

# Best Practice for Business Analysis Recruitment – a white paper. (First Draft)

## Objectives

The purpose of this white paper is to distil recruitment best practice into a practical guide for BA Managers to use for reference purposes. Whilst the focus of this work is in the UK permanent market, much of the content is applicable to contract resourcing and that conducted overseas.

## Sources

The main source of information is a workshop held at the BA Manager Forum on Friday 25<sup>th</sup> April. Around 30 BA practice leads attended the session, working in groups to provide input in three areas of the candidate engagement process; attraction, selection and retention. In the search for scarce resources, there is rightly an equal focus on each stage in the engagement process.

## Background

As business analysis gains wider acceptance of its value, so the role is in higher demand with more posts available year on year. Recognition that the BA role at its most mature can be the decisive factor in successful change delivery drives demand for the most talented individuals.

Demand is not currently matched either in terms of sheer numbers of BAs or by BAs operating at the highest level. The candidate market is therefore in both respects in catch-up mode.

One further point to consider is that there is no generally accepted BA career framework with agreed bandings of skills. The make-up of a “senior BA” differs from organisation to organisation. There is thus a need to be clear in the skills required when hiring and selecting candidates according to these requirements rather than relying on ambiguous job titles.

Whilst this document cannot account for the unique demands of every location, by focusing on attracting scarce resources in general we should provide some answers to the unique challenges faced by some organisations.

This paper provides some ideas on alternative sourcing tactics and we may address resourcing from a strategic viewpoint at a later BA Manager Forum event.

## Candidate attraction

The central question in this section is just how to attract candidates to our organisation who are both talented and achieve a fit with our organisational make-up and culture.

Early on in this discussion, a useful distinction was made between internal and external resourcing. Internal resourcing, particularly for larger companies, was seen as providing a significant pool of potential candidates.

### Internal Candidates

In addition to simply advertising roles internally, some BA practices appear adept at marketing the business analysis role and establishing a broad appeal within the wider business. Some, it seems, “socialise” the BA practice through the course of project delivery, promoting the role as they interact with other functions and, on occasion, actively approaching colleagues to join the practice. Others run more fun-based events with food usually at the centre of things in an attempt to engage with other disciplines within the organisation. BA roadshows, along with shadowing and secondment initiatives, provide a more formal means of educating internal colleagues on the role of the BA and possible career openings.

The general view of internal candidates is that they can come to the role with strong SME experience and the right attitude and behaviours to take on a BA role. In these circumstances, professional skills were seen as being far easier to develop compared to the personal skill set and sometimes-complex business knowledge. Some commented that their best BAs had come from within the business with backgrounds in call-centre or operational delivery. Broadening intake to what could be seen as “fringe roles” could be a valuable long term source of candidates.

### External Candidates

An immediate question in respect of external sourcing focused on the use of third-party agencies and/or HR colleagues.

In the survey conducted on the day, a high percentage of respondents make use of HR to distribute roles and manage responses. Around half of those responding, engage HR to make a first cut of candidate suitability.

When third-party agencies were used, the preference was for those with an immediate understanding of the BA role.

### The candidate message

All attendees agreed on the need to give a detailed appreciation of the role and organisational culture to external candidates. Few, though, could give examples of how this was achieved. Some cited web-site copy as their main contact point with external candidates. Web copy usually contained a job description with little additional information on the challenges faced or the available opportunity.

The group was interested to learn of one organisation which had produced a candidate information pack specifically targeted at attracting senior BAs into their ranks. The pack contained detailed role profiles, biographies of star BA performers, outline project descriptions and something about the journey of the BA practice including opportunities for progression. This level of information could be pulled together relatively quickly and would stand out in a crowded market, signalling an organisation very serious about the engagement of talented BAs.

## Selling the role and organisation

The message to candidates could or should be seen as an opportunity to sell the organisation and the BA role. Group members highlighted the following role features that could be attractive to potential employees:

- Money. Internal gradings or precedents may place fixed bandings on earnings allowing for little or no flexibility. Attracting candidates purely on the grounds of increased earnings can in any case be ill advised. Benefits should though be detailed and explained with a salary range given so that any potential for progression is fully appreciated.
- Work/life balance. Some organisations may offer a more balanced approach to work and home life which can appeal to many candidates. Any flexible working arrangements can be detailed at this early stage.
- Practice development/journey. As BA practices mature they may be able to track their progress on a longer term journey. Consequently, they may offer prospective employees a role in helping to develop and shape the practice. This could be of particular appeal to more experienced BAs who may find their knowledge and experience has a higher value in a relatively less mature practice
- Training and development. Formal skills development forms part of many candidates' agendas for switching roles. Any information on the scope for skills development should be provided at the earliest opportunity.
- BA positioning within the organisation. A job move may stem from frustration at the positioning of the BA within the candidate's current organisation or cycle of change. Aspects such as early stage involvement, or the internal view of the value of the BA contribution, were highlighted as two important selling points.
- Culture was repeatedly mentioned as being critical in the matching of candidates to organisation. Whilst an intangible quality that may be difficult to define in writing, it is a key factor in candidates' decision-making. Team qualities such as taking a collegiate approach or mentoring support can be particularly attractive to some candidates.
- Work rotation or the exposure to various business areas within the one company can open further career opportunities for some candidates. Larger companies might offer different business or product areas within which to operate. Smaller companies with limited BA resource might offer exposure to a wider number of business functions e.g. sales, finance or marketing.

