

# BUSINESS ANALYSIS TRAINING COURSES



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Fundamentals of Business Analysis  
Defining Business Needs and Solution Scope  
Eliciting and Managing Requirements  
Analysing Benefits and Refining Solutions  
Enterprise Business Analysis  
Facilitation Techniques for Business Analysis  
Testing Techniques for Tracking and Validating Requirements  
Business Data Modelling  
Business Process Modelling  
Developing Use Cases

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# FUNDAMENTALS OF BUSINESS ANALYSIS

2 DAYS

## COURSE OVERVIEW

Many people are unaware of the discipline of business analysis, having never thought of it as a disciplined set of knowledge, skills and techniques. Therefore managers and SMEs who work with BAs often have no idea of the value that it provides.

Fundamentals of Business Analysis addresses the entire scope of business analysis including before, during and after a solution to a business problem is implemented and also covers enterprise business analysis in order to provide an overview of the value that business analysis delivers in terms of executing strategy – both doing the right work and doing the right work in the right way.

This foundational course looks at the whole organisation and how business analysis is applied in articulating and prioritising business needs, identifying and assessing solution options, making recommendations, defining solution scope, requirements management within a project, supporting a solution once it is in place, making sure the business objectives are met and continuously improving the solution to increase its business value.

Managers, business subject matter experts, developers, project managers, junior business analysts and anyone else who is responsible for delivering value through project - and programme-based work - would benefit from taking this course.

## LEARN HOW TO

- ✓ Describe the discipline of business analysis
- ✓ Explain major functions in the scope of business analysis
  - Defining business needs
  - Requirements management
  - Benefits management
  - Enterprise analysis
- ✓ Describe how business analysis can contribute to your organisation and your individual work and responsibilities

## COURSE TOPICS

### The Basics of Business Analysis

- What is business analysis
- Who does business analysis
- Scope of business analysis: enterprise business analysis, solution recommendation and proposal, requirements management, benefits management
- Contexts for business analysis
- Asking the right questions: Who, what, where, when why and how
- It's more than just requirements: business analysis information
- Modelling
- Requirements classification
- Requirements traceability

### Defining the Business Need

- A process of discovery
- What is a Business Need
- Current State Analysis
- Business goals and objectives
- Stakeholder Analysis
- Define the Future State
- Capability analysis
- Future state analysis
- Feasibility assessment
- Business Risk
- Assess alternatives

- Business case
- Solution recommendation

### Requirements Management

- Business analysis planning
- Challenges and risks related to requirements work
- Roles and responsibilities
- Deliverables and artifacts
- Communication planning
- Elicitation techniques and challenges
- Solution scope and models
- Other requirements models
- Business processes
- Acceptance criteria
- Traceability
- Requirements management tools
- Supporting testing and implementation
- Lessons learned

### Benefits Management

- Goals of the practice of benefits management
- Benefits and value
- Patterns of business value
- Benefits mapping
- Benefits management life cycle
- Identify and quantify
- Value and appraise

- Benefits planning
- Benefits measurement and reporting
- Benefits realisation
- Solution evaluation
- Transition requirements
- Organisational readiness
- Managing the transition
- Recommending corrective action
- Organisational change management
- Continuous process improvement
- Plan-do-study-act
- Process analysis and design

### Enterprise Analysis

- Internal and external analysis
- Business ecosystem
- Enterprise analysis models
- Understanding the ecosystem
- Customer value analysis and modelling
- Marketing research
- Internal environment analysis
- Strategy mapping
- Organisation mapping
- Information mapping
- Business capabilities
- Value streams and mapping
- Portfolio of projects
- Business architecture

# DEFINING BUSINESS NEEDS AND SOLUTION SCOPE

3 DAYS

## COURSE OVERVIEW

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The skills of business analysis can help many professionals identify the right types of solutions to solve their business challenges and build the business cases to justify those recommendations. Defining the Business Needs and Solution Scope is an intermediate to advanced course designed to provide the knowledge needed to begin working on identifying business needs and analysing the benefits of various solution options to help limit the choices before work gets underway or even before the solution work is chartered. In particular, this course “precedes” the typical project lifecycle as it sets up the benefits, value and possibilities that the change may bring, which then become the focus of the initiation phase of a project to implement those changes and execute the strategy.

This course can help anyone who needs to understand how effective projects and programmes align with organisational strategy and confer benefits that solve business problems or who makes decisions or informs those who make decisions on which projects and programmes to invest in.

