basis, the natural form of interaction is joint meetings, of which we have the following types:

## BA LUNCH

This should happen every two weeks and we usually succeed in doing it. We meet with the whole team and discuss various current issues. The most common points on the agenda are:

- Welcoming new employees
- Project case studies
- Sharing knowledge between projects – presentation of individual projects
- Ideas on how to develop the team
- Corporate perspectives
- Gossip

## LEADERS' BIWEEKLY

Leaders and Chapter Leaders try to meet every two weeks to talk about what has been going on. Discussions are mainly about:

- Guild strategy topics
- New and existing projects
- Recruitment and preparing for the Assessment Centre
- Preparing the base for the new people
- The situation in projects and programs
- Ideas and gossip

## INTEGRATION

In addition to solving daily issues by the sweat of our brow and integrating through pain, we get closer to one another in a number of ways – from having lunch together, to bowling, dancing and nights out on a traditional BA Day Away. If you have an idea you'd like to throw into the ring, we can't wait to hear it.

## Relationships

We strive to have the best relationships with the customer. We focus on freedom on both sides, so that we are not afraid to ask them about something and they also know that they will always be heard if they have anything to say.

As a Business Analyst, you'll spend most of your time with the customer. This can be in a variety of ways, from a visit to their headquarters, phone calls or calls by Tandberg, or even business dinners or over a beer. Remember that, apart from political correctness and remaining the customer's representative, the client is always an interesting, everyday person.

The English are an unusual nation, so try to avoid topics like religion, the Royal family or the weather. This will help you avoid unnecessary gaffes and stereotypes – for example, did you know that statically it rains just as much in Poland as it does in England? This doesn't mean that you shouldn't talk about any subject during dinner; on the contrary, try to reduce the distance between you and the customer by asking about things like the city and some interesting facts about the place.

A relationship in which you feel good not only helps you do your job better, it also means you get to know cool people with whom you can chat before a boring meeting and so on.

Check out this helpful glossary which shows you that what an Englishman says and what he means are not always crystal clear. They rarely talk about the negatives

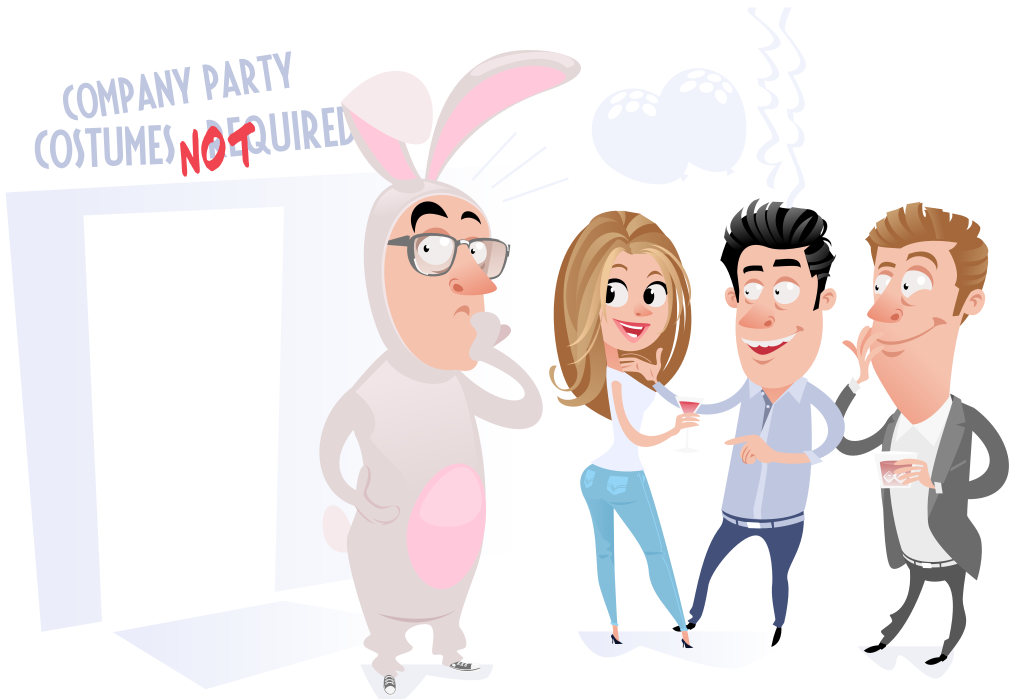
| WHAT WE/THEY SAY | WHAT WE/THEY REALLY THINK |
|---|---|
| With the great respect, but... | You are an idiot |
| That's not bad | That's good |
| That's a very brave proposal | You are insane |
| Quite good | Very disappointing |
| Oh, by the way (BTW) | This is the main point of the conversation |
| Very interested | It's total nonsense |
| I almost agree | I don't agree at all |
| I only have a few minor comments about your report | Rewrite the whole thing |

