Developing Business Analysis Expertise in Your Organization

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General Description
Matthew Leach is a Director within NTT DATA’s Business Analysis Practice and is the practice's Governance Lead for North America. A recognized thought-leader in the business analysis profession, Matthew works with clients to establish highly effective business analysis and requirements disciplines, enabling the delivery of solutions to technical and business problems. Matthew is a skilled manager, talented mentor, and natural leader.

Matthew is a Certified Business Analysis Professional (CBAP) with a proven track record of working with companies of all sizes across several industries. His typical roles and responsibilities often include:

✓ Building business analysis centers of excellence
✓ Leading, mentoring, and training business analysts
✓ Managing business analysis work on critical projects
✓ Crafting a vision & direction for products, services, and organizations
✓ Improving requirements efforts through the addition of business analysis best practices, tools, and techniques

A committed and passionate Business Analyst, Matthew frequently speaks and writes on business analysis topics, is a contributing author for the third edition of the IIBA’s Business Analysis Body of Knowledge (BABOK), and is dedicated to the growth of the business analysis profession.

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Industry Focus
- Banking & Financial Services
- Defense/Aerospace
- Software/High Tech
- Healthcare and Life Sciences
- Insurance

Select Clients
- Raytheon
- Department of Defense
- Pfizer
- LexisNexis / Insurity
- Travelers Insurance
- Navy Federal Credit Union
- Cigna

Expertise
- Business Process Improvement
- Requirements Definition and Management
- Enterprise Analysis
- Business Architecture
- Business and IT Strategy
- Business Analysis Thought Leadership
What common phrase do each of these word puzzles represent?

MIND
Matter

Na
Na

Secret
Secret
Secret
Secret

P the world

T
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Overview

Why are we here?

We recognize the need for business analysis and want to improve our own business analysis expertise and that of our organizations.

Agenda

- Why business analysis expertise is so important
- Laying the Foundation for Business Analysis Success
- Lessons learned along the way

Note:

This works best when it is interactive.
• 6th Ranked – Global IT Services and Systems Integrator
• $16B – In annual revenues
• 60,000 Professionals – operating in over 35 countries
• Balanced global delivery – 10,000 strong in India
• Founded 1967 in Japan as the technology arm of NTT Group
NTT DATA Americas at a Glance

- Integrated solutions across infrastructure, applications, cloud, staffing, and business processes
- 18,000 employees / $1.3B in revenues
- Offering clients more options through increased depth and industry depth in healthcare, financial, and public sector
- Successful long-term relationships with diverse customer base
- Balanced global delivery model that maximizes consistency and cost efficiencies
- Flexible engagement across consulting, staffing, managed services, outsourcing, and cloud

![Industry Solutions Pie Chart]

- Financial & Insurance 23%
- Consumer & Retail 14%
- Mfg. & High Tech. 17%
- Other 16%
- Public Sector 19%
- Health & Life Sciences 11%

Onshore 45% Offshore 55%

**Industry Solutions**

- Advisory Services
- Application Innovation
- Flexible Infrastructure

**Cloud Services**
NTT DATA’s Business Analysis Practice enables the success of our clients by providing business analysis expertise to deliver a variety of project focused and strategic capabilities. We adjust our services to meet the needs of our clients while leveraging our experience and thought leadership to ensure consistent, predictable and successful project delivery.

**Capabilities**

- Requirements Engineering
- Business Process Optimization
- Business Analysis Strategy and Enablement
- Reverse Engineering
- Application Portfolio Rationalization

**Key Differentiators**

- Business Analysis Thought Leadership
- Vertical Focus Resulting in Deep Domain Knowledge
- Proven Training and Mentoring Framework
- Business Driven Requirements Methodology
- Global Delivery Model

**Practice Foundation**

- Governance
- Methodology
- Toolkit
- Collaboration
- Knowledge Management

>300 Business Analysts working across the globe in Healthcare and Life Sciences, Banking and Financial Services, Insurance, Retail, Manufacturing, Public Sector, Travel and Hospitality

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What is business analysis?

Business analysis is a **mindset** and a set of **tools and techniques** used to find **solutions** to business problems and manage the resulting **change**.

What do business analysts do?

