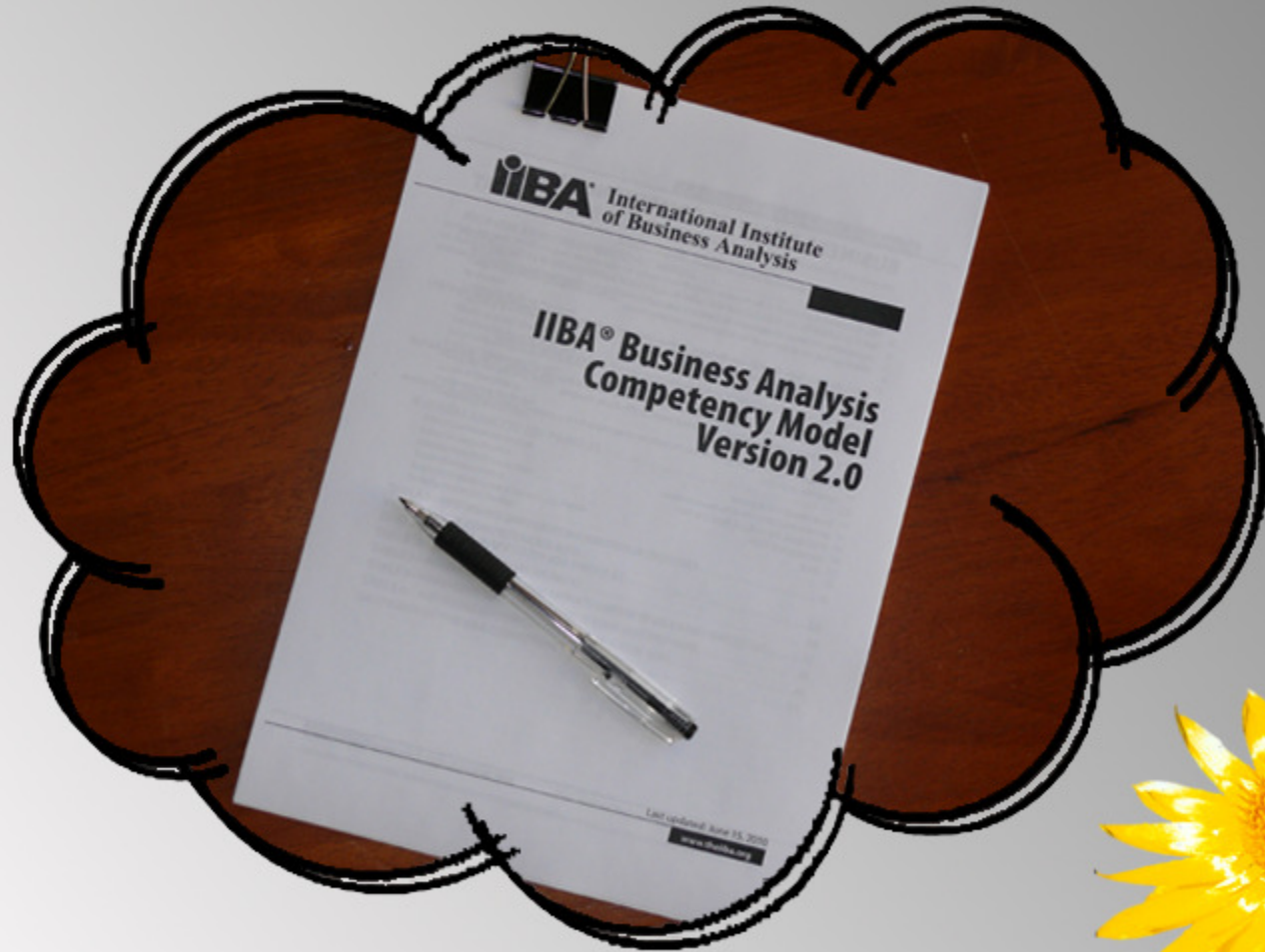


Beyond Competency: Excellence & Leadership in Business Analysis

Ann Smith MACS



2007... 2010



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IIBA[®] Competency Model

- *Based on a now-standard 5-level model¹*
- **Novice** – text-book understanding
- **Advanced Beginner** – some experience
- **Competent** – uses standardised procedure
- **Proficient** – in-depth knowledge
- **Expert** – deep **tacit** understanding
Not represented in job profiles

¹Dreyfus, HL & Dreyfus, SE, 1986, *Mind over Machine: the power of human intuition and expertise in the era of the computer*, The Free Press, NY.



Learning Objectives

- Discuss the distinction between context-free competencies, and the context-specific activities of excellence
- Clarify the project context, and some tools for examining it
- Describe actions to be taken in planning the Analysis



Learning Outcome

Leading towards ...

a broader awareness of what

excellence

could mean

for all of us



Expertise

*Tacit knowledge*¹:

*“understood without being expressed directly”*²

- **Somatic** (embodied): describable in principle but can not be used in a self-conscious way
- **Relational** (information about social relationships and logistics): describable in practice, but private, secret or unrecognised.
- **Collective** (the property of society): unspoken, ineffable, dynamic