## We are brisk

Your role is one of the most independent in our team. Only a few things will be imposed on you and you'll much more frequently be the master of your time and working methods. As analysts we try to be quite brisk and proactive. We propose ideas and initiatives and are not afraid of changes; we do not wait until someone tells us something or someone appraises our work. You'll soon see that this principle applies to both the project work and the tasks that we set ourselves as a team.

## We react quickly

Agility is not only one of our company values, it’s our everyday life in the company. We try to respond quickly – sometimes by adjusting the reality to the situation. Don’t forget that the whole team is with you and someone else will be happy to support you in this. If you have too much of something… ask for help, share your work. If there is too much change going on, examine why. First and foremost, don’t let yourself go mad! But, at the same time, try not to put things off until later. This is also a reason why this handbook may already be out of date.Oh yes, one more thing. We do not have processes at all and even if someone wants to put one in place no one follows it



## We make quick decisions – sometimes wrong ones

Sometimes you'll be forced to make a quick decision; it could be because of the deadline, because you have to give something to the team or because you have to assess the risks. Try to make it as best as you can, without fear that it will be wrong. It's better to clearly say that there's a risk and act proactively than do nothing and act reactively. You're not alone in your work; please remember that you have experienced people in your team who like you take care of the interests of both parties (PM, Tribe Master, etc.)

## We travel – and when we're travelling, we dress appropriately

In our company, the BA is the face of the project. We've probably already mentioned this during the recruitment process. A trip to the customer is the moment when this face is most visible. We work with various customers, therefore there are no clear guidelines on how to dress... and that's OK because, as you already know, we don't like imposing rules. However, before you go to the customer, it's a good idea to check what norms are accepted there. During your first days someone will surely tell you about it – the person introducing you to the project, another analyst or your mentor. Use this time to learn as much as possible as you'll feel more confident if nothing surprises you – and there are many things that can surprise you. For some customers, we dress very formally (squeezed into a suit with a tie), for others a shirt is enough.

Some customers will prepare a place of work for you – a desk and a chair – but there are places where you have to arrange it yourself. It's worth checking whether the meeting which you organise has a room, an audience and whether you should take printouts with you. If you are prepared, you'll surely avoid a few stressful situations.

When going on a business trip, we often sleep in hotels. Ask what equipment is there; maybe ironing your shirts at night before the journey is a waste of time because an iron is available. Don't be afraid to ask people in the team... even about such little things! Please remember that we act following the rule "It's worth talking".

And now a few general comments. Keep in mind that most likely you're going to a country where:

- cars are driven the wrong way around – so watch out at the pedestrian crossing
- if you're getting into the front of a taxi, the driver sits on the other side
- people walk the other way around
- the escalators are installed the other way around
- you order beer in pints – 1 pint = 0.56826125 litres
- if you order ale, don't make a scene that it has no gas – it's a feature, not a bug
- while on the street or in the hotel, do not comment on the look of the locals in your native language as many people will, rather unexpectedly, understand you perfectly

# How are you going to do it?

Now it's time to, at least partially, bring you closer to our work methodology. It should seem quite logical and natural. If you want to approach the project in another way, please go ahead and try it. But first see how we've been doing it up to now, because it has produced quite decent ideas and ideas.

## Cooperation with sales

The analyst often helps the sales team. Sometimes they simply add items to the list of questions; in other cases, they go to the customer to collect some initial requirements necessary to send the customer a quotation.

