

Analysts Anonymous

Informed comment for the BA and Business Change Community

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In this issue

Issue **14**



Tune in to get the best out of a mixed bunch



BA Career planning - The Watson Model



The BA as Internal Consultant



How persuasive is your writing?

A note from the editor

Welcome to the first edition for 2009 of *Analysts Anonymous*, which has something of a self-development theme. We have an article on getting to know your colleagues a little better (and no, it doesn't involve going back to find the mistletoe), tips on making your writing more persuasive, and a model to support career planning.

There's also a report from a recent meeting where BA managers looked to define the role of the BA as an "Internal Consultant".

I hope you enjoyed the festive season and are now fully prepared for the inevitable 2009 To Do list. Whatever else is on there, make sure that keeping up with **Analysts Anonymous** is somewhere near the top.

Anthony Madigan
Editor, *Analysts Anonymous*
AA-editor@writethetalk.com



Tune in to get the best out of a mixed bunch

Tim explains that understanding how others work will help get things done.

by Tim Mortimer

As you sit reading this article, just take a moment to look around you or think back to your last project meeting. What do you notice about all the various characters? I guess you recognise that everyone is different, but you also know some people are more different than others!

Why is that, and how different are you? Think how valuable it would be if you understood what made others tick to get the best out of them and how you could adapt your natural style to become more efficient and more effective.

The key to success in any business is getting the best out of the people engaged in that organisation.

"It is the people within any enterprise, and their interactions with each other, that ultimately produce excellence or mediocrity" Tom Morris*

The BA role is complex, and great BAs have the necessary skills, knowledge, intellect and ability to interact effectively with others. So let's see

what can be done to tune up your awareness and analyse the question, how do people differ?

The next eight paragraphs highlight some key characteristics and are organised in pairs of opposites. It might be valuable and fun to map out what fits best with you, your key colleagues, your kids or your partner.

Some people are naturally busy, driving things forward; they get their energy from taking the initiative and interacting with others. They like to talk things through and find concentrating on their own for long periods of time tiring and frustrating. At meetings they are quick to offer an opinion to stimulate the discussion.

Other people are more reserved, they are happy to support the initiatives of others, they like to spend time alone focusing on specific issues and they prefer to reflect and think things through for themselves. At meetings they are unlikely to be the most vocal but when they say something it is likely to be to the point and well considered.

They may need to be asked directly for their opinion on a topic outside of their expertise.

Some people when looking at a situation or analysing a problem are drawn to the facts and details: what is real or what they know to be true based on their experience. These people are more likely to take a cautious approach, being sure of their position before moving on to the next step. Being realistic, precise and accurate are important qualities.

Other people are much more drawn to the interpretation of the information, what could it mean or imply. The full picture, ideas and concepts are more compelling than the details. These people are more likely to take a forward looking optimistic approach. Being creative, abstract and imaginative are important qualities.

Some people when making decisions take a very logical, critical approach, they consider the cause and effect of any actions to be sure they are doing the right thing. Decision-making for them is a thinking activity, and this is the language they use most often: "I think this, I think that.....". They have an ability to step away from a situation, even ones that are emotionally charged, and take a detached, objective view.

Other people make decisions on what they feel is the right thing to do, they have a sense about what they believe to be right for them or for others. They are more likely to be guided by their values and to feel compassionate about the involvement and impact on others. They have the ability to step into a situation and deal with challenges in a very empathetic way.

Some people have a natural tendency to be planned and organised, they like things to be in order, they hate loose ends, they want to close things off and bring things to a conclusion, they bring focus to situations. They want to know things are under control, they hate being late and hate being kept waiting by others.

Other people (when they do not have the constraints of work or family to worry about) prefer to live in a more flexible and spontaneous way. They like to explore options and possibilities, to discover something interesting and different, they find the whole process of plans and planning to be constraining.

I hope you have got an insight into your key characteristics and how you differ from others. The value of this insight can come if you can tune in to the natural styles of others, tailor your communication, lay out your thinking and map out your plans in ways that are most likely to help when managing or influencing the people you are interacting with.

The frame I have discussed is based on the Myers Briggs Type Indicator. If you want to know more about this instrument and how it can help you understand your mixed bunch at work, and how you can tune in to get the best out of people, then please get in touch.

