



The Product Owner and the Business Analyst:  
whose role is it anyway?

## Introduction

This paper was produced by David Beckham, Karen Lees and Debbie Paul following a BAMF workshop held in November 2017.

The trigger to run this workshop originated from the numerous discussions, blogs and comments that, increasingly, business analysts are being asked to perform the product owner role. Our first reaction to this idea was “No, no and thrice no...”. This was an almost visceral reaction to a subject that is quite prevalent wherever BAs are working on Agile style projects. The instinctual rebuff of the suggestion is due to the fact that BAs should be ‘specialists in generalism’ and should not rely on invested business knowledge. It is the BA role to *seek* answers and not *provide* them. Although many BAs in large companies may have some inherited business knowledge in general the maxim first uttered by Shunryu Suzuki holds true; “In the beginner’s mind there are many possibilities; in the expert’s mind, there are few...”. So, would an incorporation of roles be in anyone’s best interests?

The BA Manager Forum took up the challenge to address this thorny issue. The BAMF event in November 2017 posed the question to its attendees:

*“Should the role of Product Owner be part of the role of the Business Analyst?”*

This paper summarises the discussions that took place during the workshop and the findings resulting from the group exercises.

## The Scrum definition of the Product Owner role

The product owner role is defined within Scrum. This role is accountable for maximizing the value of a product, primarily by incrementally managing and expressing business and functional expectations for a product to the Development Team(s). ([www.scrum.org](http://www.scrum.org))

## The responsibilities of the Product Owner role

In order to set a baseline from which to discuss the required skills, the workshop attendees were asked to consider the responsibilities of the product owner. The intention was to consider what the product owner was responsible for in order to then elicit the skills required to fulfil these responsibilities.

The responsibilities were defined as follows:

- Prioritising and Ownership of the backlog.
- Setting the Vision.



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- Advocate of the Vision.
- Benefits realisation/tracking of value.
- Managing product roadmap.
- Negotiation with stakeholders.
- Informed decisions on scope.
- Clarifying questions on scope/business need.

## The skills discussion

Having baselined the group understanding of the role it then seemed appropriate to discuss the type and balance of skills that the PO role requires. We decided as a provocation to group the skills into three categories:

- Business (for example, product/domain knowledge, organisation design).
- Personal (for example, communication, stakeholder management, facilitation).
- Analytical (techniques such as prioritisation, SWOT, PESTLE).

The groups identified the following skills within these three categories:

Personal	Analytical	Business
<ul style="list-style-type: none"> <li>• Team working</li> <li>• Influencing &amp; negotiation</li> <li>• Adaptability</li> <li>• Stakeholder management</li> <li>• Innovation</li> <li>• Organisational diplomacy</li> <li>• Decision making</li> <li>• Risk awareness</li> <li>• Confidence</li> <li>• Collaboration</li> <li>• Written &amp; verbal communication</li> <li>• Relationship building</li> </ul>	<ul style="list-style-type: none"> <li>• Problem solving</li> <li>• Prioritisation</li> <li>• Customer experience/design</li> <li>• Data interpretation</li> <li>• Research</li> <li>• Option appraisal</li> <li>• Informed decision making</li> <li>• Strategy alignment</li> <li>• Outcome definition</li> </ul>	<ul style="list-style-type: none"> <li>• Market research/awareness</li> <li>• Competitor analysis</li> <li>• Trend analysis</li> <li>• Business knowledge</li> <li>• High level Application knowledge</li> <li>• Regulatory awareness</li> <li>• Commercial awareness (cost/drivers)</li> <li>• Customer perspective</li> <li>• Agile methodology</li> </ul>

