Article Title: Choosing The Right Document For The Right Audience
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Brett's experience includes management of a small development team, product development as well as 10 years of experience working in the field of Business Analysis. Recent projects that Brett has been involved with include the development of a low cost airline's Airline Reservation System, Departure Control System and a Self-service Kiosk application. Today, this platform manages the sales to, and transport of 1.4 million passengers annually.

Brett has an BSc Engineering from University of Natal and has recently completed a Diploma in Business Analysis from FTI.

At the beginning of this year, after no small amount of hesitation, I finally decided to enrol in a Diploma in Business Analysis course. The deal-clincher eventually came in the form of my IIBA CBAP application form. The application process required that I have 21 'personal development' hours to my name. As I have never really gained much from any of the 3-day courses I have attended in the past I signed up instead for a 6-month learning experience.

The course itself was great fun and I certainly gained clarity on the role and responsibilities of the Business Analyst. I really feel like I have benefited a great deal from the experience, especially in the realm of Enterprise Analysis, an area of Business Analysis that I have not had much experience in.

During the course I soon discovered that the discussion regarding the naming and purpose of documents that a Business Analyst is expected to produce was a fairly common one. In this article I want to discuss what I have found to work for me in the naming of the documents, and who the intended audience is for each.

Document Naming

One of the tenets of Business Analysis is to make sure that all stakeholders are speaking the same language on a project. There a few things more frustrating than having things go wrong as a result of miscommunication. Miscommunication is largely rooted in stakeholders talking past one another by using different words to discuss the same idea or concept. On a broader scale, it benefits the project enormously when our documents are consistently named within the organisation across projects and customers, and eventually throughout the field itself.

Document Audience

It is the BA's job to bridge the gap in understanding between the business needs and the technology. There have been learning moments for me in my career as a BA and I have learnt the hard way that it is crucial that the requirements document is produced in a format that takes cognisance of the intended audience. If I fail in this regard my document typically goes unread leading to problems later on in the project.

I find it useful to state at the beginning of each of my documents who the target audience is, usually stated as roles or stakeholder groupings, and the sections in the document are relevant to each. This not only helps the reader later on, but also focuses my thinking for the document tone and structure.

Typical Documents

The documents that I tend to produce are, in sequence, the Business Case, the Business Requirements Document and the Software Requirements Specification. A BA is required to produce other documentation, but it is these documents I am most frequently working on. The documents are successive artefacts produced during the lifetime of a project.

The Business Case

I have not come across alternate names for the Business Case, though for some projects a Project Proposal may be all that is required to get the ball rolling. A Business Case is far more detailed and exhaustive than a project proposal, so the two are not analogous by any means.

The purpose of the Business Case is to engage in a logical, fact-based argument that advocates business investment in one course of action, typically a project or acquisition, whilst clearly stating why alternate options are less viable or desirable. The recommendation must be clear and credible and should to be presented in such a way as to make the chosen course of action compelling to the reader.

This is no easy task as your audience is the Executive; the captain and officers-in-charge of your ship. Remembering that the purpose of your Business Case is to win Executive endorsement of a proposed solution or course of action, and by extension project funding, you need to choose your words carefully. The tone of any BA document should at all times remain professional, but in the Business Case it is crucial not to talk down to your target audience or to use technical jargon that will leave them feeling confused and uncertain. The Business Case is in essence a selling job. I find using the tone of a Project Proposal to work most effectively. This keeps my document concise and I find that I do not include superfluous words and sentences or jargon. I am continually aware that I am positioning my ideas in such a way as to convince the reader to spend more money on a project that I am recommending and that if I am successful that the Business Case will be used as a baseline against which the ongoing viability of the project will be measured.

An important aspect to the Business Case is the stakeholder analysis as well as the analysis of the impact that the proposed solution will have on stakeholders. This leads us to the next document in the chain.

The Business Requirements Document

The Business Requirements Document (BRD) may also be called the Business Requirements Specification, User Requirements Specification, Product Requirements Specification, or Marketing Requirements Document.

This target audience for this document comprises the business stakeholders identified by the Business Case; business unit managers and users of the system. The BRD needs to be written to describe the selected solution to non-technical business people. The focus here is to describe to business the behaviours of the desired solution, in other words the ‘what’ and not the ‘how’.

The purpose of the BRD is twofold. It firstly elaborates on the very high level solution requirements and processes laid out by the Business Case in such a way that the business can confirm their relevance, clarify where necessary, and identify any gaps that may exist. In doing so, the BRD serves to assure the customer that the developer fully understands the issues, opportunities and needs of the business and that the developer has further validated the proposed conceptual solution.

The second purpose is to gain stakeholder buy-in. To this end it is important that the BRD leverages the WIIFM (what's in it for me) factor. In the past, newly rolled out solutions have been known to fail due to one or more groups of stakeholders being unwilling to adopt the delivered solution.

I find that using listing of requirements works well to present the reader with a level of detail that they do not find overwhelming. I emphasise the features that will be available to the future user of the solution and make sure that I pitch the document at a level to ensure the reader is able to validate the described conceptual solution. In cases of more complex requirements or workflows I include business-friendly process models.

The Software Requirements Specification

The Software Requirements Specification (SRS) is also known as a Functional Specification, Software Functional Specification, System Specification, or Technical Requirements Document.

The target audience for this document is the development team, and to a lesser extent project management. Although the BA has a technical audience, this document still focuses on the 'what' and not the 'how'. It is important that you maintain this separation. BA's who have a technical background must avoid falling into the trap of describing internal workings of the solution, or explaining how the solution will be implemented.

The purpose of the document is to conceptually specify the solution behaviour, and in doing so to achieve consensus from the development team on what needs to be done. Once the scope has been formalised the development and testing tasks can be timed and scheduled.

The SRS decomposes the problem domain and includes detailed models that will communicate the solution to the development team. In cases of larger solutions it is often practical to break out the SRS into a number of documents with each document presenting a logical component or discrete element of the conceptual solution. These individual SRS documents will include in-depth functional requirements, non-functional requirements and assumptions & constraints relevant to the logical component under consideration.

Conclusion

In this article I have discussed the documents that I typically work with. Although the IIBA does not dictate the naming of these documents, the naming that I have chosen above is according to the IIBA's Business Analysis Body of Knowledge (v1.6).

The documents occur sequentially during the project life-cycle, and the level of detail may vary tremendously across projects. Each of these documents has a particular audience and purpose. As many stakeholders become involved across multiple projects it is important to choose consistent names for the documentation that you as a BA produce. Further, be cognisant of your audience and use appropriate language and models. This will improve the level of communication between you and your stakeholders, and between stakeholders themselves, and this should translate into more successful projects.