

# Analysts Anonymous

Informed comment for the BA and Business Change Community








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Issue **16**

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## A note from the editor

As I write this it's cold, wet and windy outside but at least there's the warm glow that comes with the latest edition of the Analysts Anonymous newsletter. On the basis that the glow comes from reading it and not burning it for warmth, you can look forward to a lot of interesting material inside.

There are two significant articles from September's BA Conference: on innovation, and establishing a BA community. There's a useful overview of the main BA qualifications available and where to investigate further, and in these times of cost constraint there's a timely piece on how to build a case for business analysts.

Also we have a stop press article on the UK IT Industry awards and the popular announcement that James Archer was crowned Business Analyst of the Year for 2009 at the recent award ceremony

It would be good to hear from anyone who was at the BA conference in September. Was it useful? What did you learn? Let me know and I'll include your thoughts next time.

**Anthony Madigan**  
Editor, Analysts Anonymous  
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## How To Be Innovative When Gathering Business Requirements

by Suzanne Robertson, James Robertson and Neil Maiden

**One of the opening sessions at the BA Conference 2009 in London was this interactive workshop on the innovation techniques that can enhance the requirements gathering process.**

Try this: you have a tomato, some olive oil and black pepper. Now add one other item to make something interesting ... . So what did you come up with: mozzarella? bruschetta? What about vodka? Or a catapult? The audience went for the first two ideas in the main, while nobody suggested the cocktail or schoolboy options.

The point was that it can be easy to be drawn into limited options when trying to be imaginative, so we all can use techniques to break out of this mental straitjacket.

Delegates were asked what they found helpful when they needed to be imaginative. Responses included:

- freedom to be creative
- having a goal
- access to tools to support the process
- opportunity to work with a creative group
- the time to do it properly

Although there were plenty of views on what would help innovation, only a third of delegates classed themselves as innovative. However it is worth remembering that there are several roles under the umbrella of innovation (according to Roger von Oech), so when considering your own innovativeness it may simply be a case of understanding which apply to you :

- Explorers: find the good ideas
- Artists: the creative spark
- Judge/evaluators: assess which ideas might succeed
- Warriors: sell the ideas to the organisation

When asked, the people in the room overwhelmingly saw themselves as evaluators. But BAs are not stenographers, writing down what people want and passing the list on to the developers and engineers. There's a need to add something, a point highlighted in Henry Ford's famous quote: "If I had asked people what they wanted, they would have said faster horses."

## Being Innovative

There are several things to bear in mind when approaching innovation:

- **Triggers** – tend to come from somewhere (there's more later on how to use triggers to best effect)
- **Failure** – you should expect to fail many times before you get something that really works. Just accept it.
- **Give ideas time** – ideas can grow, just like babies, Too many ideas are rejected before they're fully grown
- **Solve the right problem** – sciatica sufferers feel pain in the leg when the problem is actually in the spine. It's important to get to the root cause before the idea generation starts
- **Innovation is useful throughout the change process** – investigate the Volere process for suggestions on how to do this (see fig 1. - [www.volere.co.uk](http://www.volere.co.uk))

The discussion then moved on to some specific innovation techniques.

## Removing Constraints

Even relatively early in a project a number of constraints will be imposed on your thinking, either deliberately or subconsciously: the solution has to work on these machines, be profitable etc. Imagine these constraints don't exist for a while and new solutions can then emerge. When FedEx were looking to improve their parcel tracking, it was the removal of the constraint of having unique tracking numbers for each parcel that led to the idea of tracking by customer (ie rather than enquiring about individual parcels, a customer can see details of everything in transit to them).

## Giving Up Control

- Letting clients or users make something work the way they want it to can lead to surprisingly good results. Apple and Facebook allow others to develop applications for their services and still get the benefit of their creativity. Apple also leave their support pages unmoderated, allowing them to thrive despite the negative feedback that can be posted.

