

# **BA In Transformation 2015 and beyond**

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# Presentation Agenda

- Enterprise Challenges
- BA is Catalyst
- *Current state* of BA role
  - What is it
  - What governs it
- BA Role Disruption
  - Agile
  - PMI PBA
- Critical Skills
  - Modeling
  - Enterprise Analysis
  - Business Architecture
- Position Evolution
  - Professional skills
  - Career path

# Enterprise Challenges

- Speed
  - Rapid pace of disruption and change
  - Handle change or lose and lose quickly
- Productivity
  - Key to profitability in a slow-growth environment
- Competitive Advantage
  - Customer knowledge (internal and external)
- Product Creation
  - Three elements of product creation
    - Competitive understanding, organizational capabilities, creating value
- Growing, Managing and Retaining Knowledge Workers
  - Generation “Y” dilemma (Millennial)

# BA is Catalyst to Face/Conquer these Enterprise Challenges



# What is a BA? (industry perspective)

## Position Overview

- Enterprise Analysis (business case)
- Process modeling
- Requirements Analysis, Elicitation, Management

## Position Profile

- Should act a lot like a Product Manager
- Should have solid user knowledge of system, power user
- Should be technical enough to “talk the talk”
- Much more concerned about outcome than budget or schedule
- Should have VERY strong domain knowledge
- Must be able to state/represent business case of system/software

# Who or What Governs the BA Role?

## International Institute of Business Analysis (IIBA)

- [www.iiba.org](http://www.iiba.org)
- Started in Canada, now based in Atlanta
- 11 years old
- BA Body of Knowledge (BABOK)
- Two certifications:
  - Certified Business Analyst Professional (CBAP)
  - Certification of Competency in Business Analysis (CCBA)

## Overall

- Still in infancy
- Doers know it and love it. Companies don't know what it is or offers
- BA position means something slightly different to different organizations
- Rolling out new BOK version 3.0
- New PMI-PBA certification potential impacts

# Role Disruption - Agile

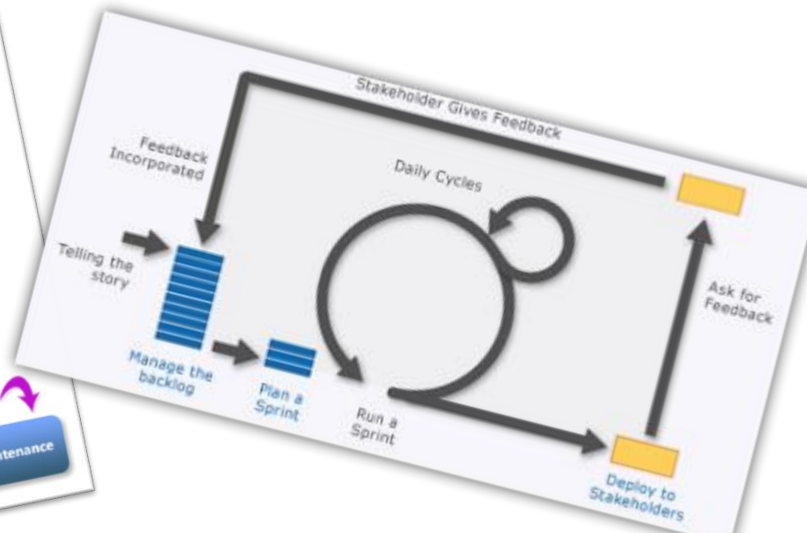


## Important Observation



*Plan-driven  
Development*

vs.



