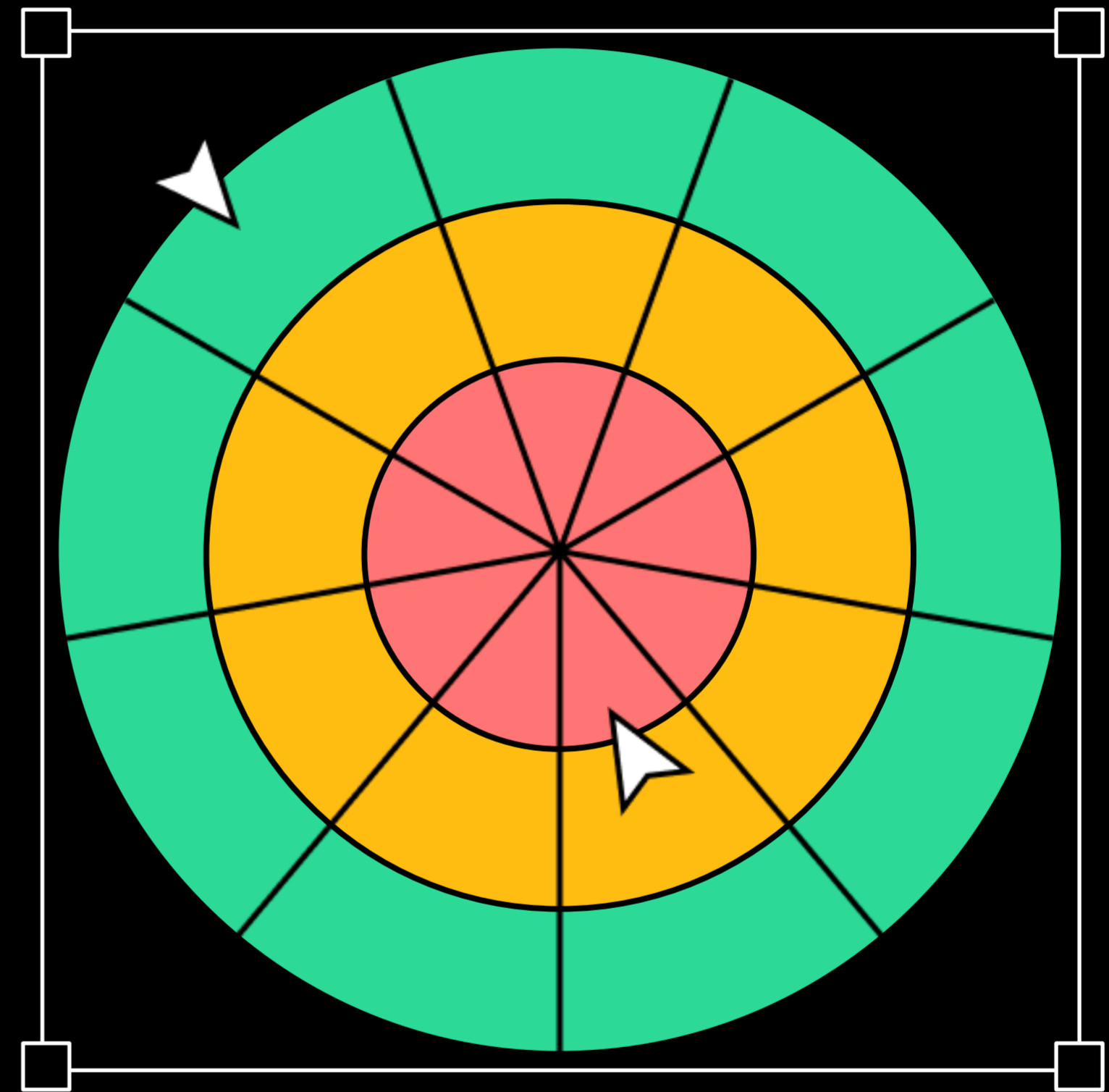


The BA Role in Operating Model Design

Workshop run by

Caroline Beasley & Phil Slinn

Principal Business Analysts, Nationwide Building Society





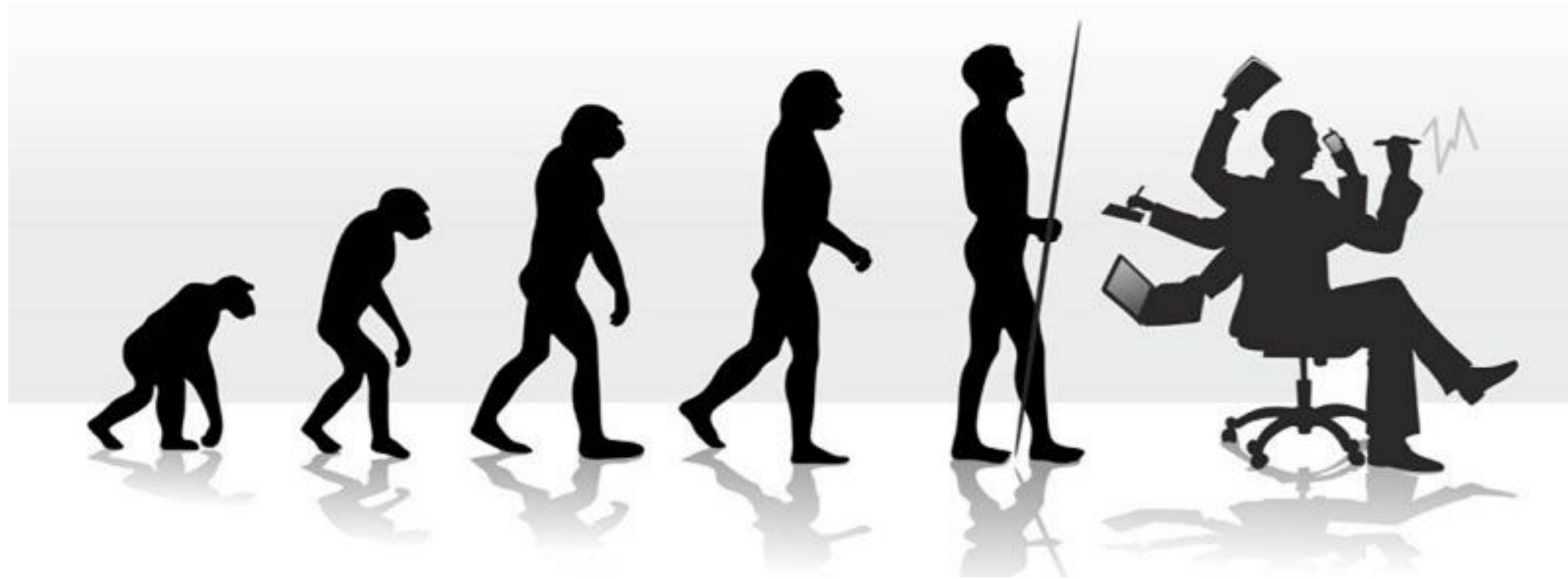
Hello...

I'm Caroline Beasley. I've been a Business Analyst for 20 years, working at different levels across various business domains.

I'm Phil Slinn. I've been a Principal Analyst at Nationwide for the past 10 years



Evolving role of the BA



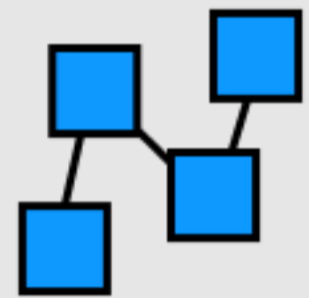
Traditional BA

Requirements
Process modelling
Acceptance/ testing

Modern BA

Multi-faceted
Play strategic role
Critical thinker

What will you take away from today?



An understanding of **what** operating models are - and what they are not



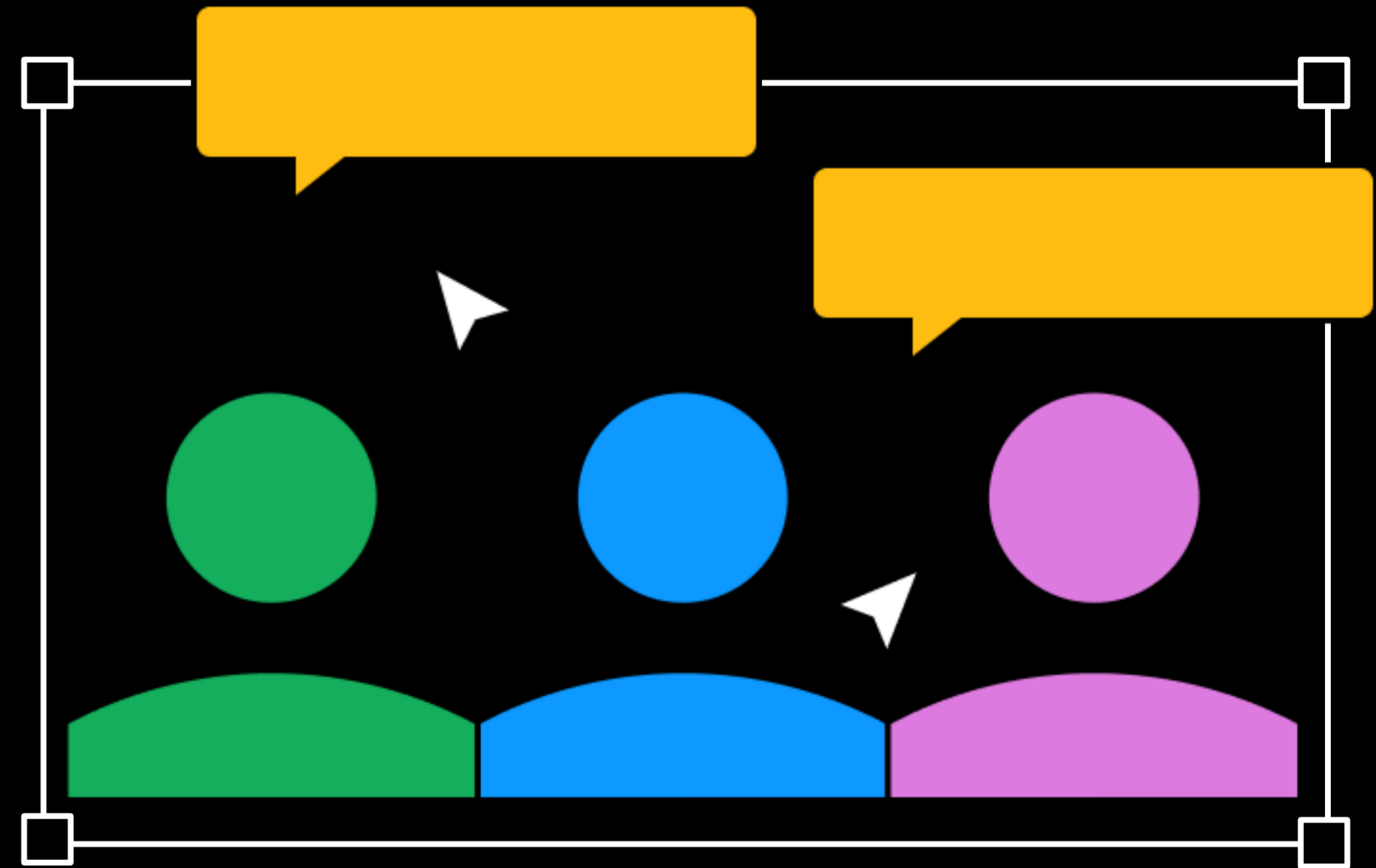
Triggers for Operating model **re-design** and how operating models link **strategy to delivery**.



