

# The Essential Business Analyst: Agent of Change

December 2009

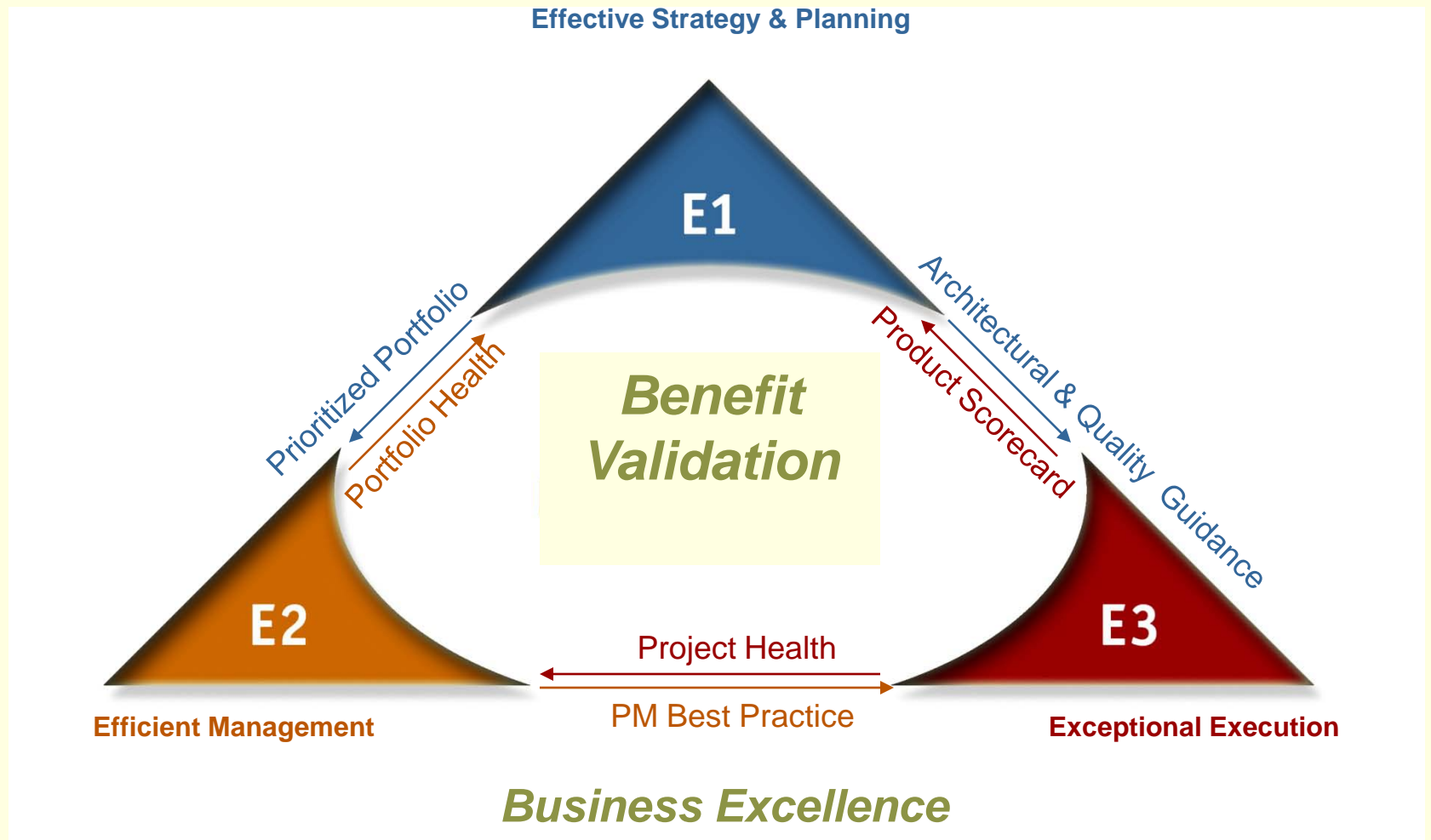
*Linda Finley*

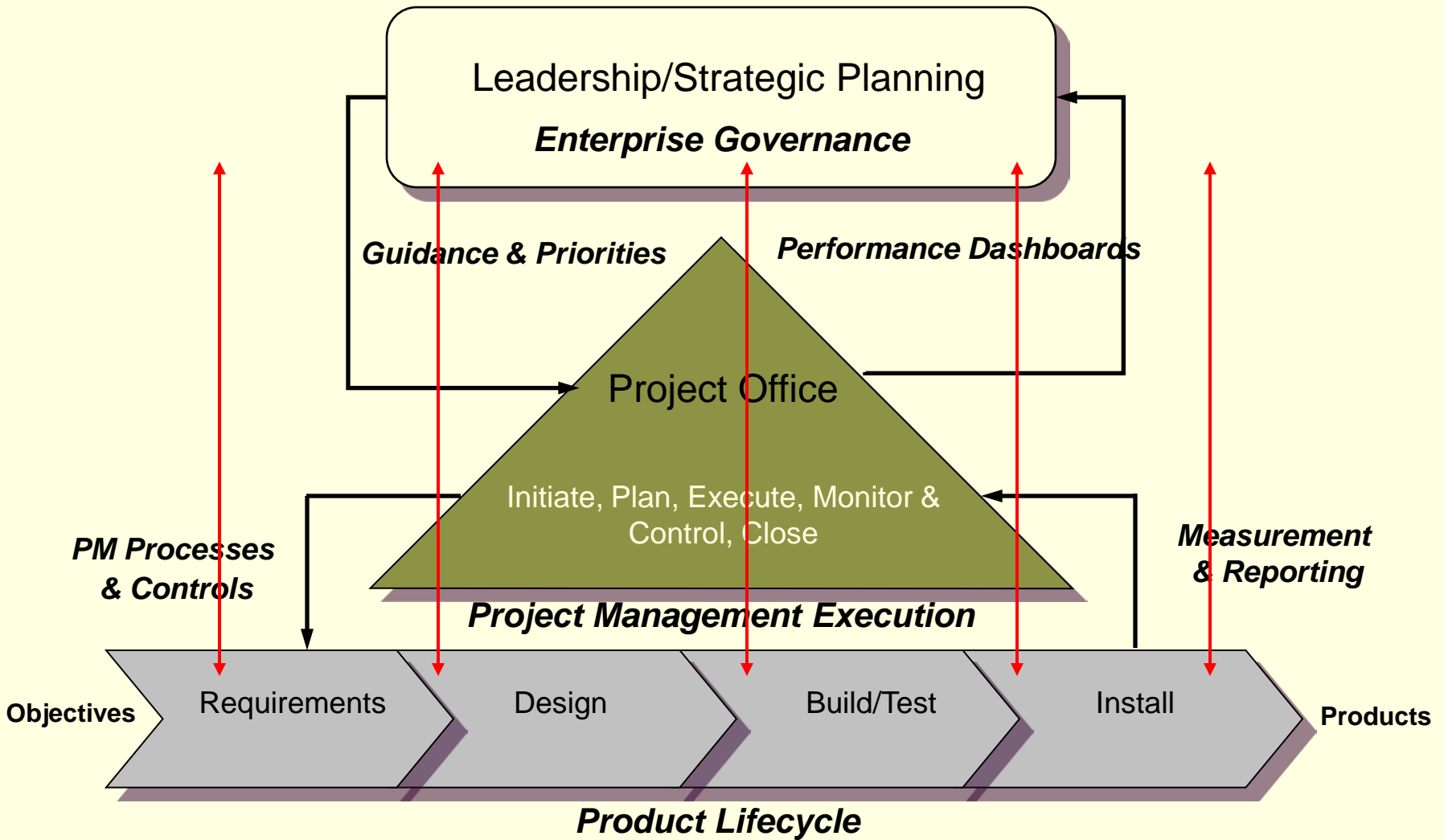
**“It isn't that they can't see the solution, it's that they  
can't see the problem”.**

G. K. Chesterton



- Learn how to clearly understand the needs of stakeholders and to use that understanding to manage articulation and adoption of change.
- Understand how to leverage the core Business Analysis competencies in enterprise analysis, requirements elicitation, facilitation and representation to encourage learning and adoption of new ideas.
- See how the accomplished Business Analyst, by definition, plays a key role in driving the introduction and adoption of change to make a real difference in project and organizational success.