*Adaptive  
Development*

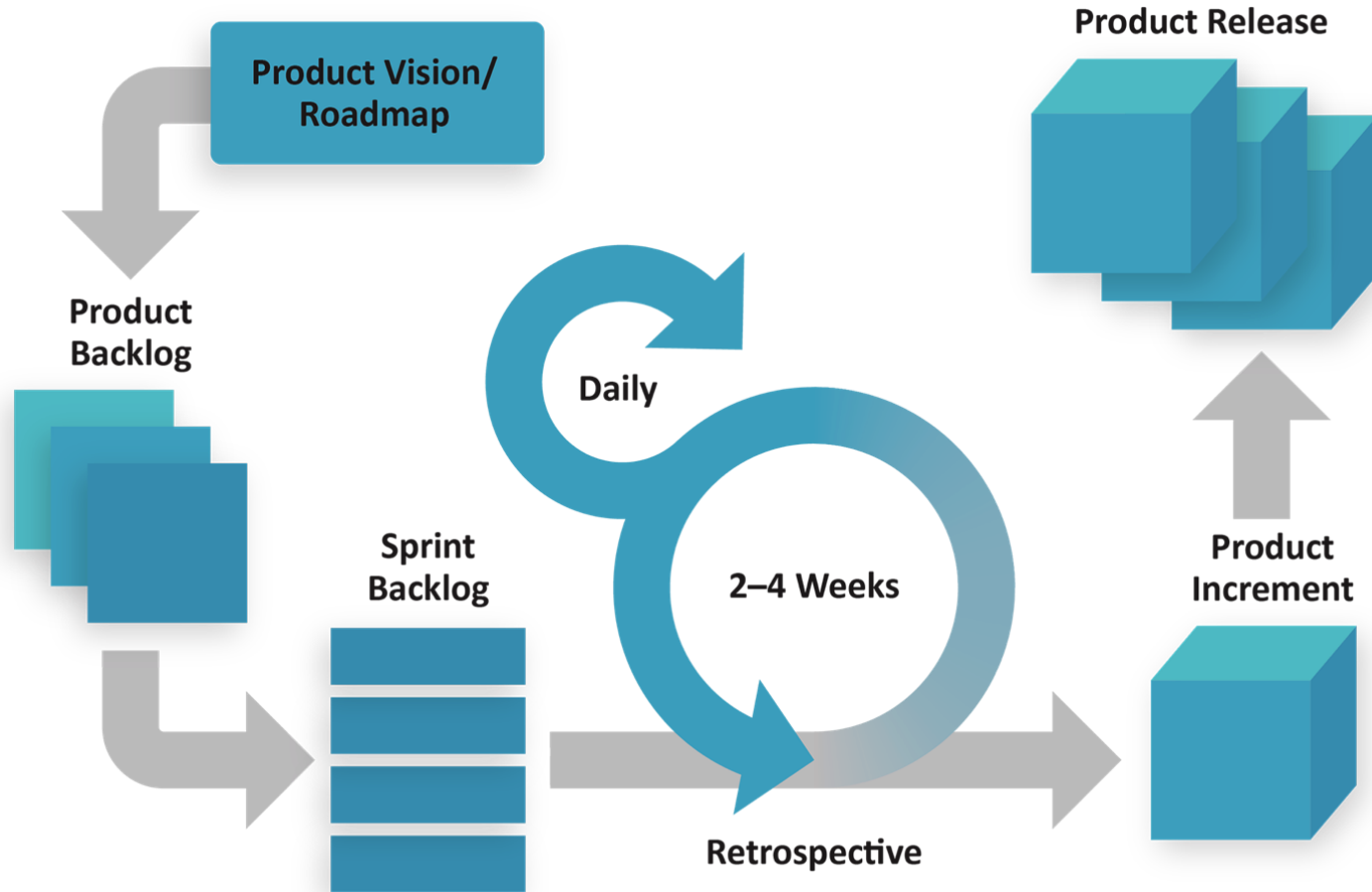
# Agile in a Nutshell

- Transformational way of working
- Built on a foundation of principles and values
  - No one-inch-thick rule book
- From those values and principles come practices
  - Like daily stand-up, retrospective, story points, etc.
- Practices are organized into flavors

**Highly extendable – very similar to open source**



# The Mechanics of Scrum, where does BA fit??



# BA Role In Iteration

- First off, Iterations are work-specific, not role-specific
- Work specific BA actions typically include:
  - Creating User Stories
  - Provide input on need and prioritization of User Stories
  - Write non-functional test cases
  - Perform non-function tests / acceptance tests
  - Write specifics
  - Write documentation / training
- In Iteration, work focuses on only one aspect of the BA skill set. In Agile a lot of the role is in and around *Iteration zero*

