

Analysts Anonymous

Informed comment for the BA and Business Change Community



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In this issue

-  Building a Business Analysis Capability at the Pru
-  BA as Internal Consultant Part 2
-  Business Analyst of the Year
-  So you want to be a Business Analyst

Issue 15

A note from the editor

Welcome to the latest edition of Analysts Anonymous. Real stories from the front-line of business analysis are always popular in AA, and this time we have a personal perspective on Prudential's development of a business analysis capability. Looking forward, the BA Management Forum has met again and discussed the evolution of the Internal Consultant role. We've summarised the important points.

There's also a great opportunity to get the recognition you undoubtedly deserve by entering the Business Analyst of the Year competition at the IT industry awards.

Finally the schools and universities are into exam season now and many young people are considering what to do with their lives. Spring is also a time when some people start to consider job changes. As Ray Watson points out, becoming a business analyst is a good option.

Don't forget to let me have your thoughts on Analysts Anonymous and particularly what you'd like to see in future editions. I know I'd like to see you in print, so drop me a line with your article ideas.

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Building a Business Analysis Capability at the Pru

Steve Danby, BA Practice Lead at Prudential UK gave a personal take on the evolution of the BA role in Prudential at a recent IIBA forum.

So a health warning first; these are my views and not everything I describe here will work elsewhere. It's a team journey though and valuable for that. I'll share some of the things that went well and some that didn't, and the nature of the BA role in the Pru and where it sits. There's also feedback from an unscientific survey completed by the members of the audience.

The start of the journey was the creation of a UK change function in 2003. At that stage:

- BAs were spread across the organisation with no overall leadership
- There was no common view of what a BA's role was
- There was a wide range of experience and focus

The creation of a central business change function and the recognition that we needed "Competency Heads" was the catalyst to creating a Prudential Business Analyst Community.

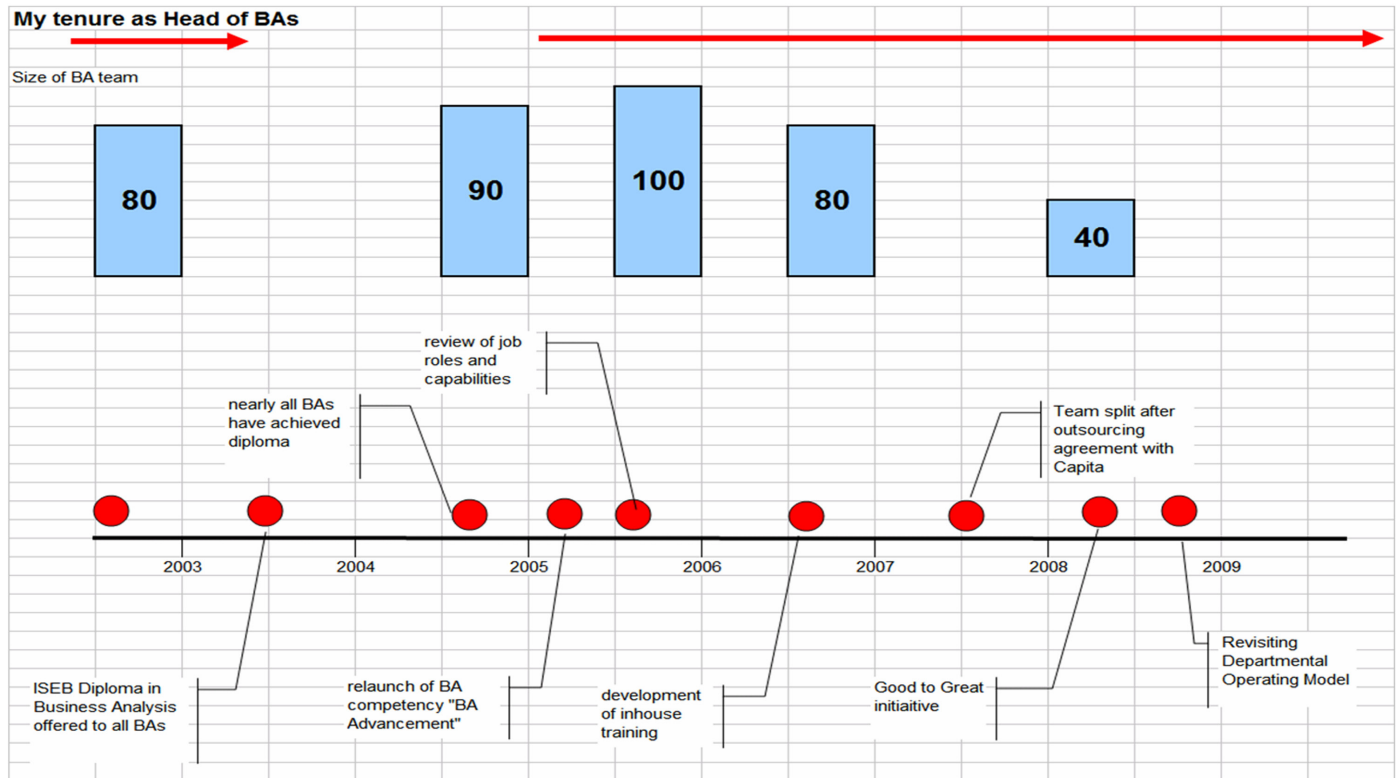
Judging from the questionnaire feedback, where we started is where many organisations are now. (See Table)