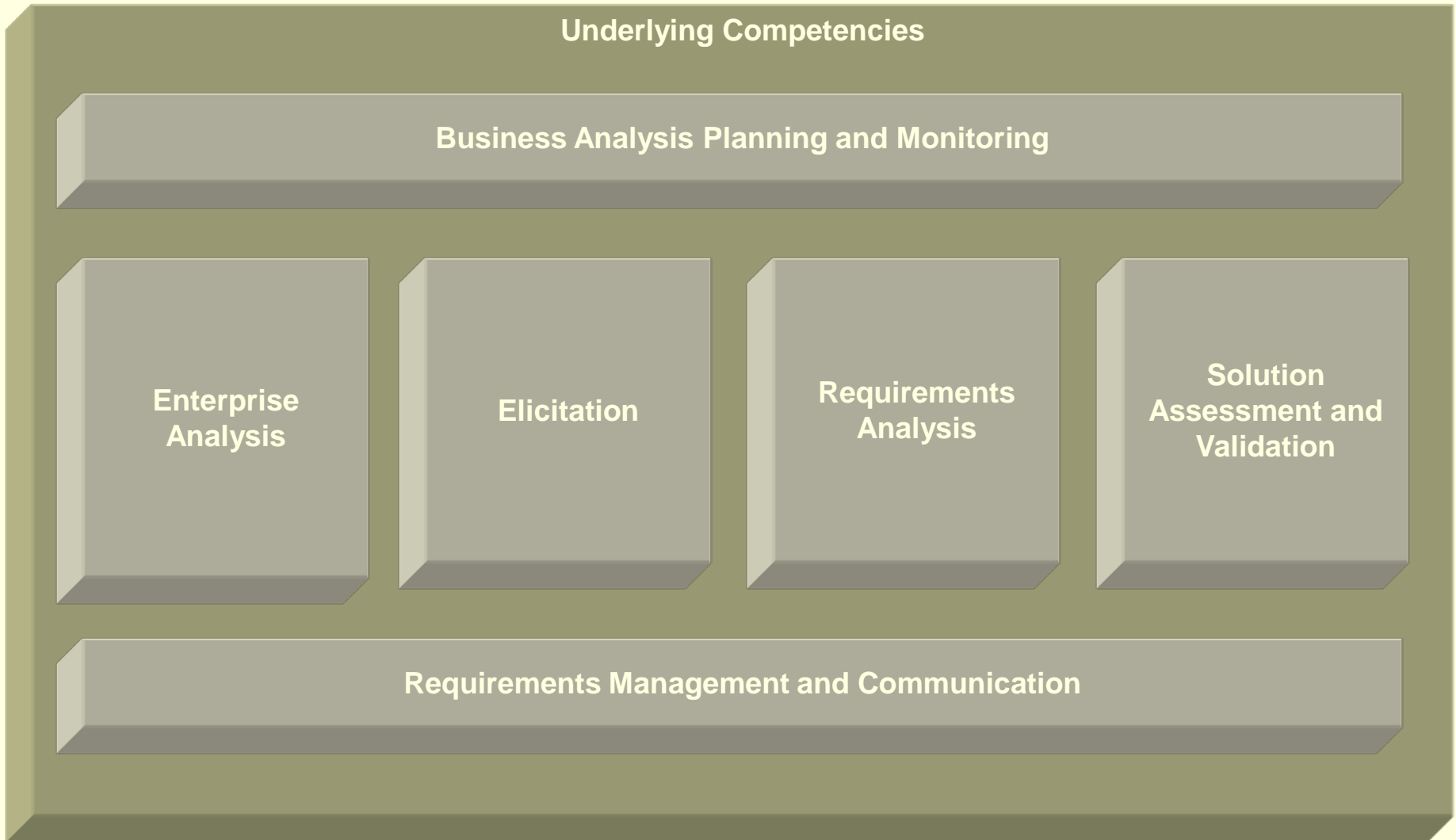


A business analyst addresses business problems by articulating processes and technology which execute the strategy defined by the business.

The business analyst gathers and analyzes new business requirements and weighs them against the existing business systems and processes.

Working closely with the business stakeholders, the analyst guides the process of modeling and designing new systems which implement the goals of the organization as expressed by stakeholders in the business requirements.

They document the solution by creating documents and diagrams which specify system-user interactions, describe how data should flow through the system, and spell out the logical operations the new system must perform.