Capturing early interest with a strong and accurate message was seen as key to engaging the career minded analyst. Forum attendees also highlighted the value of explaining the selection process at the earliest opportunity. Applicants are then clear on the means of assessment and likely timescales.

Mention was made of the use of social media and the ability to build up a credible and trusted presence in the jobs market. This was seen as particularly useful for larger organisations which

struggle to recruit on an ongoing basis and who may wish to establish themselves as a first point of call for serious job hunters.

Interestingly, any start point for a fresh approach to the market could draw on information gained from exit interviews. The exit interview provides immediate first-hand information. Negative responses may contain some opportunity to improve practice working and can shape who may better suit the working environment. Positive feedback can be used to inform the message to external candidates. Either way, this can provide for a very open approach on which to base the recruitment of new team members.

### Ongoing recruitment

Large organisations may appear to be constantly in recruitment mode due to the high number of required employees. Care should be taken to explain the reasoning behind the ongoing recruitment and the selective nature of the organisation. Smaller organisations can have equally unique needs and a six-month recruitment cycle is not unusual for a single role. In both situations, the recruitment message can constantly be updated and refined to include the reasons why candidates to date have not been successful.

### Candidate Sources

Group members were familiar with some sources of candidate profiles and highlighted Linked-in as the tool used most often and with greatest effect. Group members had less exposure to other sources of candidate details with HR or a third party agency completing the coverage of the market through available databases and personal networks.

Linked-in was used to make both direct approaches to candidates and also more subtly to raise the company profile through discussion groups.

Whilst personal networks existed, few in the group had built their network of contacts beyond their immediate reach. It was highlighted that other practice leads had benefited from more active networking, keeping in touch with former colleagues, connecting with those met at Forum and seminar events. Networking requires a disciplined approach but does pay dividends in the form of a ready pool of contacts that can act as candidates or as a means of referring others.

Networking events were seen as an effective means of targeting shortages. An open day or drinks evening was seen as appealing to candidates requiring a more informal or cursory approach to engaging with an organisation.

The group had mixed experiences of converting contract staff to permanent hires. This was sometimes seen as a short term solution with a permanent position a role of convenience in a quiet market. Contractor conversions should always be considered on their merits with most success seen with those with a genuine reason behind the change e.g. career progression or family circumstances.

Some organisations had benefitted in the longer term from introducing a graduate scheme and blending their approach to building a team. This could form part of a long term approach and something that could be discussed as part of a more strategic discussion on resourcing.

### Keeping in touch with market career points

Market knowledge, for example understanding the career structure or pay levels within other organisations, could be invaluable in positioning a role to appeal to more candidates. Mirroring or slightly enhancing pay bandings could for example keep an organisation more in step with the

expectations of the first time job mover. Candidates or recent joiners may be a useful source of information in this respect.

## Candidate Selection

### Key attributes for evaluation through the assessment process

The start point for our selection work must start with a thorough understanding of who we intend to recruit. We might consider:

- “Must have” and “must not have” skills or qualities
- Cultural fit, what is a required behaviour – what sort of person will thrive in this type of organisation?
- What role could they play in the team, what fit with the mix of current team members?
- Motivations for applying for the role?
- Flexibility and willingness to step outside a personal comfort zone
- Do they have a hunger for learning?
- Candidate potential. Is their scope to grow levels of skill?

Selection is focused on identifying the most talented individuals at different levels of experience. Account should be taken of experience levels and adapting our approach suit junior/senior candidates.

We can work through the selection process as follows:

### The CV

CVs were seen as poor indicators of technical ability and organisational fit. Very often the CV did not reflect the quality of the individual. Whilst we might hope that the stronger candidates would develop a professional document, this was not always the case. Those with the slickest CVs were not always the strongest candidates. We might consider that some candidates employ third parties to help produce an enhanced CV.

