

Fundamentals of Business Analysis

This course = everything you need to get started as a BA.



Don't just binge-watch the videos. **Do the work!**

Question-answering process:

1. Google around a little bit
2. E-mail me at don.hussey@norwalkaberdeen.com

Don Hussey
Managing Director, NorwalkAberdeen

15+ years of leading and performing business analysis

- Head, Business Analysis Center of Excellence (Bank)
- SVP, Business Analysis and Project Management (Bank)
- VP, Project Manager (Bank)
- VP, International Institute of Business Analysis (NYC Chapter)
- Business Analyst/Project Manager (Different Bank)

Wide-ranging experience in business analysis

- Software development and product management
- Organizational change
- Business process development



- We have a very narrow focus: business analysis *only*
 - BA Training
 - BA Coaching
 - BA Advisory & Consulting
- We see ourselves *as Business Analysts*, not trainers
 - Focus on real-world practice
 - No dogma
 - No nonsense

Fundamentals of Business Analysis

What is Business Analysis?

International Institute of Business Analysis (IIBA):

“The practice of **enabling change** in an organizational context, by defining needs and recommending solutions that deliver value to stakeholders.”

<http://www.iiba.org/Careers/What-is-Business-Analysis.aspx>

Project
Work

Most of our work is on projects and, regardless of their size, they change our organization.

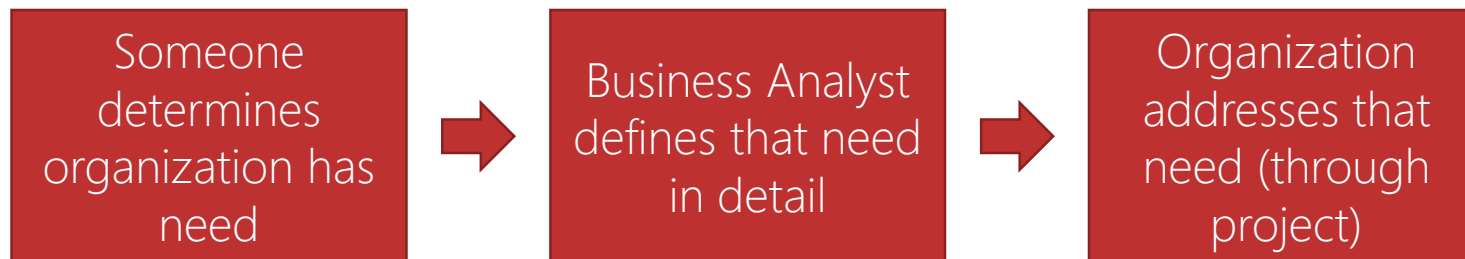
Pre-Project
Work

Work done (usually) to figure out *which* projects to run. Usually called “Strategy Analysis.”

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Solutions may include:

Systems

System
Features

Business
Processes

Policies

Training

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Stakeholder: Anyone impacted by our work.

Management, other departments, regulators,
partnering businesses, customers, etc, etc, etc.

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The Value of Business Analysis

IIBA Definition:

“The practice of enabling change in an organizational context, by defining needs and recommending solutions that deliver value to stakeholders.”

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- What happens if an organization isn't enabling change?
- What happens if an organization isn't identifying its needs?
- What happens if an organization isn't finding solutions to its needs?
- What happens if the solutions don't meet the needs of its stakeholders?

IIBA Definition:

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What happens if an organization isn't enabling change?

The organization does **not** just stay the same – **it loses ground.**

Some ramifications could include:

- Loss of **customers**
- Substantial increase in **costs**
- Substantial drop in **revenues**

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What happens if an organization isn't identifying its needs?

Real Question: How on earth can an organization make positive change, if it doesn't know what it needs?

If it doesn't understand its own needs, the organization will make **bad decisions**, and business will suffer.

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What happens if an organization isn't finding solutions to its needs?

Again, the organization is losing ground. It's failing to achieve the positive change it needs to succeed.

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What happens if the solutions don't meet the needs of its stakeholders?

Solutions that don't meet the needs of all their stakeholders are **poor or incomplete solutions**.