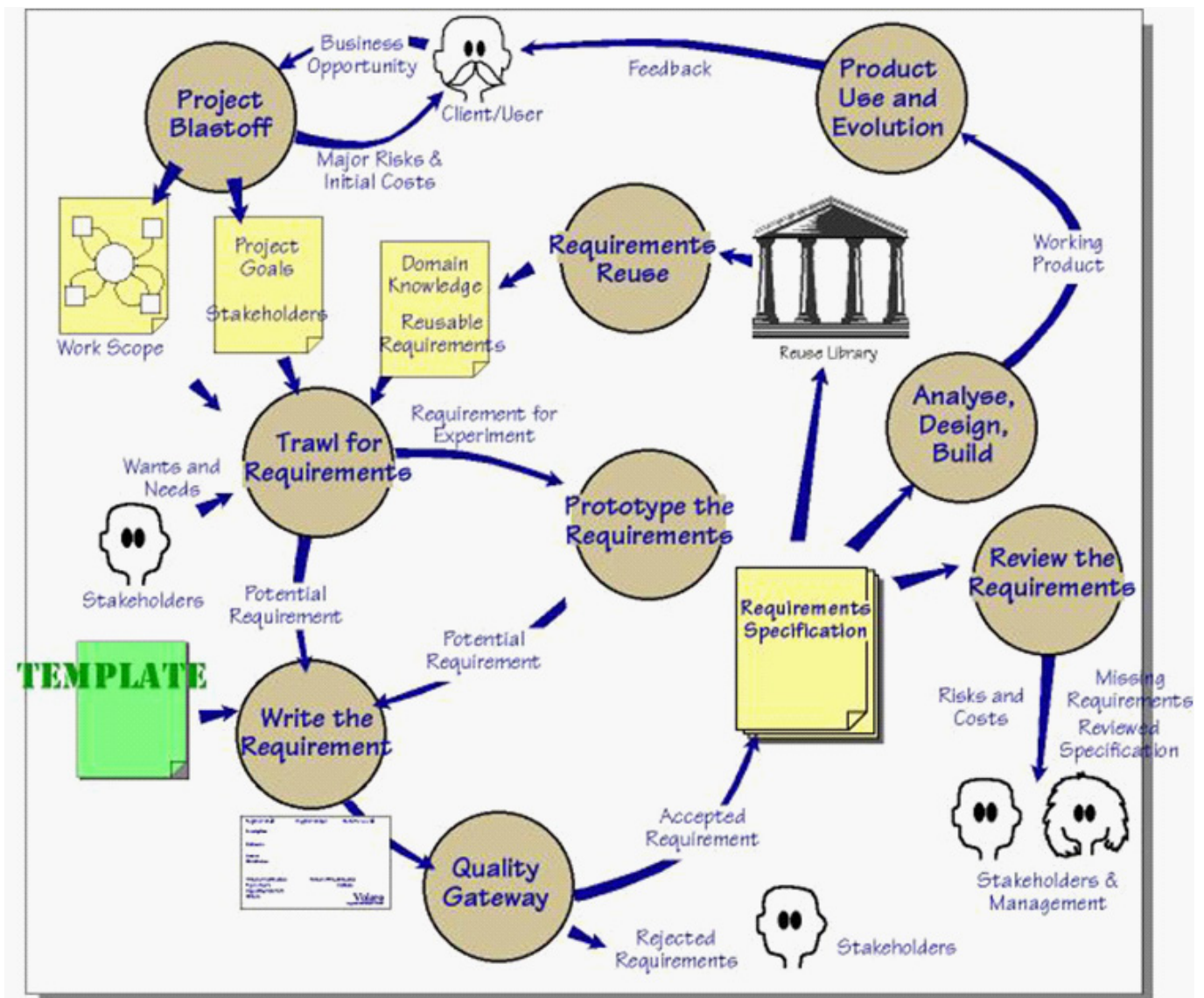


Fig 1. The Volere Requirements Process – James and Suzanne Robertson

## Personas

This is a powerful way to approach problems and solutions from the users' perspective. A persona is simply a way of describing a representative user in terms of very specific characteristics such as age, physical characteristics, a name, skills, personality, circumstances, attitude to life and work etc. A photograph is also very useful. With good research a persona or two can represent large numbers of users in a way that allows analysts and designers to develop ideas that will resonate with users and avoid the pursuit of a solution that tries to meet everybody's needs. Personas involve using the imagination which is why some of the ideas generated can be unexpected and particularly insightful.

