Maturing BA Capabilities
In a Measurable and Manageable way

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• IIBA framework of Business Analysis
• Define Business Analysis maturity
• Implementing Business Analysis maturity
  – In a *measurable* and *manageable* way
  – In *your* own way
• Not so secret building blocks of maturity
Why Business Analysis taking the world by storm?
Global Challenges

Integrated Economy
Financial and Political Risk
Innovate or Evaporate

Complexity
Regulations
Technology
Hyper Connectivity
Education
IT and Internet
Social Media
Business Value Realization

Adapted from: *That Used to be Us*
- Tom Friedman
Just Few Years Ago ....

Facebook    – Didn’t Exist
Linkedin    – Was a prison
Twitter    – Was a sound
The Cloud    – Was in the sky
An Application    – Was used to get admission in a college
4G    – Was a parking space
Skype    – Typo

Adapted from: *That Used to be Us*
- Tom Friedman
Fast-forward to reality NOW...

If you have an idea, you can go to...

- Taiwan – For product design
- India – For implementation
- China – For low cost manufacturing
- Social media – For marketing
- Amazon.com – For sales and fulfillment
- Freelance.com – For logo design

Traditional work has been commoditized.

Adapted from: That Used to be Us
- Tom Friedman
Business...Business...Business

• Business transformation using technology as a platform

• Deliver business outcomes as a result of business transformation

• Innovate rather than business as usual to stay in the game and become a major player
Achieving Innovation

Innovative Solutions

Leveraging Complexity
Problem Analysis
Opportunity Analysis
Search for Alternatives
Experimentation
Business Requirements
Solution Assessment
Feasibility Analysis
Business Case
Benefit Analysis

Managing Complexity
Planning
Execution
Monitoring
Prioritization
Risk Management
Dependency Management
Team Management
Conflict Management
Predictability

Implementing Innovation

Strategic Business Analysis

Complex Project Management

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What does it mean for BAs?

• BAs will be expected to increasingly focus on **strategy** and **innovation** vs requirement gathering and documentation

• Key skills: Critical thinking, Ability to adapt, invent, re-invent, create, innovate
  – Companies will find it hard to get such talent

• “Collaborative” leadership will be needed to deliver business transformation
  – Trusted Business Advisor

Adapted from: *That Used to be Us*  
- Tom Friedman
Enter the IIBA
“Changing the way we change”

Source: IIBA BABOK V2.0

“Controlled transformation of an organization.”

Source: IIBA BABOK V3.0
Are BAs Change Agents?

Definition of Business Analysis

Which part of the definition exhibits transformation?

“Business analysis is the set of tasks and techniques used to work as a liaison among stakeholders in order to understand the structure, policies, and operations of an organization, and to recommend solutions that enable the organization to achieve its goals.”

Source: Business Analysis Body of Knowledge, ver. 2.0, © IIBA
Business Analyst

“A business analyst is any person who performs business analysis activities, no matter what their job title or organizational role may be.”

Source: Business Analysis Body of Knowledge, ver. 2.0, © IIBA
The set of tasks, knowledge, & techniques required to identify business needs & determine solutions to business problems.
Define Business Analysis Maturity
One View of BA Maturity Model

- BA Awareness
- Business Requirements Managed
- Business Needs Met / Strategy Executed
- Technology Used as a Competitive Advantage

Source: The Enterprise Business Analyst: Kathleen B. Hass

Continuous Improvement of BA Practices
Putting it all together

BA Focus

Project Support

 BA Awareness

Operations and Project Support

Project Focus

Business Requirements Managed

Meet Business Objectives Through Projects

Enterprise Focus

Business Needs Met / Strategy Executed

Business Strategy Executed through Projects, Programs and Portfolios

Comp. Advantage

Technology Used as a Competitive Advantage

New Business Strategy Forged through Innovative Business models, Products and Services

Capabilities and Influence

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building capabilities, driving results
Putting it all together

Characteristics

- BA Value Acknowledged
- BA Forum or CoP Process, Tools, Standards Undefined
- BA Awareness
- BA Framework Project Focus
- Business Requirements Managed
- Customer involvement, Project change management, BA career track

Business Alignment

- Business Needs Met / Strategy Executed
- Business benefit mgt, C-SAT, Integrated BA/PM/QA/SDLC, BA Career path leading to C level