Source: IIBA BABOK

- ▲ Underlying competencies are the behaviors, knowledge, and other characteristics that support effective business analysis.
  - ▲ Analytical Thinking and Problem Solving
  - ▲ Behavioral Characteristics
  - ▲ Business Knowledge
  - ▲ Communication Skills
  - ▲ Interaction Skills
  - ▲ Systems Thinking (software applications)

Source: IIBA BABOK

- Of the many critical functions a Business Analyst performs to ensure successful delivery of products and projects in organizations, perhaps the most overlooked and under-planned role they play is that of change agent.



Change is constant in today's organizations and often feels like it's happening *to us* rather than *with us* or *from us*. When change becomes overwhelming it can inhibit possibility thinking. Understanding how change occurs in humans and organizations can be helpful.

Projects are *episodic* change. The change is point-in-time, or event-based and is managed by following the sequence *unfreeze-transition-refreeze*

“Things alter for the worse spontaneously, if they be not altered for the better designedly”.

- [Francis Bacon](#)

The need to anticipate and manage change in project planning and deployment is often overlooked, and as a result can challenge project delivery.

"I'm all for progress. It's change I don't like."

Mark Twain, American Author and Poet

- A Business Analyst has to get past this type of resistance and by careful messaging and advocacy convince others to embrace new ways of doing things—making them ready for a “new normal.”
- But first, he needs to get people to talk to him, to tell him the truth, and to listen to what he has to say; and that requires credibility and trust.