## Putting Techniques to the Test

In an interactive session delegates worked in groups to generate ideas to improve plane travel by removing some of the constraints and seeing what happened. Without a requirement for check-in, scheduled flights, passports and luggage, a number of interesting ideas emerged: pay-on-the-door flying; destinations chosen by on-board voting; and supporting local economies by buying all your holiday needs at your destination rather than bringing them with you. While these ideas may not be implementable in themselves, this freedom of thought generated seeds of ideas that would not otherwise have appeared.

Groups then went on to use the persona technique to develop ideas for improving the flight check-in experience of passengers. What emerged were particularly vivid descriptions of the lifestyles, wants and needs of two individuals from a simple starting point of a photo of each. From these rounded descriptions came ideas for enhanced loyalty schemes, premium luggage services and even a "mothering" text reminder service for disorganised young adults!

## Triggers for Innovation

So where to start with innovation in a design context? Triggers provide some sort of inspiration for an innovation, something to focus on and work with rather than a daunting blank page.

- **Connections:** How can you make a connection with a client or user? Loyalty cards, newsletters, and branded freebies fall under this heading as do online feedback and review functions. If you ran a restaurant you might build connections by offering cookery lessons.
- **Information:** A constant feed of information can act like an umbilical cord, so consider what would be useful to the end-user and find ways of delivering it.
- **Services:** Put yourself in the shoes of your user and think what services would add real value. Mercedes Benz have dealerships near large airports, which may not be obvious places for retail outlets, but as a businessman travelling on business the opportunity

to leave your car to be serviced during the trip with courtesy transport to and from the airport may be an attractive proposition.

- **Responsibility:** How could you make the product or service you are designing more environmentally friendly? Are there social or community considerations that might prompt some new ideas?
- **How does it feel?:** Buying decisions are often based on what one feels rather than what one thinks. How could you make someone feel better about what you are offering?

The session closed with a brief discussion on the barriers to innovation that people face at work:

- Scope and approach can be fixed before there is an opportunity to innovate, so it's good to get in early (but not too early as boundaries can help the focus of creative thinking).
- Identifying constraints can be difficult as can encouraging people to think beyond them. It is a vital part of the process though so keep going.
- Getting buy-in to a more creative approach is a challenge in some organisations particularly if you are trying to convince the most senior management to adopt a new way of doing things. In this situation don't underestimate the impact of lighting small fires of change in parts of an organisation to make an impact on a broader scale.

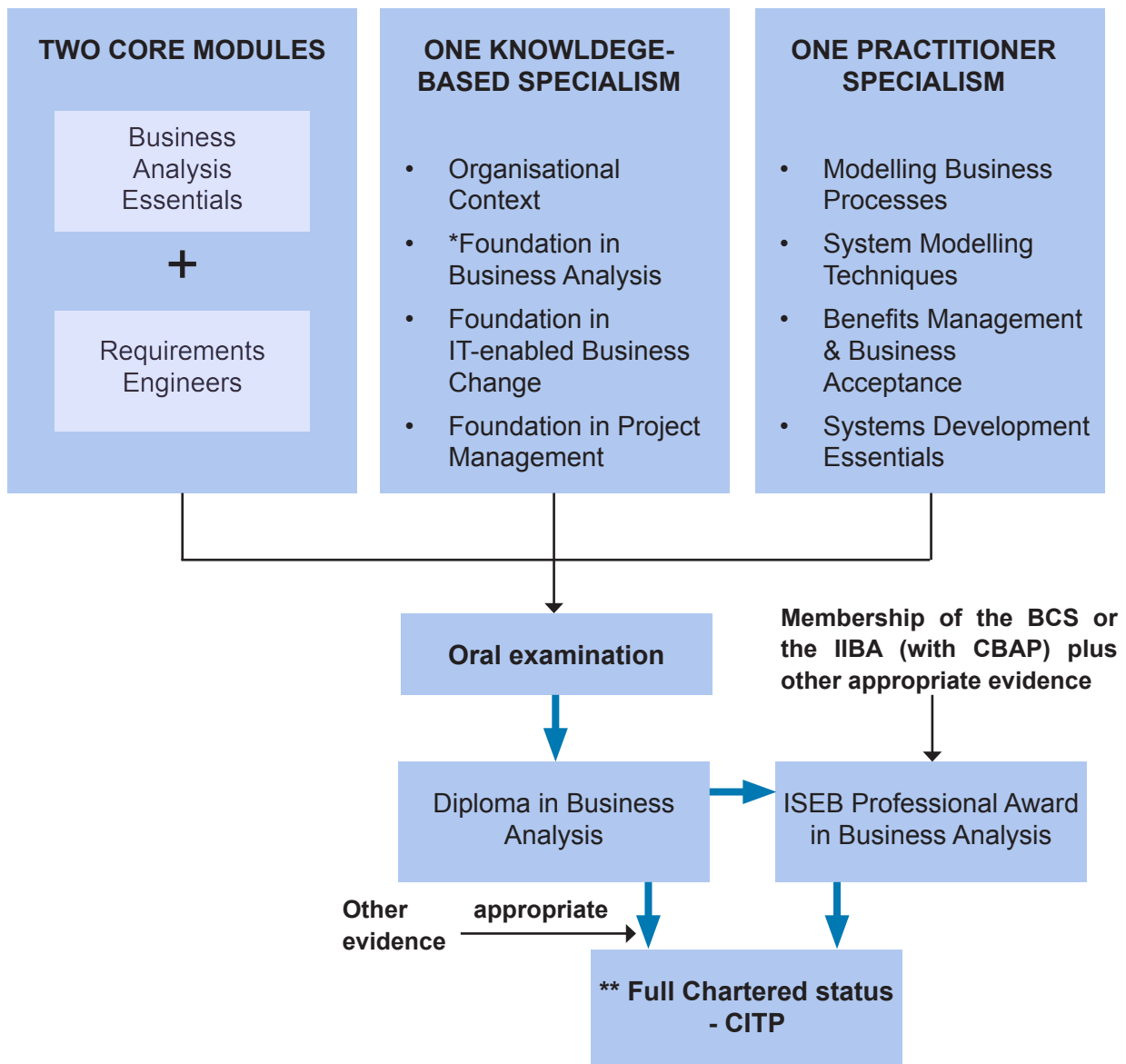
It's fair to say that the delegates in the room came away feeling more innovative than when they came in. Try putting some of these techniques into practice and see what happens.