“A business analyst works as a **liaison** among stakeholders in order to **elicit**, **analyze**, **document**, **validate** and **communicate** requirements for changes to **strategy**, **business processes**, **policies** and **information systems**.”
St. Peter’s Square – Announcement of Pope Benedict (2005)
St. Peter’s Square – Announcement of Pope Francis (2013)
St. Peter’s Square – Announcement of Pope Benedict (2005)
• **Technology** is changing at an incredible pace

• In order for organizations to compete in this environment, they need to *adapt* to these *changes*

• For this adoption to be successful, we must understand our organizations and the problems/opportunities that exist within them
The **nexus of forces** describes the convergence and mutual reinforcement of interdependent trends that are coming together to form the intelligent enterprise.
Successful Business Analysis

What skills, expertise, and tools does a need BA to be successful?
Critical Skills for Business Analysis Success

- Underlying Competency
- Business Analysis Expertise
- Organizational Knowledge
- Domain Knowledge
Critical Skills for Business Analysis Success

- Underlying Competency
- Domain Knowledge
- Organizational Knowledge
- Business Analysis Expertise
Critical Skills for Business Analysis Success

- Underlying Competency
- Organizational Knowledge
- Domain Knowledge
- Business Analysis Expertise
Laying the Foundation for Business Analysis Success
One of the most critical and important foundations for a successful business analysis organization is a **Consistent** business analysis process and approach that leads to a **Predictable** output. Bad approach & process means higher costs, rework, schedule and project failure risks.

**Big Picture Mindset**

- Understand true business problems, needs, and process e.g. *What is the objective of a major release development?*
- Clear definition of stakeholders, business events, business processes and system responsibilities e.g. *How does a change in claims affect billing?*, *What is the impact of a work log affecting new business to renewals?*

**Industry Standards**

- Best practices will assist in better and efficient requirements delivery
- Scalable to meet various work log needs e.g. *Tailor-able approach per work log priority, impact, complexity, etc*
- Assist BAs to practice right tools and techniques log. e.g. *Visual Modeling (UML, BPMN), Traceability, Business Rules Repositories*

**Benefits**

- **Streamlined Process**
  - Reduces hands-off by minimizing non value add components
- **Quality**
  - Consistent approach fosters better requirement quality and less defects
- **Optimized Approach**
  - Reduces costs, schedule delays and effort
NTT DATA's **Requirements Engineering Methodology (READ)** is a flexible approach built on industry best practices which scales to meet the needs of different domains, clients, and projects.

### Process and Approach

**Requirements Elicitation, Analysis & Documentation**

1. **PLAN**
   - Define a tailored business analysis approach which meets the needs of the project and its stakeholders
   - Socialize and validate this approach

2. **DISCOVER**
   - Understand the Business Objectives, Business Problems or Opportunities which makeup the business need
   - Develop a big picture view of the domain, organization, and business need

3. **HIGH LEVEL REQUIREMENTS**
   - Elicit, Validate & Prioritize Business Requirements (i.e. Functional & Non-Functional Requirements)
   - Define and document the Solution Scope

4. **DETAILED REQUIREMENTS**
   - Elicit & Validate detailed Requirements which describe how the system will function in the future state
   - Specify requirements traceability to ensure that all business needs are met

5. **REVIEW & SIGNOFF**
   - Package Requirements in a meaningful manner for stakeholder review
   - Conduct structured Requirements walk-through sessions with Stakeholders and obtain sign-off

6. **TRANSITION**
   - Transition Requirements to the Solution Team: Design, Development & QA teams
   - Develop artifacts and conduct training to impart Business Domain Knowledge to the Solution team

7. **ASSESS & VALIDATE**
   - Manage Changes to Requirements and assess business impacts
   - Define Solution Acceptance Criteria in collaboration with the stakeholders

### SALIENT FEATURES

- **Business Analysis Best Practices** – Iterative approach, Modeling & Traceability
- **Utilizes a Big Picture Approach** to focuses on business environment
- **SDLC Methodology agnostic**
- Fosters close collaboration with SMEs and mitigates risk of knowledge flight
• Apply a process, but be flexible
  • Make sure that BAs can own their engagement and tailor the approach
• Collect feedback and drive continuous improvement
  • Retrospectives
  • Pilot projects
  • Process reviews
  • Tailored versions for specific needs
• Create artifacts which support the process
• Audit the process and the work

Are your BAs following a Process?
An **Integrated** toolkit containing standards, guidelines, templates, tools and checklists is essential to a consistent BA output, stakeholder communication and **enhanced productivity**.