Detective

Messenger



Interpreter

Advocate



Evangelist

Coach



Negotiator

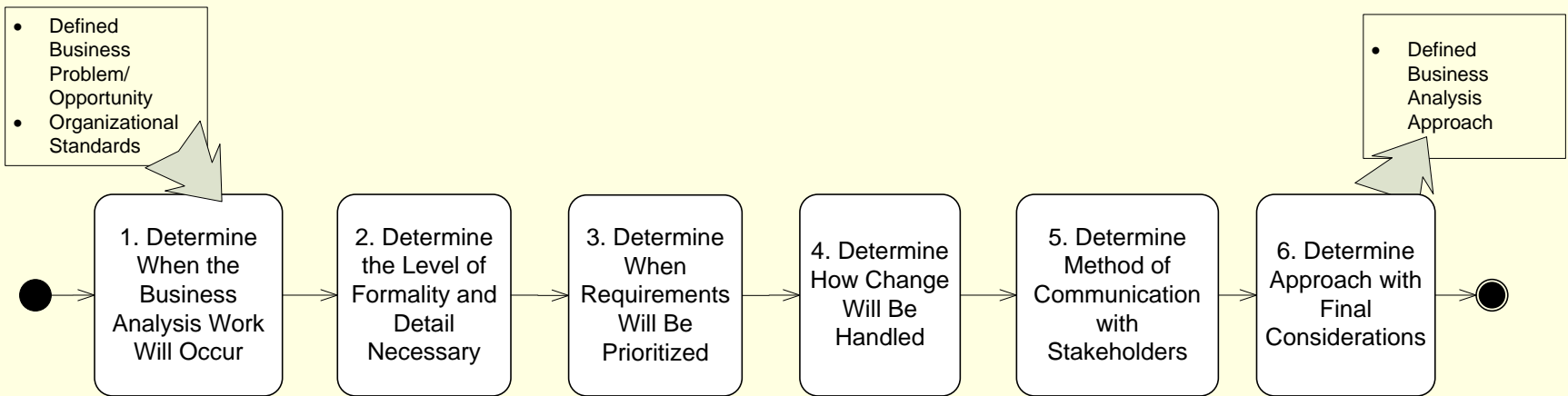


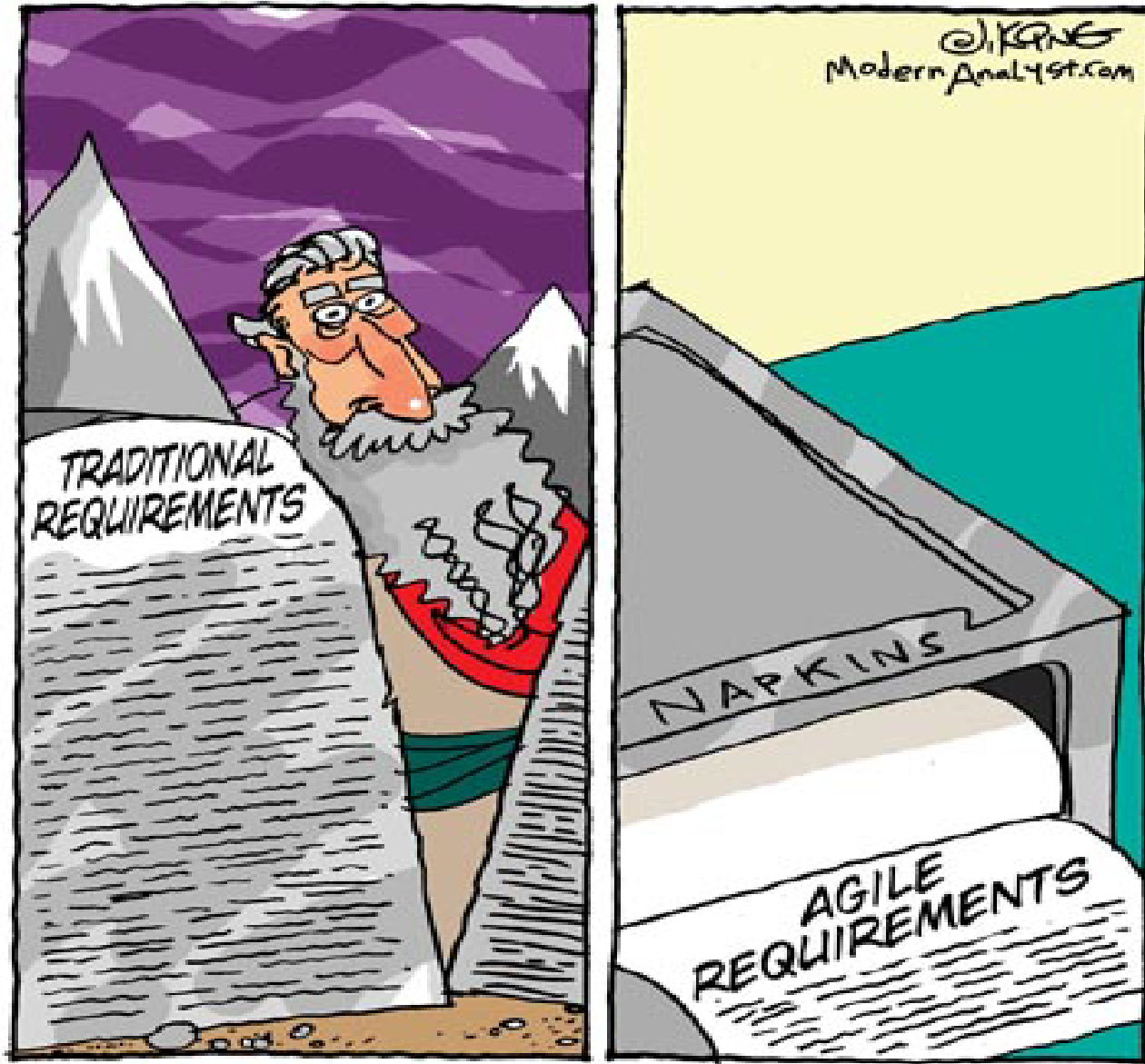
Salesman

- Elicit requirements
- Gather and critically evaluate information
- Reconcile conflicts
- Distinguish user requests from needs
- Drive and challenge
- Interpret customer business needs
- Translate requirements
- Collaborate to gain shared vision
- Proactively communicate
- Interact with diverse groups
- Serve as the conduit
- Articulate requirements
- Serve as a liaison

More than the Project Manager or even the Project Owner or Sponsor, Business Analysts have the opportunity through their professional core to encourage learning and adoption of new ideas.

- enterprise analysis
- requirements elicitation
- requirements facilitation
- requirements representation







- ▲ Business Analysis Planning and Monitoring is the knowledge area that covers how we determine which activities are necessary to perform in order to complete a business analysis effort. Encompasses the following:
  - ▲ Identification of Stakeholders
  - ▲ Selection of Business Analysis Techniques
  - ▲ The Process Used to Manage Requirements