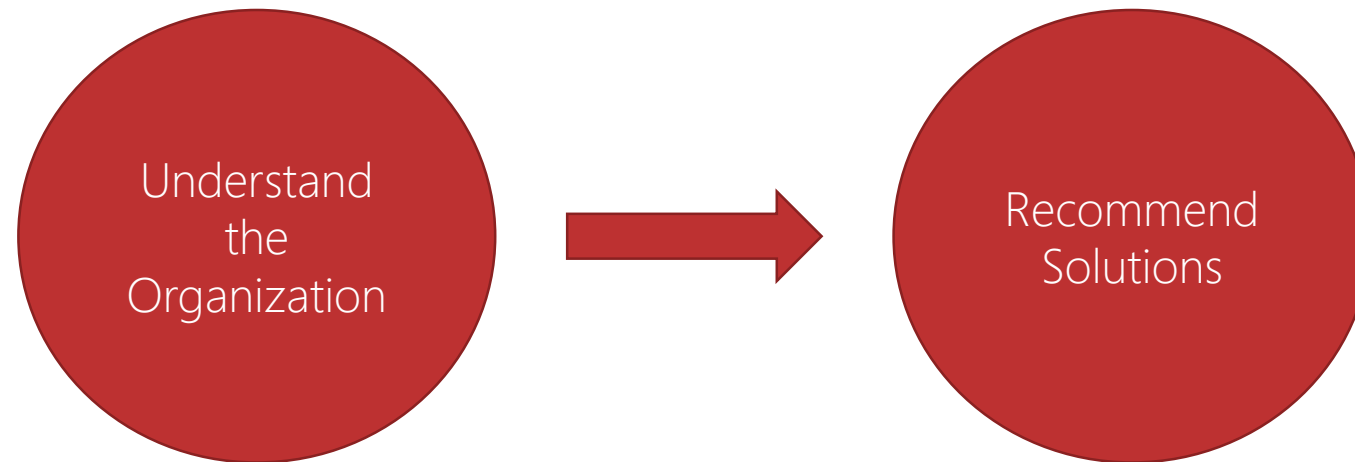
And the more important the need (or stakeholder) that is missed, the worse the solution.

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What Problems does it
Address?

Three typical business analysis scenarios

Business analysis at work!



XYZ Company: Losing customers due to poor service

Approaches to understanding:

- Getting feedback from former customers
- Interviewing Customer Service team
- Analyzing data
- Observing calls

Possible solutions:

- XYZ invests in training for Customer Service team
- XYZ creates a customer service portal
- XYZ appoints a customer advocate

XYZ Company: Slow growth due to lack of online portal

Approaches to understanding:

- Interview internal and external stakeholders
- What features are needed?
- How will those features work?
- What brand impression do we want to portray?

Possible solutions:

- Development of web portal meeting the needs of all the stakeholders
- Or are there other solutions not yet considered?

Government Department: Needs to reduce budget while maintaining services to public

Approaches to understanding:

- Interview stakeholders
- Analyze public service offering

Possible solutions:

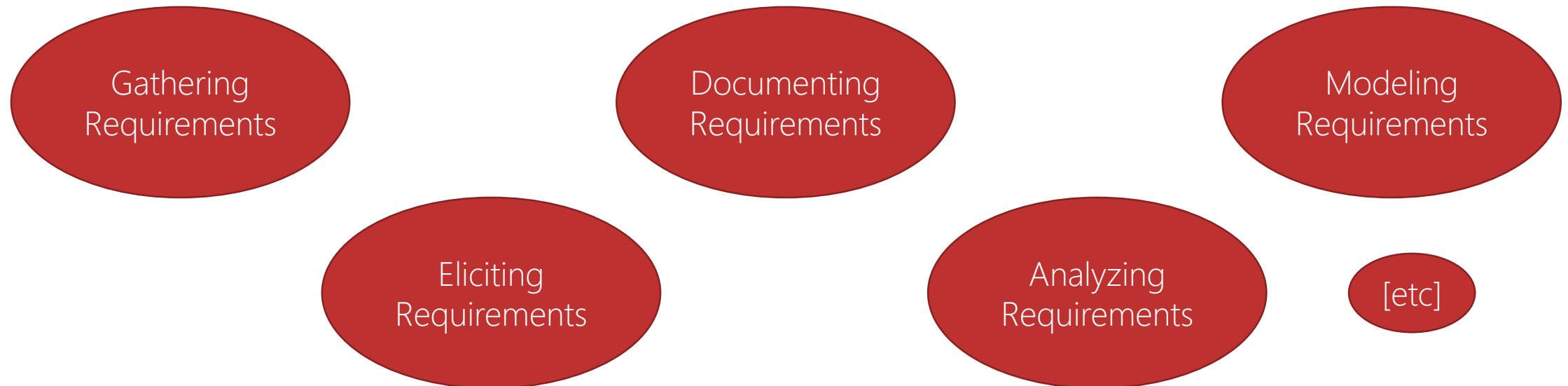
- Automate tasks
- Simplify processes

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Requirements

Requirements are a big deal for us Business Analysts.

Most of our day-to-day activities have something to do with them:



Requirement (ruh-kwai-er-mint)

“A requirement is a usable representation of a need. Requirements focus on understanding what kind of value could be delivered if a requirement is fulfilled. The nature of the representation may be a document (or set of documents), but can vary widely depending on the circumstances.”

Guide to the Business Analysis Body of Knowledge (BABOK), Version 3

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Requirements are documentation.