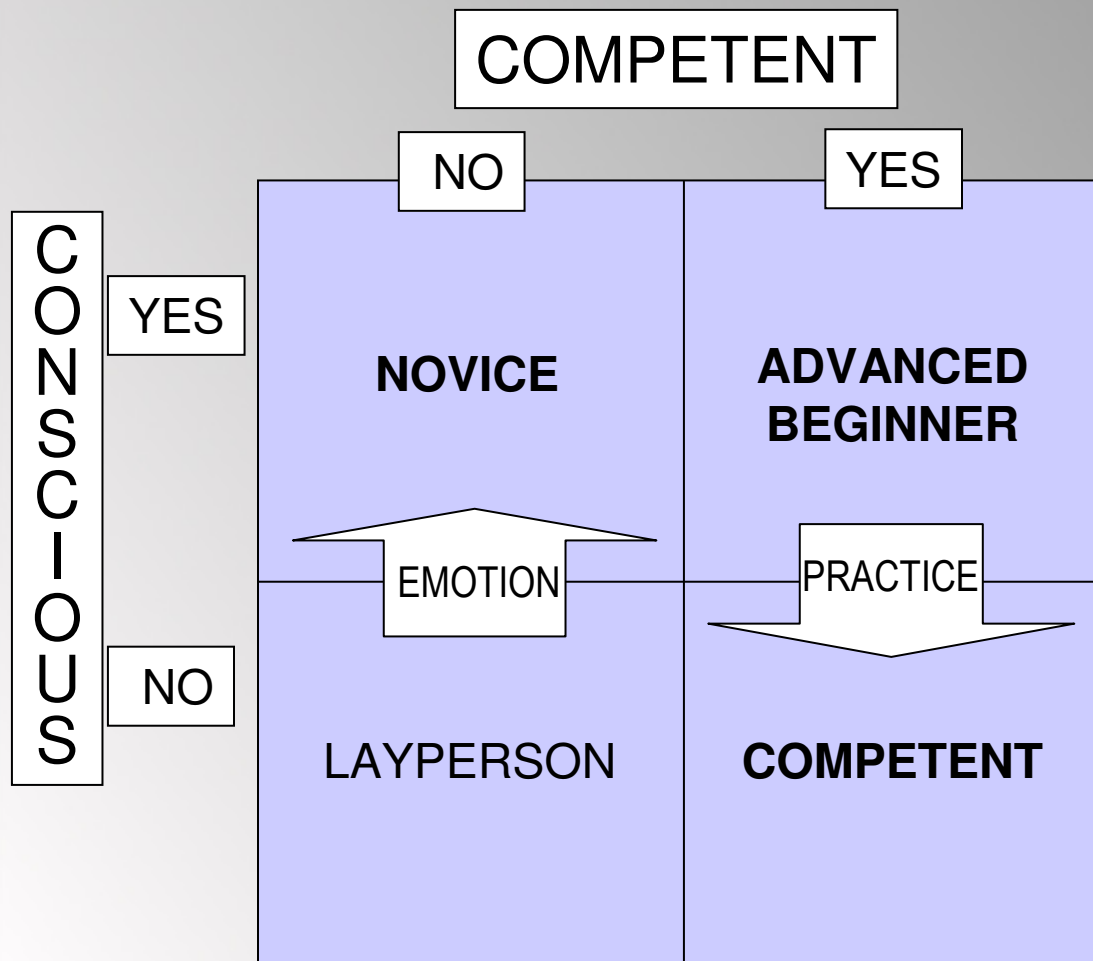
¹Collins, H 2010, *Tacit and Explicit Knowledge*, University of Chicago Press.

²'tacit' 2010, *Cambridge Dictionary Online*, viewed 10 July 2010, <http://dictionary.cambridge.org/>