There are some really important questions raised by these results:

BA's and their place in the organisation			Total	%
3	BAs in my organisation	Part of the IT function	22	58%
		Part of a central business change function	10	26%
		in the business areas	6	16%
		Other...	5	13%
4	The BAs in my organisation are all part of a central team	Y	12	32%
		N	25	66%
5	We have a Head of Business Analysis in my organisation	Y	10	26%
		N	28	74%

1. If the majority of Business Analysts work for the IT function, how likely is it that they will be perceived as true Business Analysts?
2. With the majority of BAs working in decentralised teams how are we ensuring consistency of practice?
3. With few Heads of Business Analysis, who is deciding on the priorities for developing the BA standards, the BA team etc?

We've been on an interesting journey since formation of Pru UK's central project function in 2003



Through this period the business (and project management) view of BAs has been enhanced considerably

As you'll see from Figure above, the development of the BA function has not been dull. Our initial priorities were clear: standardising job roles, putting strong line management in place (via experienced BAs in the main), implementing a standard development lifecycle, and giving everyone the opportunity to study the ISEB Diploma in Business Analysis. This wasn't at all easy but was well worth the effort as it then allowed us to focus on 5 pillars of competency:

- Role
- Skills
- Community
- Career
- Support Infrastructure

2005 turned out to be a key period for us, as we made real progress under the banner of BA Advancement.