Innovation Comp. Advantage

- Technology Used as a Competitive Advantage
- Opp translated to innovative sol., Bus. benefits tied to portfolio mgt., Integrated mgt sys, BA career path – strategic and domain experts

building capabilities, driving results
Putting it all together

Projects

- Project Support
  - BA Awareness
    - Low complexity, enhancements

- Project Focus
  - Business Requirements Managed
    - Moderate complexity, new projects

Enterprise Focus

- Business Needs Met / Strategy Executed
  - High complexity, improve multiple processes, products, technologies

Comp. Advantage

- Technology Used as a Competitive Advantage
  - Highly complex business transformation programs towards competitive advantage. Breakthrough process/prod./business models

building capabilities, driving results
Putting it all together

**Outcome**

- **Project Support**
  - BA Awareness
  - Operational processes & systems improved

- **Project Focus**
  - Business Requirements Managed
  - Req. & scope managed. Solution meets business needs

- **Enterprise Focus**
  - Business Needs Met / Strategy Executed
  - Realizing the benefits of valuable initiative and investment as per business case

**Comp. Advantage**

- Technology Used as a Competitive Advantage
  - New strategy to leverage technology as a platform to create innovative products/services/business solutions

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**BA Profile**

- **Project Support**
  - **BA Awareness**
    - Generalists/Business/Systems Specialists, Entry to mid-level BAs

- **Project Focus**
  - **Business Requirements Managed**
    - Business and IT domain experts, Entry to Sr. BAs

- **Enterprise Focus**
  - **Business Needs Met / Strategy Executed**
    - Enterprise architects, change management experts, Sr. & Enterprise BAs, influencers.

**Comp. Advantage**

- **Technology Used as a Competitive Advantage**
  - Strategists, innovators, business and technology experts, cultural change experts, Enterprise BA, consultants, technologists

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Skill Development

BA Awareness

Project Support

Req. gathering, Project specific techniques (use case modeling, data modeling, etc.)

Project Focus

Business Requirements Managed

Elicitation, Req. Management and communication, Requirements Analysis, BA Planning & Monitoring

Enterprise Focus

Business Needs Met / Strategy Executed

Enterprise analysis, Solution assessment & validation, Bulletproof business cases, Influencing without authority

Comp. Advantage

Technology Used as a Competitive Advantage

Consulting skills to solve business problems, Critical thinking, Causing incredible performance, Change management

building capabilities, driving results
What does it mean for BAs

**Business Analysts**
- Determine project complexities
- Identify gaps in the capabilities
- Plan and bridge the capability gaps

**Business Analysis Manager**
- Systematically identify and develop capable BA workforce
Maturing BA Capabilities
BA Maturity

- Must be strategic (paradigm shift)
- Is a project
- Must be flexible
- May have shelf life
- Does NOT have to fit a standard – it is cultural
- Will NOT solve everything
- Is not a shortcut, it is a way of life that continuously improves
- Can be used with other models/concepts
- And, one more thing ...
One size does not fit all!
Developing a *convincing* business case

for BA Maturity in *your* Organization
SARIE Model - A Cyclical Process

Situation

Evaluation

Implementation

“Approval”

Recommendation

Analysis

Decision

Business Leaders and Sponsors

Business Problem or Opportunity

Source: Consulting Skills, Watermark Learning
Define Situation

• Situation = Business Need/Rationale
• Includes both Problems and Opportunities
• **Tip:** Get Agreed-On Situation/Business Need before recommending *anything*

• **Situation Statement**
  – Problem (or opportunity) of “a”
  – Has the Effect of “b”
  – With the Impact of “c”
Analyze situation

1. Assess the complexity of projects
2. Assess current state of BA capabilities
3. Determine the mix of skill-set needed towards capable BA workforce
4. BAs influence, Success criteria, Training programs, Organizational readiness
Recommendations

“To-Be”

• Gap analysis
• Solution = deliverables that must be produced to address the business need
• Business case
• Risk, assumption, constraints
• 2-3 years roadmap and 12 months plan
Prepare a bulletproof business case

Percentage of CIO said

51% No process to evaluate IT investment against business strategy

68% Don’t compare actual IT project benefits to original targets

74% Don’t track financial metrics after making an investment

80% Lack of financial skills makes quantifying IT benefits difficult

Source: CIO Survey - Gartner Group, Northwestern University, and DiamondCluster

Value of Mature BA: *predict, produce, deliver, and measure expected business benefits.*
Project success

Probability of project success by increased by 400% with an exceptional BA on the project.

