1. **What is the difference between Brainstorming and JAD sessions?**

**Answer –**

 **Brainstorming** – Brainstorming is a creative problem-solving technique where individuals or groups generate a multitude of ideas to address a specific issue or challenge. This method encourages open thinking and the free flow of ideas, promoting innovative solutions and collaboration.

Purpose: To generate a wide range of ideas, solutions or concepts for a specific problem or project.

Process: Participants freely share their thoughts and ideas without immediate evaluation or criticism.

Setting: Often takes place in an informal setting, encouraging open and imaginative thinking.

Outcome: A collection of varied ideas that can be further refined, evaluated and developed into potential solutions.

Applicability: Used in creative processes, problem-solving and idea generation across various domains.

 **JAD Sessions** – Joint Application Development (JAD) is a process used to collect business requirements while developing new information systems for a company. The JAD process may also include approaches for enhancing user participation, expediting development and improving the quality of specifications. JAD sessions are highly structured, facilitated workshops that bring together customer decision makers and IT staff to produce high quality deliverables in a short period.

Purpose: To gather requirements, define project scope and streamline communication among stakeholders, especially in software development.

Process: Facilitated by a leader, JAD sessions involve structured discussions and activities to extract detailed requirements and specifications.

Setting: Organized workshops that include stakeholders, end-users and the development team in a focused environment.

Outcome: A documented and refined set of refined set of project requirements that serves as a foundation for development.

Applicability: Commonly used in software development projects to ensure clear understanding and alignment.

1. **Why Document Analysis is one of the compulsory techniques we use in a project?**

**Answer –**

 Document Analysis is a crucial and often compulsory project technique because it provides a wealth of information, helps clarify requirements, identifies risks and ensures alignment with legal and regulatory standards, all of which are essential for successful project execution.

Document Analysis involves the systematic examination and evaluation of various types of documents to extract valuable insights and information. These documents can take the form of reports, contracts, emails, surveys, social media posts or any other written materials relevant to a particular business context.

Document Analysis is an essential tool for Business Analysts for below reasons:

1. **Understanding the Context** – Documents provide background information and context that help in understanding the project’s scope, objectives and goals. This could be project plans, requirements or any official records related to the project. Analysing these ensures you grasp the foundation knowledge before diving into further steps.
2. **Identifying Stakeholder Expectations** – Many projects involve multiple stakeholders and documents such as contracts, meeting notes and emails often contain key insights into what stakeholders expect or need. Document analysis helps identify these expectations and align the project’s goals accordingly.
3. **Clarifying Requirements** – Project requirements are often outlined in formal documents. By analysing them, you ensure that you correctly interpret the project’s need and are not working off vague or incomplete information. This helps reduce misunderstandings and errors during execution.
4. **Tracking progress** – Documents like reports, progress updates and audits can give you a historical record of the project’s progress. Analysing them allows you to see what has been done and identify any discrepancies or areas where things may have gone off track.
5. **Risk Management** – Document Analysis can help you identify potential risks early. For example – legal documents, financial records or project contracts may reveal risks or challenges that need to be addressed. This helps in proactive risk mitigation.
6. **Compliance and Standards** – Many projects need to adhere to industry standards, regulations or compliance requirements. Documents like policies, guidelines and regulations ensures that the project aligns with these standards. Regular analysis ensures that nothing is overlooked.
7. **Data Consolidation** – Projects often generate multiple types of documents across different phases. Analysing these documents helps consolidate the information, making it easier to create reports, track changes and ensure consistency.
8. **Communication Efficiency** – Document Analysis can help identify key communication patterns, including what’s being communicated, who is communicating it and how. This can improve overall communication efficiency within the team and with external stakeholders.
9. **In which context we will use Reverse Engineering?**

**Answer –**

 Reverse Engineering is a technique that is used in various context, particularly when you want to understand, analyse or recreate an existing product, system or component.