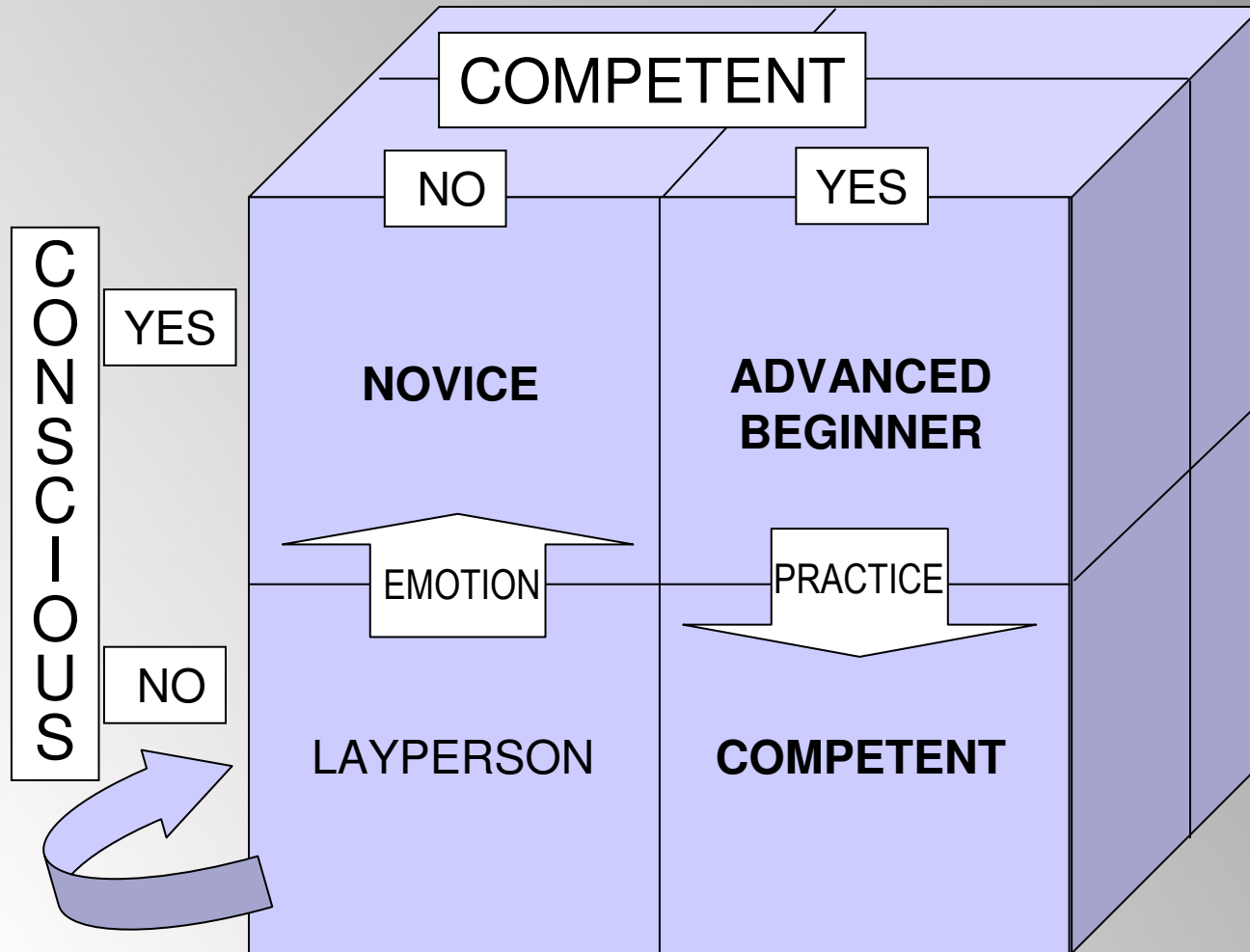
Expertise

The
Dreyfus
Model



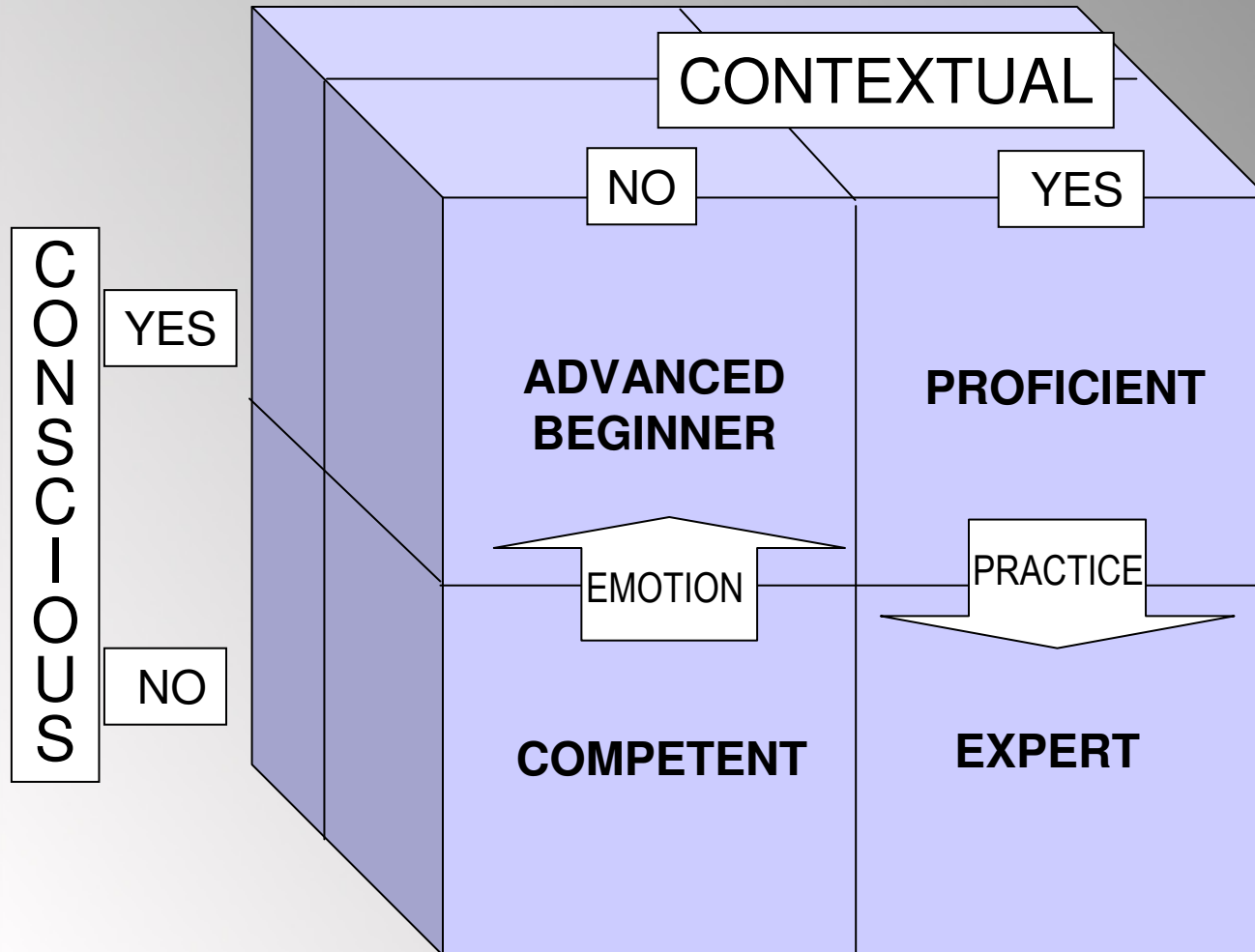
Expertise

The
Dreyfus
Model



Expertise

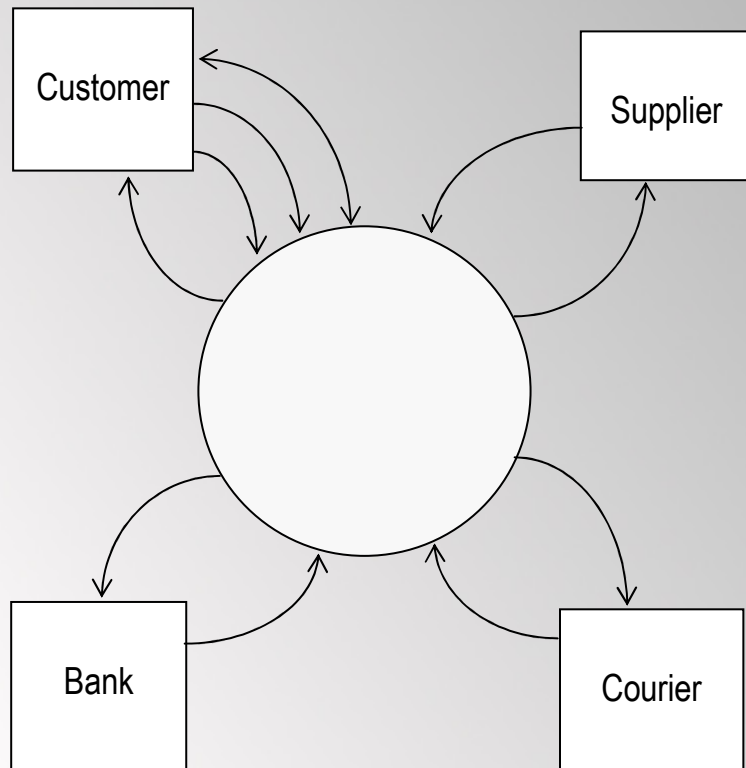
The
Dreyfus
Model





Context Level Diagram

External Entities are mapped on the Context Level Diagram and cascaded through from here to lower level diagrams.

