



BUSINESS ANALYST TRAINING BUILDING COMPETENCIES AND BUSINESS VALUE

Executive Summary

This white paper looks at the role of a business analyst, their competencies and practical steps needed in improving the value of this function to the corporation by revisiting the focus of training programs.

Too often, the focus of analyst training is on theories, methods and templates that are not immediately actionable. Focus your business analyst training dollars to get tangible results. The true measure of training success is how easily business analysts can apply their learning to achieve job success. Digital Mosaic wants to see a tangible change in productivity – both in current work, and in assessing the quality of work on prior assignments. Without this ability to apply learning on the job, little in the way of benefit is gained.

The role of the business analyst continues to evolve and increase in importance. The function is central to:

- Translating business needs into technology requirements;
- Managing stakeholder expectations in technology delivery;
- Understanding business processes, business case development, and benefit management for measuring the effectiveness of programs; and,
- Being an effective consultant to line of business owners that sponsor technology initiatives.

To be successful in these roles the analyst must successfully elicit requirements from stakeholders, and know the path to walk to gain consensus amongst this group. Too many training programs overlook this issue and do not focus on the systematic ACTION of eliciting requirements. Instead, these programs focus on the ARTIFACTS. These artifacts may do a good job of documenting requirements, but leave students unable to engage and sustain the involvement of stakeholders.

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The Role of a Business Analyst

Here is a working definition of the role of a business analyst:

'To provide an interface between the business and IT that can assess business needs and accelerate the implementation of technical solutions.'



In this definition, the role straddles business and technical functions. The role is measurable in its ability to both provide well qualified/described needs and the role's ability to improve the speed with which technical solutions are developed that specifically meet these defined needs. In our view, there are four distinct competency domains that would enable a person to function well in this role. To expand on these domains, a business analyst must be able to:

- **Consult with Business Stakeholders:** clarify or advise on the alternative paths for improving business return and the business case associated with the actions.
- **Elicit and Manage Business Requirements:** Coordinate stakeholders to bring consensus on requirements that will be translated into an information system.
- **Interface with IT and transform requirements into technology:** Translate these business needs into a format that can be readily understood by IT delivery and comprehensively describes process, business rules and data requirements of a system.
- **Resource Allocation and Management:** Manage time, resources, and results. This includes tracking the benefits of change to the organization associated with their initiatives.

Figure 1. Core Competency Domains of a Business Analyst



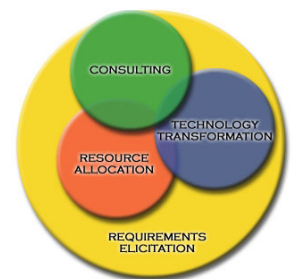
The Challenge for Business Analyst Managers

The gap for many executives in their business analyst competency building lies in elicitation:

- They have solid people that understand the business they are in, know technologies, and can work to develop business cases;
- Analysts can be trained on the internal systems development lifecycle, shown the templates and tools which need to be completed so that needs can be effectively communicated to IT; and,
- They have the business savvy to create traceability wherever possible when they are running a program;

BUT

- They do not have an approach for efficiently extracting these requirements from stakeholders and achieving consensus amongst the group on the specification in a timely manner.



The competency model of some organizations (illustrated to the right) treats requirements elicitation like a 'soft skill' rather than a specific set of enabling techniques that must be mastered in addition to certain soft skills. This creates a significant gap in the competency model. Analysts will fill the gap, but likely through brute force and willpower, rather than a repeatable and systematic approach to eliciting the requirements. The tradeoff for executives in not making an investment in elicitation skills is project cycle time.

Ultimately, improving an organization's ability to elicit requirements means gaining a more comprehensive picture of business requirements, far earlier in the development cycle.



Excelling in Elicitation – Why create a more complete picture of business requirements earlier in the development cycle?

