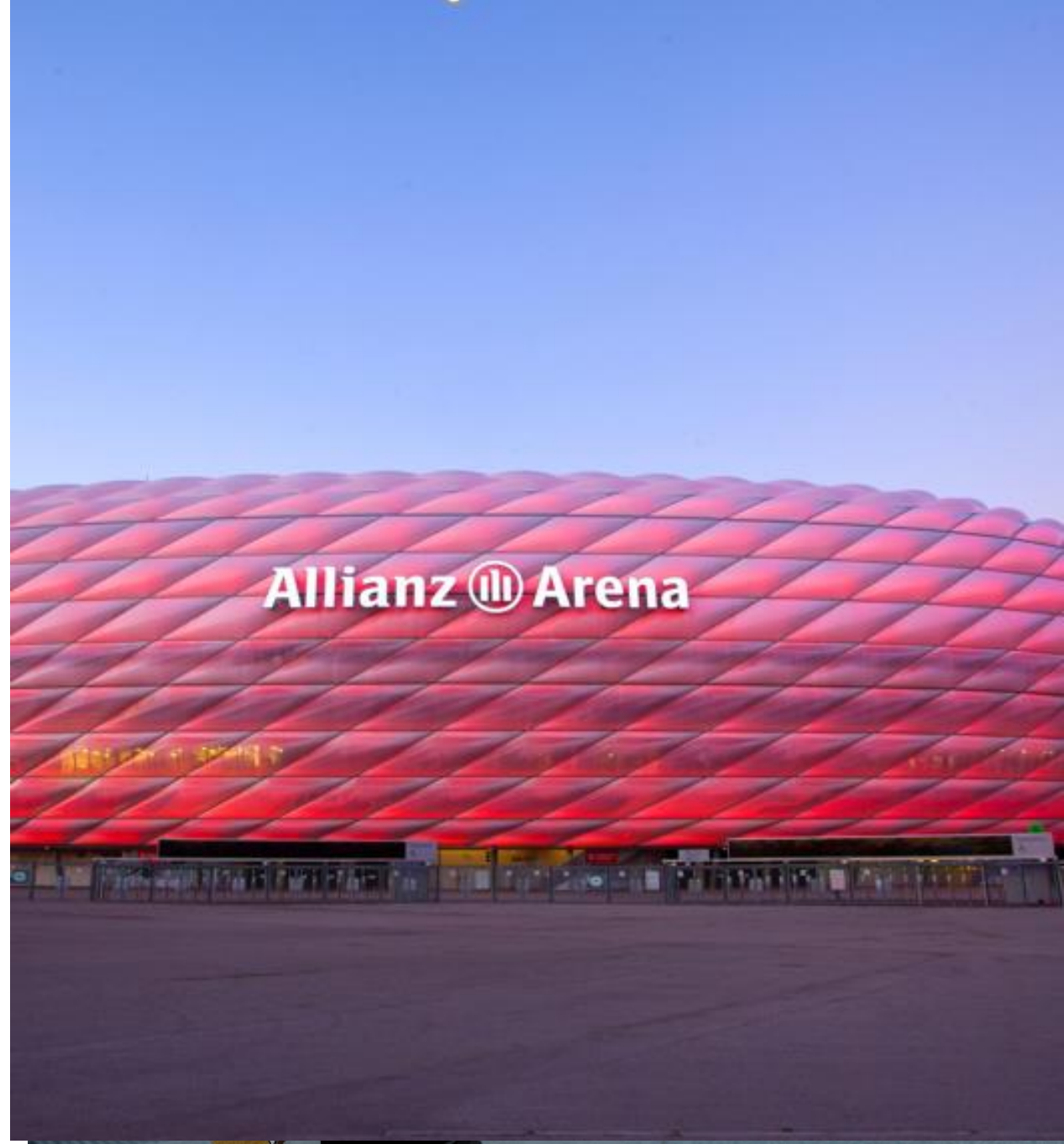




BA Manager Forum

Transforming Business Analysis – A Service Journey



Synopsis

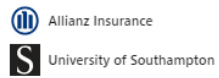
This session provides insights to a BA practice transformation and key findings ...It draws on lessons learned by the Practice leaders at Allianz Insurance.

About us

Mark Wilson



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Business Analysis Practice Manager at Allianz Insurance
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Our journey to here



This case study follows a BA Manager Forum webinar entitled “Business Analysis as a Service” which took place on 12th August 2021.