Tim Mortimer
Coaching Performance Limited

Working with business teams and individual managers to improve performance and satisfaction.

tim@coachingperformance.co.uk
01664 454199



BA Career planning - The Watson Model

A structured, one-step-at-a-time approach to career planning can provide a sound basis for development.

by Ray Watson

During my thirty years working in the Business Analysis arena, from Graduate Trainee through recruiting and developing analysts to strategic responsibilities, I have provided guidance and advice to many analysts. Some of that advice is incorporated in the 'Watson Model' which seeks to create an environment that works for mutual benefit, one that allows individual analysts to fulfil their own career goals and in so doing, achieve the business's objectives. I have used the Watson Model with many analysts, most of whom have gone on to senior and very successful careers across a number of organisations.

As with most areas of life, success and development is achieved incrementally and this is often illustrated as a series of building blocks or steps.

Companies recruiting people to work as Business Analysts have a responsibility to -

Provide a real job from day one for hands-on experience and knowledge of:

- the organisation and its culture;
- products, procedures and work flows;
- what's expected of the individual.

Focus training:

- an induction course - company background, its markets and strategy;
- involvement in a group project for team building and networking;
- meeting and influencing people, the dos and don'ts (Personal Impact);
- technical / analytical skills used by others in similar roles (Bag of Tools);
- personal development and performance management goal-setting, to align skills, competencies and job aspirations to business needs (Personal Development).

Provide a mechanism for reviews, feedback, development and planning:

- showing a genuine interest in achievements and aspirations of the individuals,

maximising enthusiasm, commitment and the willingness to do a great job;

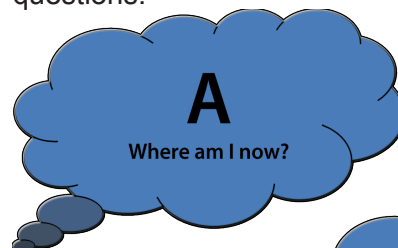
- facilitating additional training, support and exposure to greater challenges.

Sounds great so far and fairly obvious on the surface. But in an ever-changing environment - markets, legislation, mergers, technology, re-organisation, re-engineering, new products, systems - it's all too easy to forget about this. Line managers can become so focused on the business imperatives that the investment in developing quality Business Analysts may be watered down or forgotten about completely.

Clearly, the responsibility for the development of each individual is with that individual and includes seeking help and guidance from others. To expect increased responsibility, promotions and pay rises to be handed on a plate is unrealistic. As a line manager, those I have promoted have been people who have clearly shown themselves to be committed, competent, enthusiastic and consistent deliverers of quality work.

So it's down to the individual to understand what his/her current job/role is and what's expected of them. Don't forget that the Personal Impact, Personal Development and Bag of Tools training (above) will give most benefits to the individual when they are combined and regularly refreshed in support of the current role.

The greatest difficulties for new analysts, either fresh from university or other parts of the business, are the questions:



The starting point, A, is often a bit foggy – it takes time to think about the nature of current tasks/work, the work of those around them, experiences, skill sets and lessons learnt with the benefits of hindsight. The key is not to get too caught up in the detail, but to have a reasonable awareness of the current (starting) position.

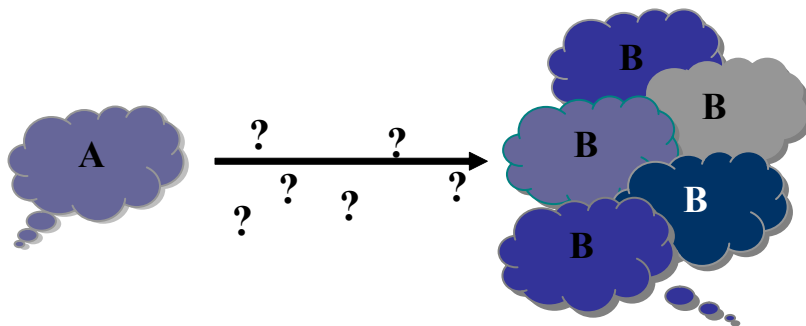
And then of course position B, where they want to be. However for many, and often those at the start of their working career, position B can be one of many options, some currently unknown!

What do they want to be?