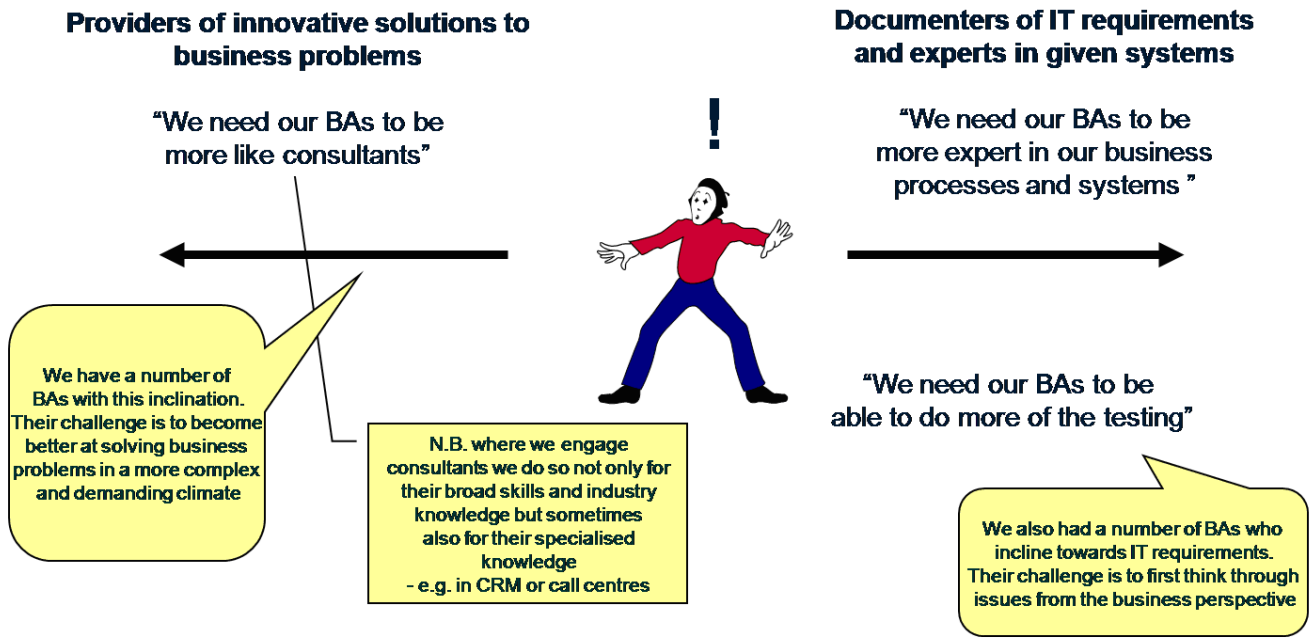
BA Advancement

This process involved taking each of the five pillars and developing goals, timescales and champions for each. By identifying specific initiatives and stepping stones for each goal we were able to communicate what we were doing and track the progress we were making. Let's look at each of these pillars in turn:

1. Role

- The BA role means many things to many people. We have a clear definition:
- A business analyst is someone who can apply the tools of business analysis to a wide range of business problems/opportunities - analysing the nature and root cause of the problem, clearly defining the business requirements, and evaluating various solutions to meet those requirements before specifying in more detail how the selected option will work.
- They do this regardless of the type of project or location in the business and arrive at robust and creative solutions to those issues.
- They do not depend on detailed knowledge of a particular business area, process or system in order to deliver.
- Having a clear definition though doesn't prevent our BAs from being pulled in different directions as the figure overleaf shows.

An issue throughout our journey has been in the expectations of the role. Today, as throughout, our BAs are being stretched in 2 fundamentally different directions



But we have managed to walk the tightrope successfully – providing both services to the business and being very clear in our own minds what it is that a good BA does and what skills / capabilities they need.

It's worth pointing out here that our BAs don't handle small change, and since the outsourcing agreement with Capita in 2007 we have spent more time on the left hand side of this tug o' war. This balancing act isn't peculiar to Prudential if the questionnaires are anything to go by:

Scope of the BA Role			TOTAL	%
1	The BAs in my organisation are predominantly:	Providers of innovative solutions to business problems	11	29
		Focused on process improvement and associated IT changes	15	39
		Documentors of IT requirements and experts in given systems	20	53
2	The BAs in my organisation	Have the scope to recommend the approach they take to their work	26	66
		Work to the direction from a project Manager / Other	16	42

These responses came with some interesting comments:

"The scope and responsibility of a BA can vary depending on the scale of the project. In our organisation we have junior BAs, senior BAs and Lead Designers. Lead Designers tend to get involved at project inception and again depending on the size of the project can remain on it or hand over to a BA to complete detailed requirements/design."

"We currently have a separate role entitled Business Process Analyst which has caused some confusion over accountabilities and seniority across the BA community."

"We don't have PMs. All BAs are expected to manage their own projects."

2. Skills

As I've said we used the ISEB Diploma to get the basics in place, and found that an external provider was the best solution. Subsequent training has been in-house, focusing on areas such as solution design, options development and consultancy skills. In my unofficial survey, 60% of organisations had at least some professionally qualified BAs but in only 21% were these BAs in the majority.

3. Community

We have been able to create a sense of community for BAs within the organisation but this has been more successful in each of our two locations than across them. Involving as many of the team as possible in defining and delivering the initiatives has been a key factor in achieving this sense of community:

- we have recognised the development of our community as a specific goal in its own right – with its own champions
- we have BA specific team meetings where we address key issues
- our business analysts do want to behave as a community and see the benefits ...
- ... but they can get immersed in their programmes and are sometimes reluctant to seek assistance from colleagues (not wanting to appear foolish!)

4. Career

We have worked hard to give our BAs a clear career path and a sense of pride in their chosen profession. Each has a clear understanding of the skills and knowledge required to progress between each role, and we look to find project assignments that will develop them. I think we also instil a sense of pride in being a business analyst. It's fair to say though that the project management role is still seen as being higher-ranking. The questionnaire suggests that this is true in as many as two-thirds of organisations.