You ou need to be aware that you are also a sales person to some degree. When cooperating with the customer and supporting them in solving their problems, you see how you can help them. You'll sometimes be better aware than the customer that some areas of their business should be computerised. If you feel that we can deliver value to the customer, suggest it. And it doesn't matter whether you propose additional or different functionality for the system that you are discussing, or another module or additional system to support a completely different department. Remember that one of our values is Win Win. Do not attempt to sell ice to an Eskimo; suggest what is needed. Remember that, as a company, we can offer additional services which the customer is not aware of. These could be UX services, UX tests, performance tests or consulting. Be aware of the range of our services so that you can share this with the customer where appropriate.

## Responding to an RfP

It is highly probable that you'll be asked to take part in a "bid". A Bid is an event when Objectivity creates an offer for our potential client, and you as a BA play a key role in it. We have dedicated training to take you through all the twists and turns of this process, but it may be the case that you'll be involved in a Bid before the training, so here are few hints for you:

- There are several steps in this process, so it might look complicated at first, but a bid coordinator will go through them if necessary. In general, a bid coordinator is your best friend, because he/she is the person who knows what and when things need to be done and will help you to get whatever is needed to get your job done. In addition to a bid coordinator and you, there will be a Technical Architect, a few developers, maybe a UX and others if needed.

- The most important part is that you will be responsible for creating a functional backlog that addresses the client's needs. Based on that backlog, the architect and the developers will build a technical solution and estimate it.

### Main things to do:

- Go through all documents available and read even the small print at the end of the document

- Make sure you know how to describe your solution – this will become a crucial part of our proposal

### Things to remember:

- Listen to everyone around you but at the end of the day you OWN the solution from the functional perspective – there is no one else to tell you what needs to be done

- The assumption is that you know how to build a backlog and work with the technical team, if you don't, ask you leader or Guild Masters for help

- Don't build a limousine if the client needs a bike to achieve their business goals – fit for purpose is what we aim for

- Understatement is your biggest enemy! Do not leave any space for interpretations of what you expect or do

- Do not be afraid; treat this experience as a short and challenging project during which you will have a chance to learn a lot about the company and how we work and maybe even contribute to gaining a new client

# High level development process

At the beginning we will tell you, in general, how our process works on a high level. You'll find more details below.

When we have an agreement with a customer to start the project then a few phases take place:

## 1. Research Phase / Transition from bid

a very important part of the project is the beginning! Proper takeover from the sales team, walking through documentation that was gathered during the BID and understanding the full picture of the organization as well as the people you will work with – those are activities you will be involved in.

Familiarise yourself with documents, talk to the people who prepared the proposal, try to understand the ideas presented in it, the vendors and company culture.

If possible, familiarise yourself with the domain, even if this means YouTube discovery .

## 2. Discovery Phase

This is the first time that you can work with the client. Most likely at their premises.

Business needs identification, as well as goals and objectives are most likely defined and described during the bid preparation, nevertheless this is a place where you can state and confront them with all stakeholders. Facilitate their analysis and involvement in the project, conduct a workshop to specify what they need and challenge them. Try to get as familiar as you can with the domain knowledge they have or can provide to you. Use the knowledge, expertise and help of you team members i.e. UX specialist. They will be delighted to go hand in hand with you during this period.

Do not be surprise if the scope and set of requirements were prepared by the customers' IT department ,but when it comes to the real case usage of the system/app it's the users who determine the work to be done. The delta between what's been proposed during the bid and what came up during this phase must be identified and clearly emphasised so that both sides (client and Objectivity) have a common understanding of the outcome of this phase.

Be bold, challenge ideas, propose, be open and stay focused, draw mock-ups or simple flows.

As a result of this phase, several artefacts must be generated. Those are: clarified client goals and business objectives, story mapping and backlog (with MVP), validated assumptions and risk assessment. Agree who you will work with and how you will deal with potential impacts, mitigation plans and change management.

You may be taking part in the Discovery for the first time, if that's the case ask for the guidelines that were prepared for cases like yours, they will help you to get your head around it.

## 3. Kick Off and Sprint 0

Once the requirements are agreed, it's time to form the team and get things done! Here comes Agile development and sprint iterations. Before you put yourself in this vortex, make sure the people involved in the project have the same understanding of its goals and objectives, and are agreed on the way of working. It's time to state the Definition of Ready and Definition of Done, and agree who is responsible for what. It may seem that all roles in the project know what is expected from them but be aware that people come with different experiences and they may differ between Tribes.

Expressing roles and responsibilities with the team, as well with the client, at the beginning, will save you a lot of frustration and unnecessary misunderstandings.