Practical examples of operating models.

Where BAs make the **biggest impact** – and where opportunities are often missed

Group discussion



Understanding of operating models

Discuss with the people on your table



- What does 'operating model' mean to you?

- What don't you think an operating model is?

- What myths do you think exist around operating models?

- What changes have you seen that forced your organisation to rethink its operating model?

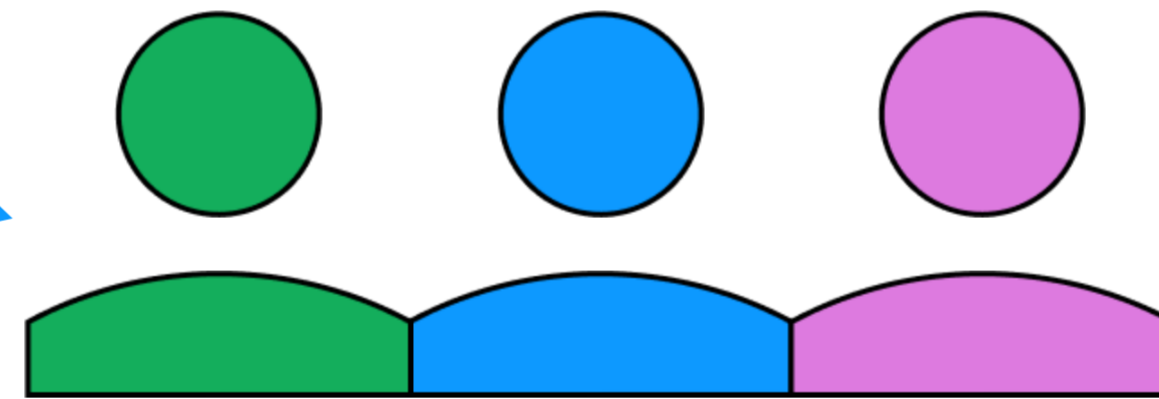
Operating model myths

'An operating model is just an org chart'

'An operating model is only relevant during major transformations'

'Once you define an operating model you're done'

'An operating model is a detailed process manual'

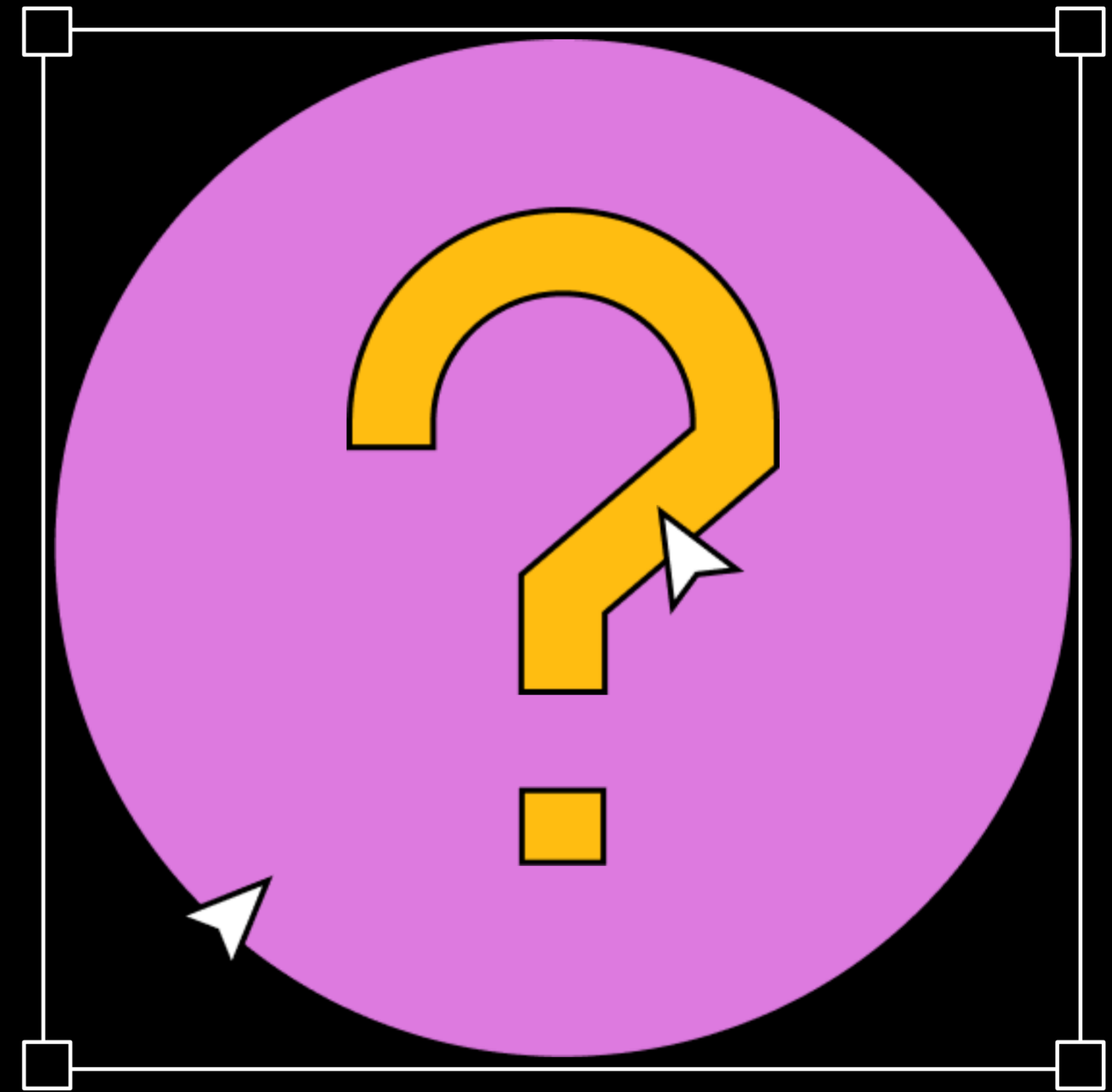


'Technology determines the operating model'

'Operating models belong to architects or consultants but not BAs'

'The operating model is the same everywhere in the organisation'

What is an
operating model?



What is an operating model?

There are many definitions...

An operating model is both an abstract and **visual representation** (model) of how an organisation **delivers value** to its customers or beneficiaries as well as **how** an organisation actually **runs itself**.¹

An organisation's operating model addresses **how** it structures its **people, functions, activities** and **infrastructure** to deliver on its business model and strategy.²

An operating model represents how **business components work** together in line with the system's **guiding principles**. At the highest level, operating models describe **how a business functions**.³