## LEARN HOW TO

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- ✓ Explain how the concepts of business needs and value drive change initiatives
- ✓ Describe the importance of business cases to solution recommendation
- ✓ Use current state analysis to identify business needs, goals, and objectives
- ✓ Relate the discipline of benefits management to solution recommendation
- ✓ Utilise stakeholder and capability analysis to plan future states
- ✓ Conduct feasibility assessments on solution alternatives
- ✓ Develop and present business cases for or against potential solutions

## COURSE TOPICS

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- Driving Towards Business Value
- The Business Case
- Define the Current State
- Establish Business Goals and Objectives
- Benefits Management
- Define the Solution Scope
- Identify and Assess Alternatives
- Financial Analysis
- Risk Analysis
- Putting the Business Case in Context

# ELICITING AND MANAGING REQUIREMENTS

3 DAYS

## COURSE OVERVIEW

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Eliciting and Managing Requirements is designed for individuals responsible for doing just that - eliciting requirements from users and stakeholders and managing those requirements throughout solution development. The course looks at the processes around solution scope validation, collaborative elicitation, modelling the solution, documenting effective requirements, solution validation, requirements change management and how to plan the work necessary to successfully drive the whole process.

After the scope of a solution to a business problem has been proposed and accepted, the work (typically project-based) of designing and developing that solution must commence. This course explores how the discipline of business analysis contributes to the work of a project, ensuring that the requirements of the solution being developed are fully elicited from, communicated to, and understood by all stakeholders involved. Additionally, the course discusses how business analysis in the context of a project ensures that the solution developed fulfills the intended scope as well as covers considerations for managing requirements (and changes to those requirements) throughout their effective lifecycle.

A participant does not have to be a formally titled business analyst to benefit from Eliciting and Managing Requirements. Many formal project and programme managers find themselves being asked to apply business analysis to project work to ensure that what is developed actually solves the problem it was intended to. Anyone responsible for delivering specific outcomes that meet business needs or solve problems will benefit from this course.

## LEARN HOW TO

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- ✓ Explain the critical role of business analysis with respect to requirements management
- ✓ Validate solution scope
- ✓ Use appropriate modelling techniques in requirements management work
- ✓ Plan the requirements elicitation and analysis to maximise efficiency and estimate the required effort
- ✓ Determine the most appropriate techniques for eliciting requirements at different points in the analysis cycle
- ✓ Analyse various kinds of requirements into complete, coherent, and organised requirements documentation
- ✓ Build consensus in order to validate and finalise the requirements
- ✓ Manage the requirements throughout the project lifecycle

## COURSE TOPICS

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- Validating Understanding of the Solution Scope
- Collaborative Elicitation and Analysis
- Modelling the Solution
- Documenting and Communicating Good Requirements
- Validating Requirements
- Controlling Requirements
- Business Analysis Planning

# ANALYSING BENEFITS AND REFINING SOLUTIONS

2 DAYS

## COURSE OVERVIEW

Analysing Benefits and Refining Solutions applies an approach to using business analysis skills that addresses the work needed to ensure that a solution, once in place, actually delivers the business value that was expected of it, and optimises that business value over its useful life.

A solution could have a useful life of many years, and is likely to evolve over its lifetime, just as the organisation that uses it - and the business context within which it operates, will also evolve. One of the challenges of supporting an existing solution is that often, the logic of why a solution is the way it is - and what the original requirements were, gradually gets lost.

This course explores the period after solution development and implementation. This may be a time where there is no identified project manager in place, but when an organisation should be evaluating the solution to ensure it is providing the value it was intended to provide. Business analysis remains critical at this point.

Analysing Benefits and Refining Solutions starts by reviewing the context of benefits management (principles, types of benefits and the benefit lifecycle) before exploring how to:

- Understand what is necessary to transition to new solutions
- Measure benefits
- Evaluate solution performance against intended benefits
- Establish continuous improvement of solutions and make improvement recommendations
- Manage the human factors of organisational change that accompany solutions

This course can help anyone with an interest in understanding the myriad components involved with the management and realisation of the benefits of a solution of any level of complexity. This topic is an area in which roles are generally undefined and this course is for any person concerned with being able to deliver and improve upon solutions that provide true business value.

## LEARN HOW TO

- ✓ Describe how project- and programme-level solutions provide benefits that contribute to enterprise strategic goals.
- ✓ Measure, track, evaluate, and manage the solutions that are intended to deliver the required benefits.
- ✓ Define the role of change management, continuous improvement, and technology in how successfully solutions are implemented.