Understanding historic career progression can still be a very useful means of establishing a candidate’s potential for growth in the future. CVs that simply list a career history in chronological order give little information on the real contribution the individual made and reveal nothing of genuine career development. We can request more information from an individual in the form of written clarification to check their involvement in a project and if they were able to see through a piece of work to successful conclusion. Some organisations no longer accept CVs, preferring application forms that elicit more specific information.

In general terms it is worth keeping an open mind on a CV/application form and being prepared to seek out more details before moving to any interview stage.

### Video interview – the talking CV

Some candidates make use of a “talking cv”. (<http://www.talkingcv.com> as an example. The video clip can be structured in response to a small number of questions posed by the hiring manager.

### Qualifications

The general view of the group was that, whilst qualifications are important, they are not critical. Some organisations have strict policies on qualification thresholds. This may be a discussion point for interview and prompt a question around ongoing learning.

### The telephone interview

The phone interview is used by a majority of those attending the workshop and is seen as an efficient first step to get a sense of the candidate's communication ability, suitability, aspirations and motivation. This is usually fairly short, often lasting around 30 minutes and obviously cannot cover all areas of interest in that time. It can then help focus later assessment efforts on the candidates who are of greatest interest.

### On line assessments – intelligence, numeracy and personality tests

Around 20% of the workshop attendees made use of one or more on-line assessments. This is fairly reflective of the market. On-line assessments can be used to benchmark baseline intelligence or provide clues in terms of a personality match. All on-line assessments come with a health warning and should be used as part of the overall selection process and not be the decisive factor. It was also mentioned that applicants learn how to "beat" on-line personality tests, possibly selecting answers they feel are more corporate and less of a reflection of their real personality. One attendee mentioned the use of a specific BA capability assessment tool developed by "Skillsedge". HR policies may mandate psychometric tests and set minimum / specific criteria which can sometimes screen out good candidates.

### Generic Question Banks and Grade tests

Where "question banks" are used, perhaps by HR, care should be taken that BA candidates aren't screened out unnecessarily by questions that are not relevant to the role. Grade tests, although not in common usage, can hold less relevance for the predicting BA performance and form a cumbersome part of the selection process.

### Interview questions

Competency questions can provide a baseline for phone and face to face interviews. Many candidates now rehearse answers for the more common questions and can then perform well at interview. A rehearsed answer may not though be the best predictor of performance in role.

One of the most useful specific questions mentioned was to get the candidate to describe the role of a business analyst, as this is often misunderstood.

Use of vague or ambiguous questions can be a useful means of seeing if the candidate can take the initiative to clarify the required information. Surprise questions about the individual themselves can change the track of an interview and get a candidate to open up and respond differently. Situational questions (using relevant business scenarios) can help give a more specific understanding of how an employee might self-start in our business.

### Case studies/exercises

The use of case studies or scenarios and playback are seen as valuable predictors of performance. Around 60% of those surveyed make use of some form of scenario, presentation or case study/role play. Development of relevant case studies can be time consuming but can reveal a candidates ability to review information, analyse key information and report back with recommendations or a course of action. Real business problems can be used to give additional purpose/relevance to the case study. There is then far more insight to an individuals' thought processes and their ability to build a case for a course of action. Candidates may receive prior warning of the case study but rarely have sight of any information before the assessment day. The case study is then also a reflection of individual ability to work under some time pressure.

### The presentation with Q&A

Producing a presentation prior to a final stage interview is a useful test of how seriously a candidate takes the role. Presenting on a topic relevant to the business analysis role provides an insight to both the individuals understanding of their role and depth of experience and their presentational skills. Q&A can be used to tune into more of their thought processes and depth of understanding.

### Written communication skills assessment

We may choose at some point in the selection process to request written material from a candidate. Some candidates are calm, articulate and poised at interview but cannot write to a high enough standard. Documents relating to past work may be too sensitive for wider distribution but excerpts or past presentations may be available for consideration. The case study could require a short write up of findings.

### Background checks and personal recommendations.

All those surveyed undertake background checks to validate candidate experience. This typically takes the form of a reference. Verbal references were highlighted as an opportunity to gain a closer appreciation of candidate suitability and seen as an improvement on the one line usually given in a standard HR response. Linked-in is used again to check CV consistency, personal recommendations and identify any common contacts who could provide an independent view. Sources such as this are often useful to the manager, prior to final selection and offer, whereas formal HR based checks are often too late in the process to be useful.

### Meeting the team

The last stage in an assessment day can be for a candidate to meet the team (BAs or wider project team as appropriate). This is usually conducted on an informal basis and is a useful means of socialising a prospective new team member. The team will have an opportunity to interact with candidates and this may reveal more information in terms of social styles and behaviours. It's also an opportunity for the candidate to more clearly visualise what working for that organisation might be like.