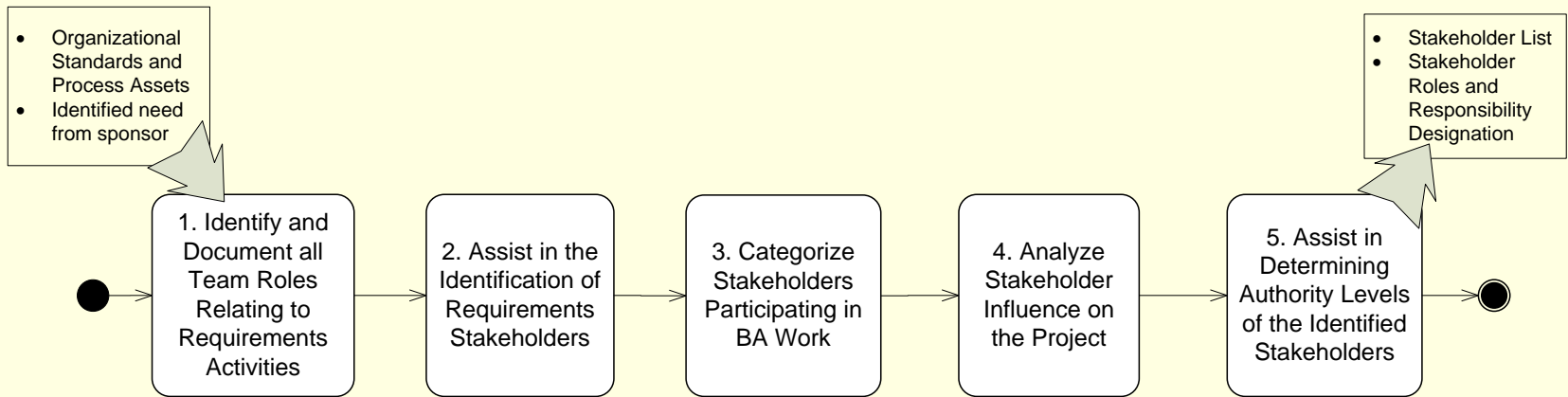
Source: IIBA BABOK

- ▲ Techniques: These techniques are used to assist the PM in planning and monitoring the tasks associated with the business analysis efforts.
  - ▲ Stakeholder Influence Analysis
  - ▲ Stakeholder Role Analysis
  - ▲ Interviews
  - ▲ Process Decomposition
  - ▲ Communications Requirements Analysis
  - ▲ Variance Analysis
  - ▲ Re-planning
  - ▲ Lessons Learned Process

Source: IIBA BABOK



## 2.3 Conduct Stakeholder Analysis



Audience/Role	Impact of Change (High Medium Low)	Preset Mindset (Resistant, Neutral, Supportive, Committed)	Level of Engagement Required (Awareness, Understanding, Belief, Commitment, Role, Performance, Internalization)	Potential Concerns/ Issues/Resistance Factors	Key Messages targeting this audience	Action Required by this audience
Executive Sponsor	High	Committed	Internalization			
Project Owner	High	Committed	Internalization			
Core Team	Low	Committed	Awareness			
Sr Level IT Leaders	High	Mixed: Resistant to Supportive	Internalization			
Mid-level IT Leaders	Medium	Mixed: Resistant to Supportive	Commitment			
Sr Level Business Leaders	High	Supportive	Internalization			
Mid Level Business Leaders	Med	Mixed: Resistant to Supportive	Internalization			

- As a business analyst, it is critical to know your company strategy so you can ensure that proposed solutions - IT or otherwise - align with where the company wants to be and how it wants to go about getting there.
- How does the proposed project support company strategy? Does it at all? If not, should we be doing it?
- As a Business Analyst, one of the ways we can add value is by asking tough questions.



- ▲ Elicitation is the process of **extracting** business needs and requirements from stakeholders while ensuring accuracy and completeness.
  - ▲ **Elicitation** Techniques
    - ▲ **Brainstorming**
    - ▲ **Focus Group**
    - ▲ **Interface Identification**
    - ▲ **Interview**
    - ▲ **Observation / Job Shadowing**
    - ▲ **Prototyping**
    - ▲ **Requirements Workshop** (JADs/JARs)
    - ▲ **Survey/Questionnaire**

Source: IIBA BABOK





- By repeatedly asking the question "Why" (five times is a good rule of thumb), you can peel away the layers of symptoms which can lead to the root cause of a problem. Very often the ostensible reason for a problem will lead you to another question.
- Although this technique is called "5 Whys," you may find that you will need to ask the question fewer or more times than five before you find the core issue causing a problem, or "pain point".
- This is an excellent technique used to get to what the solution stakeholder really needs, rather than what they may think they want.