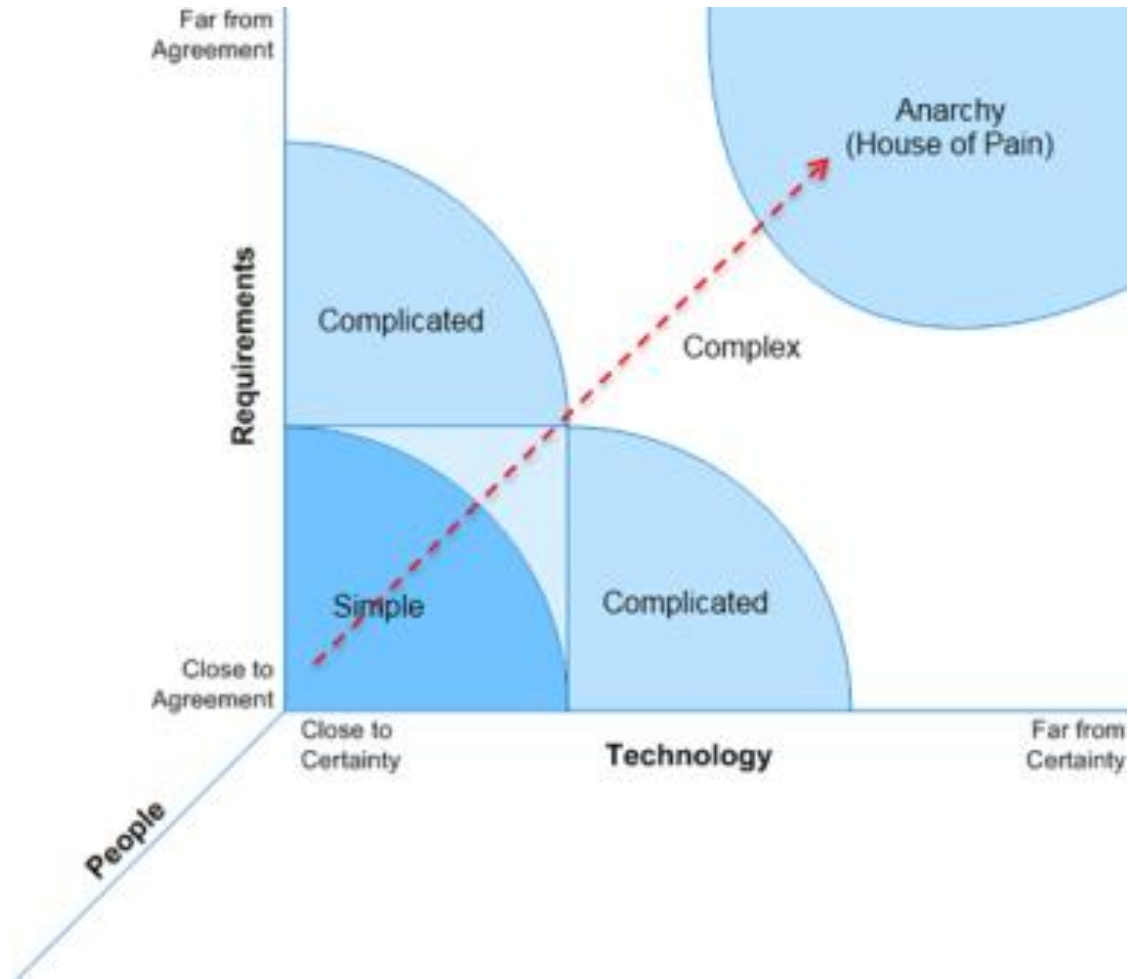
# Is BA Work A Role or a Skill?

- IIBA (International Institute of Business Analysis)
  - Sees the BA as a role
  - Specific function in defining what is going to be done and how it is going to be done
- Agile (the way of working)
  - Sees the BA as a skill
  - Focused around writing and managing requirements and testing output at user interface level
- How does PMI see BA Work?

