



Critical Success Factors and the Business Analyst

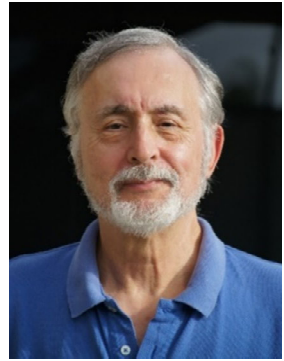
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Author, Consultant, Teacher and Coach

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Steve Blais, PMP, PMI-PBA, is an author, consultant, teacher and coach who has over 55 years' experience in Information Technologies working as a programmer, project manager, business analyst, system analyst, general manager, and tester.



He is the author of Business Analysis: Best Practices for Success (John Wiley, 2011) and co-author of Business Analysis for Practitioners: a Practice Guide (PMI, 2014) and a contributor to the Business Analyst Body of Knowledge, V3 (IIBA, 2015). His new book, The Digital Transformation of Business Analysis, published by IIBA Press, will be out at the end of the year.

Webinar overview

- **This webinar answers the following questions:**
 - What is a Critical Success Factor (CSF) and what is it used for?
 - What CSF's should the business analyst be concerned about? Which CSF's might the BA be responsible for?
 - Are there any CSFs for business analysts? If so, what are they and what is the best way of achieving them?

What is a Critical Success Factor (CSF)?

■ T w l f s n f y t s f o

- J q j r j s y s j h j x x f w k t w f s a t w l f s n f y t s a t %
x z h h j j i
- Z s n v z j a t o j f h m a t w l f s n f y t s %
- G f x j i a s a r j k w f r j a f s i a f w p j y a n t s i n y t s x

■ U w t o j h y

- J q j r j s y s j h j x x f w k t w f a u w t o j h y a t x z h h j j i
- R f s i f y t w a j v z n w j r j s y x a t a t o j a u w t g q j r %

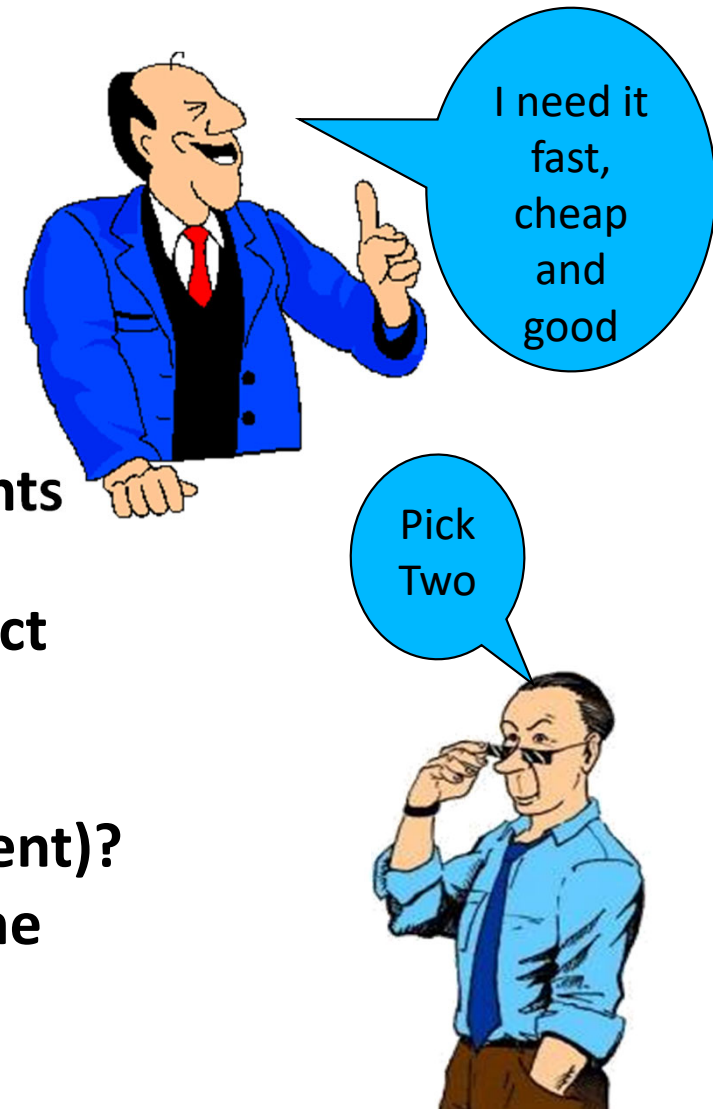
Sources of CSFs

- **Organizational:** executives, planning, corporate mission, corporate policy
- **Project:** business case, business management, project manager, solution team
- **Operational:** KPIs (key performance indicators), sales, marketing and production targets
- **Business analyst:** the business problem, the solution process

Critical success factors originate with the business

Critical success factors?