*Suzanne and James Robertson are Principals of the Atlantic Systems Guild. Neil Maiden is Head of Centre for HCI Design at City University.*

# Qualifications in Business Analysis

Paul Turner gives his personal summary of the qualification options open to BAs.

At the recent Business Analysis conference I was involved with running a series of qualification clinics. It became apparent during these that it would be useful to summarise the various qualifications and awards available, from introductory levels through to full Chartered status. This led to the diagram below which, while not trying to represent detailed career paths or what might be the most suitable choices for individuals or organisations, does I hope begin to describe the high level relationships between the main offerings from the various examination bodies.



## Notes:

\* The ISEB Foundation Certificate in addition to providing a knowledge-based specialism when taking the Diploma, is also a useful stand-alone qualification for those wishing to consider a career in Business Analysis. It is also useful for those from other disciplines, such as project or service management, who need an introduction to the topic

\*\* To achieve full CIP (Chartered) status applicants must also undertake an interview and sit a Breadth of Knowledge test set by the BCS.

It should also be noted that the IIBA CBAP qualification provides exemption from the Requirements Engineering

core module and knowledge-based specialism when applying to sit the oral examination leading to the Diploma in Business Analysis.

More details can be found at the following web sites:

[www.iseb.org.uk](http://www.iseb.org.uk)  
[www.bcs.org](http://www.bcs.org)  
[www.theiiba.org](http://www.theiiba.org)

There are also details of training courses leading to these various certifications at [www.assistkd.com](http://www.assistkd.com)

*Paul Turner is Business Development Director at Assist Knowledge Development*

# Establishing a BA Community

Simon Ward gives a comprehensive summary of a panel discussion at the BA Conference, looking at how best to build a BA community in a range of environments.