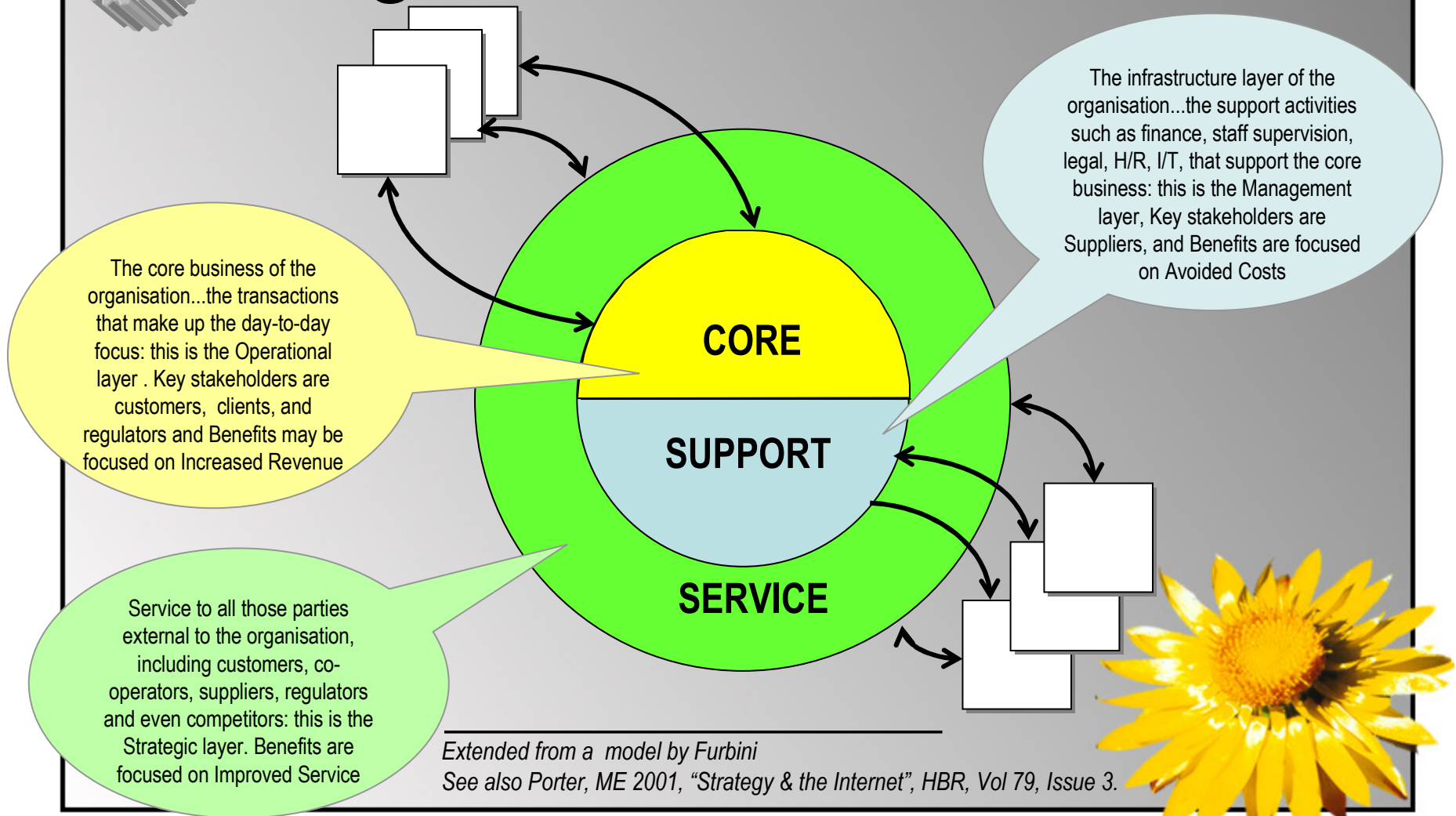


- It documents the scope in system terms
- It focuses on the business relationships, or interfaces, between the parties.
- It provides an initial reference point from which to undertake more detailed analysis in parallel
- It clarifies the system size and consultation taskload.