# PMI-PBA Demographics and Certification Vision

- Based on the make up of the PMI-PBA designation PMI sees the BA as a skill
  - It is something that can be added to a professional's set of skills and tools
  - Anyone in the SDLC and beyond can gain these skills based on their experience level
  - The skills certified are tied to “in project” BA work
  - The skills are transfer to what is needed in an agile production environment

# How do I get what I want from my efforts?



# New Project Law: s + s + \$ Does Not = 😊

## New Project Law

on time

### Schedule:

- Project delivered within the timeframe originally identified
- No date slips
- Every milestone achieved

all scope

### Scope:

- Everything originally requested is delivered
- Everything delivered works perfectly as the customer requested, no bugs

within budget

### Budget:

- Did not spend a single cent more than originally estimated to spend
- Did not need any additional resources, hardware, etc. throughout entire project

≠

happy customer



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# BA Role Current Status: Too Much Science Not Enough Art

- It seems the focus has been the measurable side of a BA's responsibilities...
  - *"if it can be measured, it can be monitored and if it can be monitored it is important"*
  - Inside Agile – Way too much focus on requirement breakdown (User Stories), Testing and documentation
  - Outside Agile – Way too much focus on requirements elicitation and development
- Anecdotal: 95% of people in our classes focus just on the science side of role
- But missing the growth to becoming a TRUSTED ADVISOR. Enterprise Analysis/Solution Architect/Management Consultant
  - What is this??

# BA Trends: “Out of Project”

## 1. Future State Modeling

1. Automation process and data flows

## 2. Enterprise Analysis

1. Reviewing solution options
2. Business case development

## 3. Business Architecture

1. Organization strategy and function by business unit
2. Planning organization adjustments based on automation / project goals before project execution
3. In-depth understanding of business capabilities and functions



# BA Trends: Models and Analysis

- A. Automation drives productivity and productivity drives profitability
- B. But Automation screws up processes
- C. Processes run companies—automate without process redefinition means HUGE WASTE

## **What a BA must do:**

1. Build future state, modeling both process and data flow
  - Does it work / will it work ?
2. Drive top / down agreement on new processes and data flow
3. Align requirements to new process
4. Push acceptance of new process flow

# BA Trends: Enterprise Analysis

- Defining Need
  - Are there other internal options
  - Is there a return on investment and what is it
  - Can the organization do what is requested

**Basically building the business case**
- Proper Enterprise Analysis drives Executive sponsor behavior
- Enterprise Analysis isn't always part of BA's responsibilities

# BA Trends: Business Architecture

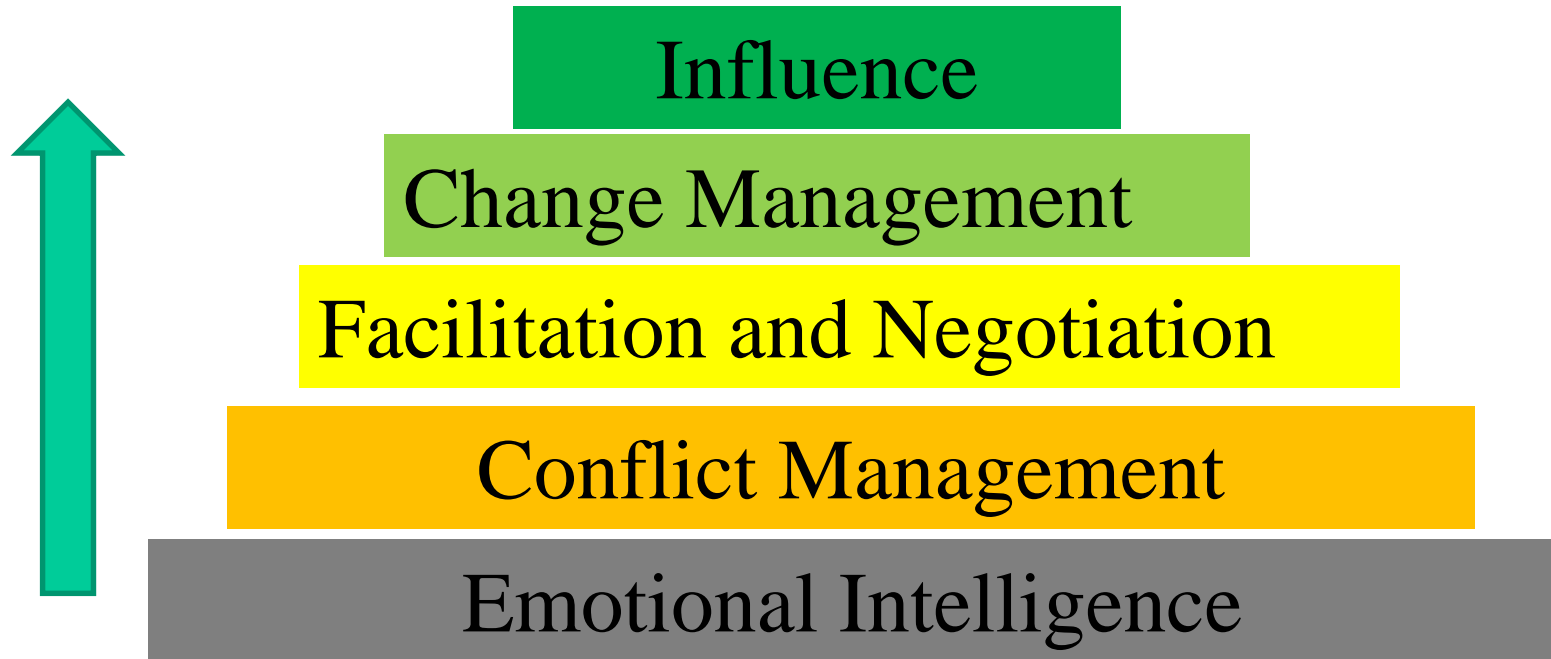
- What is it?
  - A “blueprint” of the enterprise that provides a common understanding of the organization and is used to align strategic objectives and tactical demands
  - A bridge between your business model / strategy and how your business functions
- What does a Business Architect work on?
  - Supports the definition of business strategy and tactical goals that drive organization operations
  - Documents business capabilities and primary functions
  - Develops root cause analysis to review enterprise business problems
  - Captures an organization view and documents roles, responsibilities, capabilities of business units
- TOGAF (The Open Group Architecture Framework) is a community based standards effort to describe methods and tools used by architects