Below are some key contexts in which reverse engineering is commonly used:

1. **Understanding Existing Systems and Processes**
	1. **Analysing legacy system** – Reverse engineering helps BAs understand the inner working of these systems, how they interact with other systems, and how business processes are executed. This understanding is crucial when proposing improvements or transitioning to new technologies.
	2. **Process Improvement** – If an organization has existing workflows or processes that are inefficient, reverse engineering can help Bas deconstruct these processes to identify bottlenecks, redundancies or areas for optimization. By understanding how the current system operates, Bas can suggest improvements that streamline operations.
2. **Requirements Gathering for New Projects**
	1. **Gathering Implicit Knowledge** – Reverse engineering can be useful when there are few or no formal documentation of business requirements. By analysing existing systems, software or processes, Bas can reverse engineer the business rules and logic that govern them, extracting requirements for a new solution. This can help create accurate and comprehensive requirements for new projects or system developments.
	2. **Uncovering hidden requirements** – Often, the current solution or product may not clearly document all the business logic, assumptions or rules. Reverse engineering allows a BA to identify these hidden requirements by deconstructing the system and understanding the logic behind the workflows.
3. **Competitor and Market analysis**
	1. **Competitive Intelligence** – Business analysts can use reverse engineering to examine competitor products or services. By deconstructing a competitor’s offering, a BA can understand their features, pricing models and strategies. This information is useful for positioning a product in the market or identifying gaps in the current offering.
	2. **Product Benchmarking** – Reverse engineering can also be applied to compare products or services to industry standards or competitors. Thus, analysis can inform product development and strategy, helping businesses develop competitive advantages.
4. **Analysing customer experiences and Pain points**
	1. **Understanding User interactions** – Reverse engineering can be used to analyse how customers are interacting with a product, service or system. By deconstructing user feedback, journey maps or customer service data, a BA can identify where customers encounter difficulties or dissatisfaction. This can lead to insights for improving customer experience the value proposition.
	2. **Examining Usability** – Business Analysts can reverse engineer user interfaces (UI) or workflows to understand usability issues. By deconstructing how users interact with a system, the BA can identify pain points in the user journey and propose solutions for a more intuitive experience.
5. **Evaluating Technology solutions**
	1. **Understanding Software Solutions** – When an organization is considering purchasing or implementing a new software solution, reverse engineering can help analyse the existing software or a competitor’s software. Business analysts can assess how the solution works, the underlying technology and how it addresses business needs. This helps the BA evaluate whether the solution aligns with the organization’s objectives.
	2. **Gap Analysis** – By reverse engineering the existing solution, BAs can identify gaps in functionality or inefficiencies in the current setup. This enables them to provide detailed recommendations for improvement, whether through customizing the existing solution or selecting a different one.
6. **Regulatory Compliance and Risk Management**
	1. **Understanding Compliance needs** – In highly regulated industries, reverse engineering can help business analysts dissect existing systems or processes to ensure that they comply with necessary regulations. By reverse engineering the regulatory requirements and how they have been implemented, BAs can ensure that business processes or sustems adhere to legal standards and avoid compliance risks.
	2. **Risk Identification** – Reverse engineering existing systems or processes allows BAs to uncover hidden risks or vulnerabilities. By analysing how business processes work, the BA can identify areas where errors, delays or regulatory violations could occur and develop strategies to mitigate these risks.

1. **What is the difference between Brainstorming and Focus Groups?**

**Answer –**

 The key difference between Brainstorming and Focus Groups lies in their purpose, structure and the way they are conducted.

1. **Purpose –**

**Brainstorming**: The goal is to generate a large number of ideas quickly, often to solve a problem or explore potential solutions. It’s about creativity and idea generation.

**Focus Groups**: The purpose is to gain in-depth feedback and insights from participants about a specific topic, product or concept. It focuses more on understanding opinions, attitudes and experiences.

1. **Structure –**

**Brainstorming**: Its usually informal and unstructured. Participants share ideas freely without criticism or judgement and often build on each other’s thoughts.

**Focus Groups**: These are more structured discussions. A facilitator guides the conversation using specific questions or topics and the group discusses their opinions in a controlled manner.

1. **Group Composition –**

**Brainstorming**: Participants may come from a variety of backgrounds and perspectives to encourage creative, out of the box thinking.

**Focus Groups**: Participants are typically chosen based on specific criteria relevant to the research, such as being part of a target demographic or using a particular product.

1. **Outcome –**

**Brainstorming**: The outcome is a list of ideas or potential solutions that can be further developed.

**Focus Groups**: The outcome is deeper insight into participants’ thoughts, feelings and behaviour, often used for understanding consumer preferences or reactions.

1. **Duration –**

**Brainstorming**: Generally short, lasting from 20 minutes to an hour, because the focus is on quickly generating ideas.

**Focus Groups**: Typically, last longer, usually 1-2 hours, to allow for more detailed discussions and feedback.

1. **Interaction –**

**Brainstorming**: Encourages spontaneous, free-flowing interaction between participants with minimal guidance from the facilitator.

**Focus Groups**: Interaction is moderated by a facilitator to ensure that everyone contributes, and the discussion stays on track with the research objectives.

