Who would be „alfa and omega" in a project ?

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May be the title has already suggested the reader a mystical approach of project management discipline, perhaps not few wondering if this thing is just possible. It's not case !
I will not propose specific prayers to be included in the "tools and techniques" within the project management processes, even though most of us would have wished to have some handy, for some moments in project execution when only a divine solution, appeared "Deus ex machina", would possibly save the project from a complete failure. We all might want to have someone to protect the project, either the project manager or the business analyst, to speak us like citing from Apostol John: "I am Alfa and Omega, the First and the Last, the Beginning and the End."

The idea of this article came to me during some presentations and panel debates on the limits of project management and business analysis disciplines, where I noticed a lot of opinions that don't clearly connect the disciplines and moreover it were wrongly accentuated their mutual interferences. In this context, I've thought that I should point out some technical clarifications, to investigate if there is really a competition between disciplines, or, at least, if there are negative mutual interferences. In this article, I want to bring some arguments to demonstrate that the two disciplines are two faces of the same coin, in our case the project. Most likely, this is the main reason why PMI has included in its interest area the certification of business analysis competences. Describing the model, I will bring some critical examples from Romanian IT business domain.

The question from the title can be reformulated: Who is defining the start and stop criteria in a project? Who has the task to decisively determine the most important moments of a project: the project manager or the business analyst? In which organization is he working: the client or the supplier one?

Most likely, the vast majority of my colleagues from the project management domain already answered the question: the project manager from the client organization! PMI has the same answer to the question in its guide to PM BoK, because: 1) a project can start if, and only if, a project manager is assigned, who elaborated a project plan and receives the company authorization to use company's resources for the execution of the project plan, and 2) a project can end if, and only if, the project manager delivered the project results to its main stakeholders or the project is cancelled because it's failing to deliver such results.

This is the instrumental perspective of a project, defined as a temporary endeavour to progressively elaborate a unique deliverable (product or service), and has been adopted as project definition by PMI in its guide to PM BoK. The instrumental perspective defines the project as an „instrument" that we are using to deliver a specific business value to its main project stakeholders. In other words, the project is an operational form to obtain that business value, and the project manager is the operator that makes this possible. Without any doubt, both the operational form – defined in the project plan - and the quality of the operator – the competence of the project manager – can largely vary and both of them are critical factors in making the difference between success and failure!

Of course, there are lots of project success factors, but their analysis exceeds this article scope. Considering that the project plan is made or re-made by the project manager, having the help of subject matter experts, we can conclude that the project manager and his/her project plan – authorized by the project sponsor – fundamentally defines the project start. Practically, the project can't start without these two elements! The project manager and his/her project plan determines, as well, the end of the project, meaning that the project manager should demonstrate to his client, through specific project activities, that the project results are compliant with the requirements, defined in the project requirements traceability matrix. Through testing or any other form of evaluation, the client decides if he gives the project acceptance certificate, and once the project manager got it he can go to formal project closure.

Making a small parenthesis, this ***acceptance moment*** – ***<u>this unique glory moment of any project manager!</u>*** – it's quite a strong emotional moment that usually makes the project manager a daydreamer: in the dream it appears that the client has only big words about his achievement and his project sponsor is that happy that will recommend him for a bonus, and, if all these are not possible at all, at least an email to all from the sponsor that he is the best project manager company ever had! Most likely, to this specific dream would have been thinking those who proposed the exhortation "***Keep dreaming!***" that is written on the wall nearby my desktop!

This instrumental perspective on projects is so crystal clear that it's nothing to debate on who is determining the start and the end of a project. Everything is well defined in the project plan and the project manager, with an adequate competence, will execute the project plan and will successfully deliver the project results, which in their turn will automatically generate a business value for client.

These arguments from the instrumental perspective, would allow the project managers to say that they are the "Alfa and Omega" in a project! And they are right !