They can be Word docs. PowerPoints. Prototypes or mockups. Flowcharts. Requirements data in a system.

95% of requirements documentation is in Word docs.

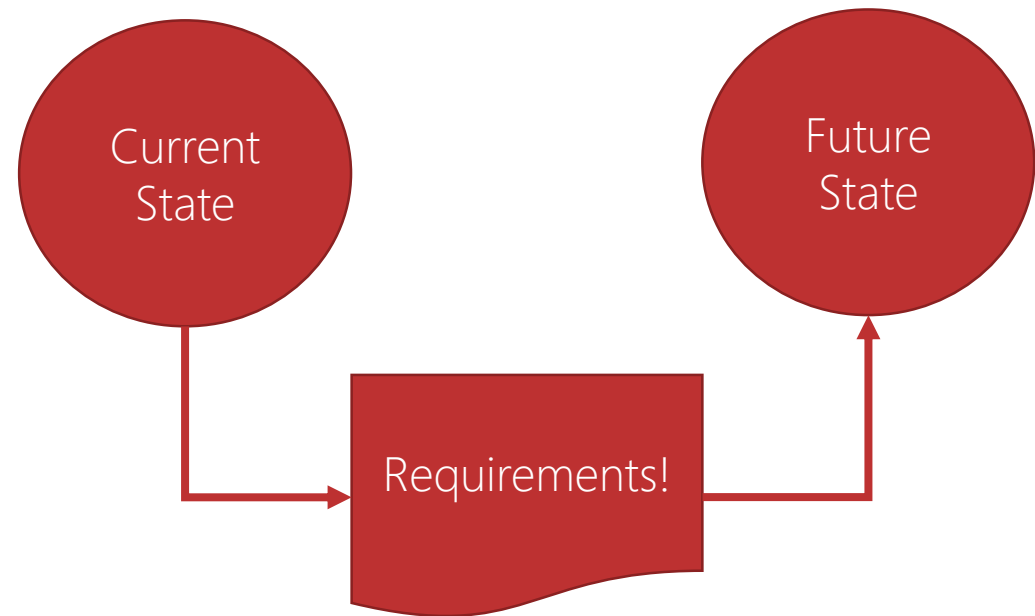
(I made that 95% number up, but it's about right.)

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Requirements provide the organizational change road map.



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Requirements need to be easy to use:

- ✓ Easy to read
- ✓ Easy to understand
- ✓ Clear
- ✓ Well-structured
- ✓ Straightforward to implement
- ✓ Straightforward to test

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There is a rationale behind every single requirement.

We Business Analysts need to **understand** it...

...And **maximize** that value in our solution.

It is tough, yes, but you can do it.

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Who Performs Business Analysis?

Category #1: **Business Analysts**

You had probably already figured this one out.

Category #2: Product Managers

Product Managers are responsible for designing, developing, and managing products for companies.

They have specialized requirements document types that are suited to their specific needs.

Category #3: Product Owners

The role of Product Owner comes from the world of Agile Development.

Product Owners are the “business person” on agile projects.

They manage the list of requirements, prioritize requirements, provide input to the development team on features, and perform other business-related tasks.

Category #4: Technologists

When a project lacks a dedicated BA, sometimes a technologist will step in to do that work.

Category #5: *Just about anyone else*

[Insert unnecessarily long story about Don's career experiences]

[Insert another one]

Stakeholders providing requirements to you

This can be done in interviews or workshops or simple phone conversations.

These stakeholders are playing a **critical** role in the analysis process.

Stakeholders reviewing the requirements you've written

These stakeholders usually represent a wide array of roles and expertise.

Their role (in this capacity) is to validate the requirements that have been collected and documented so far.

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The Business Analyst Role

Two Topics

#0: The mission of the Business Analyst

#1: The day-to-day work of a Business Analyst

Our mission:

To effect positive change for our companies and customers.

We don't just write requirements.

We are problem-solvers.

Business Analysis:

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IIBA

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8:00 – 9:00	Plan the day
9:00 – 9:30	Daily stand-up meeting
9:30 – 10:00	Help developers with questions/problems
10:00 – 11:00	Research marketing automation
11:00 – 12:00	Meet with head of Marketing to kick off marketing automation project
12:00 – 12:30	Lunch at desk while multitasking
12:30 – 1:00	Distribute meeting notes to Marketing head and team

1:00 – 1:30	BA team meeting
1:30 – 2:00	Write requirements for Project X
2:00 – 2:30	Write requirements for Project X
2:30 – 3:30	WRITE REQUIREMENTS FOR PROJECT X!!!
3:30 – 4:00	Coffee and chill
4:00 – 5:00	Project X requirements walk-through
5:00 – 5:30	Make edits to Project X requirements
5:30 – 6:00	Check on offshore development team