# The BA Evolutionary Model

## “In Project” vs “Out of Project”



# Professional Skills Buildup



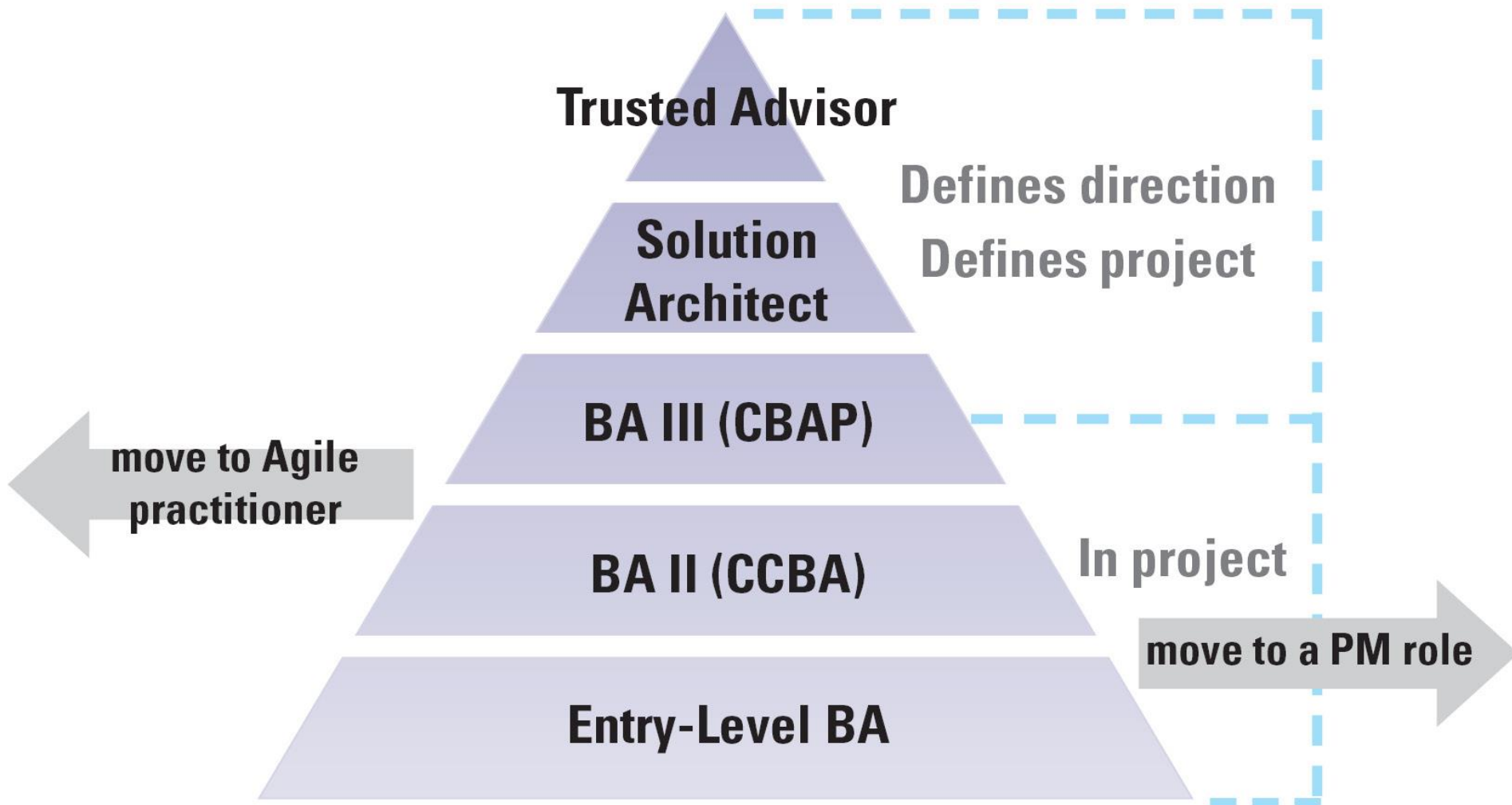
# Critical Professionals Tips

- Influence skills
  - Not what you say or write but how it comes across
  - Sometimes an idea is more important than grammar / spelling / math / specifics
  - An idea is nothing unless it is communicated / driven
- Facilitation skills
  - 70% image / 30% content