1. **Observation Technique – Explain both Active and Passive approaches?**

**Answer –**

 Observation Techniques are research methods used to gather insights about how business processes, systems or people behave in real-time. These techniques help identify inefficiencies, areas for improvement and opportunities for innovation. These techniques can be broadly divided into two approaches – Active Observation and Passive Observation.

1. **Active Observation** – In active observation, the BA actively engages with the subjects being observed. This could involve direct interaction with employees, customers or stakeholders to better understand their behaviour and experiences. Active observation often takes place during workshop, user testing or process improvement initiatives.

**Key characteristics of Active Observation:**

* **Involvement** – The BA interacts with team members, participates in meetings or observes the workflow to understand the challenges first hand.
* **Engagement with Participants** – The analyst may ask questions, clarify doubts or encourage participants to share their thoughts about how processes are functioning.
* **Hands on approach** – Involvement could be in the form of observing meetings, customer interaction or the use of a software tool by employees.

**Example – Workshops & User Testing** – A BA may organize or attend a workshop where they observe how stakeholders or end users engage with a prototype of a new system. The analyst might participate in discussions to understand the user experience, identify gaps in the design and provide feedback based on their observations.

1. **Passive Observation** – In Passive observation, the researcher observes the subjects without interacting with them. This means the researcher does not become part of the environment but instead watches from a distance, aiming to record behaviours and events as they naturally unfold.

**Key characteristics of Passive Observation:**

* **Non-Participation** – The researcher does not engage with the group or interfere with the solutions being observed.
* **Minimal Interaction** – The researcher’s role is purely observational and does not influence the behaviour of the participants.
* **Data Collection** – Observations are typically noted without interaction, sometimes using tools like hidden cameras, notes or video recordings. The aim is to capture behaviour as naturally as possible.
1. **How do you conduct the Requirements Workshop?**

**Answer –**

 Conducting a requirements workshop is a key responsibility, as it helps gather and clarify the needs, goals and expectations of stakeholders. A successful workshop ensures that all relevant parties align on the project objectives and that the requirements are well defined for the solution. Here is a step-by-step approach to conducting an effective requirements workshop –

1. **Preparation and Planning:**
* **Identify stakeholders** – Make sure to invite all the key stakeholders, including product owners, users, subject matter experts and technical team members.
* **Set objectives** – Clearly define the goal of the workshop. Define features, workshops or user stories.
* **Define agenda** – Create a structure agenda to keep the workshop focused and organized. Break a session into topics or phrases such as introduction, discussion, brainstorming and wrap-up.
* **Set expectations** – Communicate the purpose, goals and expected outcomes of the workshop to all participants ahead of time.
1. **Facilitating the workshop:**
* **Welcome and introductions** – Begin by introducing all participants and providing a brief overview of the agenda and workshop objectives.
* **Set ground rules** – Establish guidelines for interaction (eg. Respect others’ opinions, stay on topic and allow everyone to contribute).
* **Explain the process** – Explain the methodology you will use to gather and document requirements (eg. User stories, use cases, flowcharts etc)
1. **Eliciting requirements –**
	* **Facilitate discussions** – Ask open-ended questions and encourage participants to discuss their needs, pain points and expectation. Eg – “What challenges do you face with the current system?” or “What functionality is critical to the success of the project?’
	* **Use techniques to elicit information** – Brainstorming, use cases, user stories, prioritization, prototyping, SWOT analysis
	* **Document requirements** – Keep detailed notes or use a collaborative tool to capture the require requirements as they are discussed. It’s important to ensure everything is recorded accurately.
2. **Managing discussions** –
* Clarify and validate requirements
* Break down requirements
* Verify understanding
* Ask for clarifications
1. **Prioritizing requirements** –
* Use techniques like Moscow or voting or a simple ranking system to prioritize requirements
* Clarify dependencies – Identify any interdependencies between requirements, so the team understands how changes in one area may affect another.
1. **Wrap up the workshop** –
* Action items – Summarize the next steps – who will do what after the workshop. This might include refining the workshop. This might include refining the requirements, creating a prototype or following up with more detailed discussions.
* Thank participants – Acknowledge everyone’s input and thank them for their time and collaboration.
1. **Post workshop activities** –
* Document the requirements – After the workshop, create a detailed requirements document or backlog, incorporating all the discussed points and any changes.
* Share with stakeholders – Share the document with participants for validation and feedback.
* Schedule next meetings – If necessary, plan for follow-up workshops or review meetings to continue refining the requirements.
1. **In which context, Interview technique can be conducted by a BA? How many approaches are there in conducting interviews? (Structured – Unstructured) Explain them. Explain the difference between Open Ended Questions and Closed Ended Questions.**

**Answer –**

 Interview techniques are a fundamental tool to gather detailed and accurate requirements, understand stakeholder perspectives and collect qualitative data during various phases of a project.