**Tool Kit**

- **Big Picture**: Depicts structure of a system in bird’s eye view
- **Detailed**: Depicts detailed solution
- **Verification**: Confirm business needs and solution

**Artifact Type**

- **Big Picture**
  - Application Landscape
  - Process Models/Maps
  - Scope Models
  - Context Diagrams
  - Mind maps

- **Detailed**
  - Use Cases
  - User Stories
  - Business Rules Repositories
  - Activity Diagrams
  - SOPs

- **Verification**
  - Requirement Checklists
  - Requirements Test Coverage
  - Traceability Maps
  - Change Logs
  - Review Test Work Products

**Benefits**

- **Big Picture Understanding**
  - Enables effective Impact analysis

- **Common Toolkit**
  - Allows for vertical and horizontal scalability
  - Consistent and Predictable Requirements

- **Common Language**
  - Improves collaboration and communication
What is in your BA toolkit?
**Current Knowledge** and its **Timely Availability** can enhance the likelihood of project success. An effective **Training** model can go a long way in increasing the maturity level of the business analysis organization.

**Business Analysis Knowledge Management**

- **Knowledge Acquisition**
  - Identify stakeholders and sources for various line of businesses
  - Build understanding of insurance and client specific knowledge
  - Understand critical application landscape
  - Recognize the true business and technology needs

- **Knowledge Development**
  - Develop re-usable knowledge assets across work logs, e.g. SOPs
  - Templatize work log knowledge assets for easier dissemination
  - Create application overview for critical applications

- **Knowledge Sharing**
  - Assign BA per defined business and technology needs
  - Deploy multiple communication channels (Audio, Video) to facilitate global collaboration
  - Conduct continuous training sessions for better BA delivery

- **Knowledge Harvesting**
  - Sustain application and work log knowledge assets
  - Leverage knowledge assets to onboard new BAs and train existing BAs
  - Repositorize knowledge assets to promote reuse

**Benefits**

- **Common Understanding**
  - Common understanding of business domain, application, and process.

- **Global Delivery**
  - Invites global participation and technology aided learning

- **Increased Efficiency**
  - Promotes reuse of knowledge assets
  - Reduces ramp-up time for baseline resources
Knowledge Management

Alfresco

✓ A content management and collaboration tool
✓ Web based centralized BA knowledge pool
✓ Promotes sharing of Knowledge
✓ For better collaboration within the team
✓ Envisioned as a sustained knowledge management platform
While approach provides the *Theoretical Knowledge* for Business Analysis, ‘learning from experience – one’s own and of others’ helps the *Application* of this Knowledge. The key, therefore, is effective collaboration...

- Unique challenge – highly distributed team
  - Geographically
  - Historically (New Company)
  - Client focused
- Establish a common platform for communication for business analysts
- Facilitate requirements collaboration across accounts
- Create a shared understanding of
  - Business Analysis
  - NTT DATA
  - Practice Goals and Initiatives

**Benefits**

- **Improve Communication**
  - Improves and maintains constant communication across BA stakeholders

- **Increase Quality**
  - Less re-work, duplication of effort and reduced requirement defects

- **Increase Efficiency**
  - Fewer iterations reduce demands on Business and IT time and resources
Forums for Collaboration

- **All Hands Meetings**
- **Online Collaboration**

**CoP**

**How do your BAs collaborate?**

**Local CoP**
• Recognize that not all employees are the same
  • Background (education, training, etc…)
  • Experience (past projects, employers, etc…)
  • Expertise (domain knowledge, technical savvy, etc…)
  • Priorities
• Three Main Types
  • Lateral Hires – Experienced BAs
  • Campus Hires – Fresh out of College
  • New Hires – Some Experience – Not BA
• Tailor Approach to Fit Competency Level and Employee Type

What training do you provide your BAs?
The goal of the BA Self-Assessment is to support:

- Self-awareness of business analysis skills to enable personal growth
- Career growth and competency improvement
- Mentoring and coaching of business analysts
- Development of training curriculum
- Alignment of roles and responsibilities
- Business analysis professional development

Based on the IIBA’s Business Analysis Body of Knowledge (BABOK) and the BA Competency Model

Business analysts review questions, indicators, and observable results and indicate their level of proficiency for each task.
Assessment Results

Distribution of BABOK Knowledge Areas

BA Competency Levels

- Advanced Generalist BA 17.65%
- Senior BA 11.76%
- Intermediate BA 29.41%
- Junior BA 41.18%

BA Techniques

- BA Planning
- Elicitation
- Req Mgmt & Comm
- Enterprise Analysis
- Requirements Analysis
- Sol Assessment & Validation
Experienced Hires - BA Training Framework

Internal Training Framework

Foundation
- 27 courses curriculum on foundation concepts
- IIBA BABOK Aligned
- Case study based examples and exercises
- 100 marks objective questions to test the knowledge of BAs
- Available for all NTT DATA employees.