## COURSE TOPICS

### Benefits Analysis and Management

- What are benefits?
- Types of benefits
- Attributes of a good benefit
- Benefits ownership
- Emphasising benefits management
- Overview of the benefits life cycle
- Ongoing Analysis and Evaluation
- Challenges in evaluating solutions post-implementation
- Key success factors in benefits analysis
- Benefits management scorecard

### Benefits Realisation, Tracking, and Reporting

- Benefits realisation mapping
- Benefits tracking
- Benefits reporting and adjustment
- Capabilities roadmap
- Benefits governance
- Transitioning from current to future state
- Analysing and evaluating CSFs and KPIs

### Solution Evaluation

- Solution evaluation tasks
- Benefits measurement and reporting
- Evaluation techniques
- Assessing solution limitations
- Assessing environmental limitations

### Organisational Change Management

- How are benefits realisation and change management linked?
- Value realisation
- The people side of change
- Resistance to change
- Organisational inertia
- Leveraging the organisational culture
- Individual leadership
- The Role of Communication
- Assessing organisational readiness
- Reinforcing and enforcing change
- Overall change readiness assessment

### Continuous Improvement

- Designing for flexibility, scalability, and adoption
- Value stream analysis
- Reducing waste and variability
- Opportunities and emergent benefits
- Governance of continuous improvement
- Governance scope

### Changes to Technology Systems

- The role of technology
- The IT perspective
- IT Considerations
- IT Governance
- The role of IT in change initiatives
- IT support for solutions and benefits

## COURSE OVERVIEW

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Enterprise Business Analysis applies an approach to business analysis to deal with complexity and change on an enterprise-wide basis. A skill set that helps individuals address broad organisational issues, enterprise-wide business analysis can be used when:

- Merging with or acquiring another organisation (or departments/functions)
- Expanding or contracting operations
- Consolidating the operations of multiple business units
- Dealing with multiple change initiatives at a time
- Acquiring or retiring enterprise IT systems
- Dealing with large business re-engineering initiatives

Senior business analysts are increasingly involved in pre-project activities to ensure that solutions to business problems reflect the organisation's business strategy. Through Enterprise Business Analysis, the senior business analyst becomes a vital contributor to helping the organisation determine sound investments and enhance its project portfolio. These activities ensure the organisation can maximise the return on investment, minimise duplication of efforts across the organisation and realign business operations to meet the executive management's strategy.

Enterprise Business Analysis starts with the basics – what is enterprise analysis? After exploring how it helps the strategic alignment of investments and dealing with change, the course focuses on business architecture and how business architecture fits within the enterprise architecture - including discussions around the other 'architectures': information, application, technology and governance -by looking at business architecture blueprints and frameworks, along with the roles and relationships that need to happen to execute on the strategy.

The course then turns its attention to some of the tools used at this more strategic level, including: value mapping, value proposition and customer value analysis, business modelling, business process management, capability and organisation mapping to arrive at an enterprise solution.

## LEARN HOW TO

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- ✓ Apply business analysis at the enterprise level
- ✓ Understand how to model the components of the enterprise and how they work together
- ✓ Identify what your customers consider to be good value and use it to assist in formulating strategy
- ✓ Explain how an organisation can enhance the effectiveness of its people and its assets through enterprise analysis
- ✓ Apply enterprise analysis to implement improvement initiatives.

## COURSE TOPICS

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- What is Enterprise Business Analysis?
- Enterprise Business Architecture
- Value Mapping
- From Business Model to Blueprint
- Business Process Management
- Capability Mapping
- Organisation Mapping
- Develop the Enterprise Architecture
- Enterprise Solutions
- Organisational Learning

# FACILITATION TECHNIQUES FOR BUSINESS ANALYSIS

3 DAYS

## COURSE OVERVIEW

Those practicing business analysis spend a significant amount of time facilitating sessions to gather requirements and other information, yet many facilitators lack formal training on how to effectively do so. A successful facilitation session results in requirements and information that can be analysed and worked with once the session is complete. Facilitation Techniques for Business Analysis focuses on teaching the facilitation skills necessary to elicit and analyse requirements on a project.

In this highly interactive course, delegates will learn how to effectively help stakeholders define their needs and form these into quantifiable requirements through facilitation. As a facilitator, this involves learning how to prepare for and conduct both face-to-face and remote group sessions, being exposed not only to several facilitation techniques, but also effective facilitation practices and how to manage conflict in a session. Most importantly, it provides the opportunity to practice these skills in a safe environment with a trained facilitator who will guide participants through various activities.

Attendees will leave the class with the confidence to prepare for a session, including creating a facilitation plan, motivating a group's participation, building consensus, managing conflict, maintaining session focus and evaluating results for lessons learned. This course can help individuals at all levels who need to better facilitate meetings and workshops around requirements or other specific outcomes. While the course focuses in the business analysis space, this is applicable to all disciplines (agile PM, traditional PM, contracting, etc.)