**Context in which Interviews can be conducted:**

A BA may use interviews in following contexts:

* **Requirement’s elicitation** – To gather business, stakeholder and solution requirements.
* **Stakeholder Analysis** – To understand the expectations, concerns and influence of stakeholders.
* **Process Understanding** – To learn about current business processes from subject matter experts (SMEs)
* **Problem analysis** – To identify root causes of issues within current systems or processes.
* **Solution Evaluation** – To assess the effectiveness of a proposed or existing solution.
* **Change Impact Analysis** – To determine how a proposed change will affect various stakeholders and operations.

**Approaches in conducting interviews:**

There are primarily three approaches, though Structured and Unstructured are the main ones often emphasized:

1. **Structured Interviews** –
	* Predetermined set of questions.
	* All interviews are asked the same questions in the same order
	* Ideal for comparing responses or gathering specific information
	* Pros – Consistent, easier to analyse, time-efficient
	* Cons – Limited flexibility, may not uncover unexpected insights
2. **Unstructured Interviews** –
	* Informal, conversational
	* Questions are open-ended and spontaneous, guided by the flow of discussion.
	* Best for exploring complex topics or understanding stakeholder perspectives deeply.
	* Pros – Flexible, allows for discovery of unknown issues.
	* Cons – Harder to analyse, can go off-topic, time-consuming.
3. **Semi-Structured Interviews (a hybrid of both)** –
	* Predefined questions with flexibility to explore topics as they arise.
	* Combines structure with adaptability.
	* Often considered the most practical approach for Bas.

**Difference between Open-Ended and Closed-Ended questions:**

|  |  |  |
| --- | --- | --- |
| **Aspect** | **Open-ended questions** | **Closed-ended questions** |
| **Definition** | Questions that encourage detailed, elaborated responses. | Questions that can be answered with a single word or choice. |
| **Purpose** | To explore thoughts, feelings and insights. | To obtain specific, concise information.  |
| **Example** | “Can you describe how you currently handle customer complaints?” | “Do you use a CRM system to track customer complaints?” |
| **Response type** | Descriptive and qualitative. | Short, often Yes/No or multiple-choice. |
| **Usage in Interviews** | Useful in unstructured or semi-structured interviews. | Common in structured interviews or surveys. |

1. **Questionnaire Technique – Where will we use? Give one example.**

**Answer –**

 The Questionnaire Technique is a requirements elicitation method used by BAs to collect information from stakeholders through a set of written questions. It is typically used when responses are needed from a large group of people, especially when they are located in different places or have limited availability for interviews and workshops.

 The Questionnaire Technique is used when we need to gather information from a large number of stakeholders efficiently. It’s especially helpful when stakeholders are geographically dispersed, time-constrained or when standardized data collection is required.

When to use –

* When quantitative data is needed (e.g. preferences, satisfaction ratings, usage patterns).
* When conducting surveys for initial research or validation.
* When interviewing everyone individually isn’t feasible.
* To compliment other elicitation techniques like workshops or interviews.

**Example – Scenario 1: A BA is working on a project to enhance an internal HR portal used by employees across different departments.**

Use of Questionnaire – The BA creates a questionnaire to understand employee satisfaction with the current HR portal, asking questions like:

* How often do you use the HR portal?
* Rate your experience with the portal on a scale of 1-5.
* What features do you think are missing or could be improved?

**Example – Scenario 2: Redesigning a company’s intranet portal.**

Questionnaire Sample –

* How often do you access the intranet portal? (Multiple choice).
* What features do you find most useful? (Open-ended).
* Rate your satisfaction with the current portal (1 to 5). (Closed-ended).
* What improvements would you like to see? (Open-ended).
1. **How to sort the Requirements – Where will we use? Give one example.**

**Answer –**

 Sorting requirements is a key step in any project. It helps to prioritize what needs to be done and understand which requirements are most critical.

Sorting can be done on the basis of several criteria –

* Priority – Which requirements are most important?
* Category – Functional vs. Non-Functional.
* Stakeholder – Which stakeholder requested it?
* Feasibility – How easy or hard is it to implement?
* Dependency – Does one requirement depend on another?