Still, there is something that holds us to fully believe that life is so wonderful from this instrumental perspective, while we know from experience that, in most of the cases, the project reality is not fitting well the theoretical model. In fact, this is quite normal! Social sciences, within it being both project management and business analysis, are building theoretical models by conceptualizing the experience from a domain, called "best practices", reflecting a certain reality at a specific period of time. By the time the paradigmologists succeed to build and release a specific theoretical model, and then to promote it as a reference for practice, the reality is already different and the model can be proved as inadequate to the new business context, considering the constant and fast change in nowadays. This time gap is sometimes larger than 10 years! Think to Agile! It has been proposed in 2001 as a solution to software development domain and only after more than 10 years became a "de facto" theoretical model and extended to other business domains.

Now, everything is Agile! In fact, the manner most are using Agile in some domains, other than software developing, is not in accordance at all with Agile foundational principles! To highlight the differences in a funny way, I wrote an <u>Agile story</u> about what its principles and their evolution.

Basically, the instrumental perspective on projects has a major assumption: the unique deliverable (product or service) is completely defined by clear, fully described and testable requirements, no matter these are business requirements, functional or non-functional requirements. Now, the central question is: do we really know what business value is wanted by the customer, having only the full set of requirements?!

The few projects, where this assumption has been tested and was true, are statistical marginal to be considered reliable. It has been accumulated an entire literature that is criticizing this assumption made by those who are looking to the project only from instrumental perspective, mainly because it's simplifying too much, especially in the large and complex IT&C projects, where this assumption produced failures of epic proportions ! Now, we need to answer to new questions! „***What is the business value that the project must deliver to its client?***" is the one that is triggering the start of a project. „ ***The project results have generated the business value, predicted before the project start?***" is the question at the end of a project. To have these answers, we need to look to the project from a different perspective, ***the cognitive perspective*** of a project (J.R. Turner, 1996). Why cognitive? Because ***it introduces the learning process perspective, in which people are acquiring new knowledge and experience, new methods or improvements of doing business, which, if implemented through projects, will generate beneficial changes in the business environment with real benefits – business value -*** for organization and its people, not only for client organization, but for its suppliers as well.

In the cognitive perspective, the project is defined as an endeavour to obtain unique deliverables that generates a beneficial change for an organization, considering certain constraints on time and resources. In this definition, the highlight is placed on the beneficial change produced by the project results in the business environment that will generate the business value. This beneficial change is defined by quantitative and qualitative business objectives, which, if are met, will generate the business value. So, the business value of each objective is determined by its weight from the total business value produced by the new business environment. Now, to achieve the business objectives we need to change the business environment using the project deliverables that are defined by a set of business requirements. Each objective will generate a unique set of business requirements that will inherit its weight from the total business value. By this derivation and inheritance process, each business requirement will have a specific weight from the total business value. Because we are deriving from business requirements the functional and non-functional requirements, we will obtain for them by inheritance a specific weight from the total business value of the project deliverables. Associating the requirements to each of the project deliverable, then we will have for each deliverable a well determined weight from the total project business value. If you are interested to know more on this, see a method - „Earned Value Management" combined with the derivatives model in an Agile project – a presentation in Romanian language and named „Earned Business Value Management model", presented by me to announce the new management principles of Agile movement.

From the cognitive perspective, the project can start only if the business analyst precisely determined the business value for all business requirements, functional and non-functional requirements, derived from the business objectives that can create a beneficial change in the business environment that will create new business value. Only using the business analysis discipline, we answer to: what is the business value that the project must deliver to its client?

From the cognitive perspective, the project will end in the moment when the business analyst is saying that by using project deliverables the business objectives are achieved, the beneficial change has happen in the organization and is generating the expected business value. Again, only using the business analysis discipline we answer to: the project results have generated the business value, predicted before the project start?

All arguments from the cognitive perspective, would allow the business analysts to say that they are actually „Alfa and Omega" in a project! And they are perfectly right, too!