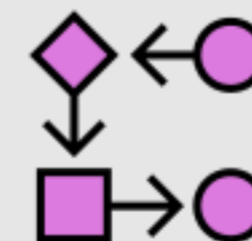
People



Functions /Capabilities



Processes

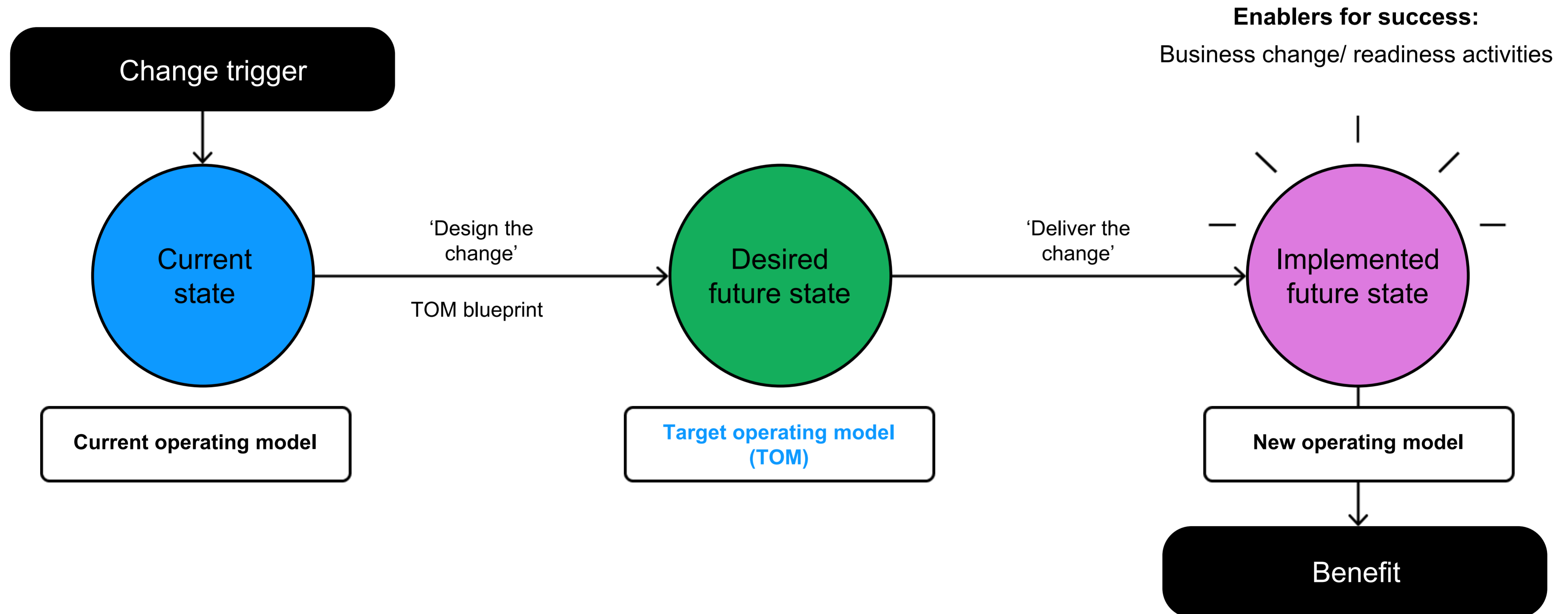


Infrastructure

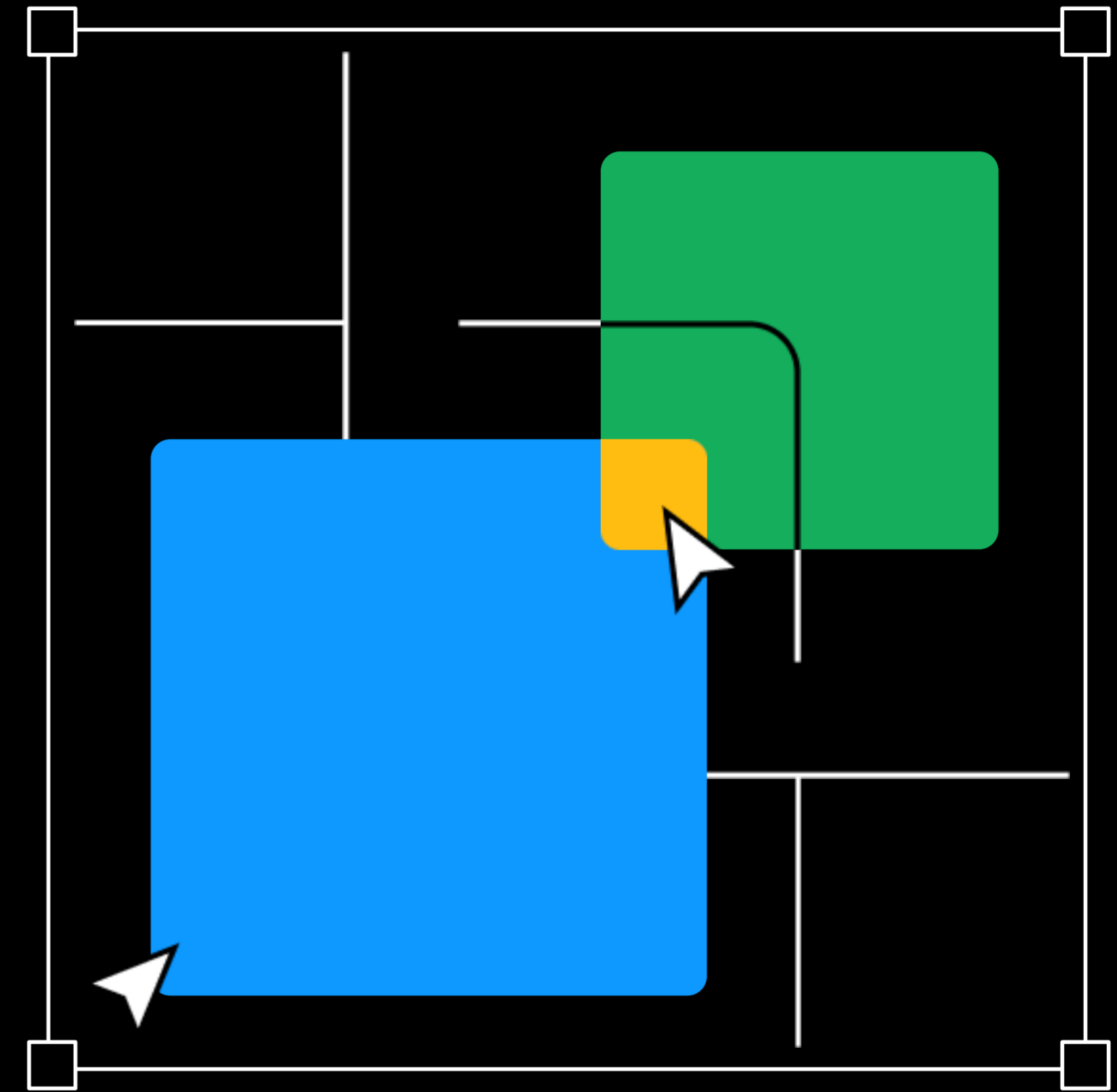


What is a *target* operating model?

Target operating model (TOM) is a description of the **desired** state of the operating model of an organisation.

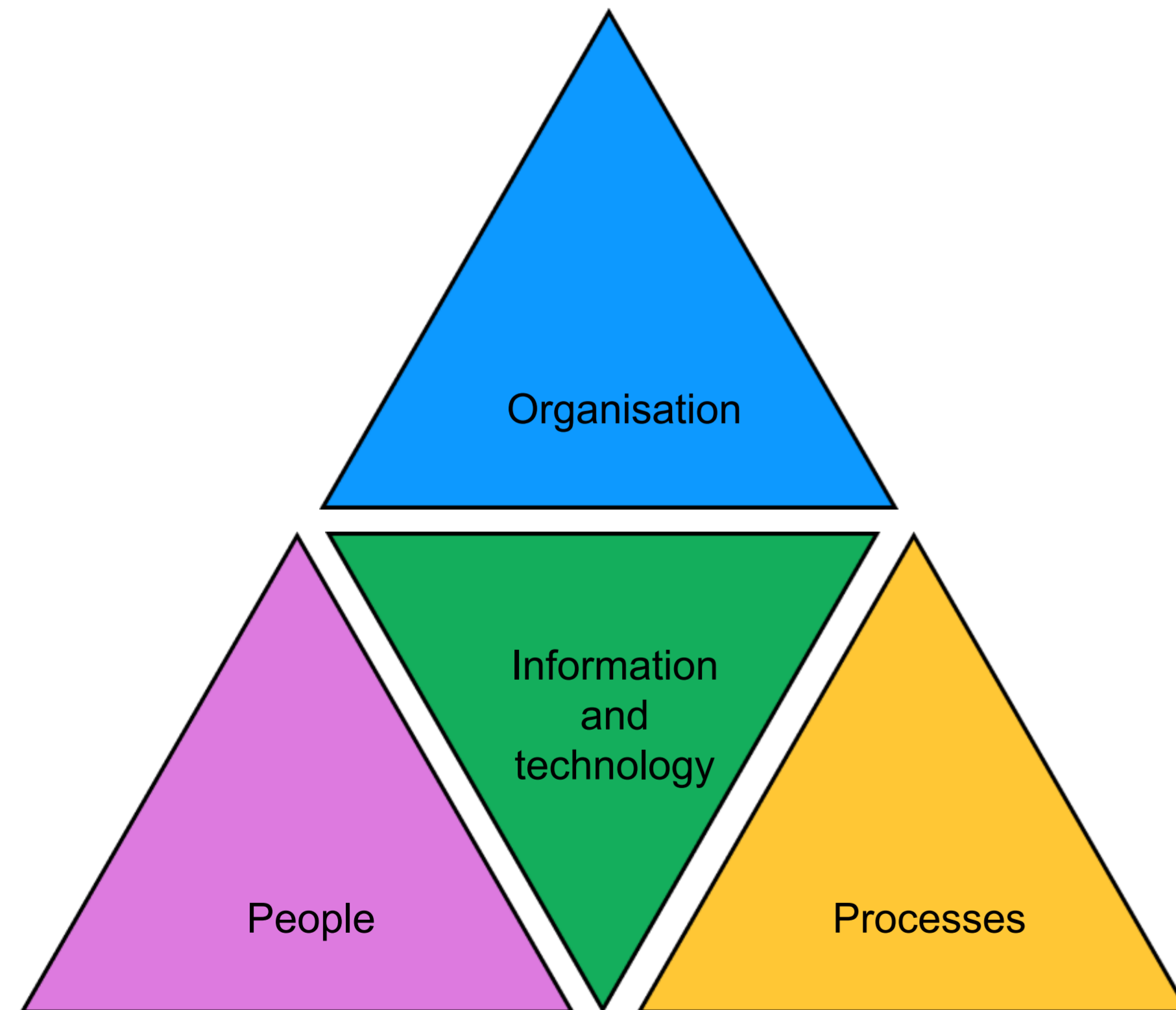


Approach to designing an operating model



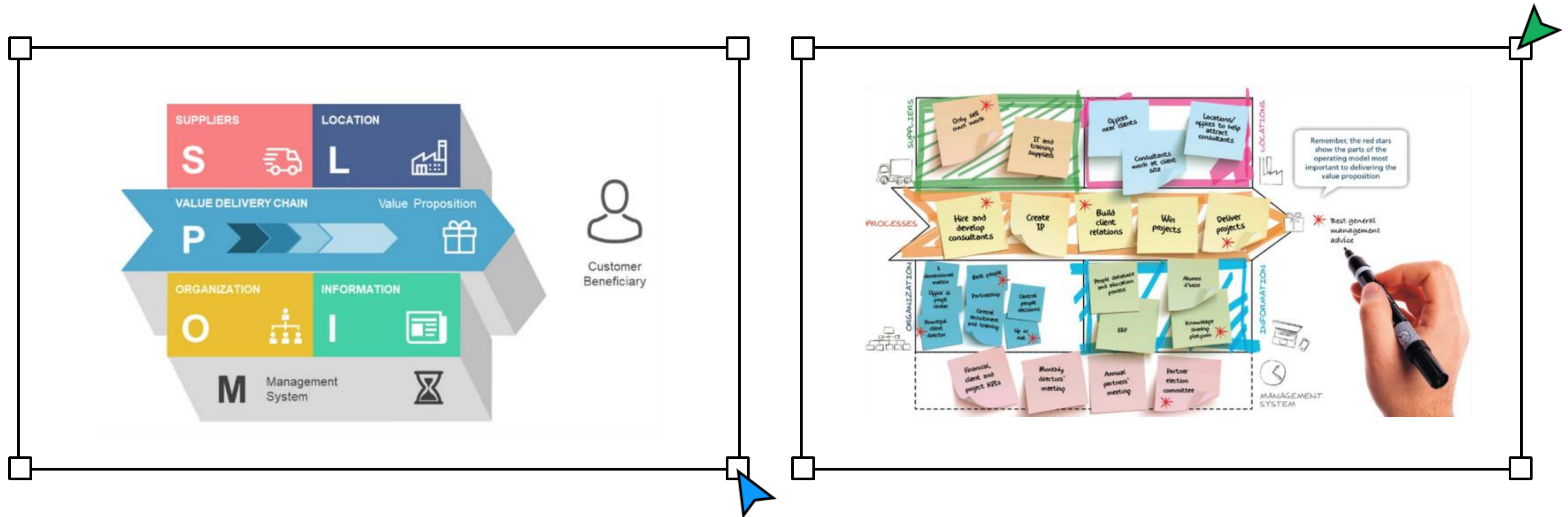
Tools to help define a target operating model