- Increase sales by X percent?
- New product release on September 1?
- Solution team stays together for the whole project?
- We cannot exceed the budget allocated?
- We need to maintain the velocity at 26 points for each Sprint?
- The new features for the web must be defect free?
- Reduce cost of sales by 15%?
- We must be the SLA (Service Level Agreement)?
- We are the best purveyor of fast foods in the world?



Theoretically...

- **Critical success factors are clearly stated by the business**
- **Critical success factors are prioritized by the business**
- **solution development is organized around the priorities**
- **In reality**



Okay, you're the BA.
This is what we need
to do and we need to
have it done in two
months with this
fixed budget.
Go get the
requirements.

Choosing which are CSFs

I had better make sure that the requirements are written without error so that it passes the requirements review meeting

requirements must specify a solution which can be done within the budget allocated



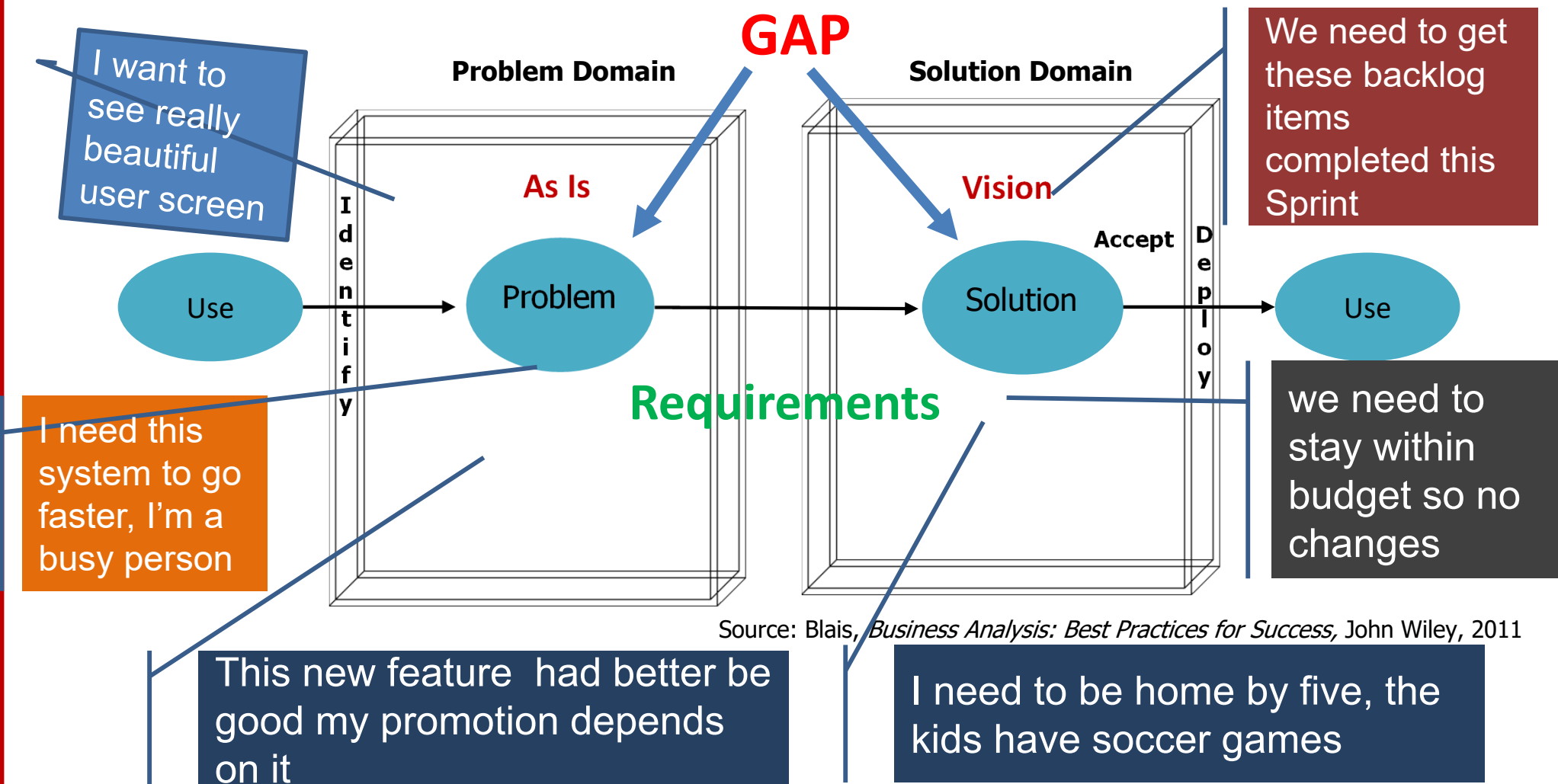
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It is time for me to stop gathering information so that I have time to write the requirements before Friday when I have to turn the men

