



The Role of the Analyst in Agile Projects

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There is a gap in much of the literature about Agile software development practices, and on many Agile teams. This gap is the role of Analysis in Agile projects – who does it, what is the use and value, and how does it change? The implied (and I have heard stated at least once) attitude is “we don’t need no stinkin’ analysts” – needless to say I feel this is **WRONG!** In this article I make the case that the Business Analyst can play a useful in relation to Agile teamwork – when properly aligned with the business, rather than with the development team, as is too often the case.

Why be Concerned with the Business Analyst Role?

It is my contention that, without the analyst, real gaps occur. For example:

- Who looks at the bigger organizational problems?
- Who identifies the underlying conflict between what management want (the Customer who pays for the software development, after all) and what the “Users” (a horrible term – but that will be the subject of another discussion) need in order to do their jobs effectively?
- Who identifies the fact that there are (say) 1500 people who are currently doing their jobs in one way, and that after we’ve implemented the new software will need to significantly change their work patterns?
- Who helps these people design new organizational procedures to ensure that the business continues to run smoothly as the changes are made?
- Who identifies the potential lost business due to a poorly thought out customer interaction?
- I could go on, but you get the picture.

Alan Cooper gave a great talk recently at the Agile 2008 conference (http://www.cooper.com/journal/2008/08/alans_keynote_at_agile_2008.html) wherein he spoke with passion about the need for inclusion of Interaction Design in Agile projects, someone who understands how people behave and who can help the Customer come up with guidelines for the technology implementation to ensure that the resultant product works effectively in real-world use.

My contention is that this role is one which is ideally and effectively undertaken by the Business Analyst, and is something that we should have been doing all along. It is part of what we are trained for – understanding the broader business needs and interpreting these needs in ways that make sense to team members who are more focused on the technology. Traditionally the custodian of the focus on the human need has been the Business Analyst.

Business Analysts Contribute to Team Success

I strongly believe that the de-emphasis of the importance of this role is one of the major gaps in many Agile teams today. In many organizations the analyst role is hobbled – unable to effectively deliver the value they promise due to organization structure and lack of management support. The business analyst needs to be seen as the customer advocate, part of the business-focused solution provision team, rather than a purveyor of technology. Politically empowered, trusted and acknowledged for the perspective and understanding they bring, the business analyst should ideally report into a business improvement area, not into the information technology group. In this structure the business analyst will be empowered to recommend changes with a clear focus on the business value, rather than being perceived as the “lackey of technology” as part of the technology group.

What about Systems Analysts?

Note the distinction here: we are talking about Business Analysts, not Systems Analysts. Where does the “Systems Analyst” fit? While the systems analyst often has the skills to undertake business analysis effectively, I make a distinction between the two roles based on their perspective – the business analyst focuses on and is driven by an understanding of the business needs whereas the systems analyst is often biased towards, and focused on, a technology-based solution, sometimes to the point of being detrimental to actually solving the business problem (“Wow, have I got a solution for you!”). Systems analysts can be good business analysts, but they need to be very careful to suppress their urge to propose technical solutions!

Why Use an Analyst? We Want a “Customer”

The analyst spends time getting close to the diverse “stakeholders” – people who represent groups and organizations that care about the successful delivery of the business change. The analyst needs to understand the multiple dimensions of the business need; discussing with management the overall goals and objectives; working with the legal department to identify any legislative or litigious impacts of the new/changed business processes, working with the logistics department to identify changes to office space or warehouse layout and to understand the potential impact of the processes on the flow of

materials or products through to dispatch; with the administrative staff to understand the potential bottlenecks that could result from a new approval process... and so on.

At some point in the analysis investigation it will become clear that solving this business problem potentially warrants an investment in technology. At this point the analyst role changes a bit and we get involved in the technical feasibility discussions – the “build vs buy” decision, the insource or outsource decision. At this stage traditionally the BA role is involved in developing the Business Case, which is still needed by the business when using the Agile approach – projects still should be justified in terms of the business benefits they will deliver to the organization. Without this valuation, the ongoing prioritization effort required for Agile backlog management can lack “big picture” vision, resulting in requirements thrash.

Once these decisions have been made and it is decided to spend some money on the technology, the analyst role changes yet again – now we become the shepherd of requirements; the collector and guide of stories. This is where the analyst actively intersects with the Agile project and becomes a vital participant with the Agile software development project team, representing customers and end users, and collaborating with the other team members to meet a clearly identified Business Need which we believe will benefit from a technology-based solution.

The Analyst works with the project team to corral the stories – acting as the customer advocate to the team, facilitating User Story definition, and being the project advocate to the wider stakeholder community, taking responsibility for getting the right customer voice to the project team at the right time. This “customer”, so blithely referred to in much of the Agile literature, is not usually a single homogeneous individual, rather they are an amorphous mass of “stakeholders” – a diverse, often contradictory, frequently competitive, sometimes negative group with divergent points of view about what the business need is and what “done” looks like.

Does the previous paragraph imply that I don’t believe in the “on site customer” – NO! I believe very strongly that we need an onsite customer for the Agile development process to be successful. The challenge we face is that there will be many customer voices, often shouting contradictory orders at the team. The Analyst must be able to filter the signal from the noise and help to identify the right representative customer(s) who should be involved with the project at any point in time.

So What Does this Analyst Actually Do?

On an Agile project, the Analyst also becomes the shepherd of stories – guiding the discovery process and facilitating the communication among the team, helping the customer representative(s) by asking probing “what if, what about” type questions, based on the broader investigation which initiated the project; building on their mapping of the stakeholder community, their understanding of the intricate political and influence relationships which underlie the formal structure of the organization and their ability to

tap into funding sources to gain access to real-world clients (the people who actually pay for the services the system will provide) to gain an understanding of what is needed to create competitive advantage and Customer Delight – which ultimately results in commercial success.