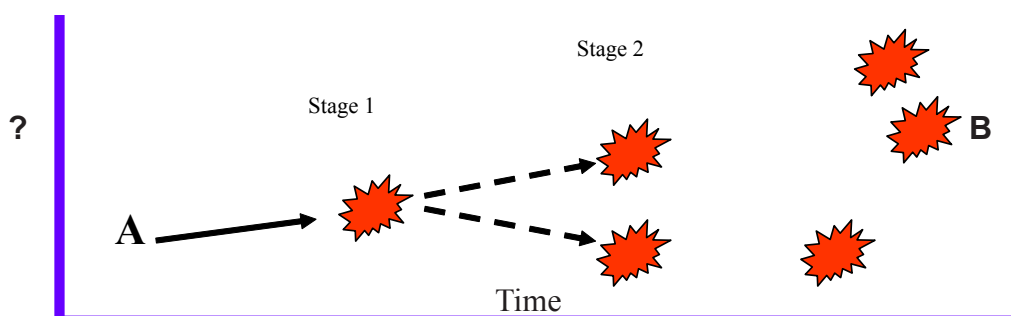
- a good analyst
- a senior analyst
- a manager of analysts
- a senior manager in a large company
- MD of your own company
- a consultant in a large firm
- high earner
- high status

Any and all of these are fine, it's for the individual to have a think about what's important to them and what they may want of the future.

The question is then how to get from position A to one or more position Bs, accepting that some refinement will be necessary and that other options, alternatives or end points will emerge as their career develops.



The difficulty is to determine how to move from A to B: what direction to take; the options that may present themselves; the decisions to be taken; and



how to control and review progress. The company may have a structured development plan, a range of current requirements and some idea of career paths, but the depth and quality of these plans is often dependent on the commitment and value placed on them by the immediate line manager.

The solution is to split the process of moving from A to B into manageable stages as illustrated below. With time on the x axis and whatever measure the analyst chooses (money, status, responsibility, etc.) on the y axis, broad steps should be planned initially. This can be refined once they are happy with the first two stages.

The arrows represent actions, e.g. successfully establishing themselves, delivering quality analysis or a project. Each stage should be a clear and easily recognisable milestone. Stage 1 for example may be promotion, conclusion of a major project, increased responsibility or something else that's important to the analyst (aligned to the y axis) or of value to the business.

Achieving one stage sets up the options for reaching the next stage. Each stage may include a number of similar or grouped targets, while others will inevitably fall away. For example, position B may be an IT director, a Financial Controller, or running one's own company.

Each stage will include gathering knowledge and experience to support an informed decision on subsequent stages. As with product and system design, version 2 cannot be built before version 1. Some actions provide strategic enablers, creating or opening options for the future. For instance, achieving Stage 3 may involve achieving professional status via examination, work that would have to start at an earlier stage.

The measure of success is progress against the y axis. This is supported by regular reviews and feedback loops, with a line manager and/or peer groups. These reviews should also link back to

training (Personal Development + Impact + Bag of Tools) to be fully effective.

Remember external factors – what else can impact or influence progress?

- new techniques and/or changes in technology
- actions of colleagues
- preceding experiences
- changes to the organisation, structure, markets etc.
- opportunities for continuous learning, possibly at your own expense and/or evening courses.

For the individual, this model provides a framework for considering future direction. It's OK for an analyst to want to be the MD of their own business or to have other long term goals. It is also OK for them to view their current role or next few years as a stepping stone(s), providing knowledge, experience and skills. The proviso clearly has to be delivering quality results and providing a return on the investment made by the company employing the individual; no organisation will tolerate a free-loader. Progress is subject to many factors, not least the input and ambitions of the individual.

For the company, it is beneficial to know if an analyst has long term aspirations. The line manager can then plan (subject to circumstances) exposure to problems for the individual or opportunities to work with experts in such areas. The benefits are clear: the individual is interested, motivated and delivers quality solutions – win/win.

It's also worth remembering that some turnover in Business Analysis and other resources can be beneficial, although an analyst leaving within two years is unlikely to provide a return on training and development investment.

Summary points for the analyst:

- Determine what you want to achieve and when
- Plan your course of action
- Monitor and review regularly
- Revise the plan as new information becomes available
- Take it in stages

- Remember, some action may take some time to achieve e.g. professional exams, possibly spanning more than one stage
- Consider how your actions may limit or create future options
- Have periodic reviews with line managers
- Seek and encourage help and support from a wide community
- Be aware of the impact of external factors.

Ray Watson
WatWil Ltd.

The BA as Internal Consultant

The Business Analyst as “Internal Consultant” – Part I – defining the role and the value of internal BA's operating as a consultant.

by Lawrence Darvill

A group of BA managers recently came together to place more definition on the potential for BA's to take on the role of Internal Consultant. This was a follow-on from the Certes June seminar where a number of attendees expressed an interest in meeting to assess the specific requirements that will enable business analysts to move into the consulting area.

The group's objectives included:

- defining the role of the Internal Consultant, how it can work, and the skills that someone in the position should have;
- quantifying its value and examining how to sell the role within organisations;
- sharing best practice and experience;
- benchmarking business analysis skills against external consultancy services.

