



Global Knowledge®

Expert Reference Series of White Papers

Playing the Joint Project Manager- Business Analyst Role

Playing the Joint Project Manager–Business Analyst Role

Adam McClellan, Project Management Professional, Six Sigma Green Belt, Certified ScrumMaster

Introduction

Having a broad skill set is a mixed blessing sometimes. Knowing that you're capable of both analyzing and managing projects sets you up for the temptation—either yours or your manager's—to take on both tasks for a project. In and of itself, that's not a bad thing . . . as long as you have a clear sense of the challenges that await you and how to navigate them effectively.

It's true that the skillset that makes a good project manager (PM) has a lot in common with what makes a good business analyst (BA). But in practice, the two roles need to maintain significant differences in perspective in order to be effective. The PM is primarily focused on getting work done; the BA's attention is on building out the solution.

When these two roles partner effectively, there's a creative tension that drives the project towards success: the PM ensuring that a multitude of team members' progress in concert towards key dates and deliverables; the BA covering the problem space thoroughly to identify a solution that addresses the core business needs. Combining the two roles into one removes that opportunity for partnership . . . but it still can be effective in the right situations.

In this white paper, we'll take a look at what conditions are needed for effectively playing the two roles simultaneously. We'll start by looking at the commonalities and differences between the two roles, move on to highlighting key challenges related to a dual role approach, and then discuss some techniques to guide you in playing the dual role well—including the ability to identify when the dual role isn't realistic.

Competencies and Responsibilities

Good BAs and PMs have a lot of things in common—in fact, I'd make the claim that in order to excel at one role, you need, at the very least, to be good at the other.

But even on a typical dual-role project, there can be confusion and jostling regarding responsibilities for the project and how best to channel the skills and energy that each individual brings to the team. So before launching into how to play the two roles effectively simultaneously, let's take a quick look at the key commonalities and differences between the roles.

Competencies

You can think of competencies as comprising the skills, behaviors, and knowledge that make up the effective practice of a given role. They don't guarantee success in the role, or for that matter on a specific project—but they do help to build your chances.

So what does it take to play these two roles well? The table below outlines competencies related to each role.

BA-only	Both	PM-only
Solution knowledge Modeling and requirements management tools	Facilitation Planning Leadership and influencing Motivation Negotiation Setting priorities Making recommendations Communication Systems thinking Trustworthiness Problem solving	Work definition Project and portfolio management tools

The competencies specific to the BA role are:

1. **Solution knowledge:** Understand solutions and how to build them.
2. **BA tools:** Handle tools for creating models and for developing and managing requirements (e.g., Microsoft Visio, IBM's Rational Requirements Composer).

On the PM side of the equation, the competencies specific to the role are:

1. **Work definition:** Know how to identify and describe the work to be done on a project.
2. **PM tools:** Have proficiency with project-management specific tools (e.g., Microsoft Project).

But as you can see, the overlap is considerable. BAs and PMs both need to:

1. **Facilitate:** Be able to effectively direct the flow of meetings and other conversations.
2. **Plan:** Sketch out the work that's required to get something done, and then update as events warrant.
3. **Lead and influence:** Set a path for the team and stakeholders to follow, and keep them moving on that path without formal authority.
4. **Motivate:** Energize groups of people to set and accomplish objectives.
5. **Negotiate:** Engage in give-and-take with team members and other stakeholders, always with the enterprise's best interests in mind.
6. **Set priorities:** Chart out what parts of the work are most critical at any given point in time.
7. **Make recommendations:** Use the knowledge and perspective gained through project work to identify the best path forward.
8. **Communicate:** Convey and receive information in a multitude of channels from a multitude of stakeholders.
9. **Think in a systems way:** Trace out how changes to one component of a system or plan can have much broader ripple effects.
10. **Be trustworthy:** Demonstrate that your actions align with your words.
11. **Solve problems:** See what's wrong, identify your options for improving it, and then choose one and follow it through.

This overlap is part of what makes the temptation of the dual role so strong. But jobs are constituted of responsibilities, not just competencies. And the responsibilities for the two roles diverge significantly.

Project Responsibilities

You can think of responsibilities as the tasks and deliverables that you're expected to execute in your given role as part of your work on a project. They vary somewhat from project to project and from organization to organization, but as a rule, BAs and PMs have the following expectations placed on them.