POPIT™ model



Tools to help define a target operating model

Operating model canvas – POLISM



Source: Ashbridge Executive Education

Source: Van Haren Publishing

TOM blueprint

- Conceptual & high-level
- Outlines the key operating model components and sub-components
- A clear reference point for design and delivery activity
- A sign-off artefact that aligns strategy, change and delivery
- A way of defining the target state before moving into delivery planning

Focusses on the
'what' not the **'how'**

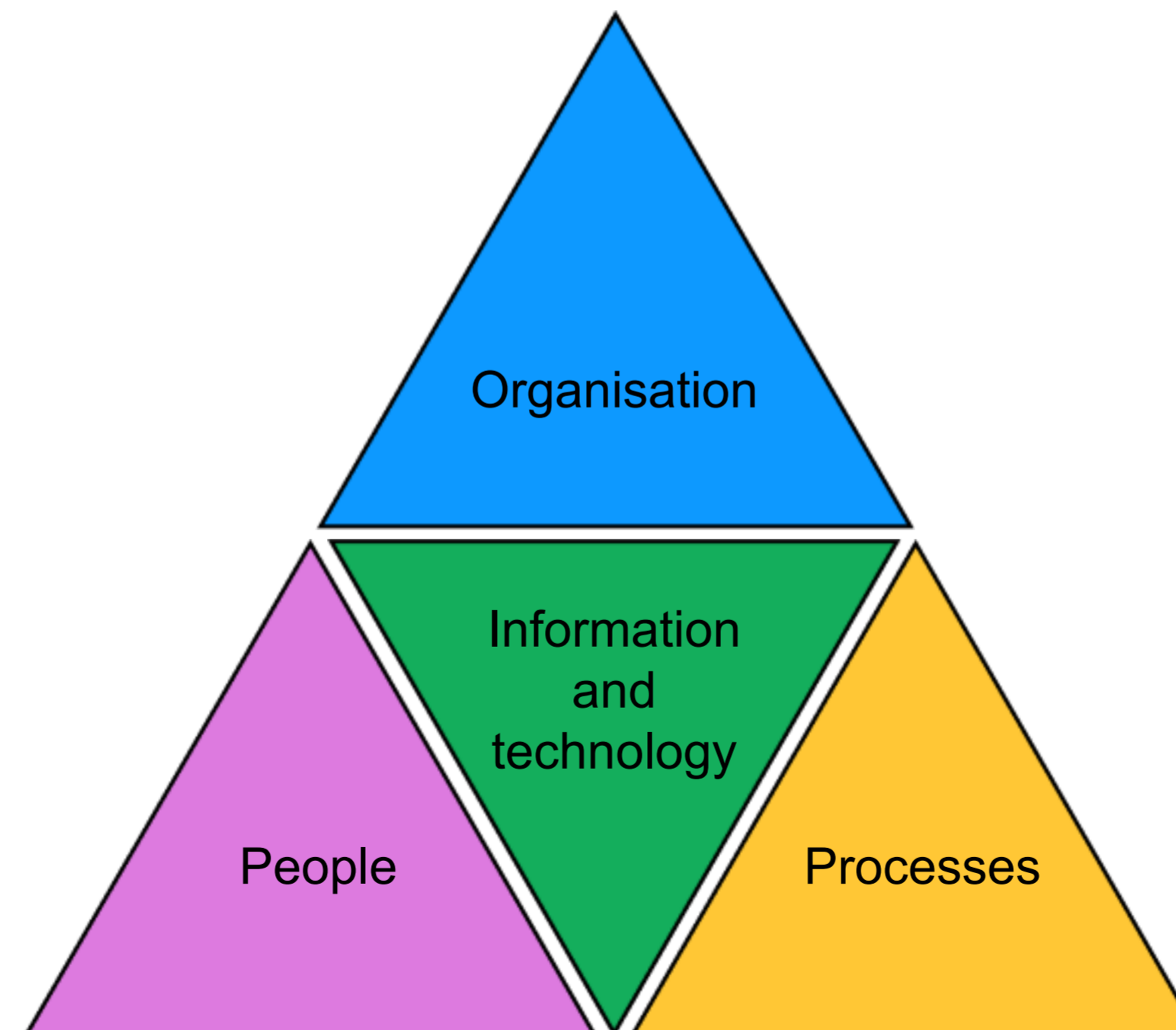
People and organisation

- Organisation charts
- Skills frameworks
- Job specifications
- Training and user support



Governance and control

- Metrics/balanced scorecard
- Governance documentation



Information and technology

- Technical architecture
- Data architecture
- Technical/design standards
- Best practice guidelines
- Support and maintenance

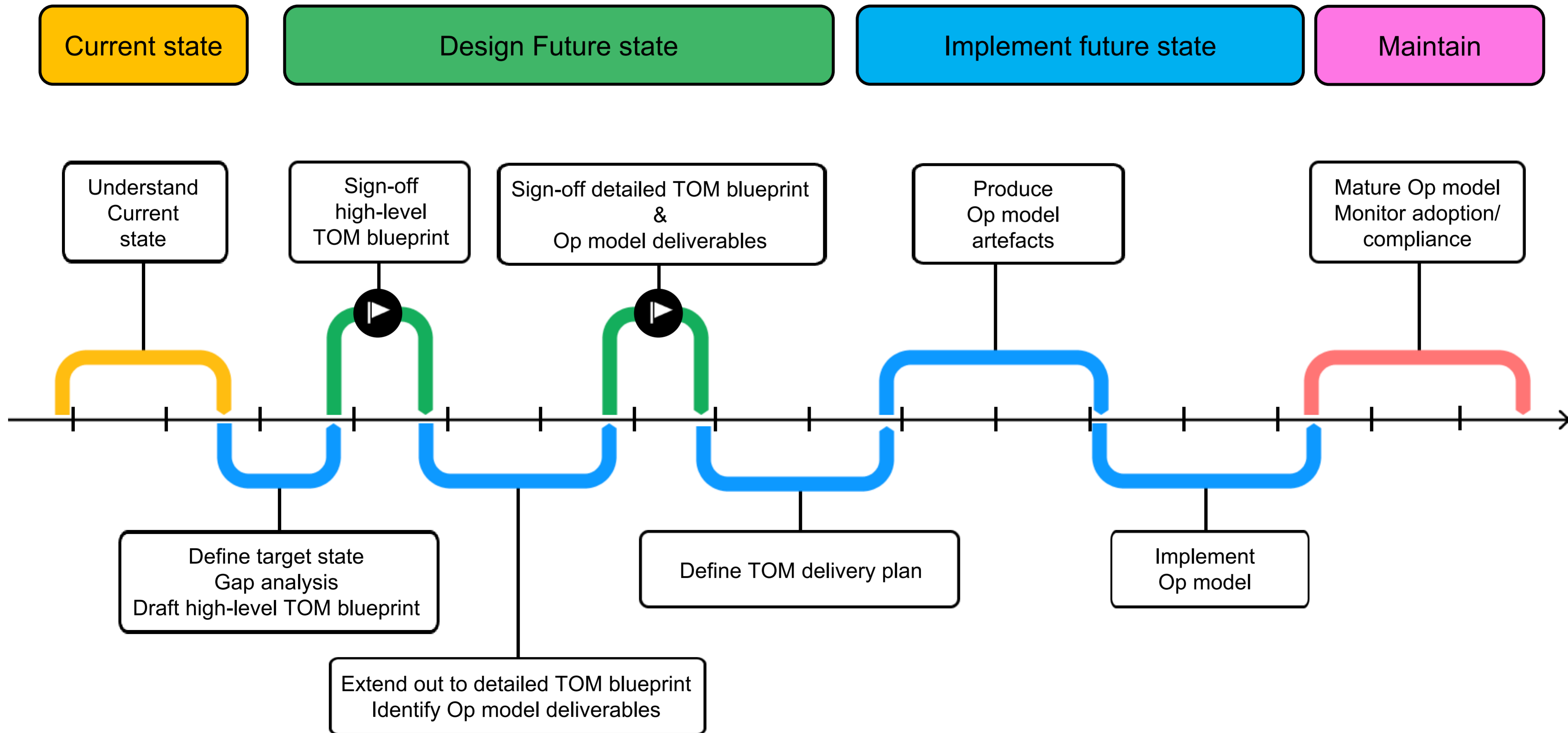


Processes

- Processes (new ways of working)
- Standard Operating Procedures (SOP)