How can I do all of these conflicting things at the same time?

the people in accounting are going to hate having another meeting, but I really do need this information

CSFs in the Domains



- Everyone has their own CSFs

Political Success Factors (PSFs)

- **Success factors dictated or expected by one person or group**
 - Not assumed to be universal
 - Usually associated with how the effort is accomplished not the overall goal
 - May have hidden agenda or ulterior motives
- **What to do about PSFs:**
 - Nothing
 - Project manager needs to determine whether to react, comply, or ignore
 - Report PSF to project manager
 - PSFs are usually negotiable

Separate PSFs from CSFs

Good bad and ugly

Ugly: completing an otherwise successful project without meeting a CSF

- Provide general guidance for entire project
 - Create a focus for all parties throughout the project
 - establish the priorities when there are project decisions to be made
 - provide initial and consistent collaboration point
- If defined wrong they may set the wrong priorities and invalid decisions are made
 - Difficulty in prioritizing the various CSFs
 - Will not necessarily stop individuals from having their own CSFs
 - Over-focus on one CSF might cause project to miss others

Benefits

Challenges

Business analyst and critical success factors

- The first job of the business analyst in terms of critical success factors is to define the critical success factors for the project

1. Identify and prioritize CSFs

- Collaborate with business stakeholders and solution team
- CSFs must be agreed upon by all