Organisational Context

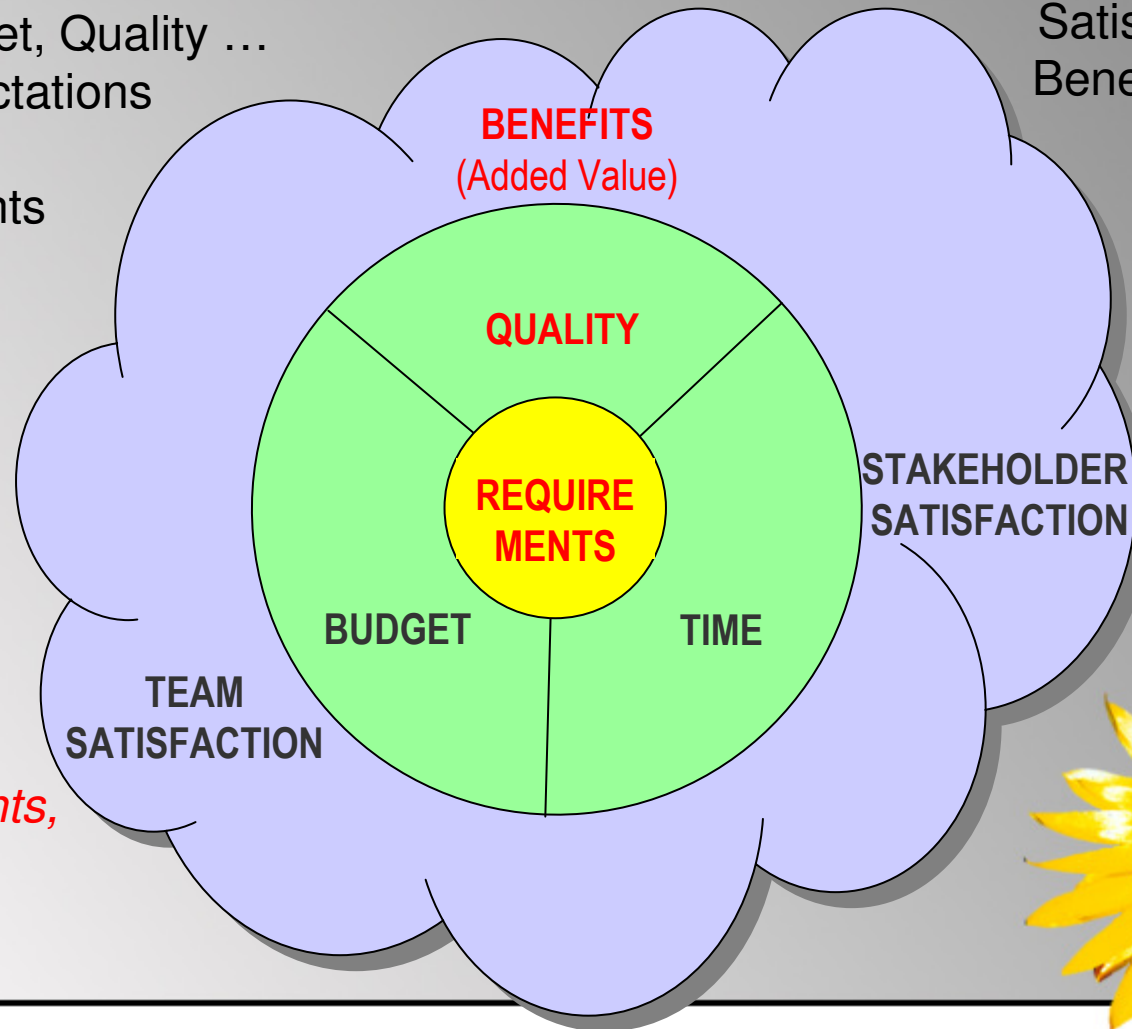




Stakeholder Context

Time, Budget, Quality ...
these Expectations
as well as
Requirements
can be met.

Satisfaction and
Benefits, on the
other hand,
are not
under
project
control.

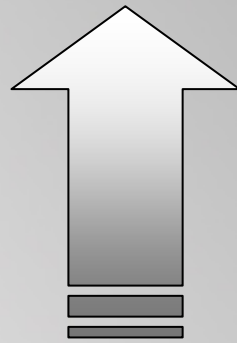


*Business
Analysis
focuses on
Requirements,
Benefits,
and Quality.*





Stakeholder Context



Client Satisfaction

Team Satisfaction

Budget

Time

Added Value

Quality

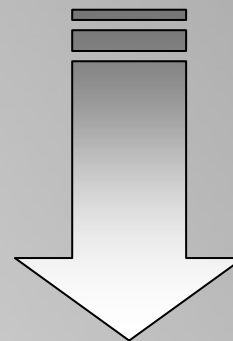
Requirements

What the Sponsor thinks...

I'd feel really pleased and my KPIs would be great if I could get the net benefits of this flowing sustainably in the allocated time, and in order to achieve that we will need...

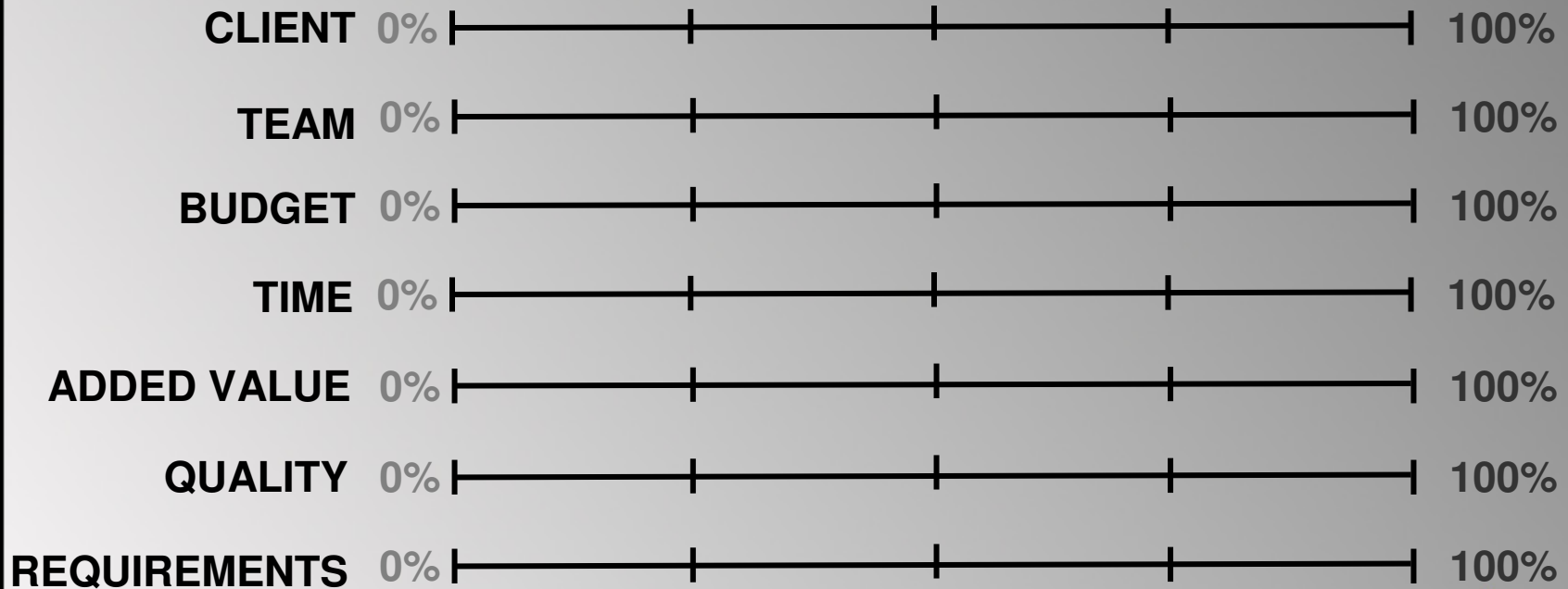
What the project team thinks...