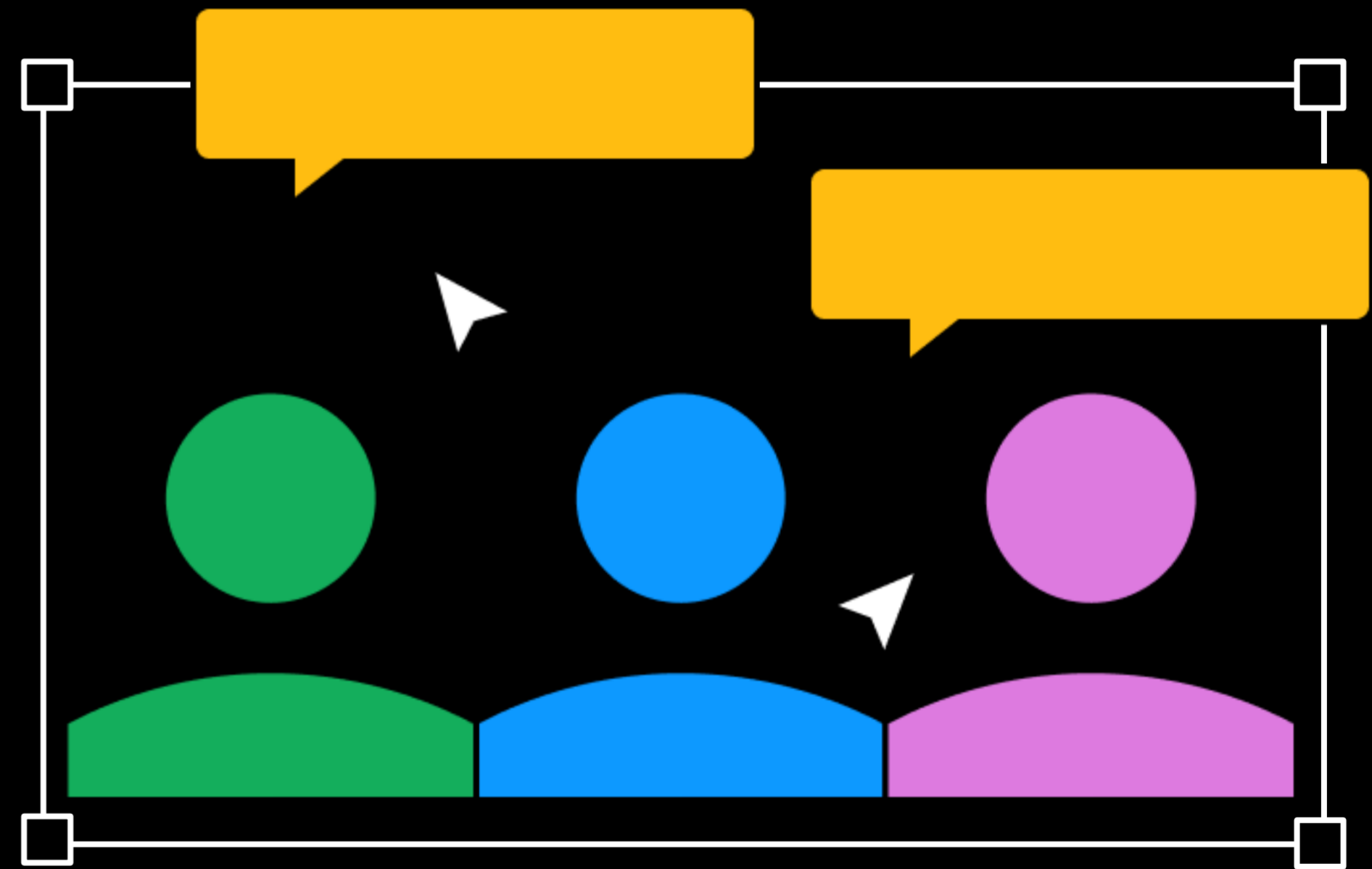


Approach to designing an operating model – roadmap



Group exercise

The role of the BA



Role of BAs within operating model work

Discuss with the people on your table



- Do BAs get involved in operating model work in your organisation?

- What further opportunities are there for BAs to be involved?

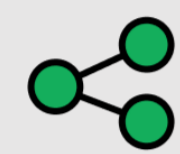
- What aspects of operating model design do your BAs get involved in?

- What other business roles are used or needed?

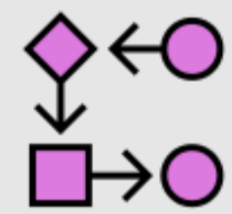
- What aspects of operating model design do you consider BAs shouldn't get involved in?

- Are there aspects of operating model design that you consider your BAs should get involved in?

Where BAs can fit into the chain



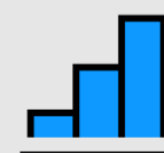
We can translate strategy into operational impacts



We can shape the operating model through process, data, systems and role insight



We can support delivery by defining requirements, validating designs and ensuring coherence



We can measure value

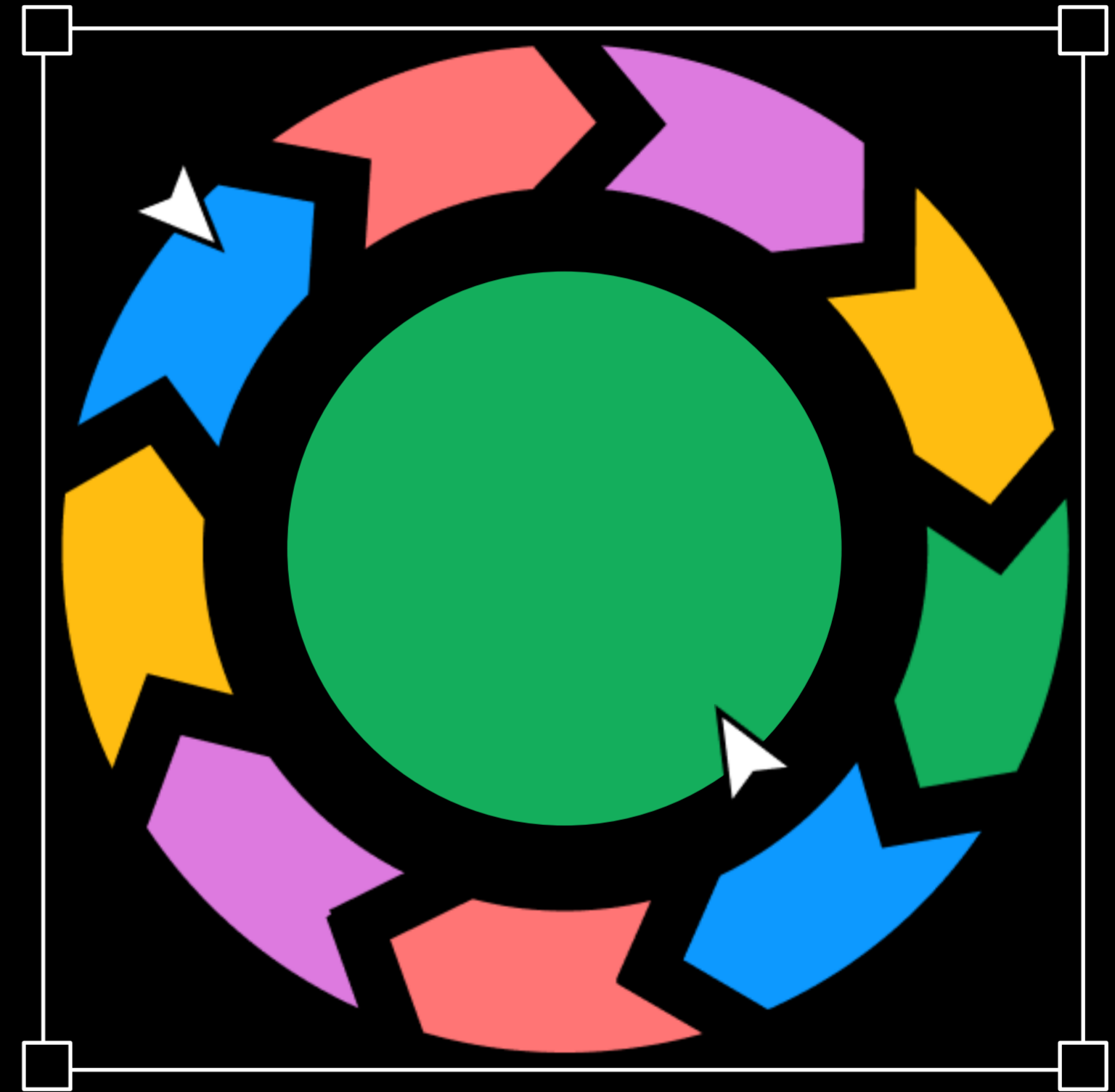
'Operating model design is too strategic for BA teams'

Reality is that BAs are often the only group that:

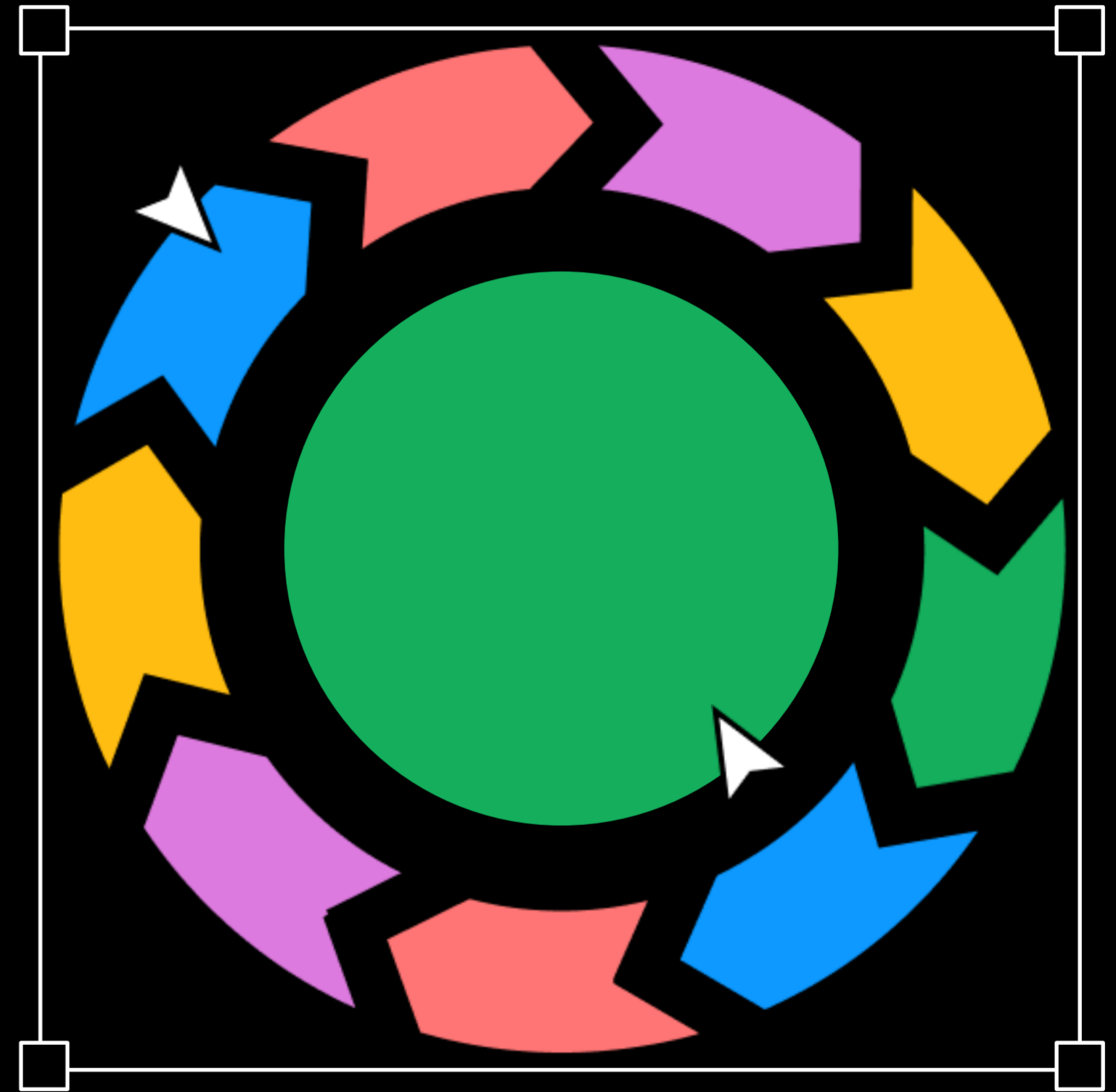
- Understands end-to-end work
- Sees pain points and constraints
- Knows what the business actually does