## LEARN HOW TO

- ✓ Define facilitation in the context of business analysis
- ✓ Identify opportunities for facilitation in business analysis
- ✓ Explain the role and responsibilities of a facilitator
- ✓ Plan a facilitation session
- ✓ Choose appropriate facilitation techniques for a given session
- ✓ Conduct a facilitation session using best practices
- ✓ Manage conflict during a session

## COURSE TOPICS

### Facilitation and Business Analysis

- What is facilitation?
- The facilitation process
- What is a facilitator?
- Facilitation in business analysis
- Facilitation in business analysis is iterative
- Roles in facilitated sessions
- The importance of the role of the sponsor and SME's
- BA facilitation opportunities
- Good facilitation is a combination of techniques and practices
- Module summary

### Facilitation Session Planning and Techniques

- Considerations for session planning
- Session planning: objective and participants
- Session planning: potential risk
- Risk management plan
- Session plan: environment
- Considerations for remote sessions
- Take advantage of virtual tools
- Remote session tips

- Session planning: agenda and techniques
- Facilitation techniques overview
- Brainstorming
- Idea Gen / grouping/categorisation
- Brain writing
- Focus group
- Various requirements workshops (i.e. process improvements, JAD's, agile iterations, others)
- Gap analysis
- Root cause analysis (i.e. Fishbone diagram, 5 Whys);
- Force field analysis
- Multi voting
- Criteria-based grid
- \*Impact/effort grid
- Verification of facilitation session plan
- Session planning demo

### Facilitation Practices

- Facilitation practices overview
- Executing a facilitation session: prior, during, ending
- Active listening
- Generating participation
- Neutrality

- Questioning
- Paraphrasing
- Maintaining focus
- Using visual aids
- Feedback
- Summarising
- Synthesising ideas
- Intervention
- Executing a facilitation session

### Facilitation Conflict Techniques

- Argument vs. debate
- Types of conflict during facilitation
- How to prevent group dysfunction (the basics of team dynamics: 'forming, storming and norming')
- Managing conflict between participants
- Managing conflict with a participant
- How to handle 'Negativeholics'
- How to handle resistance to change
- How to manage diverse groups and other cultural considerations
- Intervention during conflict
- Resolving issues
- Steps for working toward consensus

# TESTING TECHNIQUES FOR TRACKING AND VALIDATING REQUIREMENTS

3 DAYS

## COURSE OVERVIEW

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To ensure project success, planning and executing the testing process must begin as soon as the vision and scope for the solution takes shape. As the requirements for the solution are elicited, the business analyst and the test team develop and refine a master test plan. This plan incorporates test strategies to identify any defects in the requirements, solution or corresponding documentation.

In this interactive course, participants work to develop a master test plan under the guidance of an experienced instructor as well as perform exercises designed to help establish a risk-based and comprehensive master test strategy for a testing effort - activities which help the business analyst ensure that all requirements trace back to the business need.

Attendees of this course will develop the competencies required to create test cases and scenarios in order to ensure adequate test coverage according to the risk level. They will also learn about the different levels and types of testing commonly used in solution development today.

Reminder: Prior to taking this course, delegates should have acquired the background as taught in Eliciting and Managing Requirements and should not take Software Testing for Better Project Management.

## LEARN HOW TO

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- ✓ Explain and apply the role of business analysis in the testing process
- ✓ Validate business requirements documentation and analyse models with stakeholders
- ✓ Verify that the solution conforms to technical specifications
- ✓ Recognise the importance of a testing methodology
- ✓ Decide what to test, and trace those requirements throughout the solution development life cycle (SDLC)
- ✓ Develop and execute a test plan
- ✓ Describe various testing techniques
- ✓ Explain how business analysis informs and contributes to testing
- ✓ Discuss the testing process from user and acceptance testing to component testing
- ✓ Explain the relationship between test strategies, test plans, test cases, and test scenarios

## COURSE TOPICS

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- Introduction to Testing
- The Testing Process
- Levels and Types of Testing
- The Master Test Strategy
- The Master Test Plan
- Testing from the BA Perspective
- Test Case Design Techniques
- Executing the Plan



## COURSE OVERVIEW

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The Business Data Modelling course explores business rules, policies and procedures and how they can be modelled effectively. Participants will learn entity relationship diagramming, super and sub-types, attributive and associative entities and documenting data constraints. The course's logical data modelling approaches focus on the important requirements of the business that are discovered through significant user involvement during the analysis phase. Delegates will also learn how to create models without being limited by technology or organisational structure.