  - Techniques to engage and stay authentic
- Negotiation skills
  - It is NOT about winning / it is about moving forward
  - It is NOT personal, don't take it so, it is business

# Trust Advisor / Internal Mgmt. Consultant

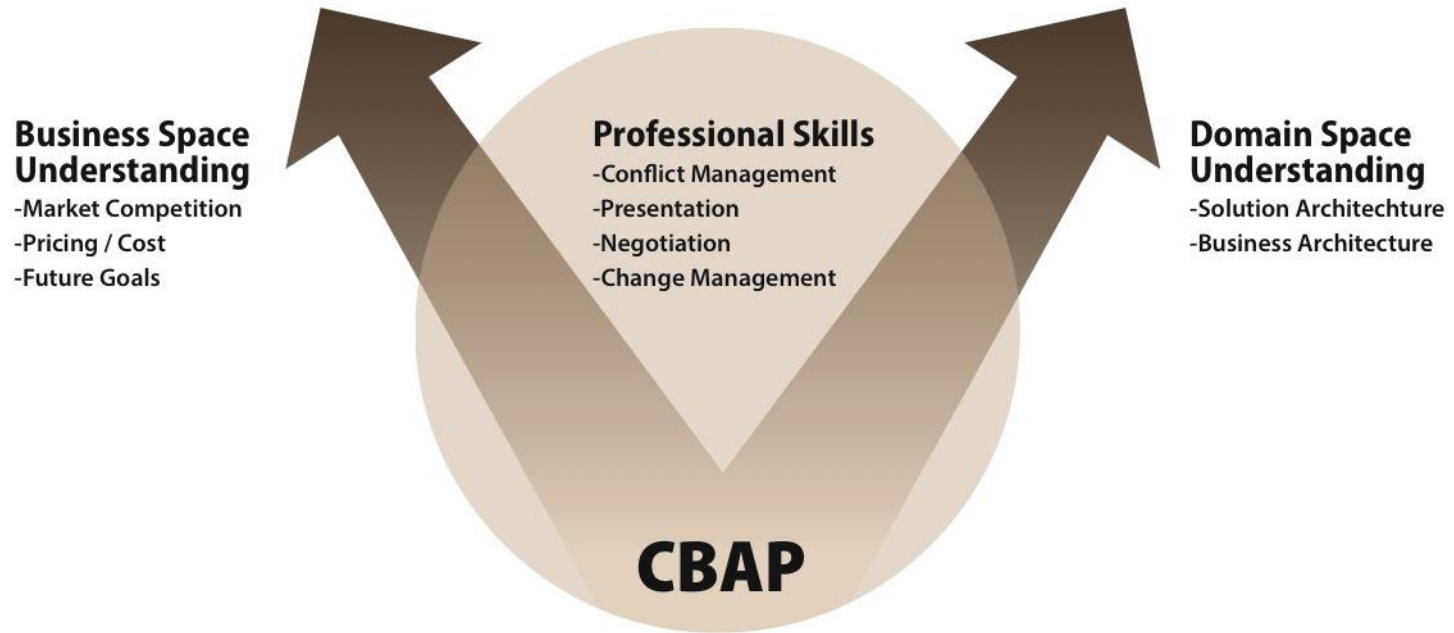
- Builds solution options
- Drive scope definition
- Define future state process
- Prices / cost definition
- Presents offer
- Pass detailed requirements development to “in project” team