Case studies

What an operating model might look like



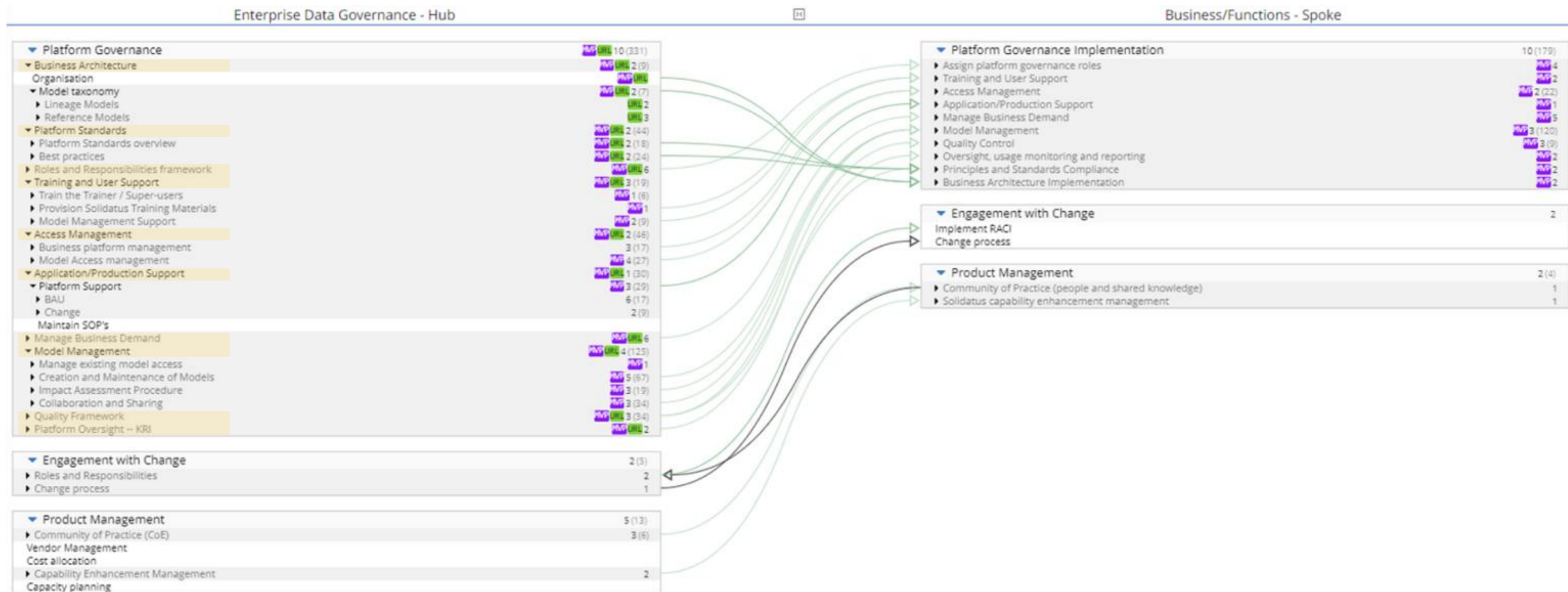
Case study 1
Data lineage
operating model for
a global bank



Data lineage operating model for a global bank

TOM blueprint

TOM blueprint level 1



Data lineage operating model for a global bank

Hub and spoke model

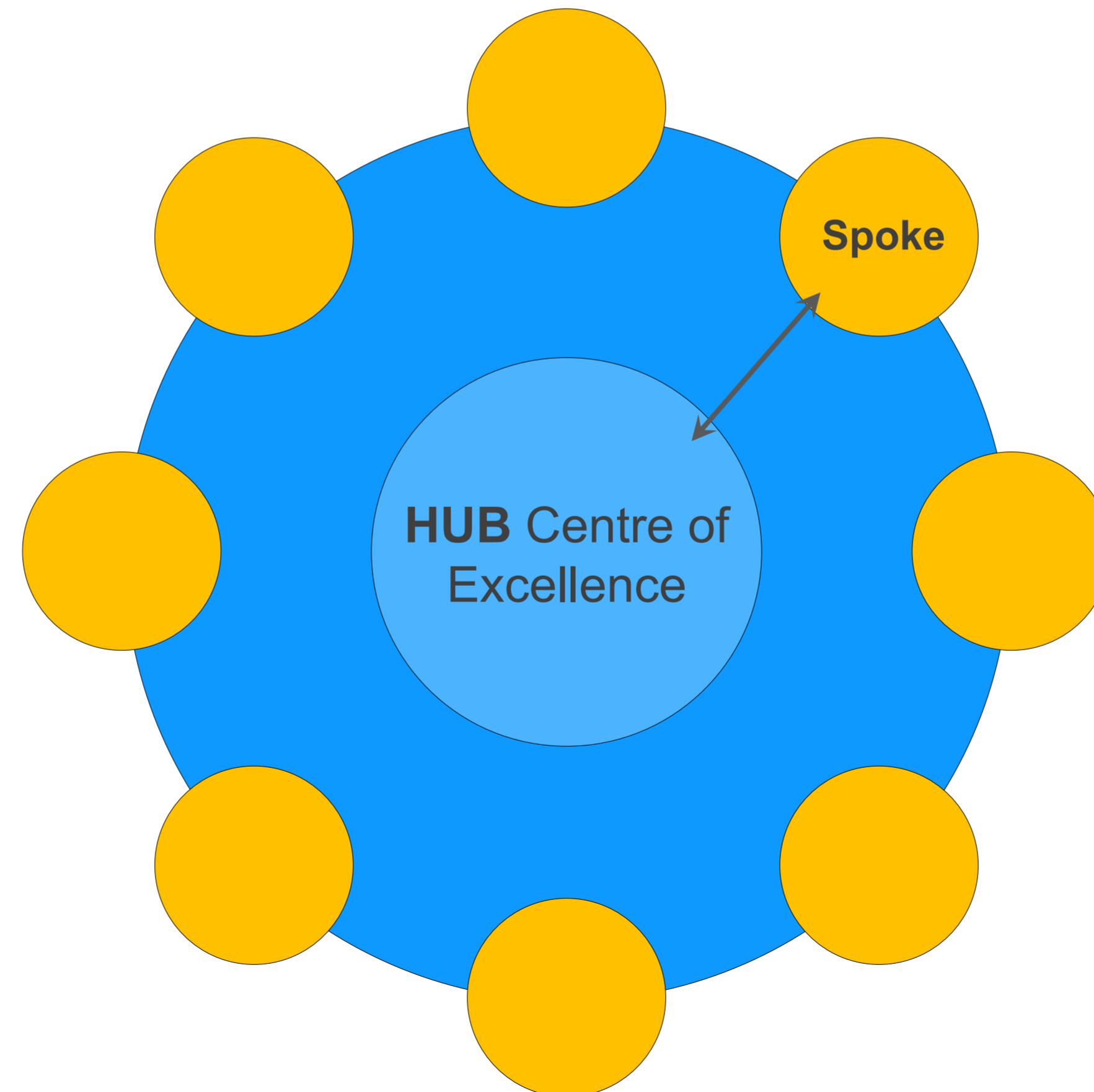
The Target operating model (TOM) has been designed as a 'Hub & Spoke' model.

Hub

- Centrally governed Hub that provides expertise, support and data services to the Spokes
- Everything originates from the Hub and is federated out

Spoke

- Consumers of the service
- Sit within the Lines of Business
- Leverage the support of the Hub

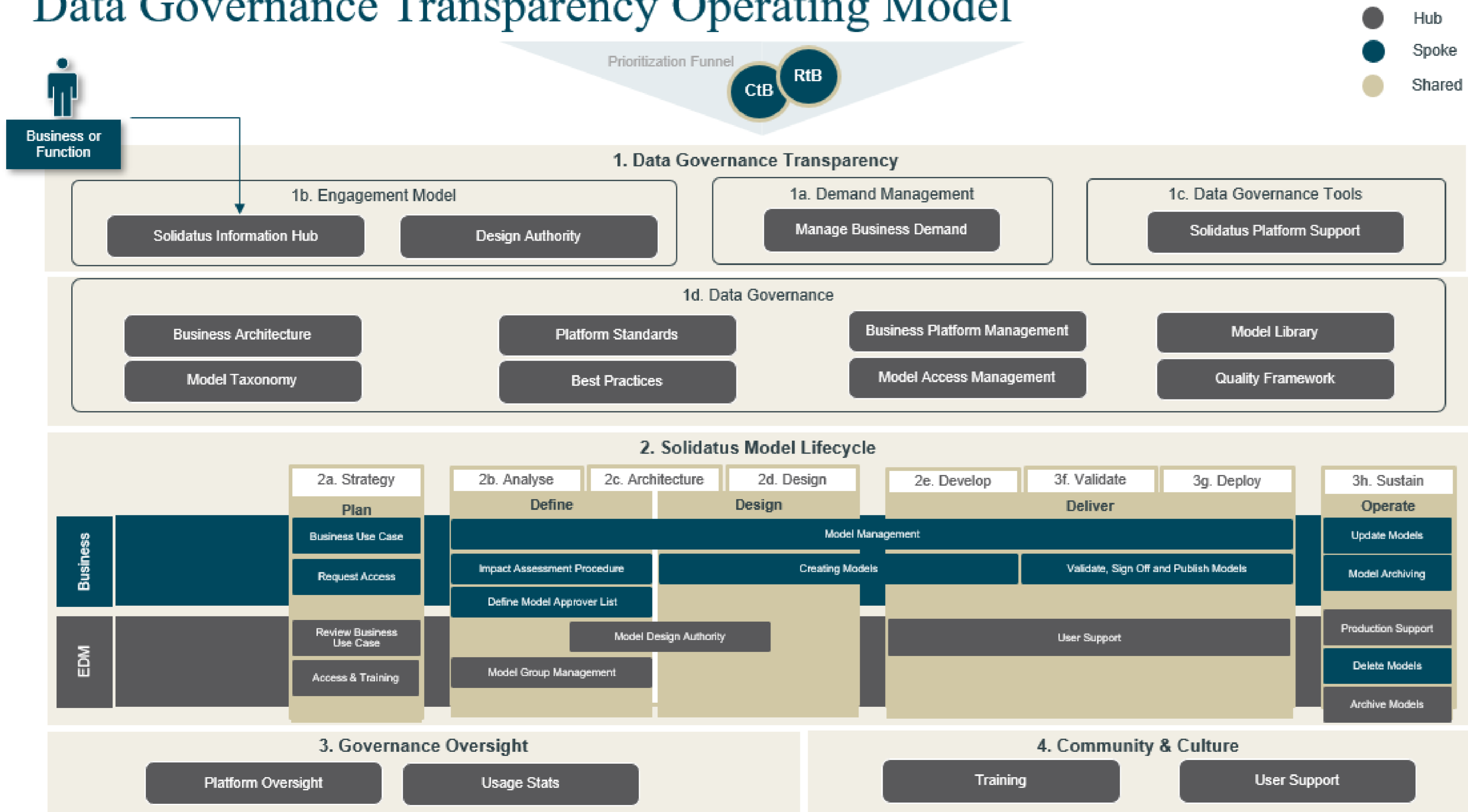


Benefits of 'Hub and Spoke' model

- Model proven to adapt to scale
- Users in the spoke empowered to drive their own data solutions
- Leverages both business and technology resources in a collaborative way
- Aligns with Enterprise Data Management (EDM) governance and strategy
- Ensures data adoption controlled, monitored and audited