As well as Allianz Insurance there were representatives from AssistKD, University of Leeds and Bank of England.

The content within this case study provides greater depth to that explored in the webinar, and the opportunity to partake in workshops to explore subjects further.

Business analysis as a service

The original recording of the webinar...

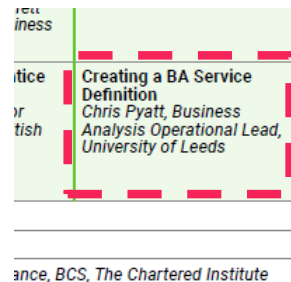


[BA Manager Forum Webinar - Business Analysis as a Service - 12-08-2021 - YouTube](#)

Insight from the other panellists [Christina Lovelock](#)

More detailed insight from the University of Leeds was shared by Chris Pyatt at BA Conference Europe 2021.

[Articles | AssistKD](#)



Insight from the other panellists [Taz Wafa](#)

More detailed insight from the Bank of England was shared by Kei Poon at BA Conference Europe 2021.

Summary of the webinar...



[Business Analysis as a service. Top tips from experienced practitioners | AssistKD](#)



Content / topics

1 Background to Allianz Insurance
Drivers for Change
Transformation Journey

3 Overview of approach to Business Analysis service definition

5 The Business Analysis Value Proposition

2 Group Discussion

4 Group Discussion

6 Group Discussion



Section one

Background to Allianz Insurance
Journey to centralisation
Maturity Journey



Background to Allianz Insurance..globally

With around **147,000** employees worldwide, the Allianz Group serves over **100** million customers in more than **70** countries.

On the insurance side, Allianz is the market leader in the German market and has a strong international presence.

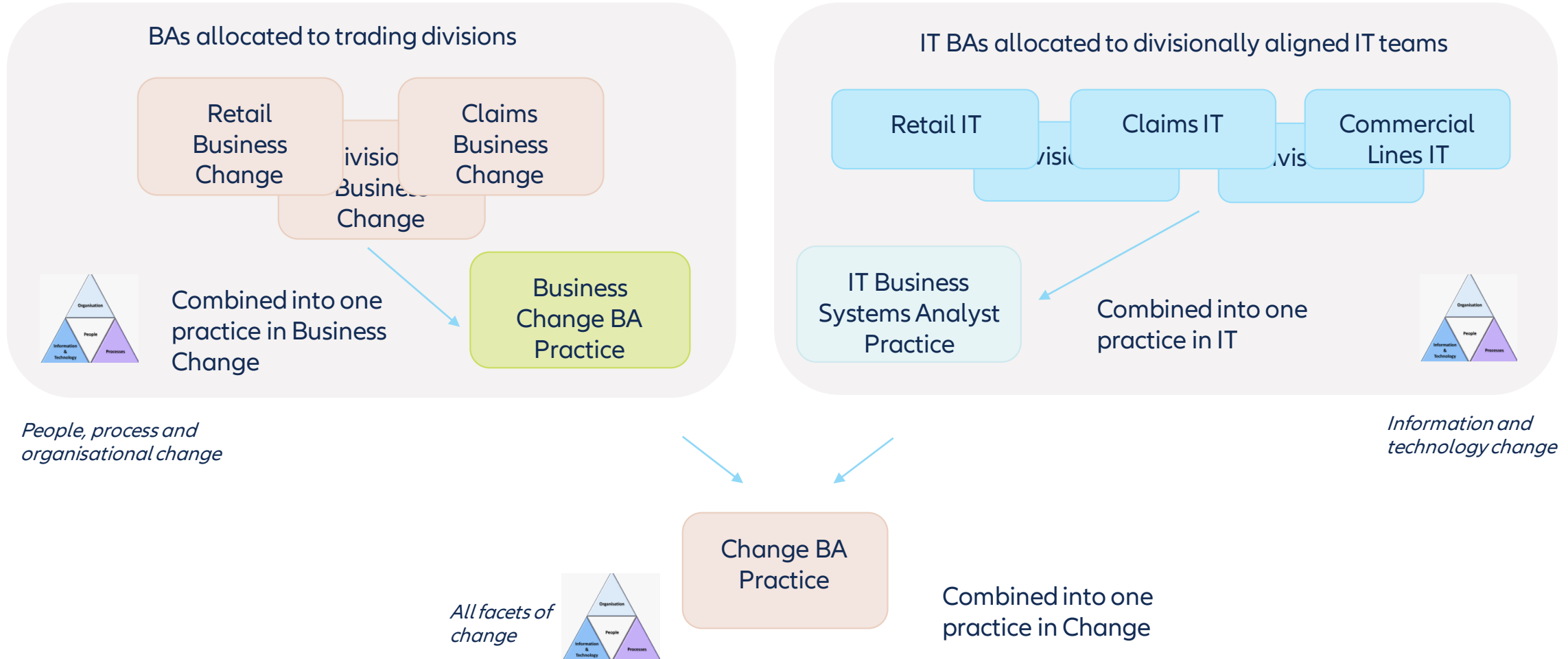
In fiscal year 2019 the Allianz Group achieved total revenues of approximately **142** billion euros.

