

The BA can be the PM too Conundrum

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"I know that you're the business analyst but why can't you also be the project manager during the scope and requirements phase? I mean, how hard can it be to wear two hats?"

Oh if I had a nickel for every time a customer asked THAT question!!!

I have seen projects where the the PM and BA roles were separate and I have seen projects where the roles of PM and BA were combined. My advice? Avoid the PM/BA combo. Let me explain why.

1. The PM manages the project. The BA manages the process.

The PM is worried about developing an actionable plan which, upon its execution, the desired result is achieved within the defined parameters of schedule, budget and quality. The PM **manages the project** and drives it to its logical conclusion

The BA is worried about working with the stakeholders, gaining their trust, and using various and sometimes multiple techniques, to get the stakeholders to communicate their wants, needs, expectations and assumptions and then translating this information into valid requirements. The BA **manages the process** and drives the stakeholders to an agreed upon conclusion.

The PM/BA is faced with the nature/nurture conundrum. The PM nature is to plan, execute, baseline and control. The BA nurture is to understand, interact, encourage, and communicate. While the right balance between nature versus nurture can be struck, it is nevertheless a difficult feat to achieve and a harrowing experience to maintain.

2. The PM is biased. The BA is unbiased.

To operate successfully, the PM is biased. The PM decides who is going to do what, when and with what technology. His/her focus is on the people, the process and the technology. The PM will be judgmental at times in that he/she will deem what others say as right, wrong, true, untrue, valuable, not valuable. The PM is an integral part of the process.

To operate successfully, the BA, as a general rule, is unbiased. By being unbiased, the BA can manage the process and guide and direct the dialogue with the stakeholders in the direction he/she intends. If the BA loses neutrality, then he/she become part of the process and his/her ability to manage and control the process and the outcome is greatly hindered.

The PM/BA cannot be both biased and unbiased. The PM's primary responsibility is to deliver a project on-time, on-budget, and meeting customer and quality expectations. To do this, he/she will display bias in decisions and interactions and this runs counter to that which characterizes a BA.

3. The PM plans the work and works the plan. The BA liaises, elicits, analyses, validates, and communicates.

The PM is busy managing the project...planning the work, assigning resources, managing the execution of the activities, task, communicating with the stakeholders, resolving issues, producing deliverables, and planning reviews, preparing for the next phase, driving to completion, just to name a few responsibilities.

The BA is busy liaising with the stakeholders to understand their business problems, their opportunities, their wants, their needs and expectations. The BA works to employ various

elicitation and analysis techniques to yield information from the stakeholder that can then be documented in the form of scope and requirements which will then be validated, communicated and maintained.

THE PM/BA can do all of the above but is challenged to do it well.

SSSSOOOOOOO...back to the customer's question: "I know that you're the business analyst but why can't you also be the project manager during the scope and requirements phase? I mean, how hard can it be to wear two hats?"

First, take the nickel.

Then tell the customer...sure, we can combine the roles of PM/BA but the way I see things, the PM's expertise is in delivering a project and a product by managing people, process and technology. The BA's expertise is working with all the stakeholders and building the scope and requirements foundation for the product that will be built. Now we can combine the roles and hope that the blend will deliver a product on-time, on-budget, and meets the stakeholders expectations OR we can mitigate our risks and have a PM who focuses on delivering the product and a BA who focuses on a defining a product clearly, concisely and unambiguously and ensures that what is wanted by the stakeholders is truly needed by the stakeholders!!