# BA Career Path





# BA as Trusted Advisor



*Moving into the role of Internal management consultant*

# The Shift

## Today

BA Individual Focus  
Requirement Focus  
Given Solutions  
Opportunities Defined  
Low Level “Job”  
Tactical  
Waterfall/Agile Hybrid  
  
In Project

## Future

Organizational Focus  
Need/Value Focus  
Providing Options  
Opportunities Found  
High Level “Advisor”  
Strategic  
Waterfall/Agile Living  
Together  
  
Outside of Project

# Questions

## **Footnote: Mastering Business Analysis Podcast**

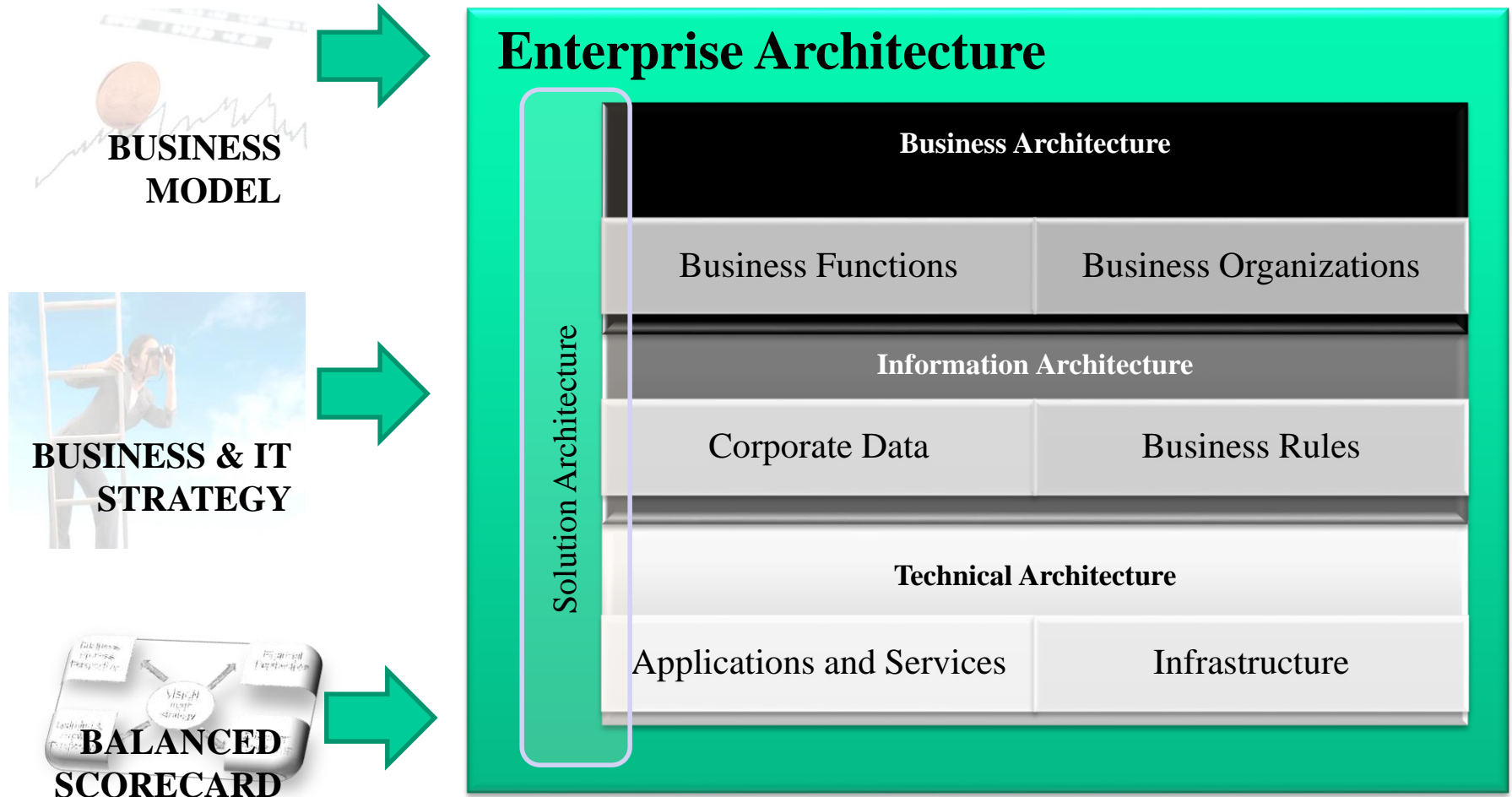
The Mastering Business Analysis podcast is a program with the goal of elevating the role of the Business Analyst and enhancing the skills of Business Analysts everywhere. Episodes include interviews with leaders in the business analysis community, helpful techniques, and effective practices. Together we will explore the Business Analyst role and we'll share information you need to achieve mastery in your role and advance in your career as a Business Analyst and beyond.