The ability to communicate the intersection of business processes and information/data needs is key to the success of any software development project. Understanding and explaining user needs is a major challenge and opportunity for the business analyst. The business analyst who understands structured modelling has a distinct advantage in addressing and communicating requirements. And the use of models can greatly increase all stakeholders' understanding of the relevancy of business rules and data management requirements to the project at hand.

**Reminder:** Prior to taking this course, we recommend that delegates have acquired the background as taught in Eliciting and Managing Requirements. This course is aligned with version 3.0 of A Guide to the Business Analysis Body of Knowledge® (BABOK® Guide)™.

## LEARN HOW TO

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- ✓ Explain how a lack of effective data analysis and usage can affect the risk exposure, cost control, and profitability of your organisation
- ✓ Explain the role of the business analyst in gathering data-related requirements from stakeholders
- ✓ Create, communicate, and validate conceptual data models with your business stakeholders
- ✓ Create normalised logical data models as a hand-off to solution delivery

## COURSE TOPICS

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- Business Data and Governance
- Conceptual Data Models
- Data Relationships
- Logical Data Models
- Applying Logical Data Models
- Data Normalisation
- Verifying and Validating Models
- Business Data Modelling Workshop

## COURSE OVERVIEW

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This course provides participants with the opportunity to perform the four phases of a process improvement project—Define, Analyse, Implement, and Control—which have been derived from the phases of the industry's leading process improvement models. The key deliverables and outputs for the business analyst are emphasised during each phase, as well as the importance of tying all outputs back to the business strategy. Participants practice identifying and prioritising the processes that require improvement, as well as creating the documents needed to communicate these changes to the rest of the organisation. Participants focus on the competencies necessary to perform workflow modelling and create AS-IS and TO-BE process maps. Finally, participants learn how to conduct a gap analysis, create new process benchmarks, and develop measurements for tracking the effectiveness of the new processes.

Participants leave this course with the preparation necessary to perform BA responsibilities within the process improvement process and to employ the required skills in accordance with sensitive cost, organisational, and stakeholder requirements.

The course is designed for those who perform the function of business analysis (BA) and those who need to manage or participate in process improvement projects.

## LEARN HOW TO

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- ✓ Describe the business process modelling framework
- ✓ Define key process modelling terms and concepts
- ✓ Plan and conduct major activities performed during each phase of process modelling
- ✓ Apply process modelling methodologies and techniques specific to the BA's role and responsibilities

## COURSE TOPICS

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- Overview of Business Process Modelling
- Define
- Analyse (Modelling)
- Analysing (Metrics)
- Implement
- Control
- Business Process Modelling Workshop

## COURSE OVERVIEW

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As a fundamental component of identifying requirements for a new or upgraded system, business analysts must be able to illustrate how "actors," such as end users, stakeholders, or related systems, will be affected after the new system is implemented. This process, also known as use case modelling, provides business analysts with a powerful tool for documenting functional (and related) requirements—and the relationships between these requirements—in a manner that can be easily communicated to designers, programmers, project managers, and other project stakeholders.

This course provides business analysts with the required competencies for identifying and modelling use cases, which serve as vehicles for eliciting, analysing, documenting, and communicating functional requirements. Participants will practice creating use cases using the Unified Modeling Language (UML®) to graphically represent the interactions between use cases and actors.

To fully gain the benefits of UML, use case diagrams are created through an object-oriented approach, which enables business analysts to sift through the complexity of a system by breaking it down into smaller units.

Through interactive exercises, they will practice writing the alternative/exception flows, arranging objects into properly named classes and reading class diagrams and most importantly, gain the ability to integrate use case modelling within the software development lifecycle to ensure that project requirements are accurate, complete and map to the objectives of the business.

The course is designed for those who perform the function of business analysis (BA) and those who need to manage or participate in use case modelling.

**Reminder:** Prior to taking this course, delegate should have acquired the background as taught in Eliciting and Managing requirements and Business Process Modelling.

## LEARN HOW TO

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- ✓ Identify actors that drive use cases
- ✓ Employ use cases to elicit, analyse, document, and communicate functional requirements
- ✓ Use the Unified Modelling Language (UML®) to create use case diagrams
- ✓ Write use case scenarios with an appropriate level of detail
- ✓ Prioritise use cases based on their importance to the business and technical considerations
- ✓ Manage use cases throughout the project life cycle
- ✓ Create and validate state diagrams

## COURSE TOPICS

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- Introduction to Use Case Modelling
- Identifying and Describing Actors
- Identifying and Describing Use Cases
- Writing User Case Scenarios
- Reusing Use Case Models
- Estimating and Prioritising Use Cases
- Ensuring Use Case Quality
- Use Cases and Project Documentation



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