## Introduction

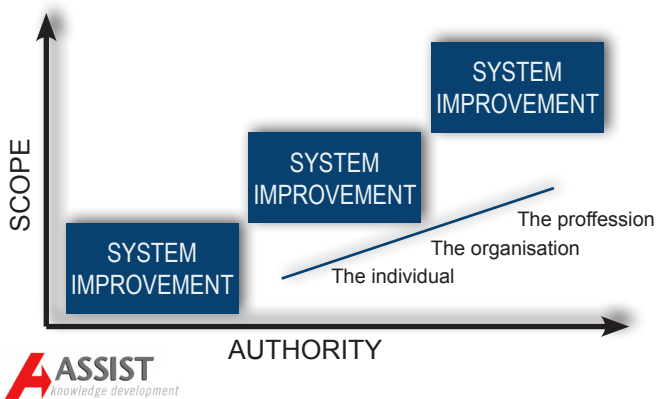
This panel discussion session shared the insights and experiences of four organisations on the journey to building up their business analysis capability. Whilst all four organisations are at different points on this journey, they have all seen a number of common themes and challenges.

This article summarises the common themes and provides some advice and guidance on how to tackle the problems when they arise on your own journey.

## The Panellists

Organisation	Contact Name	E-mail
Skandia	Simon Hartley	simon.hartley@skandia.co.uk
Prudential	Steve Danby	Steve.Danby@prudential.co.uk
Deloitte	Angela Mitchell	amitchell@deloitte.co.uk
Verizon Business	Simon Ward	Simon.Ward@verizonbusiness.com
Royal Borough of Kingston and Chelsea	James Archer	James.Archer@rbkc.gov.uk

## Business Analysis Maturity Model



The Business Analysis Maturity Model from Assist Knowledge Development is a useful model which shows the key stages in the development of BA capability within an organisation:

**System Improvement** - working with business users to improve effectiveness of business systems usually with IT

**Process Improvement** - improving the business processes to enhance the operation of the organisation

**Business Improvement** - the BA working as an internal consultant in the organisation, assisting senior managers to improve business effectiveness by identifying and implementing a range of organisational changes.

The panel members could all see where their organisations sat on the model. Skandia and Prudential both had strong executive support and organisational change at the beginning of their journey which provided the drivers for creating a centralised business analyst function. Deloitte and Verizon Business did not have such organisational drivers and have built up their business analyst community from the ground up, without an executive-led organisational change.

The panel's experience mirrors the findings from some recent joint IIBA and Forrester research (July 23rd 2009) - "Your 2009 Business Analysts: Know Them To Grow Them". The research identified that "organisations see value in grouping business analysts together to add focus to the role and its practices. And while we do see a large number of organizations creating centralized business analyst groups, we also see them creating virtual business analyst communities of interest or communities of practice, bringing business analysts together to improve collaboration and skills without making organizational structure changes".

How long does the journey take? There's no easy or even common answer to this question as it depends on the individual organisation and the approach taken. For the panel, the range was between 4 and 8 years.

## Common Areas to Address

The panel considered three states of BA organisation:

- Fragmented BA Structure (FINDING your BAs)
- Decentralised BA Structure (DEFINING your BAs)
- Established Centralised Team (GROWING your BAs)

The panellists then identified 5 common areas to be addressed across each of these states of development:

- Getting Sponsorship
- Getting Started – initial plans/approaches
- Keeping up the Momentum - the key deliverables
- Getting to the Tipping Point - marketing the role internally
- Planning for the Future - moving up to the next maturity level

## Fragmented BA structure and No Formal BA Leadership - Finding your Business Analysts

### Getting Sponsorship

- Search out the failed projects to help you build a business justification for better analysis
- Use industry benchmarks and opinions to help you walk the talk. Lack of tangible internal metrics can make it hard to quantify the value of good analysis
- Search out like-minded analysts: a grass roots approach within the community is possible, even if there's no driving business champion
- Be prepared for resistance to the Business Analyst label; the Project Manager title is much more valued. Try to ignore labels and just focus on the analysis activity
- Do your sales pitch as widely as possible across the organisation: you never know when your line management may change!

### Getting Started - initial plans/approaches

- Start networking with those that you meet on projects
- Set up a BA Forum: make the community sound bigger and more exciting than it is at the beginning. Sweets are a great way to get people along!
- Define the BA role: what does it mean for your organisation?
- Seek out and share internal training courses
- Leverage any existing Project Management Forums – there's often a large overlap with the BA community
- Use external companies and consultancies to help promote industry metrics
- Keep pushing the message: it takes a long time to build up momentum