The analyst needs to have a broad range of investigative and interpersonal skills, the ability to think critically and skeptically, using a variety of modeling techniques and other tools to help the customer representatives discover the range of stories which will ultimately make up the system. The analyst helps them express these stories in clear and understandable ways that make “done” explicit and knife edged, works with the testers and customer representatives to help identify and clarify the acceptance criteria for the whole gambit of stories..

The best analysts are involved in every aspect of story identification, and actively involved in the interaction design for the system. They have an understanding of the various ways the broad community of users will need to interact with the system, understanding the divergent needs and smoothing the differences to identify the design aspects which will work for the disparate stakeholders.

Agile Analysts are Designers as well – with an understanding which goes far deeper than simply identifying and documenting the requirements for the system. They understand the implications of screen flow and ensuring that process flows match the way people actually work, they are aware of the impact of colors and fonts, of screen layout and response times on the productivity of the people who use our systems. They look for opportunities to create truly useful systems that people want to work with, and work to guide the creation of intuitive and natural interfaces; ideally interfaces that seem to disappear, so easy to use that the operator doesn’t even notice that they are there.

The traditional analysis “what before how” approach doesn’t apply on Agile projects – most often we understand the “what” by showing the “how”, in a productive and iterative cycle that is an inherent part of the Agile development process.

Look and Feel matters – the Agile Analyst helps bring this into sharp focus when the interaction aspects of the system are being worked on.

The Agile Analyst focuses on ensuring that real business value is exposed and uncovered by working with the project team and customer representatives to find those aspects which make their work easier, more productive and deliver Customer Delight, the “stickiness” which keeps our clients coming back to do business with us over and over again.

Who Should Play the Analyst Role?

The Product Owner or chief customer advocate in a Scrum project is a role ideally suited to the Agile Analyst, provided they are empowered and supported to act on behalf of the

customer. The Analyst is in the position to actively manage the product backlog and identify product priorities. Building on relationships with business stakeholders and an understanding of technical realities the Analyst can actively manage the delivery of value in the project.

The Agile Analyst needs to be an active and productive member of the business project team, not trying to produce a lengthy tome of “shall” statements, but representing, advocating and shepherding the many customer voices, asking the hard “have you thought about. . .“ questions, ensuring that the products we deliver meet the diverse and competing needs of our customers, understanding and indentifying flaws, flows and issues with discussions and interactions within the entire project team, based on the User Stories current and past.

The Analyst Role is Necessary for Success

The Business Analysis community needs to step up to the mark – becoming active participants in collaborative Agile teams focused on the creation of systems that deliver real-world value and Customer Delight. An active move back to the “Analyst” part of the role – breaking the problem apart into its constituent components in order to understand the real underlying needs, then working as an active participant on the project team to deliver a solution that creates competitive advantage and customer delight!

*Technology exists to **serve**, not to be, the human need!*

(Malcolm Watson, the Development Manager at Pronto Software in Melbourne)

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Shane Hastie shaneh@softed.com is the Chief Knowledge Engineer at Software Education (www.softed.com) – a training and consulting provider based in Australia and New Zealand. He teaches courses and provides consulting services in: agile techniques; software project management; business analysis; software testing. Shane is a Certified Business Analysis Professional (CBAP™) and in 2007 completed his Masters degree in Information Management. His Master’s case study examined the benefits obtained through implementing Agile methods at an ERP vendor in Australia. He is also a certified ScrumMaster .

Shane has 25+ years experience implementing technology solutions to business problems, covering a range of industries from financial institutions to airlines, pharmaceutical companies, facilities management, fleet management and telecommunications.

SIDEBAR:

Who is this “Analyst” I’m talking about here?

The International Institute of Business Analysis (IIBA – www.theiiba.org) states that the business analyst “works as a liaison among stakeholders in order to elicit, analyze, communicate, and validate requirements for changes to business processes, policies, and information systems”

(http://www.theiiba.org/AM/Template.cfm?Section=Becoming_a_BA&Template=/CM/HTMLDisplay.cfm&ContentID=2245)

The role of the business analyst can well be described as the “universal communicator” – understanding and representing the diverse stakeholder perspective in a clear and articulate manner, assisting business people in the discovery process whereby emergent and unclear business needs are uncovered, and the real value adding requirements are identified.

This role transcends the development methodology being used, and the latest version of the BABoK™ (Business Analysis Body of Knowledge

http://www.theiiba.org/AM/Template.cfm?Section=Body_of_Knowledge&Template=/CM/HTMLDisplay.cfm&ContentID=3234) explicitly acknowledges the value and importance of Agile techniques, and the way the business analysis activity changes in Agile projects.

The IIBA

The **International Institute of Business Analysis** is a professional body that describes themselves as “The world’s leading association for business analysis professionals”. The IIBA has 78 chapters in 13 countries around the world, with 7128 active members in 44 countries, and its mission is “To develop and maintain standards for the practice of business analysis and for the certification of its practitioners”.

The IIBA publishes the BABoK™ - the body of knowledge that identifies the broad skills and competencies a professional business analyst should have. The BABoK™ is methodology agnostic, and in version 2.0 explicitly acknowledges the important contribution Agile methods make to the development of software solutions to business problems.

The IIBA provides a certification program for business analysts, the Certified Business Analysis Professional (CBAP™) which is based on proving experience in the field and knowledge of the BABoK™ knowledge areas.

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