5. Support Infrastructure

This is possibly the area in which we have made least progress:

- the concept of peer review of BA deliverables is almost non-existent (in comparison there is more significant focus on PM reviews)
- the assets we do have are in need of attention
- knowledge share is extremely poor and we tend to create from new (e.g. processes, use cases) rather than build on what we have.

We need to address these issues to create a more professional and efficient analysis team. At least I know

from the questionnaires that we are not alone: half of all the organisations we asked did not have clear standards for BA deliverables.

“Our “standard” is based around a set of documents that need to be completed (i.e. a template approach). The contents of the documents aren't peer reviewed. Although we have a standard of what deliverables are produced, we don't have a standard in terms of what level of quality/quantity is expected.”

Summary

So we have made a lot of progress:

- BAs are clear on their role and the skills and capabilities that they need
- We are all professionally qualified and have acquired significant skills through our projects and our competency initiatives
- We are a team with a clear identity and are proud to be Business Analysts
- We have developed a more varied set of approaches
- We are respected for what we offer the business – no longer the poor relation to project managers.

The journey continues....

Your Chance to Get the Recognition You Deserve

AssistKD is delighted to be sponsoring the Business Analyst of the Year at this year's UK IT Industry Awards 2009. This award will be presented to the Business Analyst who has best demonstrated professionalism and outstanding achievement during the past 12 months.

As the specialists in Business Analysis training & consultancy, the inspirational AssistKD team remain dedicated to championing the role of the Business Analyst. The AssistKD Business Analyst of the Year award is open to all candidates from the UK and Europe who can demonstrate outstanding contributions to their employer and/or the industry as a whole. If you can make a case for yourself or a colleague, we want to hear from you. Enter today at AssistKD 'BA of the Year' or go to www.ukitindustryawards.co.uk and follow the links.



2008 BA of the Year winner,
Leigh Taylor of Skandia



The BA as Internal Consultant: Part 2

In edition 14 we ran an article on the first meeting of a group of BA managers who had come together to discuss the opportunities for BAs to become internal consultants. In March, this forum met again, and the debate moved on to the practicalities of implementing the role. Here are some of the points made during the meeting.

Building the Case for the Internal Consultant

The simple view is that the role should bring clarity and priority to business problems, issues and opportunities, particularly where the situation is complex and answers aren't readily apparent.

It was suggested that a principal business analyst can be used within a business to tackle significant organisational issues and provide a lead-in to consulting work.

What value can the principal consultant bring?

- techniques
- insight
- ability to provide an independent view
- ability to extract facts.

Whilst facilitation is key, providing a judgement call or advice should be encouraged as there is value in acting as an authority and sanity check. It also means taking accountability and responsibility. There is also a need for flexibility: being responsive to and understanding the business, accepting that starting to investigate a problem from scratch may not always be the best approach.

An interesting analogy was developed, looking at the business context as a complex eco-system. The key drivers in this eco-system are people, so it's important to take account of people interaction. Understanding the food chain can help us understand who the key influencers are.

It was felt that the internal consultant has most to offer when not immersed in the day to day machinations and able to see the bigger picture, making connections. They should create order without upsetting people. Whether the BA has the authority to take such a position and impose a framework is an important question.

The IC role also has a significant part to play in benefits analysis, producing the business case, quantifying the business advantage, and challenging decisions.

Internal vs External Consultants

Some comparisons were drawn between internal and external consultants:

- External consultants can tend to focus on creating a pipeline for their consultancy, a conflict the internal consultant does not experience;
- An internal consultant has the benefit of existing business knowledge whilst the external brings knowledge of other organisations and best practice;
- Increasingly the external consultant is used for organisationally painful exercises. Does the BA or IC have the stomach for this?

- Is there an opportunity for the BA to engage the external consultant and combine their own expertise with the external's consulting skills while maintaining ownership?