You have time here to prepare the first backlog items.

### 4. Development

With the customer and TA, you assign the priorities to the individual User Stories. We divide the development period into periods called Sprints. They usually last from 2 to 4 weeks. For every Sprint you choose from the set of User Stories that you earlier described.

On the first day of the Sprint, you present the User Stories (requirements) for the Sprint and pass them to the team. The team deconstructs them and plans their work.

During the Sprint, you support the team in their current work and describe the US, which will be considered in subsequent Sprints.

You always ensure that you're communicative; you explain the whole context, and you take care that even those who want to know only a fragment acquire all the knowledge.

There's a demo at the end of each Sprint, during which we present the customer with what has been developed during that Sprint. In fact, we may say, that the purpose of the Sprint is to feel no shame during the demo.

And since we don't lie to the customers and we don't colour reality; if we fail, that's where a small sense of shame lies.

Once per Sprint, we carry out backlog refinement. It's nothing more than throwing away outdated requirements and updating the remaining ones. This applies to both the content of the requirements and the estimation.

### 5. Project completion and Hypercare Phase

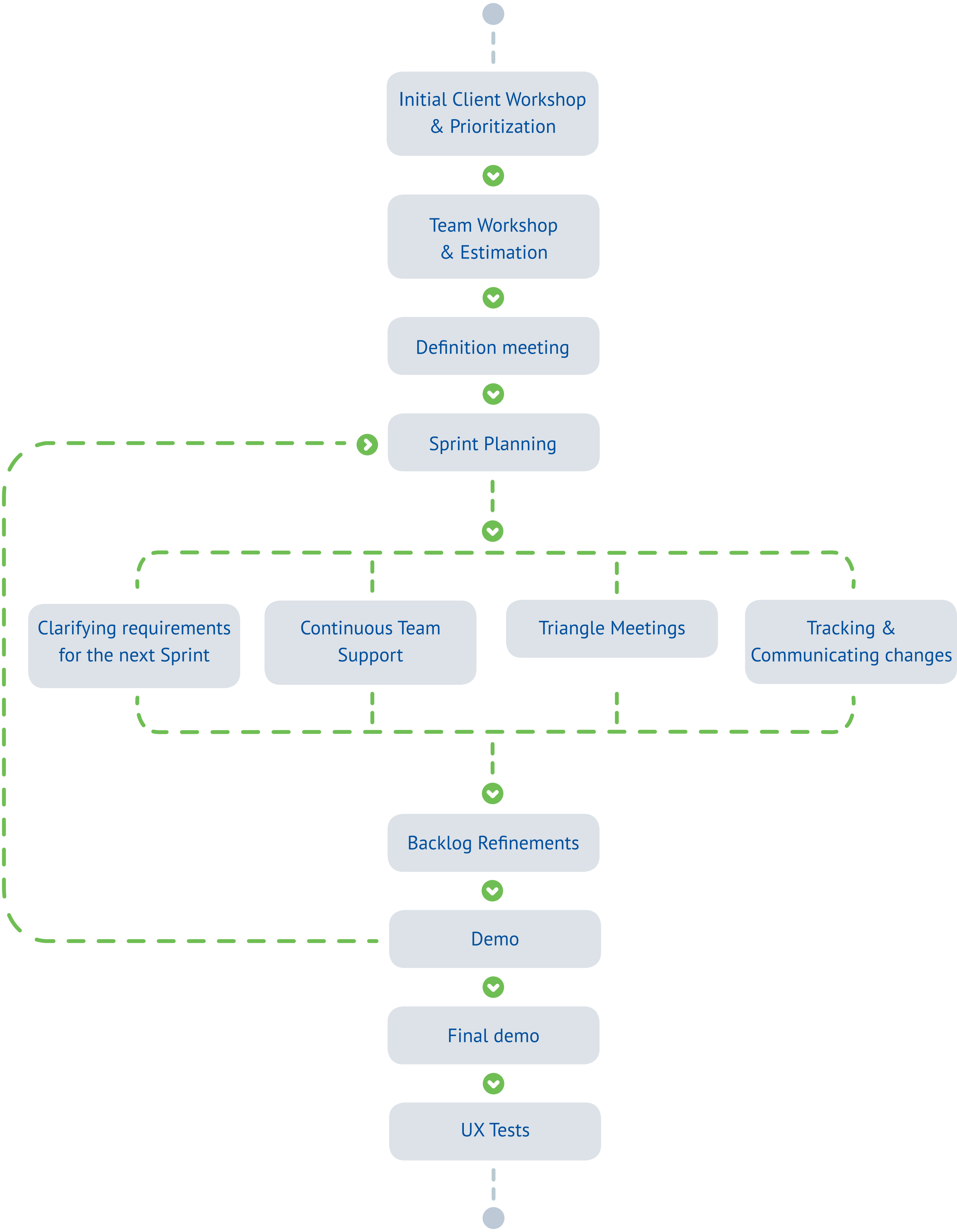
The end of your project does not mean the end of your work. Before you jump into new open waters, make sure all items are closed, documents are stored, the user manual is up to date and the project is handed over to the client or to another BA.