We need to do this, this and this, and in order to achieve that properly so the customer will get the outcome they want we will need this much time and resources, and that would make a pretty good project...





Stakeholder Context: *Sliders*



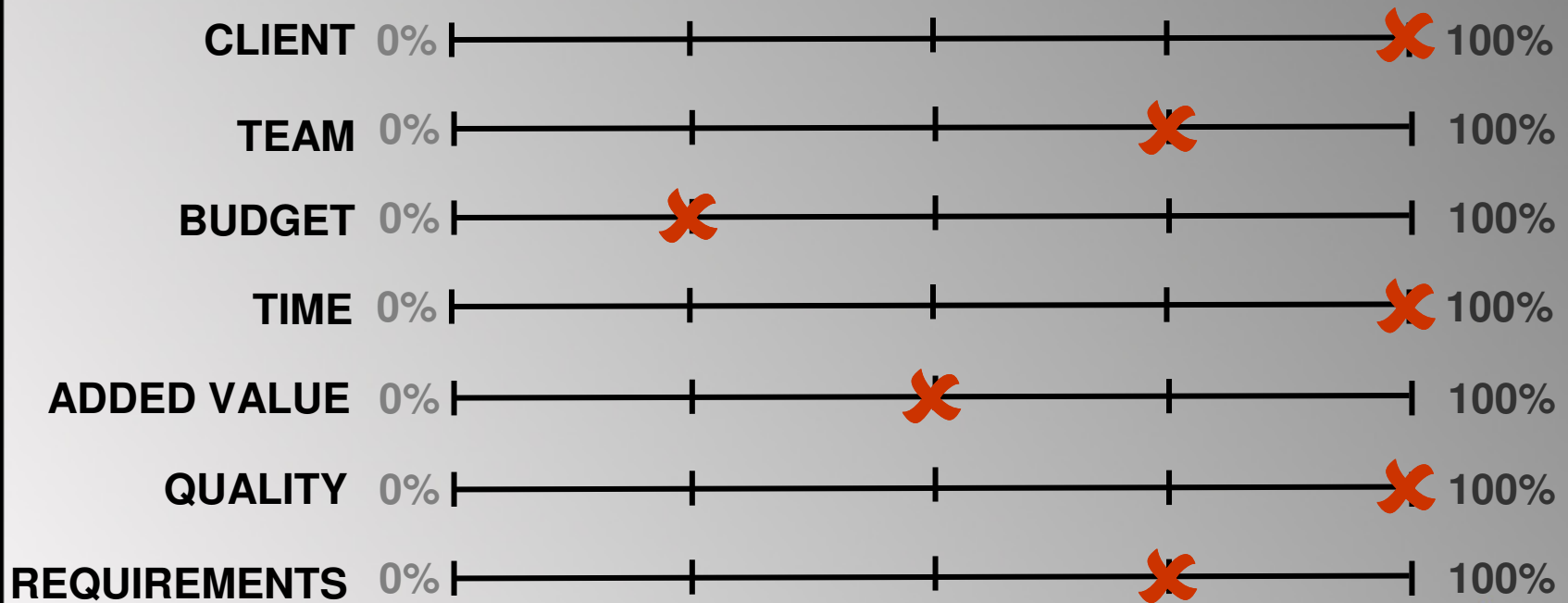
Rob Thomsett developed this concept in the 1980's and has trialled it with thousands of executives and project team members in Australia and overseas.

www.thomsettinternational.com.au





Stakeholder Context: *Sliders*





Stakeholder Context: *Sliders*

- Not intended to compare projects: what is important is the relative ranking of the factors within a project
- The tool separates out the factors so they can be discussed and understood, but they can be interlinked
- All of the factors can be measured
- Mostly, one factor will be significantly more important:

What's the minimum factors on 100% ? **1**

What's the maximum factors on 100% ? **1**





Stakeholder Context: *Sliders*

- It is a communication tool, to assist in understanding what the sponsor wants. The project sponsor sets the rankings
- The relative importance of the factors will change over the life of the project

... All of which adds up to a need to discuss the situation before the project gets under way, and to plan the analysis phase accordingly.





Quality

User-friendly ...

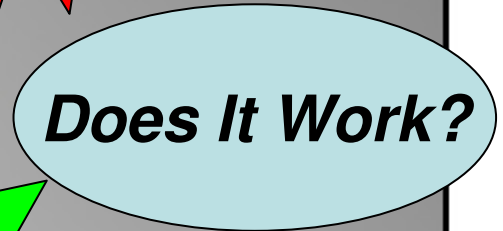
+/- 5 metres ...

Kid-safe ...

Secure ...

On-the-go ...

Compliant ...





Quality

What does this all mean for Project Analysts?

Somehow ...

we have to transform these “expectations”

...into deliverables.

ISO/IES 9126-1: 2001 can assist here.