This is used during the planning phase of a project, especially in requirements analysis or product backlog grooming in Agile methodologies.

**Example – Building a mobile banking app. We gather these requirements:**

* Users can log in using biometric authentication.
* Users can transfer money.
* The app should load within 2 seconds.
* Admins can generate monthly transaction reports.

**We can sort them by priority:**

**Priority Requirement**

High Users can transfer money

High Users can log in using biometric authentication

Medium The app should load within 2 seconds

Low Admins can generate monthly transaction reports

1. **Prioritise the Requirements – Where will we use? Give one example.**

**Answer –**

 Prioritizing requirements means ranking them based on importance, urgency, value or feasibility, so that the team knows what to build first.

We will use requirement prioritization in:

* Software development projects
* Product Management
* Agile sprint planning
* System design phases
* Anywhere resources (time, people, budget) are limited and smart decisions are needed.

**Different prioritization methods:**

* MoSCoW
* Kano Model
* Value vs. Effort Matrix
* 100-Dollar Test

**Example – Building an Online Learning Platform**

**Let’s prioritize using MoSCoW:**

**Requirement Priority**

Students can watch video lessons Must Have

Students can take quizzes after lessons Must Have

Students can rate courses Should Have

Dark Mode UI Could Have

Instructor analytics dashboard Won’t Have (for now)

This is because watching videos and taking quizzes are core to learning. Rating and dark mode improve experience but are less critical. Analytics is useful, but not needed in the first version.

1. **Weekly status reporting – How will we drive?**

**Answer** – Weekly status report, also known as a weekly check-in, is a communication tool that project managers use to keep tabs on their employees’ work experiences. While a team lead can do a weekly status report in person, it’s easier to do it online.

A weekly status report is a complete overview of your week at work, covering projects you’ve completed, ones that are still in progress and upcoming plans for the future.

A weekly report is a review of your workweek and provides a summary of what you completed, what projects are in progress and plans that outline your workflow for the next week. Typically, weekly reports are brief and concise and only one page long. Most professionals send weekly reports on Friday afternoons to establish consistent communication with team members and supervisors. Additionally, a weekly report can benefit both you and your employer by providing insight into important aspects of the work you complete.

**We will drive weekly status reporting this way –**

1. **Define the purpose:**
	* Track progress on goals/tasks
	* Highlight blockers or risks
	* Align team and stakeholders
	* Plan next steps
2. **Set a fixed schedule**:
* Choose a consistent day and time (eg. Every Friday at 3 PM)
* Keep it short and focused (15-30 mins)
1. **Create a standard format/template:**

A common format looks like this:

**Section Details**

**Accomplishments this week** What was completed

**In Progress** Ongoing tasks

**Blockers/Risks** Issues needing attention

**Next steps** What’s planned for next week

1. **Assign responsibility**
* Usually, the project manager, scrum master or team lead drives it
* Team members contribute updates for their areas
1. **Use tools for visibility**
* Share status in tools like:
	+ Jira
	+ Microsoft Teams
	+ Confluence/Google docs/Excel
1. **Review and follow up**
	* Discuss blockers and assign action items
	* Update project timeline if needed
	* Send summary email or document to stakeholders

**Example – Managing a website redesign project.**

Weekly status report: April 12, 2025

* Completed – Homepage wireframe finalized
* In progress – Mobile responsiveness testing
* Blockers – Waiting on final logo from design team
* Next steps – Begin About Us page design, get client approval on homepage
1. **Meeting Minutes Document – Prepare one sample.**

**Answer –**

**Meeting Minutes:**

Meeting Title: Weekly Project Status Meeting

Date: April 12, 2025

Time: 10:00 AM – 10:30 AM

Location: Microsoft Teams/Conference Room A

Facilitator: Jane Doe (Project Manager)

Note Taker: Alex Smith

**Attendees:**

* Jane Doe – Project Manager
* Alex Smith – Developer
* Priya Kumar – QA Lead
* Samuel Lee – UX Designer
* Client – John Miller – ABS Corp

**Agenda:**

1. Review progress from last week
2. Discuss current issues/blockers
3. Plan tasks for next week
4. Client feedback on UI mockups

**Agenda:**

1. Review progress from last week
	* Development team completed user login module.
	* QA began testing login functionality on staging server.
	* UI mockups for the dashboard were finalized and sent to client.
2. Current issues/blockers
	* Delay in API integration due to missing documentation.
	* QA reported a bug in the password reset flow – Alex to investigate.
3. Tax planning for next week
	* API documentation expected from backend team by Monday.
	* Front-end team to begin integrating dashboard UI.
	* QA to continue regression testing login and registration features.
4. Client feedback on UI mockups
	* John Miller appreciated the design but requested:
		1. Lighter background on the dashboard
		2. Larger font size for headings
* UX Designer Samuel Lee to revise mockups accordingly and resend by Wednesday.