Use this time to train users (if needed), after all it's time for you to be happy and celebrate your success. Congrats, you've just made somebodies life easier and your work is appreciated.

## Process exceptions?

Mostly we work using the Agile and Sprint methodologies, but there are situations/ clients who prefer other ways of doing things. Fixed Price projects and Kanban mode should not scare you! Make sure you understand what is expected from you and by when. Bear in mind all changes made to the scope, and always handle them according to the agreed process. If you feel lost – ask you PM what to do. You are never alone, the worst thing you can do is to keep it to yourself.

# HIGH LEVEL DEV PROCESS



## Sprint planning

OK. You've agreed with the customer what they need. You already know what the priorities are. It is a good time to start the producing process. You already know that the project is divided into Sprints. So, select a few key User Stories and let the team start developing them.

However, before they do this, it is good to plan the team's work before each Sprint. The meeting, devoted to planning, is called the Sprint planning meeting.

At this meeting you present the team with each of the User Stories chosen by you. The ideal flow of such a meeting is:

- Presentation of US
- Deconstruction of each US by the team and subsequent estimation

Treat the presentation of the US seriously, just like a presentation in front of the customer. The more you think everything through, the less difficult questions you'll get from the team. Have these requirements described and have as many images as possible, such as diagrams and mock-ups of the UI. Remember that the team will then break these requirements into development tasks and estimate them. There will be a lot of questions about the details.

Don't get angry if they torment you – they don't do it because they are nasty but because they need this knowledge. Estimation is necessary, to be sure that you'll develop everything during the Sprint.

Oh, and it helps to know that there are checklists

that help the developers and testers to decompose US and produce estimates. Ask for them.

## IF YOU DON'T WANT TO HEAR DURING SPRINT PLANNING...

that your requirements are not feasible, send them to all members of the team about 4 days before the event. Of course, don't send all of them, because no one will read them. Just let everyone get 1 or 2 user stories for review. If there's anything they don't like, you'll still have a day or two to make a change or improvement. Thanks to this, you won't find out at the sprint planning meeting that your requirements are incorrect.

## Deliverables – backlog, user story, drafts

During your work you'll create quite a lot of documentation of various types, depending on the customer, the type of the project and the stage of the project.

In fact, not only the documentation will be the result of your work, but a few other things. More about them below.

### BACKLOG

This you already know. It's just a list of functionalities that we need to develop. Each of these functionalities is called a User Story. The elements of a backlog should include priorities that you have determined with the customer.

### USER STORY

A single requirement which is a part of the backlog. This is usually a functionality but it depends on the way in which you've deconstructed the system into requirements. It might as well be a screen with a few selected items and only a description of the behaviour of one of them. The principle is that the description of one US doesn't contain more than four A4 pages, contains as many drawings as possible and is communicative. If not, the others will probably be rather reluctant to read it. Ask someone for a template and sample US.

### EPIC

A large unspecified functionality. If the customer wants something big and yet neither you nor the customer has an idea for it, then you place such a rudimentary description in the backlog.

### BSR, FDD, SPECIFICATION

We sometimes describe the requirements in a different way than in the form of a US, perhaps because some of the customer units so require. We then use their templates. It happens that for the team we make "our" US and then for the customer, at various stages of the project, we pack these requirements into the customer's template.