BA-focused	Shared	PM-focused
Modeling & analysis Elicitation Requirements deliverables Traceability and requirements management	Risk management Quality validation Issue escalation Product scope management	Schedule management Budget management Resource procurement Project communications Vendor management

Nothing earth-shaking here. The BA is responsible for:

1. **Modeling and analysis:** Building the appropriate set of models to represent the key characteristics of the solution
2. **Elicitation:** Interacting with all available requirements sources to obtain needed information
3. **Requirements deliverables:** Creating the agreed-upon textual and visual representations of the solution from a business perspective
4. **Traceability and requirements management:** Ensuring that project objectives, scope, requirements, and design are in alignment

The PM, on the other hand, is tasked with:

1. **Schedule management:** Establishing key milestones, tasks, and activities and ensuring that the necessary progress is made toward them
2. **Budget management:** Tracking project actual and anticipated expenditures and taking action to address any significant variances
3. **Resource procurement:** Getting the needed people, tools, vendors, and technology involved in the project
4. **Project communication:** Informing stakeholders of project progress and serving as the formal point of contact for project inquiries
5. **Vendor management:** Coordinating efforts with any external parties involved in the creation and delivery of the solution

Shared responsibilities include:

1. **Risk management:** Identifying potential issues related to the solution and project execution, and ensuring that they're addressed appropriately
2. **Quality validation:** Providing assurance that the test coverage is complete and that quality is sufficient to move forward with the solution
3. **Issue escalation:** Taking project challenges and problems to the right set of authorities at the right time
4. **Product scope management:** Ensuring that solution features and functions align with the project objectives and with requirements

As you can see, the overlap in responsibilities is a lot smaller. And I'd argue that even the items in the shared pool reflect different perspectives: delivery focus for the PM and solution focus for the BA.

So in playing a dual role, you're applying similar skill sets to a diverse and divergent set of responsibilities. In short, you're setting yourself up for significant but not insurmountable challenges.

Challenges

Project work is generally challenging, as those who have worked on projects know all too well. Playing a dual role raises the difficulty level, particularly in the following ways.

One Perspective Starts to Dominate

It's hard to maintain a dual mindset over the long haul. There's an ongoing risk that you'll begin to gravitate toward one perspective or another. It may be a matter of the role you prefer; more likely, it will be influenced by the types of questions and concerns that you're fielding from your management and other stakeholders.

If they're primarily concerned with schedule, percent complete, and budget tracking, you'll find yourself pulled more and more into the PM focus. Somewhat less commonly, if they've got persistent, ongoing questions about solution feasibility and process details, you'll shift into the BA's orbit.

Once one perspective starts to take over, you and the project begin to suffer. Stakeholder requirements get overlooked. Schedule dates start to slip. And you find yourself having to work even harder to make up that ground.

No One to Partner With

Consolidating the PM and BA roles into a single person takes away a core partnership from the project team. A functional PM-BA partnership not only splits the shared responsibilities outlined above; it provides additional support for each role's core responsibilities.

The BA may not have any formal responsibility for the schedule, but a good BA will be attuned to the schedule and budget implications of requirements and scope discussions. Similarly, the PM isn't responsible for defining solution requirements, but a good PM will have an eye for business value. They can help build consensus on which requirements are truly the high-priority ones; they can also help identify when requirements are pulling the project off course or are otherwise inconsistent.

Taking that additional perspective—an extra set of eyes and more—out of the equation increases the chances that things big and small are going to get missed.

Overload

Finally, taking on a dual role doesn't change the nature of time. There are still only twenty-four hours in a day, and seven of those in a week, and you need some of that for sleeping, eating, and the rest of your life.

In other words . . . there's only so much that one person can get done. That's not always an easy recognition to make, or an easy message to deliver. But it's a real risk that you run in the dual role.

Having confidence in your skills may lead you to say "yes" to work that is in fact more involved, risky, and challenging than you initially assessed it to be. And what looked to be doable in twelve weeks of fifty hours each starts to swirl and spiral upward. As the situation intensifies, you move more and more into fire-fighting mode, leaving less bandwidth to perform the tasks that make up each role. That, in turn, increases the chances of additional things going wrong.

Not a pretty picture. But there are things you can do to mitigate the chances of it happening.

Techniques for Playing the Two Roles Well

As the responsibility breakdown from the previous section shows, playing the two roles well means performing at a high level in a variety of different tasks. Challenging work, but often doable—particularly when you take the following into account.

Make Sure You've Got the Tools to Do Both

In any job, the right toolbox is essential to doing quality work efficiently. To play the analogy out . . . you *can* drive nails with a wrench, but it makes for slow, ugly work. And if you're playing both roles, you don't have the luxury of slow and ugly.

Instead, get the supporting tools that you need. For the PM side, line up effective project management software and a good knowledge-management platform. And on the BA side, make sure that you've got a good tool for building your requirements model and, at the very least, a spreadsheet application that you can use to manage the requirements you've delivered.