Allianz is one of the world's largest asset managers, with third-party assets of **1.7** trillion euros under management at year end 2019.

Background to Allianz Insurance..in the UK



BA Practice Journey to centralisation



Practice vision

- Practice vision defined and implemented under continuous improvement through Vision Groups
- Practice thought leadership developed through Special Interest Groups

Vision Groups

EXPERTS in analysis & change across our business & systems.

COLLABORATIVE PARTNERS involved in shaping & maximising the value of change across the organisation.

A **GREAT TEAM** to be a part of that provides opportunities to learn & grow – personally & professionally.

Special Interest Groups

Data SIG

BA Agile SIG

Business Process SIG

Skills Hub SIG

Benefits of centralisation

For the profession;

- Consistent, predictable and efficient delivery of services
- Enabling technical development in the profession.
 - Learn through others
 - All facets of change
 - Self-supporting community
 - Environment of active and psychologically safe learning
- Economies of scale for L&D
- Present on a more 'professional' footing

For Technical Excellence;

- Commitment to our business, and investment in technical excellence
- Aligned career development

For our people

- Engagement
- 'One voice'



Disadvantages of decentralisation explored at BA Conference Europe 2016

ment Model for New Business and People Realities - the Sta
t, Statoil

Analysis Stories	BA or not BA? Exploring Flavours of the BA Role	Creating Org Agili
Experience: ons To a Practice Michael Hall thampton	Learning to Love Regulatory Change Wybren den Breejen Old Mutual Wealth	Think It, Sa Paul Ryan & Ge AXA Partners – C Protec
Analysing the e Customer A New Poin optical Goods Retailer , Agilpro	IT BA and Business BA; Gaps and Overlaps or Sharing the Load? Laura Firth & Jo Wilson Allianz	Exploring A Perspective: of the Mastek Syne Ayo Ogunsak

Consulting
at with BCS & IIBA (Global), Lucy Ireland, BCS Learning & Develo

Maturity journey

- One year following new practice formulation
- AssistKD engagement
 - Scope and objectives understood
 - Workshops and documentation reviews undertaken
 - Recommendations, and other insights.
- Started us on the next stage of journey, service definition.



What is the biggest change you have seen made to the business analysis discipline and how was this managed?.



Section two

Service Definition



The process of using one's resources to create value with and for the benefit of another actor

(Wieland et al, 2012)



Why did we need a Service definition?

Following organisational change, understand ourselves, and communicate to others, what we do

- Role clarity an ongoing theme in engagement surveys, and our maturity assessment
- Drive professionalism, and leadership within the team.
- Non-specific stakeholder feedback
- BAs in agile delivery teams. Dichotomy between the need for the definition of a profession, and 'do what needs to be done' in agile.
- Challenge in working with external consultants
- Moved for a 'toolkit' based change approach, from a 'form filling' approach to change
- Increased recruitment activity
- Senior leadership positioning change as an 'internal consultancy'

How did we define our Services?

- Initial definition based on 'general' and expected BA services, with insight from the leadership team, and 'Delivering Business Analysis – The BA Service Handbook' (Debra Paul and Christina Lovelock)
- Aligned with the competencies of our practice career framework
- Some services identified as being more 'aspirational' than others.
- Considered what services would be beneficial to stakeholders
- Stakeholders not directly consulted at this stage