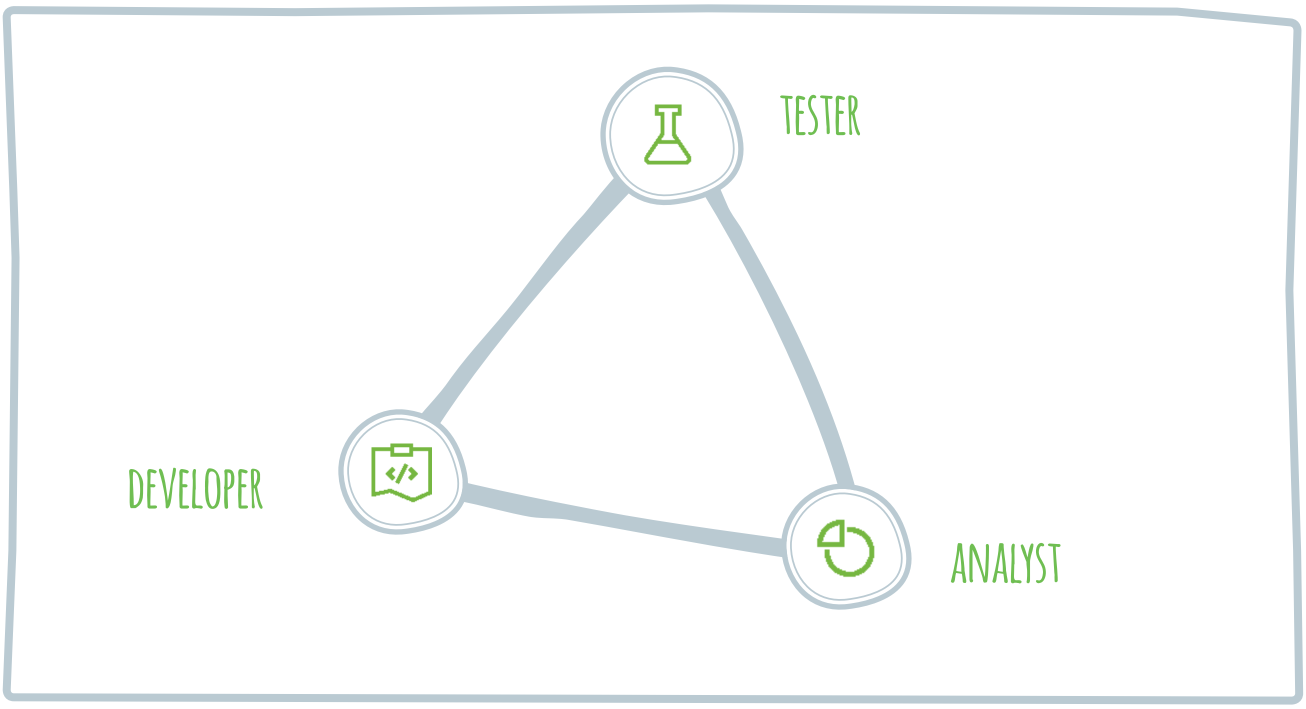
### PROPOSALS

The sales team assembles various documents at the sales stage. They may sometimes ask you to drop a line for them. Typically, this is a chapter of "their" document.

## Triangle meeting

Once you have written the requirement documentation, after the task planning and estimation, you may get an impression that everything is now clear for all parties, everyone in the team has understood what you presented during the planning and there's nothing else but implementation and then tests. The "Triangle meeting" is going to put you right quickly.

# PARTICIPANTS




This is a meeting that should precede the start of the developers' work. During this meeting, the analyst once again presents selected US to the developer and testers, carefully explains the task, describes the business benefit resulting from it and, most importantly, answers a number of questions, agrees on a common interpretation of the individual points and explains all inaccuracies discovered in the document. It's a short meeting but it sometimes saves the developer an unnecessary waste of time and spares everyone a few nerves at the end of the Sprint. This is often the point after which you'll need to update the US and make the necessary corrections.

## Communicating changes

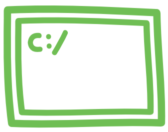
You've described and thought over the requirements for the current sprint, the team have started developing… and the customer suddenly makes some changes.