**Action Items:**

|  |  |  |
| --- | --- | --- |
| Task | Assigned to | Due Date |
| Fix password reset bug | Alex Smith | April 14, 2025 |
| Revise UI mockups per feedback | Samuel Lee | April 16, 2025 |
| Submit API documentation | Backend Team | April 14, 2025 |
| Continue regression testing | Priya Kumar  | Ongoing |

**Next Meeting: April 19, 2025 – 10:00 AM**

**Meeting Adjourned: 10:30 AM**

1. Change Tracker – Document – Prepare one sample.

Answer –

 Change Tracker Document is a kind of document that is used to log and monitor all the changes made to a project, product or process – particularly in IT, software development or project management.

**Change Tracker Document**

Project Name: Customer Portal Enhancement

Document Version: 1.0

Prepared by: Alex Smith

Date: April 13, 2025

**Change Log Table**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Change ID** | **Date** | **Description of Change**  | **Requested By**  | **Impact** | **Status** | **Owner** | **Approval** |
| CHG-001 | Apr 5, 2025 | Updated login page design for improved user experience | Samuel Lee (UX) | Low-UI Only | Completed | UX Team | Approved – Jane Doe |
| CHG-002 | Apr 7, 2025 | Added multi-language support for registration | John Miller (Client) | Medium – Backend  | In Progress | Dev Team | Pending |
| CHG-003 | Apr 10, 2025 | Remove deprecated “Help” section and replace with chatbot | Priya Kumar (QA) | High-Impacts support flow | Planned | Product Team | Not yet reviewed |
| CHG-004 | Apr 12, 2025 | Modify password reset logic to align with new security policy | Jane-Doe (PM) | High-Security Compliance | Completed | Dev Team | Approved – Compliance Officer |

**Summary Notes:**

* All high-impact changes are being reviewed weekly by the change control board.
* CHG-002 is awaiting backend integration specs before moving to development.
* CHG-003 will be evaluated in the next sprint planning meeting.

**Next Review Date:** April 19, 2025

**Document Owner:** Dane Joe (Project Manager)

1. **Difference between Traditional Development Model and Agile Development Models.**

**Answer –**

Traditional vs. Agile Development Models

|  |  |  |
| --- | --- | --- |
| **Aspect** | **Traditional Development Model** | **Agile Development Model** |
| **Approach** | Linear and sequential | Iterative and incremental |
| **Process Flow** | Phases like Requirements – Design – Dev – Testing – Deployment (each completed before the next starts) | Divides project into small cycles (Sprints), with continuous feedback and improvements  |
| **Flexibility** | Rigid – Changes are difficult and costly once the project starts  | Highly flexible – Changes can be made throughout the project |
| **Planning** | Detailed planning at the beginning, minimal changes allowed later | Adaptive planning; evolves throughout the project |
| **Client Involvement** | Limited – Usually at the start and end | Continuous – Clients give feedback after each sprint |
| **Testing** | Happens after the development phase | Continuous testing during each iteration  |
| **Delivery**  | Final product delivered at the end | Working software delivered regularly (eg. Every 2-4 weeks) |
| **Risk Management** | Risks are identified and addressed late in the office | Risks are managed  |
| **Team Structure** | Usually siloed (e.g. separate teams for development, QA, etc) | Cross-functional, collaborative teams |
| **Documentation** | Heavy and detailed document | Lightweight documentation – focus on working software |

**Example –**

* **Traditional** – You design the entire product, develop it all, then test and deliver at the end (like building a house).
* **Agile** – You build and deliver small parts quickly, get feedback and improve continuously (like building and improving a mobile app version by version).
1. **Explain Brainstorming Technique – Where to use?**

**Answer –**

 Brainstorming is a creative problem-solving technique used to generate a large number of ideas quickly. It encourages open, free thinking in a group or individually without immediately judging or evaluating the ideas.

The goal is quantity over quality at first – the more ideas, the better. Later, these ides are refined, combined and evaluated.