Allianz BA Practice Service definition



Supporting all change delivery approaches



Incorporating into our ways of working

Change Service Definition

Business Analysis Service Definition

Career Framework

Business Analysis Policy

Learning and Development Strategy

Corporate Change Framework

Standards and Guidelines

Toolkits

Supported by our core skills approach

Balanced Scorecard

Building our Service Catalogue

- Develop a service catalogue, to house the definition. Included;
 - Service definition
 - How we work with others
 - Value proposition
 - A number of groups in the practice involved;
 - Definition of value proposition (more later)
 - Identify how we collaborate with our partners
 - 'Inspiration' gained from materials from other external consultancies.
 - Given a professional look and feel
-
- Working draft, always be under continuous improvement



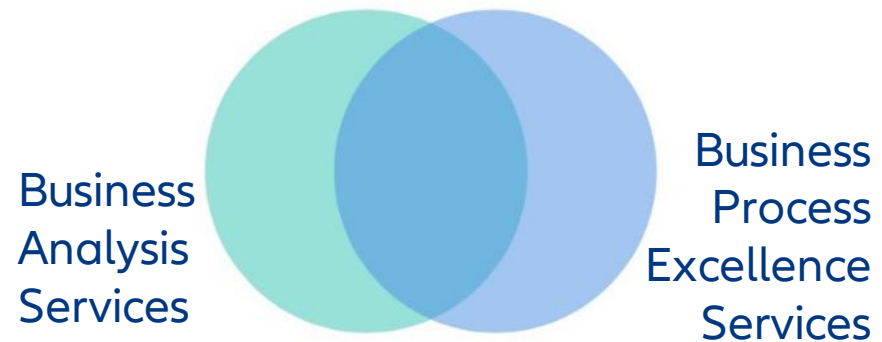
Launching a service definition to the team

- Timing is key, team need to be 'ready'.
 - Services introduced following the maturity assessment, and talked about in a number of forums, before launch.
- Messaging about its use is vital, so it meets intended purpose;
 - Support BA conversations with projects
 - Highlight concerns where work isn't falling into the 'general' service expectation
 - Team leaders using in one to one conversations
- Careful around messaging about what we 'don't do'

Introducing service definition to our partners

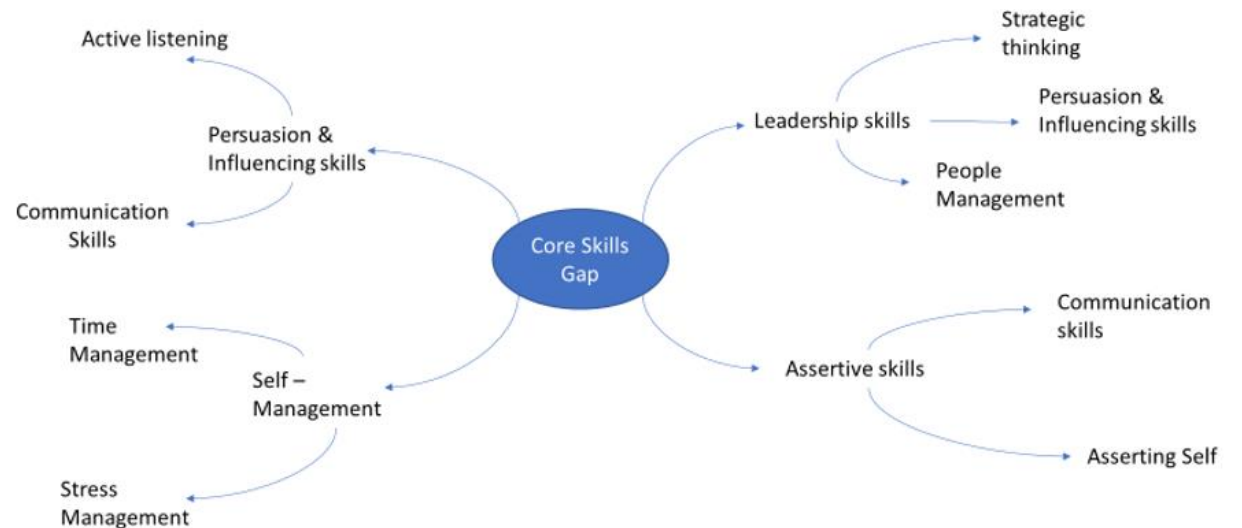
During the early stages of the services definition, activities were undertaken to trial and explore it with our partners;

- Exploring new pieces of work coming into the portfolio, with a Change Delivery Partner
- Supporting some challenging situations in a project, where the BA role was not clear
- Guiding conversations with other professions, where there could be overlap in services. For example, with Business Process Excellence



Developing our team members core skills

- In parallel with launch, a series of core skills sessions launched
- Based on insight from engagement activities, and team leader insight
- Skills gap identified around influence and time managements
- Develop our peoples core skills and the service catalogue to support them in those challenging conversations.