Data lineage operating model for a global bank

Data Governance Transparency Operating Model



Data lineage operating model for a global bank

Delivering the Operating model - artefacts and activities

Target Operating Model

- TOM blueprint

Roles & responsibilities

- Roles and responsibilities framework
- RBAC model
- Access request form

Product development

- Business use case demand approach
- New business use case request form
- Software release approach
- Release test strategy

Guidelines and standards

- Model best practice guidelines
- Technical standards
- Model taxonomy approach

Processes and procedures

- Processes defined
- Standard Operating procedures (SOPs):
 - License management
 - Platform monitoring
 - Access management
 - Training requests

Metrics

- KRI/ KPI'S

Training and support

- Product training
- FAQs
- Role-based training approach
- End-user product support
- End-user technical support

Product and platform governance

- Design Authority ToR
- Platform Review Meeting ToR

Communications

- Confluence site for end users
- SharePoint repository
- MS Teams channel
- Newsletter

Data governance lineage operating model for a global bank

Communicating the operational model

Confluence

Data lineage information hub

User friendly one-stop-shop.

Includes:

- Introduction videos
- How to get access
- How to request new business use case
- How to get training
- How to get technical & product support
- FAQ's/ Testimonials
- Links to other Operating model documents



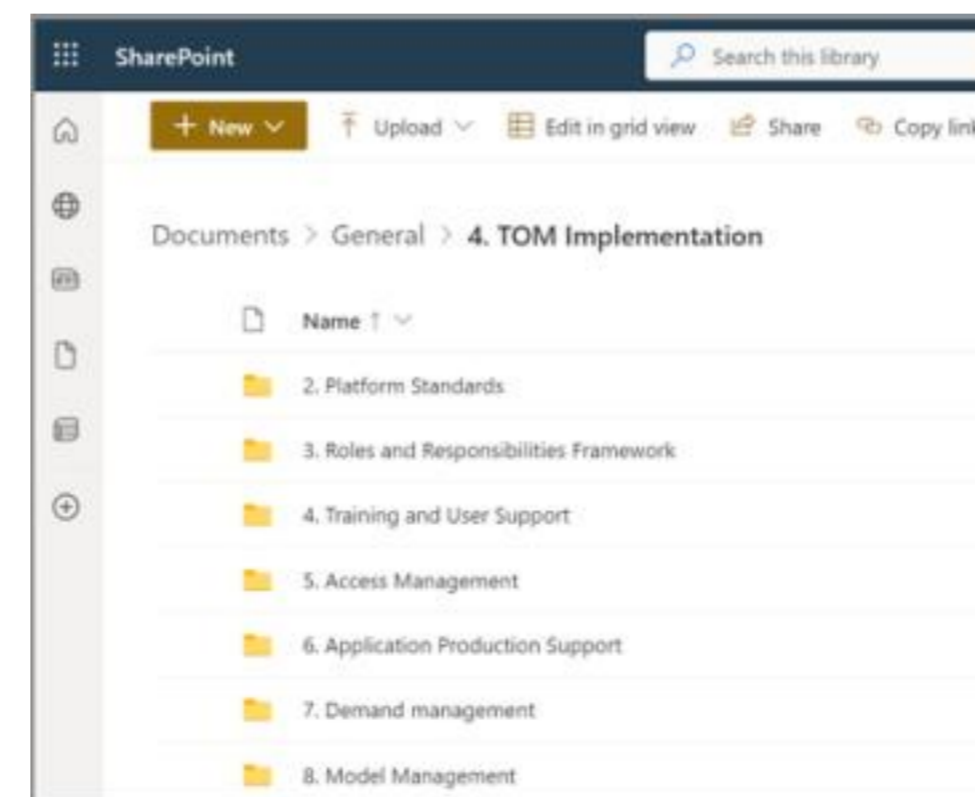
SharePoint

Data lineage SharePoint site

Location where **all** operating model documents are stored.

Master repository.

References to operating model documents hyperlink to this site.



Confluence

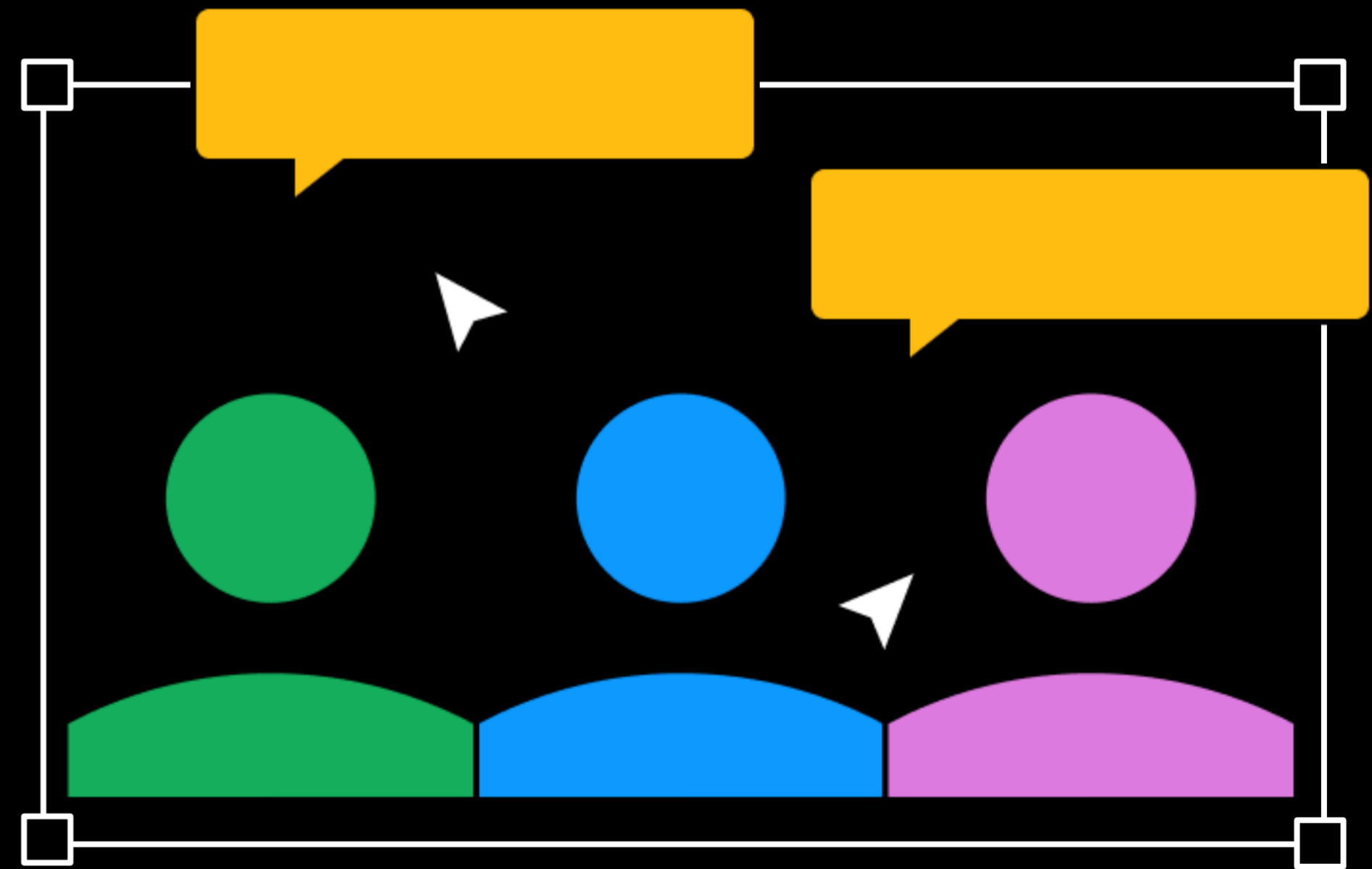
Enterprise Data Governance (EDG) Operating model repository

Location where the corporate EDG Operating model documents and SOPs are stored.

References to Operating model documents in SharePoint included in these corporate documents

Audited by Internal Audit team.