Quality

1: Characterise the quality expectations:

Conformity	Must it all have functions, features, capabilities?
Maintainability	Must it be easy to maintain or correct?
Flexibility	Must it be easy to modify or enhance?
Auditability	Must it be auditable?
Security & Safety	Must it be safe and secure from unauthorised access or damage?
Usability	Must it be easy to understand, learn and use from the user's perspective?
Accuracy	Must it function consistently?
Reliability	Must it function predictably and without failure?
Portability	Must it be easy to migrate to another organisation or physical environment?
Job Impact	Must it fit in with other functions and roles, to provide an acceptable user work environment?





Quality

2: Analyse these quality characteristics:

- Partition the system around clustering of quality characteristics

- Rank on the basis of stakeholder preference: **Mandatory / Optional**





Quality

3: Reframe into verifiable criteria:

Conformity	Completeness, Correctness, Traceability
Maintainability	Commonality, Documentation, Simplicity, Modularity, Self-descriptiveness
Flexibility	Documentation, Simplicity, Modularity, Self-descriptiveness
Auditability	Audit Control, Modularity
Security & Safety	Access Control, Modularity, Safety Control
Usability	Completeness, Correctness, Training, Support, Operability (inc. accessibility)
Accuracy	Correctness, Simplicity, Modularity
Reliability	Correctness, Simplicity, Modularity
Portability	Correctness, Simplicity, Modularity
Job Impact	Correctness, Documentation, Work Dimension, Operability, Support & Training, Safety Control





Quality

- Some criteria contribute functional requirements

Training	Datstores for training materials Delivery Process(es) for training
Support	Datstores for help and explanatory materials Delivery Process(es) for support
Operability	States and Feedback(using the State Diagram) Navigation Metadata
Access Control	Authorisation Process Change Control Process Security Checking and other Processes Safety Processes Deletion Process Datstores for Access Logs Datstores for Passwords, Authorisations, etc
Audit Control	Processes for Standard Reports Processes for Internal Audit Processing Datstores for Transaction Logs





Quality

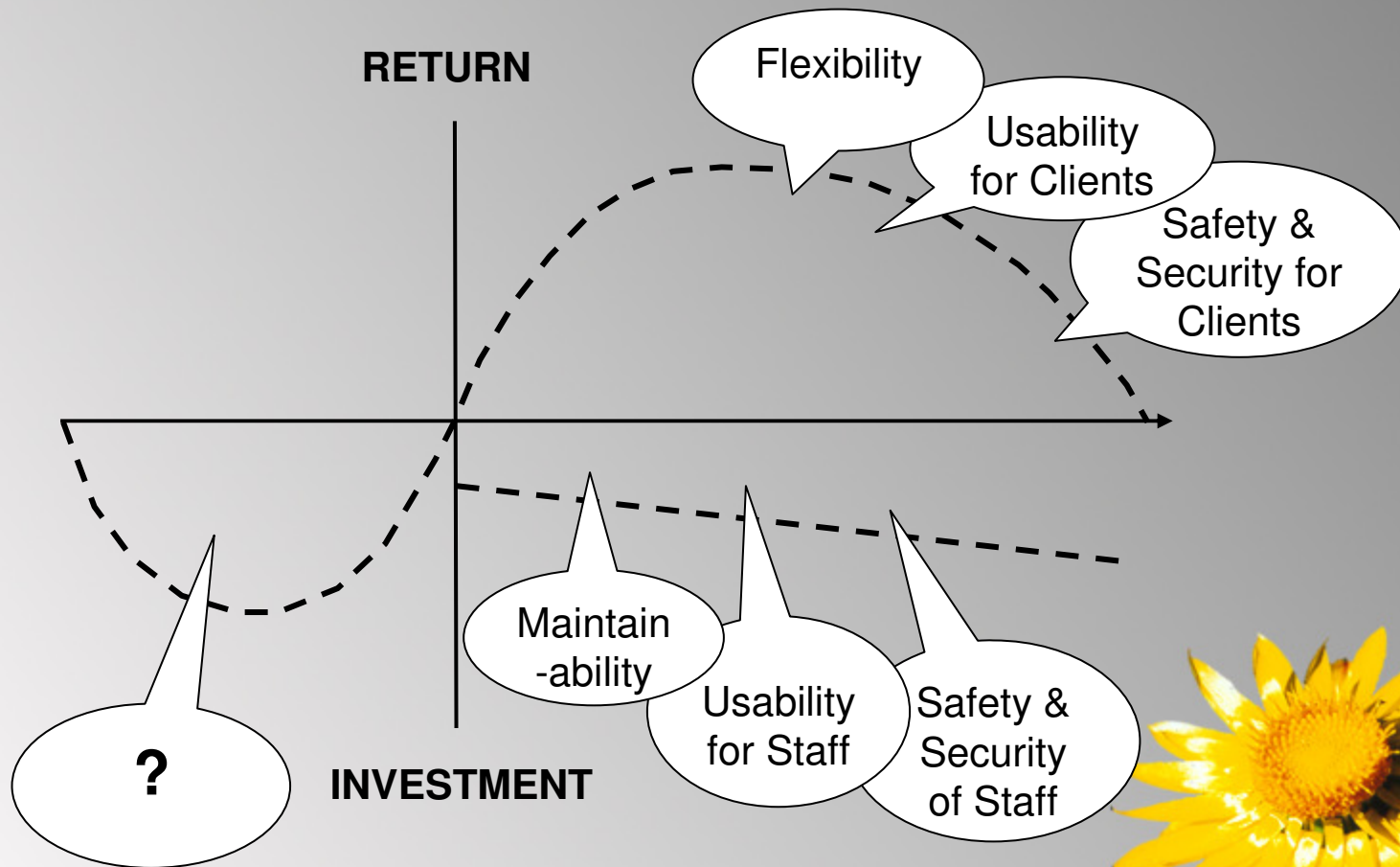
- Some criteria affect the way we do the analysis

Completeness	Full documentation of all activity in scope
Correctness	Full review of all analysis documents
Traceability	<ul style="list-style-type: none">• Full documentation of project scope• Full review of all analysis documents• Controls, including change log, for documenting & tracking of requirements
Structure/Modularity	These three all require: <ul style="list-style-type: none">• Full decomposition of processes• Full normalisation of data structures
Simplicity	
Commonality	

Come and see me during a break if you would like a reference card that maps all the Quality Characteristics to the BA techniques and activities.