(BA Benchmark Study, AG Consulting 2008)
Components of Implementation

• Competent BA workforce
• Organizational support
• Executive leadership and sponsorship
• Implementation framework
• Sustenance and continuous improvement
Implementation framework

Components of maturity model – one view
Standards

- Standards (center of practices)
- Best practices (shared by community)
- Methodologies, lifecycle, processes, procedures, templates, ...
- Tools
- Services
- Decrease project risk
- Increase business value

Organizational Readiness

Governance

Knowledge Management

Metrics

Competency

Standards
Competency

- Organizational Readiness
- Governance
- Knowledge Management
- Metrics
- Competency
- Standards

- Skill assessment
- Practitioners and managers views
- Industry standards
- Internal standards
- Training needs
- Coaching and mentoring
- Team building
- Feedback
- Career path
- Role definition
- Pay for performance

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Metrics

- Process
- Performance (how we are doing)
- Diagnosing (why is it not working)
- People (performance)
- Reporting
- Tools (manual or automated data collection)
Knowledge Management

- Repository
- Structure
- Continuous improvement efforts
- Reuse tools
- Limited by lack of ownership

Organizational Readiness
Governance
Knowledge Management
Metrics
Competency
Standards
Governance

- Organizational Readiness
- Governance
- Knowledge Management
- Metrics
- Competency
- Standards

- Internal compliance
- Change management
- Portfolio management
- Program management
- Benefit management
- Tools

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Organizational readiness

- Assess stakeholders
- Analyze and prepare target audience
- Educate
- Communicate
- Transition change
- Continuous improvement
- Manage risk

Organizational Readiness

- Governance
- Knowledge Management
- Metrics
- Competency
- Standards

building capabilities, driving results
Naming your maturity model

- Organizational Readiness
- Governance
- Knowledge Management
- Metrics
- Competency
- Standards

- Center of Excellence
- Center of Competency
- Center of Practices
- Community of Practices

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What’s in a name?
Name your maturity model

- Organizational Readiness
- Governance
- Knowledge Management
- Metrics
- Competency
- Standards

- Center of Excellence
- Center of Competency
- Center of Practices
- Community of Practices

building capabilities, driving results
Name your maturity model

Organizational Readiness

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Name your maturity model

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Community of Practices
The digestible model

- You can and **should** have it in your own way!
- 2 standards
- 3 tool
- 4 metrics
- 1 assessment
- And lots of bandwidth
• “Manageable” = Choosing the right components and the bandwidth to handle them
Your maturity journey begins

- Create an environment that people love and trust
- Be strategic not reactive
- Leverage and exploit your strengths and the strengths of your participants
- Understand the shelf life
- Bite it off in tootsie roll size chews
- Be a superhero change agent!
Plan Evaluation Criteria

• Measuring Benefits after solution delivered, such as:
  – Costs saved
  – Costs avoided
  – Revenues increased
  – Market share gained

• Recommend measures in business case
  – Case Example: Reduced costs due to fewer requirement changes
  – Case Example: Increased revenue from fewer abandoned loans

• Measure and report benefits post-implementation
Not so secret building blocks of a BA maturity journey

1. Treat this effort like a project
2. Form a coalition
3. Get buy-in
4. Take turns with different people leading the effort
5. Become a change champion
6. Create a strategic plan, vision, goals and objectives
7. Hold community sessions to share, bond and build trust across participants
8. Be transparent
9. Have presentations at the ready to discuss with anyone, anytime, anywhere
10. Influence, influence, influence
11. Ensure representation at sessions by a diverse audience (roles, departments, disciplines)
12. Create variety for engagement
13. Volunteers (people that do the work) develop best practices
14. Create a schedule for how often to meet and get agreement by all participants
15. Develop a list of best practices to share, build and adopt
16. Documents: Best practices, issues, risks, assumptions, constraints, roles & responsibilities, org charts

And, one more thing...
Where do I begin?
Recognize when you need help, and secure it!
Summary

• Business analysis is of strategic importance and critical for businesses
• How to use IIBA framework to complex transformation projects
• Business analysis maturity model and how to determine the right level for you
• How to use SARIE model to plan, implement and evaluate your BA maturity efforts
• Tips on implementing business analysis maturity