"If you don't ask the right questions, you don't get the right answers.  
A question asked in the right way often points to its own answer.  
Asking questions is the ABC of diagnosis. Only the inquiring mind  
solves problems."

Edward Hodnett

- ▲ Requirements Analysis is the process by which the solution definition is progressively elaborated to enable design and construction that will meet the needs of the business and stakeholders.
  
- ▲ Requirements Analysis Techniques
  - ▲ Business Rules Identification
  - ▲ Data Modeling
  - ▲ Event and State Modeling
  - ▲ Indicators, Metrics, and Reporting Review
  - ▲ Non-Functional Requirements
  - ▲ Organizational Modeling
  - ▲ Scenarios and Use Cases
  - ▲ Process Modeling

Source: IIBA BABOK



*“Maybe I should’ve been more clear when I said I wanted to build a bridge between business and IT.”*

- We are in a position to ask powerful questions, that are sometimes difficult to ask--especially of a Sr. Executive about a pet project that, according to him is going to “solve world hunger.”
- An appeal to corporate strategy is an appeal to the overall company vision. Understanding and linking project activity to corporate strategy creates an impression of maturity, credibility and leadership
- As a Business Analyst, we may not necessarily be involved in defining strategy, but we do need to be aware of it, and use it as a reference point when helping business stakeholders make important directional decisions.
- We need to have the courage to ask and tell the truth.

- ▲ Requirements Management and Communication describes how to manage conflicts, issues, and changes, and ensure that stakeholders and the project team remain in agreement on the solution scope.
  - ▲ Requirements Management and Communication Techniques
    - ▲ Manage Requirements Conflicts
    - ▲ Requirements Presentation
    - ▲ Requirements Review
    - ▲ Formal Requirements Approval

Source: IIBA BABOK

- From the very first requirements interview, the Business Analyst begins socializing the changes the project will bring, and through the requirements methodology used, he or she drives the picture of the "new normal" that will exist following the solution deployment.
- By acknowledging and planning this aspect of his or her role, the accomplished Business Analyst can play a key role in driving the introduction and adoption of change to make a real difference in project and organizational success.



### The Change Agent:

- Is aware that successful strategic change is about changing individuals first
- Approaches change holistically
- Understands how mental-maps of individuals work and how to transform them
- Makes Vision and Mission linkage for the Individual and the Organization
- Establishes a Sense of Urgency
- Communicates the Change Vision
- Anchors New Approaches in the Culture

- The Business Analyst is the project team member who must fully grasp the business vision and then interpret and translate that vision through requirements for the technology builders.
- He or she is positioned to clearly see the current state, the desired state and the change gap in between.
- Gap Analysis:
  - you simply ask two questions - *where are we now?* and *where do we want to be?*
  - The difference between the two is the **GAP** - this is how you are going to get there.

- Understand your position and ability to drive change
- Know your organization
- Stay open to ideas and committed to working with your stakeholders in their best interest
- Use the tools already at your disposal as Business Analysts
- Spend time with the people you want to change
- Listen more than you talk
- Use your license to ask why, why, why, why, why

There is never any harm in  
asking an honest question.  
Lucky Numbers 35, 53, 42, 21, 51, 46

Thank you!

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- ▲ Enterprise Analysis describes how we take a business need, refine and clarify the definition of the need, and define a solution scope that can feasibly be implemented by the business.
  - ▲ Enterprise Analysis Techniques
    - ▲ Competitive Analysis and Benchmark Studies
    - ▲ Decision Analysis
    - ▲ Enterprise Architecture
    - ▲ Feasibility Analysis
    - ▲ Gap Analysis
    - ▲ Opportunity Analysis
    - ▲ Problem Analysis
    - ▲ SWOT Analysis

Source: IIBA BABOK

- ▲ Solution Assessment and Validation are the tasks performed by the Business Analyst once the project team is ready to propose a solution, and describes the following:
  - ▲ Assess Proposed Solutions Against Business Need
  - ▲ Identify Gaps and Shortcomings
  - ▲ Determine Necessary Workarounds
  - ▲ Assess Deployed Solutions Against Business Need
- ▲ Solution Assessment and Validation Techniques
  - ▲ Defect and Issue Reporting
  - ▲ RFI, RFQ, RFP
  - ▲ Structure Walkthrough
  - ▲ User Acceptance Testing

Source: IIBA BABOK