Theoretically, according to the cardinal rules of Scrum, it is not allowed. Fortunately, we're not so badly indoctrinated. No matter whether it is you or the customer that makes the changes, simply communicate them to the entire team. Talk it over with the TA and with someone who is developing or testing it. If the thing that is changed hasn't been developed yet, or if the change does not require dredging through the code or is not much more expensive, just do it! If additional effort is required, tell the customer and let them know that it's possible to implement the change but it means that we can do nothing else in a given Sprint. It's also possible that you'll have to throw out some other US from the backlog if we are to meet the deadlines.

## Demo

At the end of the Sprint (though there are other variants), we present the Product Owner and other interested parties with what our team has made in the concluding Sprint. It's advisable to start such a demo from a review of the backlog and presenting to everyone which tasks we've managed to finish in this Sprint.

**THEN, AS FAR AS POSSIBLE… WE PRESENT THEIR EFFECT IN THE RUNNING APPLICATION OR SYSTEM.**

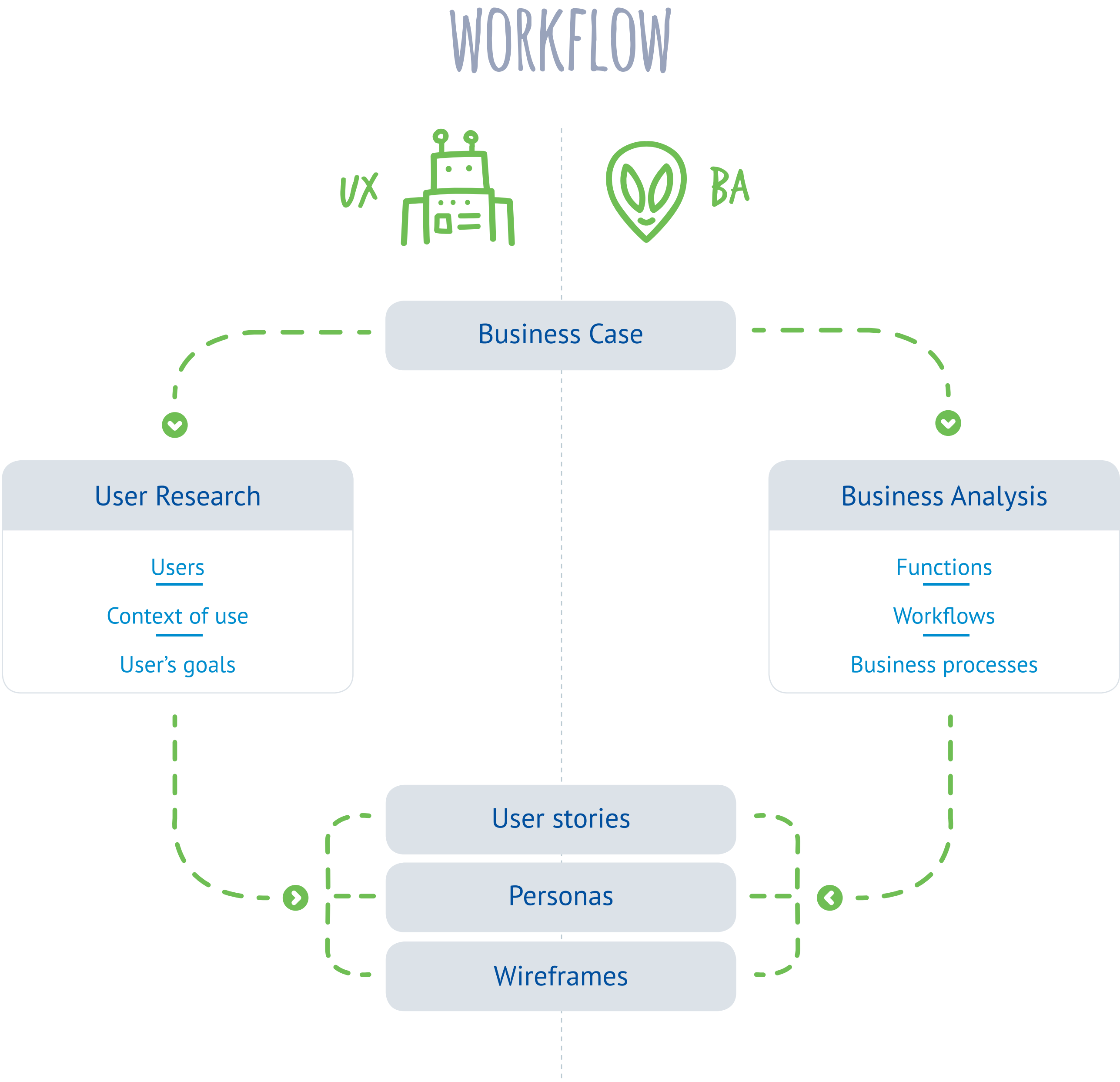



We can do this directly at the customer's premises but, very frequently, we just share the screen with the customer. There is no strictly defined scope how large the part presented by the analyst, among the new functionalities, should be; it is good, if the analyst at least coordinates such a presentation as a whole.