To not finish the story like in the Jewish joke, where the rabbi gives right both parties, each of them having contradictory opinions, let's briefly analyse a simple theoretical model (for clarity, I will use role names, not project phase names)

In an ideal client organization, meaning inexistent one in real life, the logical succession of the activities performed by a specific role would be the following:

1. ***The business analyst***, assigned by an executive, roughly defines the beneficial changes wanted in the organization, documented in a business case that clearly specifies the expected business value, for which there are defined quantitative and qualitative business objectives with a specific weight from the total business value;
2. ***The project manager***, assigned by an executive, receives the mission to make the business case „to really fly", meaning to produce the expected business value for the organization by executing a project. First step for the project manager is to build a project plan, which includes the business analysis plan, and to get the executive approval for it. Starting the approved project, the project manager is asking the business analysts team to deliver the business requirements documentation;
3. ***The business analyst*** is making the detailed analysis, and from the business objectives is deriving the unique set of business requirements, each of which having a specific weight from the total business value. The identified business solution should have clear descriptions of actual state – „as is" process environment – and the target state – „To be" process environment. The business requirements must be technological agnostic, meaning that are not depending on a specific technology, must be clearly documented and must be testable, while the corresponding business objectives must be measurable with key performance indicators (KPI). As well, the business analyst must elaborate the requirements traceability matrix, which should have at least the attributes mentioned above. Having all said above delivered to the project manager; business analyst will offer just support during the project execution.
4. ***The project manager*** is revisiting the project plan, mainly the cost and time estimates, and goes again to the executive approval. If the business case is still „flying", the project plan is approved quickly. If the executives are seeing that the project costs are not sustainable by the organization, then the project plan is placed in a drawer and the project manager is released, waiting better financial times (or some European funds!) for organization. Once the project plan is approved, the new mission of the project manager is to deliver the business solution, based on the business requirements traceability matrix. It's not relevant for our analysis if the solution delivery it's done with own resources or it's externalized to suppliers partly or entirely. It's important for the project manager just to make sure the project results are evaluated against their requirements and, if there are compliant, to start the business solution transition phase and to engage the business analyst.
5. ***The business analyst*** receives the acceptance report and is starting to evaluate if, by using the new business solution, the business objectives KPIs are fulfilled and to what degree. The business analyst defines the transition phase duration in direct relationship with new business processes time to produce results and with the people learning time to really check if the business value is produced and, as his final conclusion, to state clearly if the beneficial change has happened.
6. ***The project manager*** receives from the business analyst the evaluation report of the business case and calls for an executive approval, which triggers the project close out.

If the business case report is positive – the business value is produced as expected - we can just imagine that the executives will firstly congratulate each other for their decisions made in this business case and then will send an email to the project team of the type „Good work, thumps up!”. ***Usually, the executives will organize a big internal meeting and will congratulate the project team,*** maybe giving them merit diplomas too.

If the business case report is not so positive – poor business value for the money spent – the executives will just let HR team to explain to project manager how great he is and what other external opportunities he can pursuit, having as well a compensation package. This act is done as a ritual, a sacrifice of the innocent lamb for a collective forgiveness of the sins from organization that will allow a fresh start ! Just kidding! Don't forget that we are talking about an ideal organization where all decisions are rational and for the best interest of the organization, not of the executives. ***In a rational way, the project manager is authorized by the executives to engage the business analyst to determine what corrections should be done, and based on these new business requirements to execute a new project that finally delivers the expected business value.***

If the business case report is negative – no business value at all, but loses – meaning that the business analyst detected a „fatal error” in building the business case or errors in the consecutive „small adjustments” made by executive decisions, ***then the project is silently closed because no one from the organization don't want to discuss about errors, failures and bad executive decisions***. If you have suicidal instincts, you can ask for a post-mortem analysis of the project (which is now the new skeleton from the executives closet), but you should be aware that you will be seen as negative person, too critical and too anchored in the past, so you don't fit anymore in the organization that has only positive and pro-active people. Shortly said, in the Romanian sweet corporatist slang, „you've taken it yourself!” or „you've stolen it yourself!” (Rom. „ti-ai luat-o!” sau „ti-ai furat-o!”)

At the end of the day, does it exists an evil source that direct so much projects down to hell or complete failure? Where in the above model project manager or business analyst fails to deliver the expected results? Or just small details overlooked in each phase are pushing little by little the project into the hell?

One source can be the very initial business analysis, where is not clear at all what is the business value that the project results must generate, but the business case is still authorized by executives and the project has a „GO” decision, especially if the decision is made by a three-letters executive title (pet projects). In this case, does have the project manager the courage to say to the executives that he can't run a project without a clear indication from the business analyst that the project results will create some business value? It's just another open question!