1. Early project momentum builds support with stakeholders and sponsors.
2. Requirements definition lets a project manager predict with a greater degree of accuracy when a project will be delivered and for what cost.
3. Project managers are equipped with sufficient detail at each stage of the project life cycle to gain executive support, funding and approvals.
4. Requirements definition identifies project risk and allows managers to take actions in proactively addressing this risk.
5. Inconsistencies amongst business users can be detected at an earlier stage, rather than after implementation. This often reduces the overall cost of a project *by a degree of magnitude*.
6. Systematic requirements definition encourages early and continual collaboration amongst cross-functional business entities. This ultimately leads to more optimized end-to-end processes, greater project momentum, and phasing that keeps development focused on high value initiatives.
7. Business Requirements leads to a better definition of system infrastructure, and/ or system architecture where the impact on and reusability of functionality within the existing environment can be assessed more accurately.
8. By creating a comprehensive base line, the definition of business requirements leads to better management of changes.
9. When evaluating packaged software, a strong requirements definition leads to a better assessment of the packaged software capabilities, and fit and definition of customization that might be required, which then leads to a better negotiation in price.
10. Accurate and documented requirements allows a project team to improve QA testing scripts, is essential for traceability, and creates the blueprint needed for future maintenance efforts.

Improving Your Organization's Approach to Eliciting Requirements

The challenge is not one of simply learning facilitation skills in an attempt to run an elicitation session, nor is it to provide increased automation to the requirements management or technology automation tools. Elicitation is a unique set of techniques and skills to:

- Elicit requirements in a way that is engaging for users;
- Proceed using a process that is efficient and enforces participant discipline;
- Probe users with the right questions at the right time so that their input is organized and comprehensive;
- Simplify startup and give stakeholders confidence in the process;
- Be systemic in their ability to adapt to the total requirements gathering process; and,
- Be repeatable in their degree of success.



Digital Mosaic uses XCellR8 (pronounced 'accelerate') an approach to eliciting requirements that typically compresses requirements elicitation by a factor of four. i.e, compress a month of work into a week. From our experience from over 20 years in this field we suggest a number of 'ideals' in improving your own approach to elicitation when evaluating alternatives:

1. **Speed really matters:** If you feel your current approach is 'cumbersome', your stakeholders probably feel it is 'murderous'. The more efficient the approach, the more likely your organization will be to maintain stakeholder involvement.
2. **Adopt an 'open system' elicitation approach:** To borrow a Unix concept, there are many proprietary variations of systems development lifecycles and methodologies, each with a unique set of templates for documenting requirements. 'Open systems' means that the elicitation approach is independent of changes to the development lifecycle method and comprehensive enough to plug into the standards that the corporation may wish to adopt in the future. It is an 'application' on the development standards 'platform'.
3. **Ensure all techniques used for facilitation are in business terms.** Explaining what a Use Case is to an executive that just wants to tell you what they want the system to do can be frustrating to both parties. Like the use of Open Systems, above, the framework is not familiar to the business user. Each technology artifact must be discussed and elicited in a way that is transparent to the participants in a session. A logical data model is not a facilitation technique for stakeholders. But, this artifact and others must be easily derived and validated from the actions with these stakeholders if a business analyst is to communicate effectively with IT development functions.
4. **Have a definitive starting point and ending point:** Any approach that does not yield a definitive starting and ending point is doomed. Both stakeholders participating in defining requirements and the analyst assigned to elicit requirements from this group must have a clearly defined way of initiating a project. This same group must also be absolutely convinced that they have comprehensively completed the assignment when they reach the end of the elicitation session. Otherwise, it is not repeatable.
5. **Be able to identify INTERDEPENDANCIES and CONTRADICTIONS:** Most elicitation approaches are not good at identifying these two since they tend to sequentially elicit requirements from stakeholders or use less structure in elicitation sessions. The savvy analyst will find and correct these errors, but is challenged when a system or interdependencies crosses functional boundaries since the process ownership and impact are shared.

Ultimately, the purpose of an elicitation approach is to gain consensus on requirements amongst the stakeholders. The effectiveness of any approach can be measured in how predictably analysts can produce requirements specifications that can be both handed over to development for completion AND signed off on by stakeholders as an accurate representation of requirements. In over 70 engagements, Digital Mosaic has never missed getting stakeholder signoff. Why? Because these stakeholders remained engaged, and 'owned' the outcome.