### Keeping Momentum - the key deliverables

- You need critical mass in the BA Community to get started; what that critical mass is depends on your own organisation (one panel member reached this with about 30 interested parties)
- Establish a regular programme of Special Interest Group meetings: perhaps start quarterly, becoming monthly as momentum grows
- Produce some practical guides and checklists that people can use in their work. Whether they think of themselves as analysts or not, if you can get them thinking like analysts they are part of the community
- Start to measure current competency levels and establish an agreed starting point that everyone understands. Use self-assessment surveys and questionnaires

- Map out next steps and the time it will take to achieve the vision

### Getting to the Tipping Point - marketing the role internally

- The BA role needs continual marketing: it is hard work to keep promoting the message
- Use various communication channels, e.g. monthly BA newsletter, internal social networking sites, regular BA forums to share ideas
- Ensure group is balanced; don't make it too IT-heavy. Establish a steering group for the BA community
- Use IIBA contacts to share experiences from other organisations at a senior level. This can carry more weight than you pushing the message
- Gather success stories at every opportunity to show the difference that BAs have made. Measure and promote the real benefit of your BAs

### Planning for the Future - Moving up to the next maturity level

- Develop your informal BA community into a formal structure that suits your organisation
- Build a business case for future investment
- Define a recognised role, with a formal HR job family and professional BA qualification/certification

## Decentralised BA Teams - Defining your Business Analysts

### Getting Sponsorship

- Work on breaking down the view that business analysis is often seen as a more generalist skill, possessed by all consultants.
- Work on improving the recognition of the specific business analyst skills and the value they bring, rather than BAs being seen as a generalist role.
- Work to gain recognition for professional business analysis skills. Secure sponsorship and budget to develop methods and tools to support the professionalisation agenda.
- Define a clear identity and vision for your business analysis group

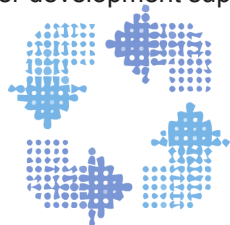
### Getting Started - initial plans/approaches

- Define your BA purpose: identity and vision, where we add value, the bridge between the business and the technology, solving complex business problems
- Agree the core offerings/capabilities to focus on: strategy, business cases, requirements analysis,



specification and selection, IT due diligence, delivery assurance and testing, benefits management

- Gain buy-in from your senior management team to the group's plan. Sell this message across the group to secure commitment from within
- Establish leadership and one-to-one relationship with everyone in the group
- Build up the BA community spirit: events, newsletters, promote successes, face-to-face if possible, webinars if large geographical spread
- Get to the point where everyone in the group has a specific role in contributing towards developing the group
- Draw on best practice to establish a common approach and practical toolkits for each core area
- Define skills profile and associated learning and training courses
- Introduce mentoring relationships to promote BA community and provide career development support



### **Keeping Momentum - the key deliverables**

- Continue to have a clear definition of what the BA role is and how it adds value
- Develop the BA community and sense of pride in being a BA
- Drive towards recognised professional recognition via learning pathways and accreditation

### **Getting To the 'Tipping Point' - marketing the role internally**

- Work to understand where your BAs overlap with other areas of your organisation. Consider capability in areas such as programme leadership, testing, and financial analysis. Ensure you continue to carve out the BA space
- Raise the profile of your BA capabilities with all stakeholders to ensure you are the first port of call for business analyst skills
- Continue to market and promote what the group can do: BAs support cost reduction, applications rationalisation, decommissioning, strategy development, new systems procurement etc
- Share your BA tools and training courses across your organisation. Share, share, share
- Develop an internal BA marketing pack and encourage all BAs to have conversations with colleagues about what they do and their success stories

### **Planning for the Future - moving up to the next maturity level**

- Keep your focus on things that have gone well to date (community, methods, learning and development)
- Introduce external accreditation for all BA staff, e.g. ISEB or CBAP
- Develop greater levels of industry/business process knowledge and linkages across your organisation
- Maintain the flexibility of individuals given current market conditions

### **Established Centralised BA Team – Growing your Business Analysts**

#### **Getting Sponsorship**

- Getting to this level of maturity requires senior sponsorship and a desire to focus on true business improvement. In Skandia sponsorship came from the Chief Operating Office - IT Outsourcing and creation of Shared Services were the key drivers to centralise the Business Analysis capability from 4 teams across both business & technology
- Senior sponsorship must include a focus on competency development
- You will still find that Business Analysts are not given same recognition as Project Managers; keep fighting hard against this view
- Emphasise the benefits of informed decision-making, particularly during the feasibility stage
- Build your business case to support the organisational change. Themes to consider are:
  - > consistent interface with both business & IT Suppliers
  - > improved capability and BA service offering
  - > improved supply and demand management
  - > creation of competency areas in key business activities, processes, systems, tools
  - > improved quality assurance
  - > reduction in the amount of change and therefore cost in the change life cycle.