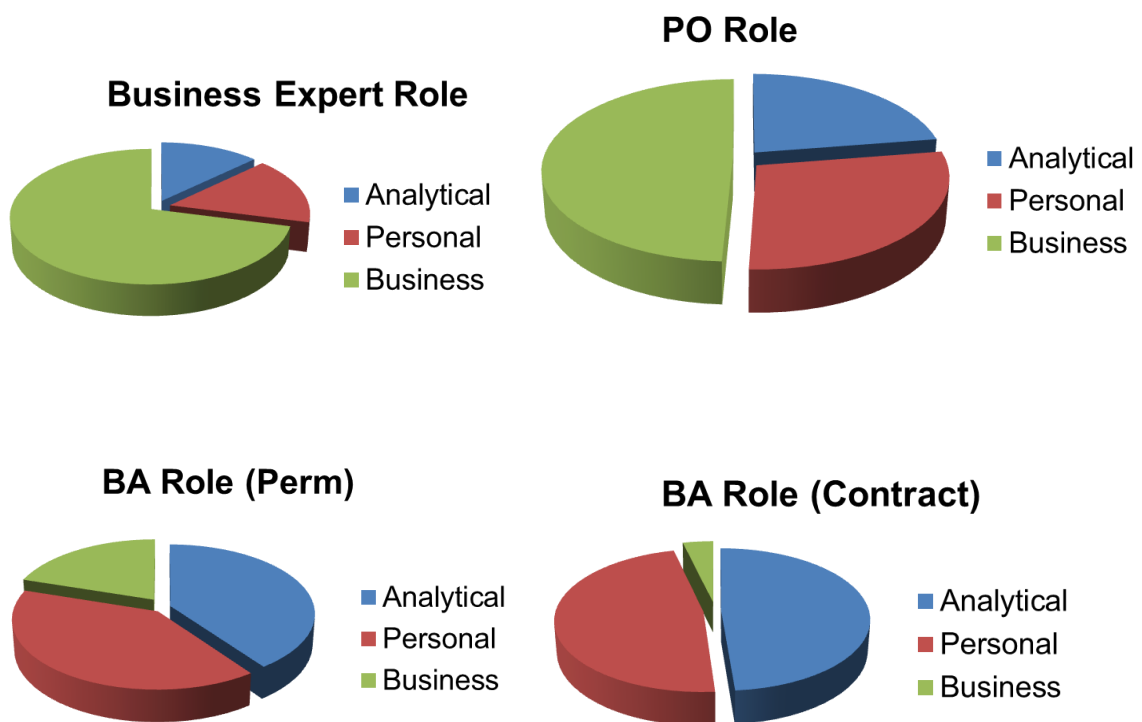
There was a lot of intense discussion but the groups were in general agreement about the skills required within the three categories.



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## The Aviva view of the skills

As a discussion point, four pie charts that showed the percentage split of the skills within the three categories for the BA and PO roles within Aviva. These are reproduced below:



While these are derived from an Aviva perspective, where there is a tendency to recruit BAs internally, the pie charts show that Aviva BAs have a higher ratio of business background. However, there seemed to be a general consensus with the ratios that were proffered.

## Is this a BA role? Factors influencing the decision

One thing that became clear during the debate was that there were almost as many flavours of Agile or agility being employed as there were companies in the room. There was a general feeling that in most cases it was almost impossible to deploy a dogmatic approach to Agile as there were always constraints imposed by the host organisation that would impact upon the approach adopted. These constraints could include:



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- The inability to co-locate due to geographic scale.
- The size of project, for example, the host business may be unwilling to entrust large budgets to a BA.
- Unavailability of business representatives leading to BAs acting as 'Proxy PO's'.
- BAs becoming POs simply through experience within project rather than being the best fit.
- Cost/profit centre constraining correct allocation of resource.
- A lack of required product-specific knowledge.

These constraints can result in the business analysis profession struggling to define its role boundaries within the Agile world. Having said that, it was notable that a growing confidence exists that BAs have a vital skill-set in terms of successfully delivering Agile initiatives. While this is contrary to the commonly-espoused dogma that there is no role for BAs in a feature team, the reality is that business analysis skills contribute to the success of such initiatives. This situation perhaps should be acknowledged by the Agile evangelists within the IT industry.

It was also observed that BAs stand to gain increased job enjoyment from applying Agile principles and approaches which may lead to increasingly high advocacy of the method within the BA community.

## Conclusions

During the debate, it became clearer that this is a topic that is not as clear cut as instinct would initially suggest. The product owner role, as defined in Scrum, is ambiguous and this opens up the possibility of unclear expectations regarding skills and behaviours. In general, it seemed clear that whilst the BA *could* do the job it was unclear whether they *should*. However, the definition of the PO role needs clarification and, given that this may be done at an organisational or even project level, the possibility remains of the BA covering the PO role.

There were several reasons why executive level sponsors may feel it appropriate to blend the roles, including a lack of business resource or the impossibility of co-location. However, these are not genuine attractors to a positive outcome, more a reactive decision in response to a fractured methodology.

Scenarios exist where a blended role could be successful. For example, in a small, multi-skilled enterprise or in a company with a limited or very simple product range. However, for large globally-distributed, multi-market and heavily legislated organisations it remains a questionable ambition.