2. Establish measurable metrics for each CSF

3. Publish and promote the CSFs

Constant CSF: Solve the Business Problem

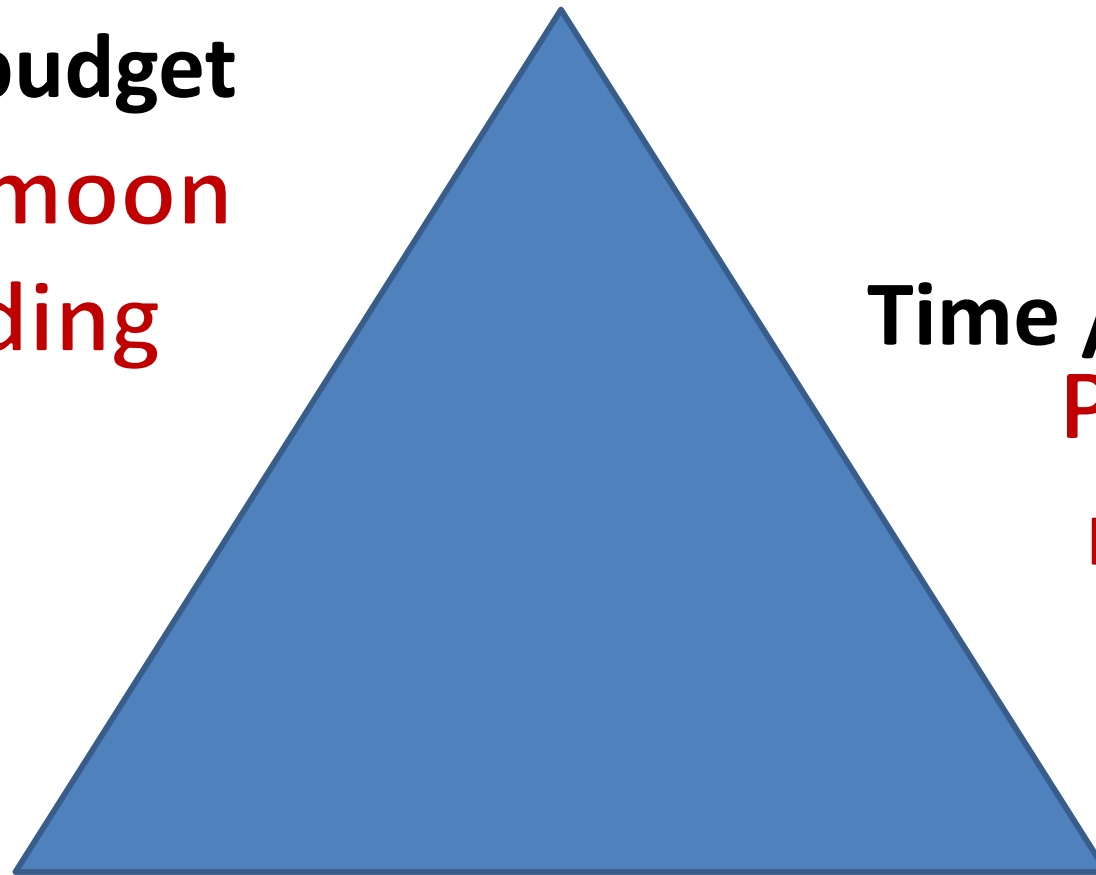
- **# 1 critical success factor: The business Problem MUST be solved**
 - No project can be successful otherwise
- **The business analyst's job to define the business problem to be solved**
 - Project manager and team's job to implement the best solution
- **After that, the business analyst's critical success factors are the projects success factors**
 - there will be product critical success factors as well (e.g. the product must work for the consumer)

Project Critical Success

- **Cost / budget**

**First moon
landing**

Time / Deadline
**Product
release**



Scope / product delivery
Apple reality glasses

Tangible and non-tangible CSFs

- **Ostensibly, critical success factors should be measurable**
 - unambiguously define when success has been achieved
 - provide definitive proof when challenged
- **Tangible is measured in monetary values, non-tangible cannot be measured in money**

Identifying CSFs

■ Product Vision

- What the world looks like when the problem is solved
- The view of the business stakeholders

■ Expectations

- Voiced and unvoiced



We need to have all these new features by the end of the quarter

I want it easier to use than it is now

CSFs are reactive

- Evaluated when it's over
- Known at the start
- Puts focus on the critical success factors rather than the noise
- Allows for renegotiation in real time



How do we know
we are successful?

What about the BA's CSFs

■ How do we know the BA effort is a success?

Did I appropriately represent the business stakeholders on the solution team?



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Did I define the right business problem completely and unambiguously?
Have I do find a way of knowing that the business problem has been solved?

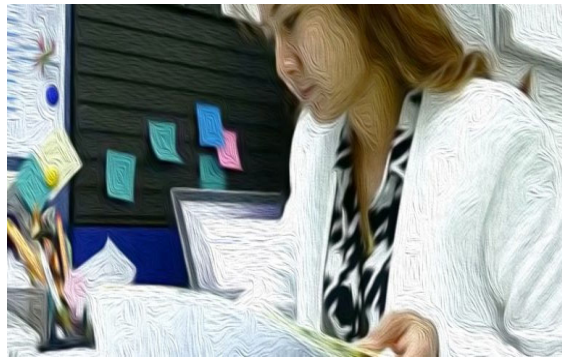
Did I make sure that all of my requirements are fully measurable and testable?

Did I include all the information necessary to come up with a valid solution?

The BA and CSFs

The Business BA

- Identify all critical success factors
- Determine how they will be measured
- Keep the conversation going about CFS throughout the project



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Decisions
and
actions

Listen and observe

- Evaluate CSFs for continued relevance
- Measure the CFSs to ensure success
- Document and record success (or lessons learned)

BA

The Success of the Project
The Success of the Product

Questions and Contact Slide

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