The forum covered a variety of topics including the definition of the role, the reasons that can prompt a move towards internal consultancy, and the skills needed to do the job.

So why might an organisation move towards internal consultancy?

The Need for Speed: where organisations need to reduce the time it takes to deliver business change and lessen the risks of wasting time and effort on the wrong programmes. Early engagement with the key decision-makers and functions such as marketing is an important part of achieving this. The Internal

Consultant can be well-placed to make this happen.

Commerciality: where organisations are moving to a more entrepreneurial model and require individual members of staff to be more aware of the financial implications of courses of action. BAs may need to move away from analysing the need for IT developments to considering broader business changes.

Regulation: if there is a need to manage the impact of initiatives such as Treating Customers Fairly (TCF) and keeping ahead of compliance and risk management requirements.

Reorganisation: where significant changes in organisational structure and the need for cost savings are driving efficiencies and a need for in-depth analysis. There may be a need to promote operational reuse across the organisation, reduce the use of external consultants, or support an enterprise shift towards outsourcing. In uncertain times many companies are looking at how to make the most of what they've got (inside-out) rather than looking for external solutions.

Working Together Better: if organisations are recognising the benefit of business change programmes, where business-wide awareness and a longer term view are needed. BAs are already in a strong position to provide a cross-functional focus, across different business units.

Retaining Key People: where hanging on to good BAs can be helped by providing alternative career paths and better pay scales.

What is an Internal Consultant?

A definition is a useful place to start when assessing the value that a role can bring. The Forum came up with this:

An internal consultant analyses and validates business needs in order to identify a range of options to fulfil these needs, and enable decision-makers to make informed decisions leading to effective business change.

Using this definition the forum considered what value the IC role could and should offer to an organisation:

- Help organisations spend money on the right things
- Contribute to the development of business strategy
- Translate strategy into action
- Bring new, broader and more inclusive perspective to business challenges

- Assess the impact of environmental factors
- Challenge assumptions and beliefs
- Provide a structured approach
- Identify and shapes the actions that the organisation will undertake
- Select external consultants where an objective business view is required

Of course, value means outcomes, so what deliverables should be expected from an internal consultant? Although not exhaustive, the list should include:

- Articulation of business intent so that the impact can be assessed.
- Definition of options and required business changes.
- Early identification and definition of business issues.
- Rigorous business cases.
- Well-rounded solutions.

Using this information as the context, the forum then considered the skills an individual BA requires in order to take on the role of an internal consultant. These were considered under three headings:

Business Skills & Knowledge:

If business analysts are to work successfully in supporting their organisations, it is vital that that they understand the business. Some key areas of understanding and knowledge are:

- The core business purpose, vision and strategy and how this is to be implemented.
- The business planning life-cycle.
- The industry and sector within which the organisation operates, including the competitors and customer base.
- The processes that deliver products and services to customers.
- The use of technology to enable business success.
- The organisational environment: equipment, operations, politics and regulation.
- Commercial aspects relating to the organisation.

Professional Skills and Qualifications

There are three categories under this heading: information gathering and problem solving, the planning and management of business changes, and the delivery and tracking of benefits. Examples of professional skills include process modelling, the analysis and management of requirements and business case management. Examples of qualifications are the ISEB BA Diploma and Prince 2 Foundation.

Personal Skills and Attributes

Not surprisingly, communication features highly in the list of personal skills that an IC needs to succeed. More specifically this capability includes an ability to influence and convey ideas confidently at all levels of the organisation. With this comes a need for perceptiveness and empathy, topped off by the gravitas and integrity needed to gain the attention and trust of senior management.

Attitude is also important, particularly the tenacity and drive to work on one's own and make things happen. It's not all about steam-rolling obstacles, as flexibility will play its part in achieving objectives.

BAs will recognise the need for objectivity, an analytical approach, and an eye for detail. Going beyond that, a lot of value will come from always looking for better ways of doing things and thinking laterally.

Next Steps

There will be another meeting early in 2009, and items on the agenda will include:

- the transition to internal consultancy
- overcoming barriers to change.

If you want to contribute to the debate on internal consultancy, you might want to consider the following questions:

- Credibility and take-up: will the term "consultant" work in particular organisations?
- What is the role of the external consultant where internal consultants are in place?
- What value do qualifications, such as ISEB, offer in comparison with practical experience?

Send any comments you have to aa-editor@writethetalk.com. There will be updates on progress in future editions of the AA newsletter.



How Persuasive is Your Writing?

AA editor Anthony Madigan looks at how to improve this vital skill.