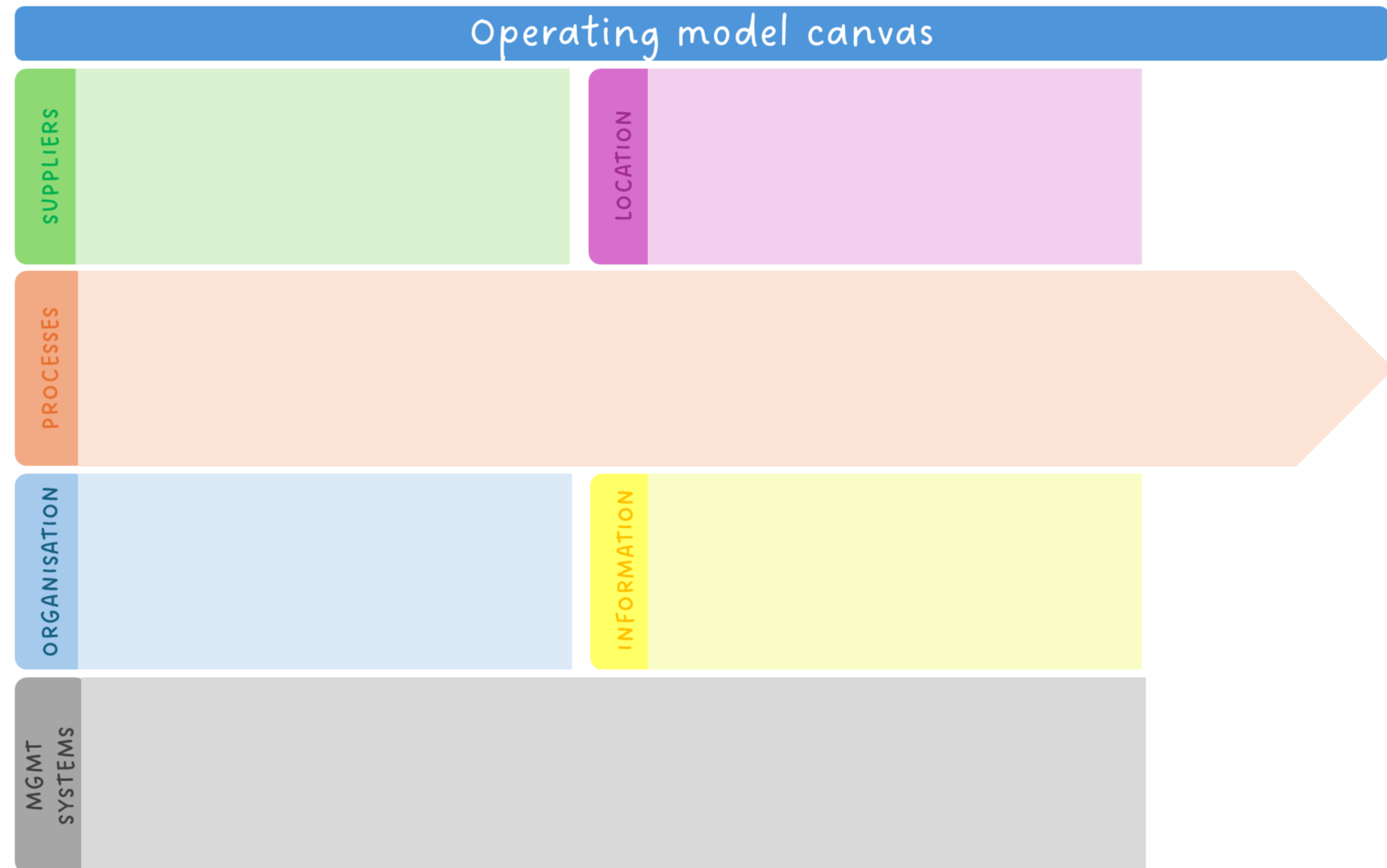
Group exercise – Operating model canvas



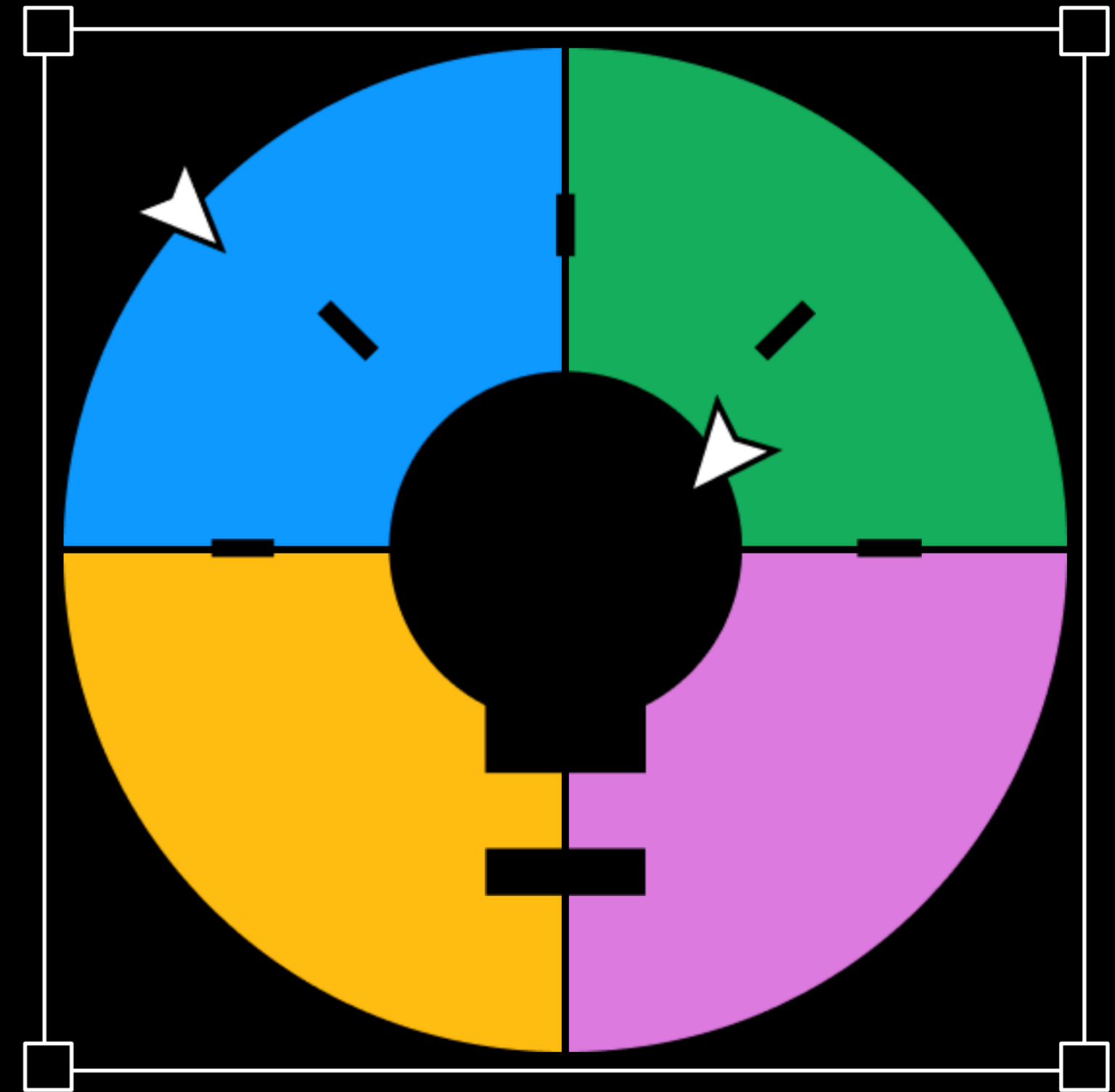
Using the operating model canvas

 10 mins

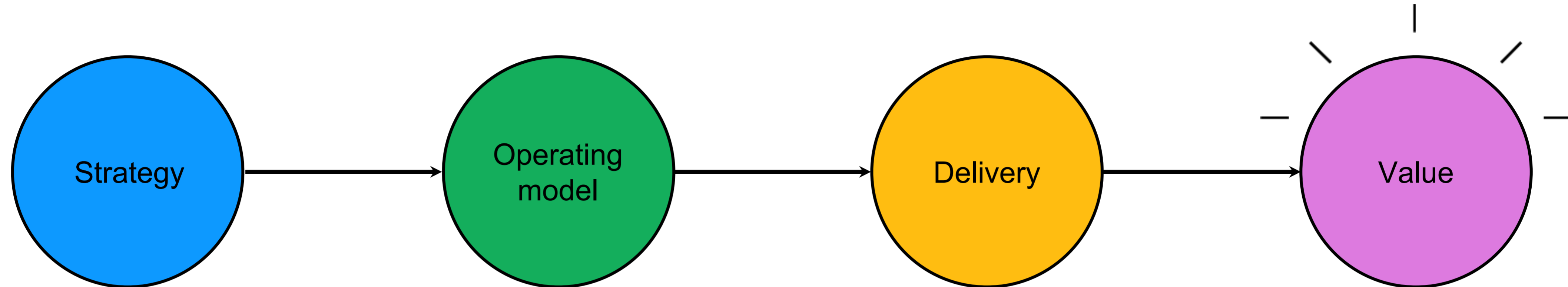
- Each take a copy of the operating model canvas template
- For your organisation think about an operating model you want to capture
- Mark up what are the core capabilities for that operating model
- Think about what deliverables you might need to create for these capabilities



Time for
reflection



How operating models link Strategy to Value



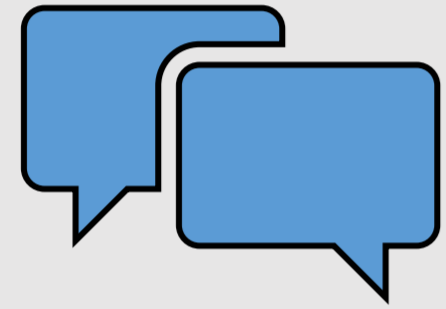
- What we want to achieve
- The organisations intent – the visions, goals and priority
- The *what* and *why*

- How we must work to deliver strategy
- A workable design for the organisation through a TOM blueprint
- Defines *how* the organisation should operate

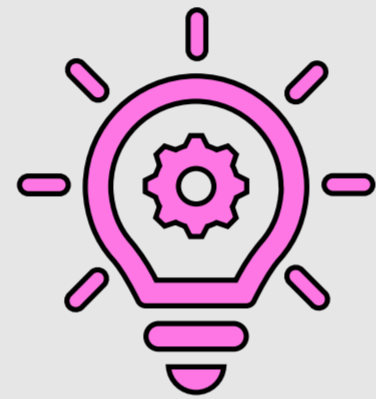
- Turning the TOM blueprint into reality
- Includes writing artefacts & communicating the change

- Did we achieve the strategy?
- Value realisation:
 - Customer outcomes
 - Cost savings
 - Improved efficiency
 - Better compliance
 - High higher Revenue

What will you take away from today?



What are your
key
takeaways?

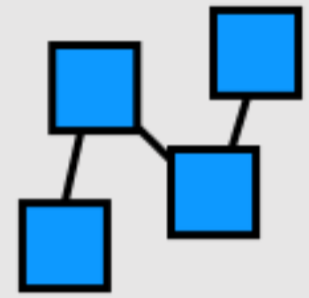


Have you had
any lightbulb
moments?

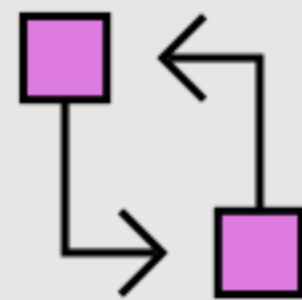


Will you do
anything differently
following today?

Takeaways from this session



An understanding of **what** operating models are - and what they are not.



Understanding of the **operating model lifecycle**.

Seen real **examples** of operating models.



Understanding of **how BAs can lean** into operating model work and become **strategic partners**.

Thank you

You can find me on LinkedIn



Caroline Beasley

Experienced Business Analyst and Change professional helping businesses deliver strategic goals.

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