Implementation Issues

There can be many barriers to putting the internal consultant role in place:

- Getting the authority – this can be quite person-specific.
 - certain people have more credibility but it is possible for this to detract from the role itself. There's a need to focus on the role and not the person
- Gaining sponsor commitment and management buy-in to maturity model and BA positioning
 - it's important to work with key agents for change who can pass on skills and produce a compelling proposition to sell the role to the business
- Senior BAs can be engaged for whole projects rather than doing the early engagement work then cutting off. This demarcation of senior and junior BAs can be useful for the IC role.
- Internal charging
 - what rates should be used and what is the mechanism?

Supporting Infrastructure

Business knowledge in a number of forms is needed:

- shared files
- project documentation
- white papers

Standards are also important, as are the tool kits to support them.

How to Measure Success

Some suggestions for performance indicators:

- monitor customer satisfaction
- BA utilisation and usage: how much, by whom and where?
- staff capability: skills and performance
- auditing of standards
- delivery compliance, via peer assessment
- consider the cost of maintaining a body of knowledge and the payback to the business. How and when does the BA/IC contribute to the knowledge base?

Overall the success of the role and its measurement should be iterative. Continual improvement is the objective.

Future Meetings

Among the subjects for consideration at future meetings:

- marketing the BA team
- establishing a knowledge base/sharing resource
- the right level at which to work and engage.

There'll be a summary of the next meeting in a future edition of Analysts Anonymous.

So you want to be a Business analyst?

Ray Watson considers the BA role from the perspective of a jobseeker.

Cast your mind back to the end of your time at school or university when everyone was talking about what they wanted to do. Perhaps you had some career ideas which helped determine your choice of subject(s), but they were probably quite broad: business management, economics, accountancy, IT or marketing. If you are reading this as a BA you are less likely to have opted to study medicine, dentistry, zoology, music or other arts. However, at last June's BA seminar at the Institute of Directors, I heard an argument suggesting that those with a 'creative' background could bring something different and valuable to the work of an analyst; it had a lot to do with different ways of thinking.

Many years ago, when I was approaching the end of my postgraduate degree, I applied for three jobs and was offered two (how times have changed). I accepted the role of 'Graduate Trainee' with a large manufacturing company, based in the North East of England and part of a large multinational group.

The graduate trainee route into a company was and is very popular for many large organisations. Traditionally it gave the individual exposure to all parts of the business with a little time in each department. The full rotation would normally last about two years. The argument was that it provided a good understanding of all areas of the business in readiness for one's first junior management role. The better, forward-thinking companies provided a structured development path often towards specific goals.

In my case, after two weeks on the programme the Commercial Director asked me to work for him on 'special projects' and to forget about the graduate training. This was the start of my career as a business analyst.

So, a question I have heard many times over the years: what does a business analyst do? Some options:

- business performance, evaluation of financial records, ratios, leverage, ROCE and advice on investments

- process flows, procurement, facilities (including disaster recovery planning), administration, marketing or internal communications
- systems analysis, systems support and development, programming, testing
- project or change management and delivery, training, documentation
- project financials, initial business case, gaining buy-in and commitment, tracking and reporting benefits
- strategic planning, future needs, senior management roles
- problem solving

The answer is all or any combination of the above plus anything else you can think of. This is why business analysis as a career and profession can mean different things to different people. It crosses many areas of a business, from accounting and finance, through administration and marketing to change initiatives. The common denominator is business direction, while utilising a natural tendency for logic and structure in one's thinking, methodologies and analysis.

For many individuals and companies, a business analyst is someone only concerned with delivering projects, but this isn't right. A BA should be seen as an in-house consultant, someone who may have a strengths in say finance, systems or projects, but who is flexible and able to evaluate ideas and propose solutions (and manage delivery where appropriate) business-wide. Work may be as an individual, as a team member or leader, or with external consultants on large scale projects.

Large companies may have a dedicated team of business analysts aligned to IT or change management. Smaller concerns may only have one or two such roles often isolated in one department. As markets are continually changing and each business must keep up, business analysis should be part of every manager's role and where practical, supported by dedicated business analysts.

So when you are next searching the job ads make a note of the company details, its market, recent performance, future plans, the advertised role description and what career opportunities such experience will provide.

Finally, before you apply for a hundred jobs, give yourself some time to think about your career aspirations and appropriate stepping stones to achieve them. See the 'Watson Model' (also available at www.watwil.co.uk); it may help you think and plan before you jump.

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