**Link to future of Business Analysis David Mantica interview on Mastering Business Analysis website:**

<http://masteringbusinessanalysis.com/episode14>

# **Supplemental Slides: Business Architecture within Enterprise Architecture Framework**

# Business Architecture in Context



# Enterprise Frameworks & Methodologies

Enterprise Frameworks		Best at...
Zachman Framework for Enterprise Architectures	Oldest (1987) and most used taxonomy of architectures	Classification of architectures
The Open Group Architectural Framework (TOGAF™)	A methodology developed in 2003	Process completeness and depth
Business Architecture Body of Knowledge (BIZBOK™)	Version 3.5 copyrighted in 2013	Provides best practices and a foundation for building a business architecture practice. Focused only on the business architecture.
OMB Federal Enterprise Architecture (FEA)	A methodology initially developed by the government in 2002	Reference models giving different views of the enterprise architecture and partitioning guidance
Gartner (Meta Group) Methodology	A methodology developed in 2005	Focusing on business value and can be applied quickly

*Adapted from Roger Sessions, ObjectWatch, Inc. , May 2007*

# Using the Architectures

## Business Strategic Decisions

- Mergers and Acquisitions
  - Can multiple processes be collapsed?
  - Are there impacts to the value chain?
  - Are we aligned to new strategies?
  - Can organizations be consolidated?
- New Product Line or Service
  - How are processes, information, organizations, applications and infrastructure impacted?
  - Is there a strategy associated with this new line?
- Infrastructure Investments
  - How behind are we in infrastructure investments? What problems are we seeing today?
  - How quickly can a change be made if there is a high level of diversity in infrastructure by business unit?
- OTHERS?

# Using the Architectures

## Technology Driven Initiatives

- Link business processes to applications and infrastructure that must be supported by IT to identify critical/non-critical processes
  - CMMI
  - AGILE
- Identify functions that can be outsourced on vendor supported environments for scalability and cost savings
  - SaaS, PaaS, IaaS
  - ITIL
- Organize business and technology components into services for improved reusability and value tracking
  - SOA
  - ITIL



# Using the Architectures Information Driven Initiatives

- Provide standards for consistent view of data
  - Data Warehousing
  - Big Data
- Integrate and improve quality of data for use across business functions
  - CRM