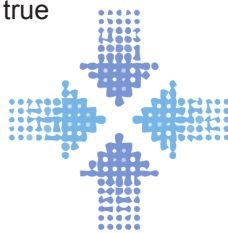
#### **Getting Started - initial plans/approaches**

- Implement a standard development lifecycle
- Standardise your BA job roles
- Give all BAs the opportunity to study for the same qualification (ISEB/CBAP)
- Put strong line management performance management in place and, predominantly through experienced BAs
- Set clear goals for the group and appoint champions for each initiative. Create pride and sense of community in being a BA – a shared vision

- Involve the whole team in delivering the priorities, discuss progress at regular team meetings
- Develop a process for regular assessment of current and future demand for your business analysts. Develop a rate card, with a set of expense, recharge and profit targets to work to: sharpens the mind on utilisation, customer satisfaction, seeking out opportunities, raising capability
- Carry out maturity assessment of your new organisation in terms of existing capability, process, tools etc
- Focus on the sales and marketing of your Business Analysis capability and the value it offers to the organisation. This is also important within the BA team.
- Focus your efforts on the front end of the project lifecycle. Focus on cross-functional business strategies e.g. CRM, Knowledge Management, SOA, Correspondence, Outsourcing, Business Architecture, Operational efficiency.
- Introduce a step into your procurement process before engaging external consultancies. Look at what can be done internally first. Nobody knows your business as well as your internal staff
- Develop strong stakeholder management at middle management and executive level to ensure that your BA services and capabilities are used effectively

### Keeping Momentum - the key deliverables

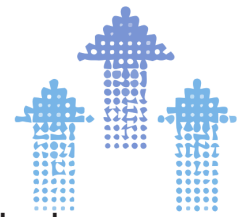
- Maintain clear job descriptions and associated capabilities. Make sure that all are clear on what the role is and what is expected
- Develop strong governance process to ensure there is some level of consistency across your BA work: clear standards, good examples etc
- Ensure you have good process for analysing personal development needs. Support this with good development and training material
- Look at what support you can give in-house,, using your expert BA resources
- Build and maintain a forum for BAs to come together and discuss issues
- Refine and enhance the BA toolkit: a set of practical tools, processes, practices, templates, guidelines
- Continue to fight the PM vs. BA battle. You must focus on ensuring BAs do analysis.... not project management, writing procedures, systems analysis, testing etc. You'll never build the required capability if you are constantly doing someone else's role
- Concentrate on developing analytical skills set rather than content; manage the organisations expectations accordingly
- Great BAs can become great subject matter experts (SMEs), but the reverse is rarely true



### Getting to the Tipping Point - marketing the role internally

- Be prepared to face two main challenges along the way and to tackle these issues head on when they arise:
- Convincing senior management to give due consideration to analysis/design issues & opportunities. Can be difficult when senior management tend to focus on delivery and project management methods
- Constant challenge is that Business Analysts are seen as gap-pluggers. This often happens when there is a lack of SMEs in a particular area

### Planning for the Future - moving up to the next maturity level



- If you have got this far you will have created many assets and developed a strong BA community that can now operate independently of any organisational structure!
- Place more emphasis on internal consultancy and develop those skills to support/challenge/facilitate/drive the business strategy and its decision-making
- Build a strong knowledge management store: business architecture, process hierarchy, data model, systems & technology to support the analysis process
- Champion Business Analysis as a profession in its own right: if you want legal work done you turn to a Lawyer; if you want finance work done you turn to an Accountant; if your teeth hurt you go to a Dentist; if you want any form of Business Change, you turn to a Business Analyst.