So what do you know about persuasive writing? It happens to be part of the National Curriculum in Literacy, and my 11 year old has been learning the ropes for at least a couple of years now. You'll probably know it better as the basis of all modern marketing and copywriting – it's the use of words to get the response you want. So what has that got to do with business analysis? In my view, an awful lot.

Being a successful analyst involves many things, but the ability to communicate well is key. More than that, being able to get the response you need whenever you write is vital. Whether you are putting together an analysis and recommendations paper on a business issue, a progress report for your boss, or a communication to people affected by change, you need to be a persuasive writer if you are going to be successful.

Persuasive writing is a big subject, but there are three things that you have to do if you are going to give yourself the best possible opportunity to get the results you need from your writing.

Know who your reader is

OK, statement of the blindingly obvious, I hear you say. Well, you'd be surprised. You'll almost certainly have a distribution list for any report or email before you start to write, but if you're not careful you'll try and address them all at the same time. That would be like getting them all together and communicating your findings by megaphone. Reading is a much more personal experience than that, and if you are not making the most of that fact you are missing a big opportunity to influence.

To be persuasive you have to write with one reader in mind: it will make your writing more personal and compelling. The trick is to come up with an imaginary reader who represents well the group of people you are writing to. Get as clear a picture as you can of

this reader: perhaps it's a hard-nosed executive with better things to do than read your report or a worried member of a team going through change. Whatever the audience, fix that reader clearly in your head.

Now when you are writing, address that person directly. Focus your attention on that person, their prejudices, concerns and desire for knowledge. Write as if you are that inner voice in your reader's mind. If you do this, you will automatically become more persuasive.

Know what you want

Be clear about what you are trying to achieve. Like trying to write to many people at the same time, writing with many objectives in mind is difficult and more likely not to work. Longer documents might have several individual objectives, but you ought to be clear about what you want to achieve overall. It may be as obvious as getting sign off for a project deliverable, or as sensitive as letting key stakeholders know about a delay without bringing your promising career to an abrupt end.

If you don't know what you are trying to achieve, don't start. And don't be fooled into thinking that just because you've been told to do something (like the weekly progress report) that there's no underlying objective. Even in this situation you need to know what response you're aiming for.

Once you are clear about the objective, and your representative reader is clear in your mind, you can concentrate on getting the response you want. There are many techniques that can raise the possibility of success but here are a couple of ideas to work on:

keep it interesting: if your reader is bored stiff, your chances of making the right impression are going to be reduced. Whatever the subject, look for ways to raise the interest levels: grab the attention with strong headings and openings; tantalise with the promise of compelling information later in the document.

edit well: obviously mistakes are counter-productive, but I'm talking here about removing the unnecessary. A good writer will only let in the words that are going to earn their place. If you can take words out without changing the meaning, leave them out. Unnecessary words sap the energy of your readers, and for the persuasive writer that's counter-productive. I used the analogy recently of an exclusive club: your writing needs a bouncer on the door to keep out the free-loaders and riff-raff.

My final point is about an aspect of your writing that you should concentrate on whenever you put fingertip(s) to keyboard:

Be yourself

Perhaps the most difficult part of being persuasive, particularly in the corporate world, is being yourself. Far too much corporate communication is weighed down by a deadening blanket of impersonality, jargon, and over-complicated language. How many people do you know who, in polite conversation at the pub, talk about leveraging their assets, optimising their operating models, or delivering class-leading customer service solutions? There's a good reason for that: it's boring. It's language that almost every function in every department in every organisation is using (or will be soon) and it doesn't mean much any more.

Now I reckon you're too interesting to use language like this. You can do better; you can be natural. Don't get me wrong: I'm not suggesting that you adopt text-speak or like, well, write ... er ... like you, sort of, speak. This is about using engaging language to convey your thoughts, ideas and findings, in a way that sounds at least a little like you. Use words that you are comfortable with, and don't be afraid to leave a little personality on the page. If service levels for customers have been rubbish, say so. Sub-optimal just doesn't have the same impact, does it?

So, find the right balance for you (and don't forget your reader) and avoid falling into the trap of believing that being a good business writer means sounding like everybody else. Being persuasive is good for you and the business, so make it part of how you do things.

Go on, you can do it.

Anthony Madigan

Write the Talk Ltd

When I'm not editing the AA newsletter, I help business people write like human beings. For free writing tips, visit www.writethetalk.com.



Certes Analysis Resources
3 The Courtyard, Roman Way
Coleshill, Birmingham, B46 1HQ
Phone: 01675 468930

E-mail: analysisresourcing@certes.co.uk

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