Advanced
- 15 courses curriculum on advanced concepts
- IIBA BABOK Aligned
- Case study based examples and exercises
- 100 marks objective questions to test the knowledge of BAs
- Available for ‘Foundation’ certified NTT DATA employees

Overview

Salient Features
- Aligns all BAs to deliver consistent, predictable and quality project results by training on best practices induced methodology and concepts
- Delivers training program across the globe 24x7 through e-learning courses
- Provides guidance and assistance during training through mentoring and job shadowing
- Focuses on application of concepts through case study based approach
Continued Growth - Supporting Your Business Analysts

- Good Business analysts are life long learners
  - Education assistance
  - Courses and conference
  - Certifications (CBAP, CCBA, and Industry)
- Business analysts want to belong
  - Corporate IIBA membership
  - Access to industry material
- Access the online BA community
  - Get your BAs to contribute
  - Take advantage of resources
- Get business analysts to publish!
  - Write articles
  - Speak at conferences
  - Get out in the community!
Governance is the *Glue* that shapes, sustains and enhances the business analysis organization. Effective governance is the *extremely essential yet most ignored overarching arm* that decides the strategic nature of this critical function.

**Benefits**
- **Consistent Business Analysis**
  - Ensure consistent business analysis delivery
- **Efficiency**
  - Increased efficiency due to adoption of Best Practices
- **Improved Decision Making**
  - Better decision making due to “Single” snapshot of BA Capability
- **Continuous Improvement**
  - Enable Business Analysis maturity to deliver enhanced value
The **Requirement Quality Diagnostic Tool** provides an efficient and effective method for Quality Assurance/Test Leads and Business Analysts to evaluate requirements deliverables.

- **Solution**
  - Systematic approach for examining requirements deliverables
  - Developed based on industry best practices and NTT DATA experience
  - Identifies areas of focus for improving business analysis expertise
Lessons Learned
Lessons Learned
Understand Where You Are Starting

Know where you are coming from...

• Begin building expertise by taking inventory of what already exists
• Learn about your organization
  • Interviews
  • Workshops
  • Document Analysis
  • Process Analysis
  • Survey
• Get the right people involved
  • Business Analysts
  • Stakeholders
  • BA Partners
  • Managers
• Competency Assessment
It is all about change

1. Understand what business analysis can do for your organization to address its specific business challenges

2. Quantify the effect that improvement will have on these objectives

3. Perform gap analysis and determine the needs of your organization

4. Implement practices *incrementally* on projects

5. Focus on reusability and create “asset” for that can be applied on other projects

6. Optimize with Lessons Learned and *integrate* improvements

7. Communicate incremental improvements and demonstrate success
If you want to demonstrate improvement, then you need to set a baseline.

Business analysis is a very difficult thing to measure.
  - Requirements Counts, Defects, Duration, Stakeholder Satisfaction

NTT DATA Tools
  - Requirements Quality Diagnostic Tool – Adherence to Best Practices
  - Individual Assessment - Business Analysis Competency

Set goals and use measurements to show that they have been achieved.
Layout your activities and a plan

- Like any project, you need to follow a process and get everyone working together
- Define where you want to be and your roadmap

Improving Business Analysis

Discovery
- Understand current state of business analysis
- Map against best practices
- Define improvement

Methodology & Deployment
- Define requirements methodology
- Incorporate Blueprint
- Define roles and responsibilities
- Develop training and certification program

Training & Mentoring
- Deploy training and certification program
- Conduct pilot projects
- Provide project mentoring to BAs on new process, tools, and techniques
- Develop BA repository

Optimize & Sustain
- Create BA support structure to sustain improvement
- Understand effectiveness
- Improve approaches
- Train-the-trainer

- Prioritized Recommendations
- Improvement Plan
- Training Plan
- Requirements Methodology
- BA Artifacts
- Training Curriculum
- Certification Program
- Pilot Project Deliverables
- Certified BAs
- BA Knowledgebase
- BA Support Structure
- Measurements of BA Effectiveness
- Continued Certification
Topics Covered

- Why business analysis expertise is so important
- The foundation for establishing business analysis expertise in an organization
- Developing business analysis expertise
- Lessons learned along the way

Questions?