This theoretical model can assume that, if the organization doesn't have professional resources to execute the project, it can outsource the project to external suppliers selected for each phase, but this can bring the disadvantage of handover lost time and lack of details. ***The best case scenario would be when an organization will engage with a carefully selected and trustful supplier all the steps from this theoretical model, actual to deliver an e-2-e solution to satisfy a business need.*** In this case, it should be in place a flexible contract relationship between the customer and the supplier, where it can be negotiated the delivery time and prices for each phase of the project, which can be done either successively or incrementally and iteratively, depending on the complexity of the project and its impact in own organization.

This best case scenario is very rare in our business domain, because ***the real business value is confidentially kept by executives to prevent any business intelligence leak to reach the competitors***. That's why only from the forth step the project is usually outsourced, based on a set of RFQ requirements. The suppliers in a bid just assume that the customer organization has followed this theoretical model, which has a critical importance for the customer project success. The supplier project manager can close a project on a specific customer project phase, only just making sure that the acceptance criteria is based on fulfilling the customer requirements, but the project manager from customer organization can't close a project without making sure that project results deliver the expected business value. This is a main source of confusion in debates about the mutual interferences between project management and business analysis disciplines.

The most important phase is the third phase - 3 being a mystical number! – and must be done carefully and in details by the client organization. In Romanian context reality, the client organization either assigns an internal „smart and wise engineer" to elaborate the business requirements or it outsources the job to a business consultant. This is not a problem per se, if the resources engaged, either internal or external, are professional ones, they have enough experience in that business domain and are kept accountable until the end of the project.
The problem appears when it's not happening at all or to a very low qualitative grade and level. You can see a lot of RFQ documentations which appears as a strange „melange" of functional requirements extracted from different vendors' products best functionalities – actually, defining a super-product - or you can't find at all any business requirements, not to mention that transitional requirements are quite "rara avis". Sometimes it may happen that the RFQ requirements elaborated for a bid are so technology oriented that it created in Romanian business context an aphorism: ***„ Show me the RFQ requirements to tell you what supplier they want to select!"***.

The projects' reality shows us that, no using professional and experienced business analysts to elaborate the requirements, the customer is afraid of missing something important for the business, so ***they are formulating such generic requirements that even they don't know later on in the implementation phase what is all about that requirement***. Basically, it's like ordering a shaorma, where the supplier asks you about its specific configuration (with or without onion, with or without ketchup, etc) and, being annoying to think on all these small details, you are just saying: „Shaorma with everything!" ***So, the customer is doing the same thing when he is defining a generic RFQ requirement, without any specific details on it, so you can call it: „Requirement with everything"!*** Just an example: „the system must generate reports."! Having it in an RFQ, the bidders usually play this absurd loose-loose game and have a response in the RFQ compliancy statement like: „Compliant, the system can generate reports" without any reasonable limitations, based on well-known sales strategy: ***"Let's take first this big contract and later on the project manager can figure out a solution with the business analyst!"***

Client organizations are considering that fulfilling the requirements automatically the business value is generated, without spending effort and time in the transition phase to check if this is the real case. They are making the wrong assumption that from time of elaborating the requirements to moment of testing the implemented solution against business requirements, nothing has changed in the organizational business processes environment or in the external business context.

Avoiding the risk of a too lengthy article, I will resume the examples from real life, but you should know that it can be written thousands of pages with examples where this simple theoretical model has been violated, altered or emptied by any content and meaning, and that's why the projects didn't have a chance to produce, by their results, the beneficial change in organizations and to generate the promised business value.

Concluding, we can state that successful realization of any project should approach both perspectives, instrumental one and cognitive one, according to the simple model briefly described in this article. There are two faces of the same project and implies excellence in both disciplines: project management and business analysis.

Finally, it's not relevant if the business analyst or the project manager is „Alfa" or „Omega" or both in a project – it was just a wording game to get the reader's attention – because they are both part of a larger project team and share the accountability for the project success. The project manager and the business analyst teams from both organizations, customer and supplier, should make sure through a method that their common project brings to all a certain business value, and it will allow their organizations to progress, which is the single „raison d'etre" for any project in the world !!