What's next?

- Continue to embed into practice ways of working and align with 'Change' service definition
- Add more detail regarding data and process elements – redeveloping career framework and job specs to match
- Identify initial 'friendly' senior stakeholders with whom to trial usage
- Develop our balanced scorecard to support our services
- Plan next steps in launching to the wider stakeholder community

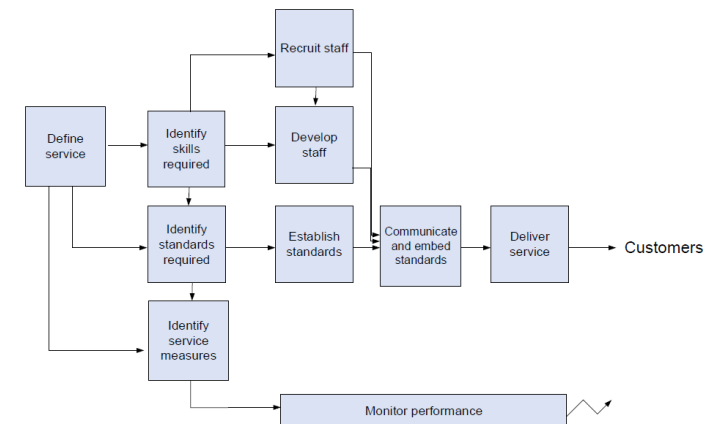


Figure 4: Generic value chain to deploy a BA service



What is your service proposition for Requirements Definition and Management? How do you define it, make that meaningful and something that can be conveyed and understood by others?



Section three

BA Value Proposition



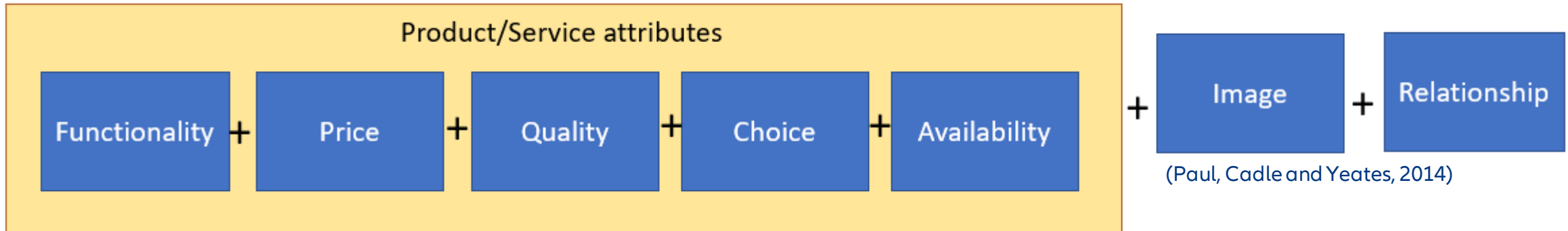
Why did we need a value proposition?

- Formed a key part of our service catalogue
 - Drive understanding as to the benefits of the services being articulated, based on low stakeholder understanding
 - Help the team think about how to 'sell' business analysis

"Value propositions state the characteristics of the value that is offered to connect those offering a service with the possible beneficiaries" ('Delivering Business Analysis – The BA Service Handbook' (Debra Paul and Christina Lovelock))

How did we define our value proposition?

- Engagement activity
 - Volunteers from the practice
 - Used proven technique
 - A challenge to do
 - Mindset shift
 - Output into a vision representation
- Asked the volunteers, “What’s your elevator pitch?”



BA Practice value proposition...





What is your elevator pitch? “What do you do and how is it beneficial”?

Summary and take aways

Journey to centralisation;

- Ongoing journey across Allianz to centralise the BA Profession into one practice.
- A shared vision brings everyone together, with the ability to focus collectively on L&D, ways of working and professionalism.
- The practice was able to focus on it's maturity journey following its formation.

Service Definition

- Frustrations around role clarity evident.
- Service definition was used as a vehicle to start to address this, as well as an engagement activity.
- A service catalogue is now in place, bringing to life the services defined.
- Supported within the practice by a core skills review activity.

Value proposition

- Selling the services meant a value proposition was needed to support it.
- Traditionally a challenge for BAs to articulate the benefits of their role

Thank you!