*Simon Ward is Manager, International IT Business Engagement & Analysis at Verizon Business*

# Can We Do Without Business Analysts?

## Ray Watson makes the case for BAs in an environment of cost-cutting

Sales are down; profit projections are a concern: it's time to cut costs. Obvious targets are non-customer facing departments: how big is our administration, HR, finance, marketing? How much are we paying IT and our suppliers? Every department will justify its own existence, how critical it is to the business, while pointing fingers at other departments and their spending – how much did that new office cost?

Any business which has a Business Analyst unit will be asked about its value and contribution to the business. The larger the team, the more difficult it is to justify. Equally if the team is too small, how can it add significant value? The answer lies in the perception of the team, its achievements to date, and the current initiatives and strategic developments that depend on it.

So long as the unit can demonstrate significant (not marginal) benefits to the company, not just in annual savings and cost reductions but in co-ordinating company-wide synergy in strategic thinking, planning and projects, the arguments are strong.

Another key benefit of the analyst unit is the inherent depth and breadth of products, systems and business knowledge. This can range from Disaster Recovery / Business Continuity to planning and implementing system changes and associated project management. This pool is also a rich resource for succession planning. A line manager with a Business Analysis background is often better placed to understand his department's place and impact on the business matrix. It's also essential for senior managers to have a good understanding of the business dynamics, internal as well as external – the analyst's background is a significant asset here.

But hold on, I have a background in Business Analysis so I would say all this, wouldn't I? Yes I am a little biased, but having seen some of the alternatives and seeing the question from a business planning and budgeting perspective, I have no doubt Business Analysts are valuable - providing they are properly managed and integrated with the whole business and not an isolated and insular unit.

So what happens if you don't have an analyst unit? Nothing is one answer, the business will continue to handle customers as it always has done – perhaps while losing market share. Inevitably line managers will seek to improve the performance of their departments by tweaking processes and systems where possible - easy with local PC-based systems, more problematic with mainframe systems, and almost impossible for changes affecting customers. These developments are normally ad hoc, unstructured, incomplete and inward-looking

with no consideration for the impact on other parts of the business. Results are increased costs, inefficient and over-complex systems, confusion and dependency on local key people. This is not a good place to be. An individual analyst in such situations may be very protective of local systems, which they developed (or even wrote the code) – a clear recipe for failure.

By educating staff and managers in the role and value to the business of Business Analysts (or in-house consultants) some demand or requirements may be created. Clear evidence of BAs adding value provides a solid grounding and cross-department awareness and provides greater potential for the business to perform. For individuals in these roles the potential to achieve top jobs is obvious.

So no, any reasonably sized company cannot do without Business Analysts – they are part of what drives the ever-changing business machine.

*Ray Watson, WatWil Ltd.*

### Business Analyst of the Year – winner announced!



James Archer collects his BA of the Year award from AssistKD MD, Debra Paul and guest presenter Sean Locke

Congratulations to James Archer of Royal Borough of Kensington & Chelsea on being crowned 'Business Analyst of the Year' at the 2009 UK IT Industry Awards. From a high quality shortlist James Archer really impressed the judges. "James is an outstanding proponent for business analysis, an excellent role model who exemplifies his profession. James showed how by discovering and understanding the real business needs an IT solution was transformed from one designed to deliver financial benefits to one that also made significant improvement to the quality of home care delivered to some of the most vulnerable people in society."

Special mention must also go to medallists Christine Henly of Allianz Insurance and Paul Perry of NFU Mutual, both of whom were outstanding candidates.

AssistKD thanks go to all 10 inspirational candidates who featured on this year's exceptionally strong shortlist.

- > **Julian Dyer** - Business Analyst, National Grid
- > **Stuart Pearson** - Business Transformation Leader, Procter & Gamble
- > **Paul Perry** - Business Analyst, NFU Mutual
- > **Clair Douglas** - Business Systems Analyst, Capital One
- > **Christine Henly** - Business Analyst, Allianz Insurance
- > **James Archer** - Business Analyst, Royal Borough of Kensington & Chelsea
- > **David Wood** - Business Systems Manager, Berwin Leighton Paisner
- > **Jane Kelly** - Business Analyst, The Insolvency Service
- > **James Mitchell** - Business Analyst, Centrica
- > **Claire Lamb** - Business Analyst, Allianz Insurance

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If you would like to find out more about how to enter the 2010 awards please contact Chris Martin on 01844 211665 or at [chris.martin@assistkd.com](mailto:chris.martin@assistkd.com).



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