



Checklist Instructions: Answer every question with one of the following answer choices:

Yes No NA = Not applicable to this project ??? = Can't answer at this time

Completed by: \_\_\_\_\_ Date: \_\_\_\_\_

	Name or short description of project/change:	Yes, No, NA or ???	Research Needed/Notes
<b>NEED</b>	<b>What is the Business Need?</b>		
	Do you understand the problem to be solved (root cause)?		
	Do you understand the opportunity available?		
	Is there a constraint? Regulatory?		
<b>VALUE</b>	<b>What is the expected Business Value?</b> (select at least one of the following)		
	Cost reduction? (How much?)		
	Revenue increase? (How big of an increase?)		
	Improved customer satisfaction? (How will this be measured? Do you have a baseline?)		
	Is this change required by regulation? (What is the penalty of non-compliance?)		
	Increased customer retention? (How much increase? Do you have a baseline?)		
	Improved use of resources? ("Green"? How much improvement? Do you have a baseline?)		
	Increased goodwill? (How will this be measured? Do you have a baseline?)		
	<b>Has a Business Case been documented?</b>		
	Has someone estimated the cost to build?		
	Are the business objectives SMART?		
	Have business risks been identified?		
Have financial measures been assessed? (ROI, net present value, payback period)			

<b>STAKEHOLDER</b>	<b>Who are the Stakeholders?</b>		<b>List Known Stakeholders Here</b>
	Do you know the sponsor? (How available is he/she?)		
	Do you know who will be affected by the change? (End users)		
	Will these users need training?		
	Will these users' managers be involved?		
	Are there internal Subject Matter Experts? (Domain SMEs)		
	Are there external experts to be consulted?		
	Will you have access to governing/regulatory representatives?		
	Do you know who will build and implement the change?		
	Do you know who will operate and maintain the solution?		
	<b>For each stakeholder: Where is he/she located? What is his/her level of involvement?</b>		
<b>SOLUTION</b>	<b>Is the result of the project expected to be a product?</b>		<b>Brief description of the Product</b>
	Do you know what materials are needed to create the product?		
	Are there technical constraints on the design?		
	Will prototypes be created?		
	Will manufacturing facilities be needed?		
	Has product distribution been designed?		
	Are quality measurements defined? What level of quality is desired?		
	Is there a standard product testing process?		
	Will the product be maintained or enhanced in the future?		
	Is the product design complete?		
	<b>Will the product be provided to external customers or clients?</b>		
	Has the product name been chosen?		
	Have market studies been conducted?		
	Have estimated sales been projected? What timeframe?		
	Has pricing been set?		
	Has product packaging been designed?		
	Will user documentation be provided?		
	<b>Is the result of the project a new service?</b>		

		Brief Description of the Service	
<b>SOLUTION</b>	Do you know the expected users of the service?		
	Do you know where the service will be provided?		
	Do you know how the service be provided?		
	Do you know how the service will be sold and delivered?		
	Are quality measurements defined? What level of quality is desired?		
	<b>Will business processes be affected?</b>		
	Are the current processes well understood? Measured?		
	Have the changes (future state) been outlined already?		
	Do you know how many people are involved with these processes?		
	Are there related changes to policies/guidelines/rules/regulations?		
	Will the changes impact job descriptions and employee procedures?		
	<b>Are there any security or safety issues?</b>		
	Data security?		
	Privacy regulations?		
	Other?		
Will the workers on the project be at risk of physical injury?			
<b>CONTEXT</b>	<b>Is there a technical component?</b>		
	Has your team used this technology before?		
	Will a new software application be created? How will the system be built and tested?		
	Will any technology components be purchased?		
	Will an existing application be changed? Is it supported by an outside vendor?		
	How will the system fit with the enterprise architecture plans?		
	Are existing data stores adequate?		
	Will existing data be converted?		
	What documentation will be needed for ongoing maintenance?		
	<b>Do you know where this product or service will be used?</b>		
	<b>Are there interfaces to existing systems?</b>		
	Are there impacts to enterprise applications? (e.g. ERP, financials)		
	Will data be transmitted outside the organization?		
	Are there interfaces with existing hardware devices?		
	Will there be changes to existing communication protocols?		

<b>CHANGE</b>	<b>Do you or your team members have experience with a similar project/change?</b>		
	Has the team been identified?		
	Are skilled resources available?		
	Will outside personnel be involved? (e.g. contractors, consultants)		
	<b>Have any constraints been imposed on the change/project?</b>		
	Is there a firm due date?		
	Is there a predetermined budget?		
	Will equipment or materials be procured?		
	What project or product development methodology will be used?		
	<b>Have project risks been identified?</b>		

<b>TALLY</b>		Count	Percentage (Divided by 80)	
	Yes answers to questions			These items are <b>known</b> .
	No answers to questions			These items <b>may need research</b> .
	??? answers to questions			These items <b>definitely need research</b> .

### Business Analysis Core Concepts Model®

Source: Business Analysis Body of Knowledge (BABOK® Guide) Version 3  
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