**Business Analysis Plan**

[AGENCY NAME]

[PROJECT NAME]

[Publish Date]

**Table of Contents**

[Using this Template 1](#_Toc438470191)

[Revisions 2](#_Toc438470192)

[Introduction 3](#_Toc438470193)

[Business Analysis Approach 3](#_Toc438470194)

[Stakeholder Register 3](#_Toc438470195)

[Business Analysis Activities 3](#_Toc438470196)

[Work Breakdown Structure (WBS) and Activities List 4](#_Toc438470197)

[Work Breakdown Structure (WBS) 4](#_Toc438470198)

[Activity List 4](#_Toc438470199)

[Solution Approach 5](#_Toc438470200)

[Acceptance 6](#_Toc438470201)

# 

# Using this Template

This template contains “suggested language” and assumes that the author of this document will make appropriate additions, deletions, and changes for their specific project needs.

To create a document from this template:

* Replace [bracketed text] on the cover page, in the header, and throughout the document with your project and agency information by filling in the [bracketed text] area in the document text. Filling in the information once, will propagate that field throughout the document.
* Complete the entire template making all necessary adjustments
* Each section contains abbreviated instructions (**Green Font**) and an example using (**Black Font**).
* Delete this “Using This Template” page.
* Update the Table of Contents by clicking on the “References” tab, selecting “Update Table”, then “Update Entire Table” and click “Ok”.
* Save.

To provide any suggested improvements or corrections, please email [TBSM.info@tn.gov](mailto:TBSM.info@tn.gov).

# Revisions

| Revision | Description of Change | Author | Effective Date |
| --- | --- | --- | --- |
| v1.0 | Initial document upload to TBSM intranet site | BSD Team | 09/28/12 |
| v2.0 | Updates to template | BSD Team | 3/27/2013 |
|  |  |  |  |

# Introduction

The Business Analysis Plan is the roadmap to all later business analysis tasks. It describes the scope of the work, which should include a Work Breakdown Structure, and may contain an Activity List with estimates for these activities. It may be a summary or detailed, depending on the size of the project. The Business Analysis Plan should be developed as part of the Business Analysis Body of Knowledge’s (BABOK®) Plan Business Analysis Activities task.   
  
The inputs to this task are: Business Analysis Approach; Business Analysis Performance Assessment; Organizational Process Assets; and Stakeholder List, Roles, and Responsibilities.

# Business Analysis Approach

The Business Analysis Approach follows the knowledge areas of the Business Analysis Body of Knowledge (BABOK). The approach defines the lifecycle, deliverables, templates, and tasks that should be included. Plan-driven approaches seek to define requirements as early as possible to reduce uncertainty, while change-driven approaches encourage requirements to be defined as close to implementation as possible. These differences will lead to different deliverables and tasks being identified as well as different sequences and dependencies of tasks. The approach will also determine how the planning process is performed.

The Business Analyst (BA) will serve as the liaison among stakeholders to understand existing business processes, and to elicit, analyze, communicate and validate requirements. The BA will help to understand existing business processes where needed, business problems and opportunities and recommends solutions that enable the business to achieve its goals and objectives. The BA will be responsible for utilizing the most appropriate means of gathering business requirements and assimilating those into system requirements.

# Stakeholder Register

The Stakeholder Register includes the names of each stakeholder, their position within the organization, role on the project (i.e. Project Sponsor, Functional Lead, etc.), contact information and general expectations while serving on the project. A template for this register can be located on the TBSM site.

# Business Analysis Activities

Business Analysis Activities are activities that must be performed, and include deliverables, an estimate of effort required to perform that work, and identify the management tools required to measure the progress of those activities and deliverables.

The BA will determine which activities will be required for [PROJECT NAME], how those activities will be carried out, the work effort involved, and an estimate of how long the activities will take. This Activity List includes activities to:

* Identify business analysis deliverables
* Determine the scope of work for the business analysis activities
* Develop estimates for business analysis work.

The inputs to this task include Business Analysis Approach, Business Analysis Performance Assessment, Organizational Process Assets, and Stakeholder List including Roles and Responsibilities. These documents and tasks provide the information needed to complete the Business Analysis Plan.

# Work Breakdown Structure (WBS) and Activities List

This section should discuss the WBS, WBS Dictionary, and Schedule baseline and how they will be used to manage the project’s scope. The WBS provides the work packages to be performed for the completion of the project. The WBS Dictionary defines the work packages. The Activities List describes the processes which will be used to complete the work packages. The schedule baseline provides a reference point for managing project progress as it pertains to schedule and timeline by the project manager.

The WBS for the [PROJECT NAME] Project is comprised of work packages which do not exceed 40 hours of work but are at least 4 hours of work. Work packages were developed through close collaboration among project team members and stakeholders with input from functional managers and research from past projects.

The WBS Dictionary defines all work packages for the [PROJECT NAME] Project. These definitions include all tasks, resources, and deliverables. Every work package in the WBS is defined in the WBS Dictionary and will aid in resource planning, task completion and ensuring deliverables meet project requirements.

## Work Breakdown Structure (WBS)

The WBS provides the work packages to be performed for the project, or the “what”. If a WBS is done properly, there should be a smooth process from defining work packages, moving into activities and then into time estimations. Work packages are defined, with great amounts of input from the customer. After the “what” is defined in the WBS, then it is time to move on to the “how” using Activity Lists.

## Activity List

One result of the Work Breakdown Structure process is the Activity List, which is a comprehensive list of all schedule activities required on the project. Where WBS is created with much customer input, Activity Lists are most accurate when created by the person doing the work.

The Activity List includes an Activity ID, a corresponding WBS ID, Activity Name and a detailed description of the scope of work for each activity (Define Activities). The Activity List facilitates the sequencing of activities by identifying predecessors and successors and ordering the activities accordingly (Sequence Activities). The next step is the estimation of resource types and quantities for each activity (Estimate Activity Resources). Finally, each activity’s effort and duration is estimated (Estimate Activity Resources). At this stage the Activity List evolves into the tasks of the Project Schedule.

The Activity List is not a formal project plan deliverable and does not require approval. However, the Activity List is an invaluable tool for developing a complete and reliable Project Schedule and should be reviewed in-depth by project team members.

# Solution Approach

The Solution Approach describes the general approach that will be taken to create or acquire the new capabilities required to meet the business need. To determine the solution approach, it is necessary to identify possible approaches, determine the means by which the solution may be delivered (including the methodology and lifecycle to be used) and assess whether the organization is capable of implementing and effectively using a solution of that nature.

Some possible approaches include:

* Utilize additional capabilities of existing software/hardware that is already available within the organization
* Purchase or lease software/hardware from a supplier
* Design and develop custom software
* Add resources to the business or make organizational changes
* Change the business procedures/processes

# Acceptance

(This section should be modified for best application to specific projects. Include all project team members that should have some level of authority regarding document review and approval.)

Approved by:

Date:

<Name of Approver>

[PROJECT NAME] Executive Sponsor

Date:

<Name of Approver>

[PROJECT NAME] Business Sponsor

Date:

<Name of Approver>

[PROJECT NAME] Project Director/Manager

Date:

<Name of Approver>

[PROJECT NAME] Stakeholder