**How it works** –

1. Define the problem or goal clearly
2. Set rules – like no criticism, encourage wild ideas, build on others’ ideas
3. Generate ideas freely – spoken or written
4. Record all ideas – whiteboard, sticky notes, digital tools, etc.
5. Review, group and evaluate ideas afterwards

**Techniques under Brainstorming** –

* Classic Brainstorming (in-person group discussion)
* Mind Mapping
* Brainwriting
* SCAMPER (Substitute, Combine, Adapt, Modify, Put to another use, Eliminate, Reverse)
* Reverse Brainstorming (think about how to cause the problem)

**Where to use Brainstorming** –

|  |  |
| --- | --- |
| **Area** | **Example Use Cases** |
| **Business & Marketing** | New product ideas, campaign strategies, branding concepts |
| **Education & Learning** | Group projects, essay topics, problem-solving activities |
| **Software Development & Design** | Feature Planning, UX/UI design ideas, the stack choices |
| **Team building & Workshops** | Icebreakers, innovation challenges, collaboration exercises |
| **Creative fields** | Story ideas, script development, visual design themes |
| **Problem Solving** | Process improvements, customer feedback solutions, crisis management |
| **Personal use** | Goal setting, life planning, travel planning, event organising |

**Tips for effective Brainstorming** –

* Create a relaxed, judgement free environment
* Set a time limit to keep it focused
* Encourage wild ideas
* Build on each other’s suggestions
* Have a facilitator to guide and keep the session on track
1. **What reports Accounts Departments will generate (minimum 5 reports)**

**Answer –**

 The Account Department typically generates a variety of financial reports to help manage the company’s finances, support decision-making and ensure compliance. Here are five key reports that are commonly generated –

1. **Profit & Loss Statement (P&L)**
	1. Purpose – Shows the company’s revenues, expenses and profits over a specific period.
	2. Use – Helps in understanding financial performance, cost management and profitability.
2. **Balance Sheet**
	1. Purpose – Summarizes assets, liabilities and equity at a specific point in time.
	2. Use – Provides a snapshot of the company’s financial position and liquidity.
3. **Cash Flow Statement**
	1. Purpose – Tracks cash inflows and outflows from operating, investing and financing activities.
	2. Use – Helps assess cash availability and manage liquidity.
4. **Accounts receivable Aging Report**
	1. Purpose – Lists outstanding customer invoices by age.
	2. Use – Monitors overdue payments and helps manage collections.
5. **Accounts payable Aging Report**
	1. Purpose – Details unpaid vendor invoices and how long they’ve been outstanding.
	2. Use – Helps schedule payments and manage vendor relationships.
6. **What is the structure of the message/mail communicated from the HR department to the employee in case the loan is rejected?**

**Answer –**

 A professional and empathetic tone is key when communicating a loan rejection from the HR department to an employee. Below is a common structure for such and email/message, along with a sample template –

**Structure of the message/mail** –

1. Subject Line – Clear and professional
2. Greeting – Address the employee formally
3. Acknowledgement – Reference the loan request
4. Decision Notification – Clearly state the loan has been declined
5. Reason (Optional) – Brief explanation, if applicable
6. Empathy & Support – Express understanding and offer help if possible
7. Closing – Professional sign-off

**Sample Email Template**

**Subject: Update on your loan request**

Dear [Employee Name],

Thank you for your recent application for a staff loan dated [insert date].

After careful review, we regret to inform you that your loan request has not been approved at this time. This decision was made after evaluating the current loan policy criteria and other internal considerations.

We understand this may be disappointing and we want to assure you that the decision was made through thorough review. You are welcome to reapply in the future should your circumstances change, or if you would like to discuss alternative options, we are happy to assist you.

Please feel free to contact the HR department if you have any questions or need further clarification.

**Warm Regards,**

**[Your Name]**

**[Designation]**

**Human Resources Department**

1. **What is the structure of the message/mail communicated from the HR department to the employee in case the loan is approved?**

**Answer** –

 When a loan is approved, the HR department should send a clear, positive and professional message outlining the approval details and nest steps. Here’s a structured approach to the message, followed by a sample template:

**Structure of the loan approval mail from HR**

1. Subject Line – Clearly indicate loan approval
2. Greeting – Formal address to the employee
3. Acknowledgement – Acknowledge receipt of the loan application and thank the employee for their patience or cooperation
4. Approval notification – Clearly state that the loan has been approved
5. Loan details – Provide a summary of key details:
	* Approved loan amount
	* Interest rate (if applicable)
	* Repayment period and schedule
	* Disbursement date
6. Next steps – Mention any actions the employee needs to take (eg. Signing documents, meeting with finance)
7. Point of Contact – Provide HR of finance contact information for further assistance.
8. Closing – Use a professional closing line
9. Signature – Include the HR representative’s name, designation and department.