Set Aside Designated Time for Each Role

If you love to work off the cuff, you're going to want to gloss over this particular suggestion . . . but don't. Seriously, block a certain regular slice of time for focusing in on the responsibilities of one role or the other.

Then stick to it. Treat these reminders with the respect that they deserve. You're playing two roles on a project, both with significant responsibilities. You can't split your personality to take this on, but you can chunk your calendar. And doing that will help prevent one role from stealthily dominating your working life, causing missed details and worse.

Track Logistics and Solutions Information Separately

It's a given that your project plan and requirements documentation will be separate and distinct entities. But take that division a step further and apply it to your own working documentation.

When putting together to-do lists, assembling questions to pursue, creating meeting minutes—in your project work in general, track delivery considerations separately from solution considerations. Not only will it help you maintain that distinction, but the document trail you create will help you gauge whether you're giving adequate time to both roles.

Find a Right Hand

I mentioned previously that the PM and BA can form a partnership that provides a driving creative tension for the project. Losing that second person takes that particular creative partnership off the table, but it does allow for other options.

Part of that creative tension, after all, comes from having two perspectives working the same problem space—for example, looking for risks and issues, troubleshooting personalities, debriefing after project meetings good and bad. And doing those sorts of things doesn't take a PM or BA per se.

So look around your project team. Is there a developer who gets both the details and the big picture? A tester who understands the business well? A systems analyst whose perspective and advice you've found to be particularly solid?

If so, dig a little deeper. Take them out for lunch or meet up for coffee and talk through the project and see if they're open to the extra responsibility. There's a lot of potential benefit to be had: you get a partner, they get an opportunity to take on additional responsibilities, and the project benefits from having two perspectives in the leadership space.

Build Up Both Skill Sets

Granted, this takes a certain amount of planning ahead. But if you know that you want to (or are going to be asked to) play a dual role—build up the core skills for each side of the equation.

On the BA front, familiarize yourself with how to elicit requirements effectively, the different types of models appropriate for representing various requirements information, the basics of requirements traceability.

To manage projects well, learn how to develop a work breakdown structure, how to build and manage an effective project schedule, the ins and outs of budgeting, how to procure resources in general and in your organization in particular.

And build from there. Think about which skills you want to build in yourself and pursue formal training. Look for good discussion forums (online or otherwise) for exchanging ideas and building your own perspective. And keep a healthy reading list.

Scope and Schedule the Work Appropriately

Above all, make sure that the fundamental expectations being placed on you are realistic.

Your project management skills are your friend here. Don't fall into the trap of managing your own work in your head. Instead, break down the various activities that will constitute the PM and BA work for the project.

Then assign your name to them and see how the hours stack up. The occasional marathon week may be workable for you . . . but if you're seeing sixty-hour week after sixty-hour week, you're likely setting yourself up for trouble. Techniques will only get you so far, after all.

Knowing When to Say "Too Much"

You can call it a technique, or you can call it a lesson, but it's one of the key takeaways here: sometimes the dual role just isn't the right choice for the situation.

If you find yourself staring at a scope and timeline that are going to require six months of twelve-hour days, or facing a set of data requirements that you don't have the experience and skillset to model, or working with a vendor partner that requires intensive ongoing care and feeding, or in any other situation where you as a project expert find yourself digging an ever deepening hole . . . then the best path for you and for your organization is to ask for help.

Being able to play both roles is a great skillset to have. But in the end, it's not about you or your skillset. It's about the project and the solution. Above all, make sure that your team gets what it needs in these two key roles so that you all can deliver successfully.

Learn More

Learn more about how you can improve productivity, enhance efficiency, and sharpen your competitive edge through training.

[Business Analysis Essentials](#)

[Requirements Development, Documentation, and Management](#)

[PMP® Exam Prep Boot Camp](#)

[Project Management Fundamentals](#)

[Project Management, Leadership, and Communication](#)

Visit www.globalknowledge.com or call **1-800-COURSES (1-800-268-7737)** to speak with a Global Knowledge training advisor.

About the Author

Adam McClellan has over a decade of experience as a project professional, including multiple stints as a business architect and business analyst. As a Project Management Professional, Certified ScrumMaster, and Six-Sigma Greenbelt, he brings a combined focus on high-quality solutions and timely delivery to his work and has experienced firsthand the valuable knowledge and enlightening conversations to be had at all levels of an organization.

The philosophy at the heart of Adam's approach to work can be summed up as:

1. Know the problem you're trying to solve.
2. The solution may be simpler than it looks.
3. If you think every solution is simple, you're fooling yourself.
4. Always keep driving toward a solution.

Adam lives with his family in Durham, NC, where he operates his consulting practice, Brightrope.