Skills Building And Business Value - Where to Focus Effort Post Training

Business Analyst training must practically equip a person with a way of looking at IT projects in a way that is valuable for their business stakeholders. This content is effective whether students have technical or non-technical backgrounds, or when there are divergent degrees of tenure with a company or industry. Business Analysts have extreme variability in background. With this diversity in students, what common sources of value deliver results back to the organization regardless of technical or industry background? Focus on five value questions.



The Five Value Questions: What can you expect your business stakeholders to ask of you when you get back to the office?

What makes a great business analyst? What makes this person someone that is 'in demand' by the line of business owners as someone that gets the job done. We've spent many years training business analysts and working with executives responsible for this function and have come up with five questions that stakeholders ask of their analysts. Being able to help business units respond to these issues puts you in demand!

Help me objectively identify the risks and benefits of this project.

The big problem here is blank page syndrome – where do you start? To get at the risks and benefits a person needs to more precisely define the scope and expectations of an assignment. Being able to readily identify the 'show stoppers' from this work brings tremendous value to the corporation.

How long is this project going to take to deliver?

The challenge is to know exactly how long it will take to get a basic estimation and further, exactly how long the elicitation process will take. Both of these answers go a long way toward being more effective in managing stakeholder expectations. Analysts that can accurately size whether a proposed initiative is something that fits into a 'barn' or a 'breadbox' and are credible. This estimation takes an analyst a long way toward being an effective bridge between the business and IT function.

The approval timetable is slipping, but the delivery timetable has stayed the same...

Once a project mandate is set, momentum is everything. Creating momentum keeps stakeholders engaged, and in the early phases of a project – begin to compress the overall delivery cycle. If the requirements phase stretches – everything begins to stretch. If requirements are compressed – the entire project cycle begins to compress.

I just want a system that does ...

Real value for a business analyst comes from an ability to rapidly turn an abstract concept into a concretely defined path for action. The challenge is analysts not only must the path be rapid, but also, the requirement definition must be absolutely comprehensive. Failing this, and the company may risk a false start on a new application. The analyst that has the ability to help their stakeholders move seamlessly from scoping (50,000 foot definition of requirements) to completing the requirements specification (500' level and 90% of the way there), to negotiating Use Cases (tree level), is the one trusted where the company cannot risk a false start.

What is the impact on ...? Thinking in terms of the total corporation.

Business analysts are the bridge between IT and the Line of Business application owners. This means being able to define for the IT team the applications needed that bring value to the corporation in sufficient detail to make the IT team successful. Business Analysts are also the custodians of interdependencies. This means being able to definitively determine what areas of the corporation or process could be impacted by potential application changes, and negotiating these changes with the business owners. This level of objectivity in defining requirements builds trust.



The Five Pitfalls: Watch out for Business Analyst career limiting steps

In any job it is easy to misstep, but most mistakes are not career limiting. Because analysts play that role of intermediary, they have a particularly challenging role. From our experience, five missteps really stand out as the career limiters:

1. Failing to get consensus on requirements
2. Not understanding or showing you understand the business
3. Getting too biased to a technology
4. Missing a major set of issues
5. Failing to follow the standard development procedures

What is our advice to avoid these pitfalls? Have a process that more repeatably ELICITS the business requirements from stakeholders. By its nature, such a process:

- builds consensus;
- forces the facilitator to listen to the business specialists to capture their practices;
- keeps people focused on the business process and rules, not the technologies that enable these processes;
- has a tangible start line and finishing line that are easily measurable; and,
- easily integrates into the documentation standards for your systems development teams.

Such a process brings real value to the business.

ABOUT DIGITAL MOSAIC

Our practice leader and her team of consultants have compiled:

- 70 successful elicitation engagements with companies like American Airlines, Transcontinental and Scotiabank.
- A methodology that secures the comprehensive collection of requirements within weeks. It scales equally well from small regional initiatives to large multinational programs.
- An extensive training program for business analysts of all skill levels
- Tools that enable facilitation teams to spot gaps, build collaboration, and talk in business user terms.
- Approaches specifically designed for both packaged selection/modification and custom development.
- An unbroken record in obtaining consensus and executive sign-off on requirements at the conclusion of an assignment.

CONTACTING A MOSAIC SPECIALIST

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