**Sample email template**

**Subject: Loan approval confirmation – [Your name]**

Dear [Employee’s Name],

We are pleased to inform you that your loan application has been successfully reviewed and approved.

Loan details:

* Approved Amount: Rs[Amount]
* Interest Rate: [X]% (if applicable)
* Repayment Period: [X months/years]
* Repayment Start Date: [DD/MM/YYYY]
* Disbursement Date: [DD/MM/YYYY]

To proceed, please review and sign the attached loan agreement and return a scanned copy by [Deadline date]. If you require any assistance or have questions regarding the loan terms, feel free to contact [Contact person] at [Email/Phone number].

Thank you for your continued contributions to [Company Name].

**Best Regards,**

**[HR Representative Name]**

**[Designation]**

**Human Resources Department**

**[Company Name]**

1. Design a sample report on the Loans applications received by the accounts department.

**Answer –**

**Loan Applications Report**

**Department:** Accounts

**Reporting Period:** [eg. March 1 – March 31, 2025]

**Prepared by:** [Name]

**Date:** [Report Generation Date]

**Summary Overview**

|  |  |  |  |
| --- | --- | --- | --- |
| **Total applications received** | **Approved** | **Pending**  | **Rejected** |
| 25 | 15 | 5 | 5 |

**Detailed loan application list**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| S No. | Employee Name | Employee ID | Department | Loan Amount | Date of application | Status | Remarks |
| 1 | Ramesh Kumar | EMP1023 | Sales | 50,000 | 02-Mar-2025 | Approved | Disbursed on 06-Mar-2025 |
| 2 | Anita Desai | EMP1045 | Marketing | 75,000 | 05-Mar-2025 | Pending  | Awaiting documents |
| 3 | Suresh Mehta | EMP1071 | Finance | 1,00,000 | 07-Mar-2025 | Rejected | Credit Limit exceeded |
| 4 | Priya Shah | EMP1080 | HR | 60,000 | 10-Mar-2025 | Approved | Agreement signed |

**Observations & Insights**

* The majority of applications came from the Sales and HR departments.
* Rejections were primarily due to missing documentation or eligibility criteria.
* Pending applications are under review, mostly delayed due to incomplete submissions.

**Recommendations:**

* Introduce a checklist for employees to ensure complete submission.
* Set up a standard processing timeline (eg. 5 working days) to improve efficiency.
* Send automatic reminders for employees with pending documents.
1. **Which reporting tools we will use for generating reports.**

**Answer** – The choice of reporting tools depends on your organization’s size, existing systems (like ERP or HRMS) and how detailed or automated you want the reports to be. Below are some commonly used reporting tools for generating reports like loan application summaries in the Accounts & HR departments:

**Popular reporting tools –**

1. **Microsoft Excel**
	* Why use it: Simple, flexible, widely available
	* Features: Pivot tables, chart, formulas, data filtering, templates
	* Best for: Small to mid-sized businesses, quick ad hoc reports
2. **Google Sheets**
	* Why use it: Cloud-based, collaborative
	* Features: Real-time editing, sharing, built-in charts and pivot tables
	* Best for: Teams needing shared access and real-time collaboration
3. **Power BI (Microsoft)**
	* Why use it: Advanced analytics, Interactive dashboards
	* Features: Data modelling, visual reports, auto refresh, integration with excel & SQL
	* Best for: Mid-to-large organization, data-driven insights
4. **Tableau**
	* **Why use it: Powerful visualization and reporting**
	* **Features: Drag-and-drop dashboards, real-time data analysis, rich visuals**
	* **Best for: Interactive dashboards and visual data storytelling.**
5. **Zoho Analytics**
	* **Why use it: Budget-friendly BI tools for SMBs**
	* **Features: Auto-generated reports, drag-and-drop analytics, data import from various sources**
	* **Best for: Companies using Zoho suite or looking for affordable BI**
6. **SAP Crystal reports**
	* **Why use it: Detailed and formatted reports from complex data**
	* **Features: Custom templates, parameter-based reporting, printing-ready layouts**
	* **Best for: Enterprises using SAP or needing structured, print-friendly reports**

**Tool Selection depends on:**

* **Volume of data**
* **Real-time vs static reporting needs**
* **Collaboration and access requirements**
* **Budget and technical expertise**