Planning the Analysis:



Planning the Analysis:

- Check in with the Sponsor, the Vision and Objectives
- Map the Sliders
- Identify Stakeholders
- Prepare a Context Level Diagram: verify for project scope and document data in the Data Dictionary
- Document the Quality Matrix
- Develop the Strategy¹ – a *top-down* game-plan within which “iterative and ongoing”² planning will occur.

Only now can the analysis effort be scheduled, estimated, and detailed.

¹Smith, A 2008, “Agile Analysis: It’s not Optional”, AIPM Conference, Canberra.

²PMI 2008, A Guide to the Project Management Body of Knowledge, 4edn, PMI, USA..



NOT
EXCELLENCE

What about ...

- **Experience** – necessary, but not sufficient.

In itself it is not enough. An expert will have considerable experience, but not all experienced people will be expert.



NOT
EXCELLENCE

What about ...

- **Performance Level 3 for Key Competencies in VTE-sector Units of Competency –**

is about evaluating and reshaping processes.



What about ...

- **Strategic Analysis ...**

- **5 Forces & Value Chain Analysis**

Porter, ME 2001, 'Strategy and the Internet.', *Harvard Business Review*, March, Vol. 79 Issue 3 .

- **Perceived Use Value**

Bowman, C & Ambrosini, V 2002, 'Value Creation versus value capture: towards a coherent definition of value in strategy', *British Journal of Management*, No. 1, pp 1-15 .

- **SWOT Analysis**

Johnson, G, Scholes, K & Whittington, R 2005, *Exploring Corporate Strategy*, 7th ed, Prentice-Hall.

- **Market Segmentation and Differentiation**

Kotler, P 2005, *Marketing Management*, Prentice-Hall .

- **Value Innovation**

Kim, C & Mauborgne, 1995, *Blue Ocean Strategy*, Harvard Business School Press.

- **Co-opetition**

Brandenburger, A & Nalebuff, B 1998, *Co-opetition*, Currency-Doubleday.



NOT
EXCELLENCE

What about ...

- **Strategic Analysis**

- Definition of the strategic intent, corporate & business objectives
- Helmsman¹'s Level 4 (Jacques Organisational Hierarchy model)

It may pay more (because the consequences can be high if it goes wrong), however it is still essentially a competency with models that can be taught...



¹BA Symposium, Sydney, 2008

NOT
EXCELLENCE

What about ...

- **Team Leadership** –As we have seen today, this activity has its own models and tools that can be taught. Team Supervision is also a line management function that has specific competencies associated with it.

Leadership and direction of the Analyst team is thus a series of competencies.

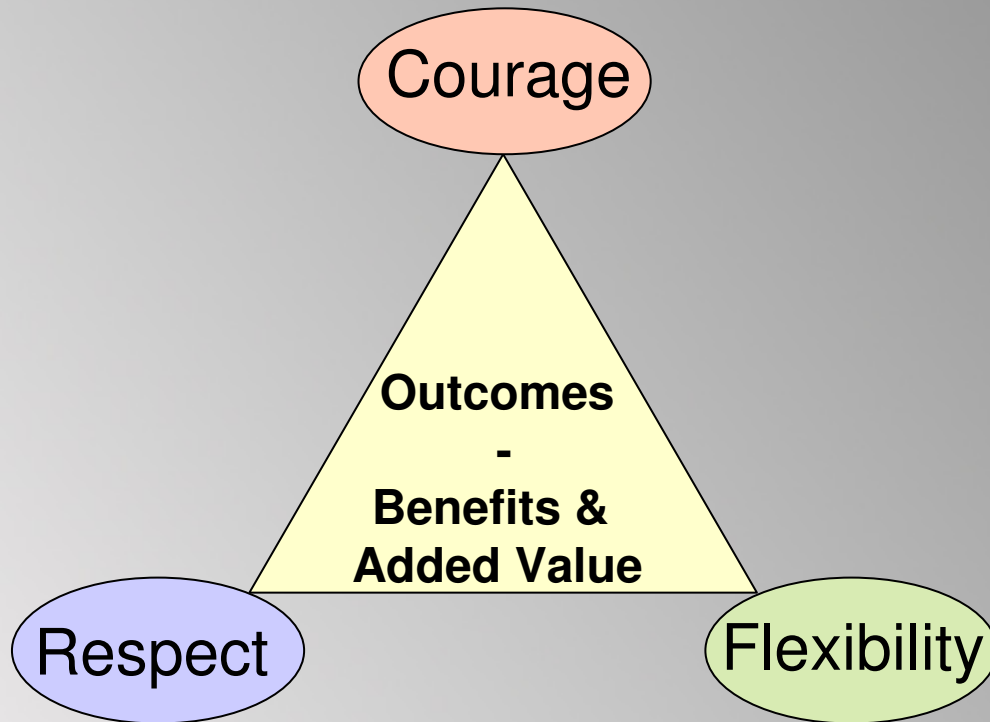


Behaviours of Excellence

- Responds to the specific context of the project or situation, the team, the specific stakeholders, and their expectations
- Self-validates their professional choices in the moment
- Integrates quality assurance into the analysis, referencing back to the project context
- Understands industry context, and is risk-aware, but not risk-averse



Values of Excellence



You can help !

*Participate in research
to further our understanding of Expert performance*

- **Fill in the front of the card with your:
first name, mobile number and/or e-mail address**
- **Sign to consent to be contacted**
- **Look for the Black Circle logo in the break-out area**
- **Drop the card in**

Don't forget to ask for your copy of a reference card that maps all the Quality Characteristics to the BA techniques and activities.



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