### The question of candidate compromise

Discussion included the possibility of compromising on the candidate that is hired and whether this is acceptable in any circumstances. Time constraints and market shortage may force a reconsideration of the level or type of candidate that is hired. Some held the view that some missing professional skills can be taught or more junior staff developed. Most held the view that there should not be any compromise on basic interpersonal skills.

### What can we do to avoid losing the best people through the selection process?

There can be a significant time commitment required for the candidate to undertake the extent of assessment described above, which may be off putting to some. Opportunities should be taken throughout the process to sell the role and the company to the candidate and keep candidates engaged.

There is universal agreement that the recruitment process, whilst thorough, should be compact and well planned with a clear timeline to the offer stage. Candidates should be kept well informed throughout the process and once the process is complete, quick decisions should be made.

## Candidate retention

With talented BA resources in short supply, employee retention is as important as effective attraction and selection.

### Attraction & induction stages

Effective retention begins upon first contact with the prospective candidate. Information provided at this stage will be relied upon for career decision making and form the basis for a candidates fit with the organisation. New starter behaviours can be matched with those in the organisation who best represent what you are trying to achieve. Candidates need to be aware of the challenges faced within the BA team.

### The early months

The first months of employment can be as much about people and behavioural learning objectives being met. The individual then has an opportunity to settle into the team and tune into the culture of the organisation. Any formal training needs identified during the selection process can then be addressed as a second step.

### Ongoing retention

A range of factors impact on retention and on people working effectively. The group provided ideas and options for maximising both. In no particular order:

- Secondment. The opportunity to work in another area where skills may be developed and needed can provide a necessary change in focus and re-engagement with the organisation. Be prepared to lose people but lose them internally. A former BA in another area of the business is never a bad thing.
- Working in a dedicated BA practice with a clear brand and sense of purpose can foster a greater sense of belonging and provide more opportunity for sharing best practice and career growth.
- Relevant training to enable someone to take on more responsibility or work in a new area can open up new challenges. The chance to use and develop new skills can reduce the desire to exit the organisation.
- If appropriate/possible, provide a clear career structure and opportunity for career progression. Be clear on the trigger points and provide realistic timescales for progression. This can mitigate the BA role being seen as merely a stepping stone to other disciplines.
- Addressing performance issues in poor performers helps retain good performers.
- Market and congratulate success. Examples or pen portraits for successful performers at each level of BA role can provide a benchmark for achievement.
- Standardising role profile and "titles" can remove inconsistencies. There is then no ambiguity as to what constitutes a "senior BA".

- Track staff motivation and, when appropriate, ask the awkward questions. It's better to know in advance if someone is going to leave. Questions on money, work life balance and career aspirations may yield issues that are fixable.
- Encourage aspiration. External frameworks or examples, e.g. Expert BA or BA of the Year Award, can drive practice standards and be cascaded through senior and BA roles to develop industry-wide confidence in role-meaning.
- Operate with a clear set of values and behaviours. If necessary, the team can take on its own values such as respect, integrity, service excellence and stewardship to create a greater team identity.

### Good leavers

Some people simply need to leave the organisation, in particular when the benefits of the working environment are out balanced by lack of career progression and or remuneration.

We might expect some graduates or junior BAs to leave after a few years but there is no reason why they can't return in later years.

### "Negative" retention

The group was very aware of negative retention and the team members who outlive their usefulness in their role or consistently under achieve. We may not want to encourage these colleagues to stay with the organisation.

### Other factors

Specialisation can create a risk of a person leaving for more money or more senior roles. Unique knowledge of a particular business area or an application can increase their stock several fold and lead to more active/aggressive approaches to secure these skills from other organisations.

High demand for BAs continues to drive the contract market. We shouldn't be surprised that confident and commercially astute BAs make the transition to a contracting career. Most companies operate a strict policy of former employees not returning on contract. Others make use of an individual's unique business knowledge but usually after a sensible period of time has elapsed (2 years being the norm).

## Summary

We cannot alter the market conditions in the short term. We do, though, have best practice options for attracting, selecting and retaining the most talented BAs

The key points for note and improvement are:

- Plan your recruitment process in detail much as you would any other project deliverable
- Provide as full and as positive a message as possible from first contact with the candidate. Consider using a candidate information pack tailored to the BA role.
- Sell all aspects of the role but be open on the challenges the practice faces and realistic in terms of available opportunities.
- Keep an open mind on a CV and be prepared to seek more written information or arrange a telephone interview.
- Plan and operate a quick and efficient recruitment process. It speaks volumes for your organisation
- Don't be afraid to compromise on your candidate choice if you can develop a candidate in the specific areas where they fall short.
- Be creative in your retention strategy – you do have options.
- Continue to develop your network to provide a resource pool in the longer term.