It's important to remember that demo is not only where the presentation occurs but is also used to obtain feedback from the customer.

## Cooperation with UX

It may happen that a person dealing with the User Experience will appear in your project. Their main task is to assist in making a product that is useful and adapted to the needs of the end-users. You'll work with the UX at various stages of the project.



In the early stages, UX will accompany you in gathering requirements (through workshops and interviews). However, they will focus on the user requirements.

Base on this, they'll create personas and mock-ups, or interactive prototypes of the user interface, which you can attach to the description of the User Stories and use, for example, during the refinement process.

Throughout the project, they'll ensure that the created system is useful, effective and provides the best user experience. Please remember that UX is there to make your life easier and help you in decisions connected to, for example, the colour of the buttons or the arrangement of fields in the form.

# HELPFUL TIPS

### KEEP THE FOLLOWING ACTIONS IN MIND:

- think the scenario over and write it down (it's also advisable to talk it over with the testers)
- prepare the data
- set the appropriate environments
- ask the testers to test the selected scenarios

### AND BEFORE THE PRESENTATION:

- print scenarios
- set up the telephone conference
- check whether phones, screen sharing, network and other solutions are working

# THEN JUST LOG ON, TALK, ANSWER QUESTIONS AND WRITE COMMENTS.

## Refinement

The thing about the requirements is that, from time to time, they become outdated. The ones that seemed to make sense at the beginning of the project don't necessarily make sense at the end of it.

Therefore, once a week, the entire team sits and reviews the backlog:

- Future requirements are reviewed and, if they are outdated, they are removed or combined with others.
- US estimates are reviewed and, if necessary, updated.
- The team takes note of what has to be done in the following Sprints; it shares the knowledge about the whole system.

## Any exceptions?

The above process represents about 80% of cases in which we work. However, there can be projects in which the process is completely different, as well as short consulting works during which we behave differently.

In fact, in each of the following tasks, you can use the workshops that we describe in the process. These techniques are quite universal. To date, additional tasks which BAs have dealt with in Objectivity can be divided into the following groups:

- **Preparation of RFP**
  Almost every British customer requests the vendors to provide a quotation. This request is called an RFP – Request for Proposal. They describe what they want in it. In the case of IT solutions, this is usually a specification of a system which is to be developed. We sometimes help our customers to create such an initial specification. To do this, we often investigate their processes and learn what they need at different workshops.

- **Reply to a customer's RFP, pre-sales analysis**
  In order to reply to a customer's RFP, we sometimes help the sales people to make a list of questions to the customer. We sometimes go to the customer to talk to their people and to detail what we've found in the RFP.

- **Consulting at the customer's premises – inventory and process optimisation.**
  In the recent times, we mainly do it to help with preparation of the RFP. However, it has happened that we've helped to carry out transformations and created AS-IS and TO-BE process maps. Besides, even if you support the development of software for the customer, it's sometimes good to understand their relevant processes. So feel free to ask the customer about their processes. The more you know about their organisation, the more value you can deliver.

- **Support**
  Different people in the company may ask for your support. These may be sales people requesting you to ask questions to the customer, HR may ask you to inventory their processes.

## What you can teach us

Now that you're here, you've probably brought with you an interesting load of experience and considerable expertise.

If you've seen an interesting way of implementing projects, helpful tools, intriguing ideas or anything that might make the project better or more efficient, share this knowledge with us; we'll be happy to hear it.

# Now, do you know everything?

Congratulations, now you know everything – and what you don't know has been cleverly hidden from you.

## RESPECT FOR READING THIS HANDBOOK!

And now go for coffee and then get back to work!


Handbook

www.objectivity.co.uk