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Q4 2021

BA DIGEST



- The Other Side of a Business Analyst
- Facilitation in the “Next Normal”
- Business Analysis & The PMO
- To Gamify or Not
- And much more …

Your regular round-up of useful BA content

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Welcome

Welcome to the Q4 edition of *BA Digest*. It's often said that 'the pace of change is getting faster', and organisations increasingly need to adapt quickly to their environments. As a community of analysts, there are increasing demands for us to help our organisations quickly determine the best direction, and deliver change in an experimental way that means it's possible to learn and adapt as we go along.

BA Digest is no different. Just over a year ago we carried out our first big experiment. We pivoted from an e-mail based newsletter, to a PDF magazine. This proved to be a far more successful experiment than we ever could have imagined, circulation has increased by nearly 40% in that time! However, it's always dangerous to sit still…

With that in mind, we have two experiments running at the moment. The first is a ***jobs page***. We offer FREE job advertisements to organisations that agree to disclose the salary, the location and agree to give feedback to anyone who gets an interview. We like to think of this as a place to advertise great BA jobs to great BAs (if you're reading this, you're a BA who is interested in professional development… which is exactly what most employers would want!). You can find this on page 50.

We're also pleased to announce a new experiment: "Viewpoints". Perhaps you'd like to comment on an article that somebody has written, or put forward an idea of your own. Or maybe you want to make a public 'shout out' to celebrate a colleague's work? Well, now you can! Check out the 'Viewpoints' section on page 20. Assuming some people actually *do* write in, we'll include this section in the next edition.

Finally, please don't forget that we are *always* looking for content for BA Digest. You *don't* have to be an experienced writer, we proof-read and copy-edit all articles, and we'll help you through the process if you need it. All you need to start is a good idea. You can submit your article idea at: overto.link/write@digest

We hope you enjoy BA Digest. And if you do, be sure to pass a copy on to your colleagues, and encourage them to subscribe too!

Adrian

Adrian Reed
Principal Consultant, Blackmetric
Editor of BA Digest

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Facilitation in the "Next Normal" - Author Interview

Penny Pullan

A lot has changed in the last couple of years, and virtual and hybrid meetings and events are more commonplace. Facilitation is a core skill that every BA should have, and it's crucial to flex to the context. We caught up with, well known international speaker, consultant and author of many books including 'Making Workshops Work' to get some tips.

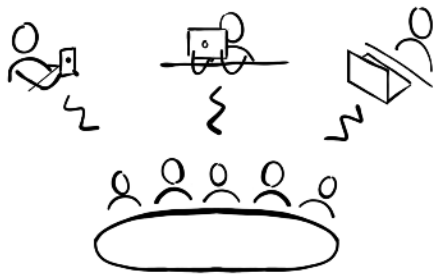
Penny, you recently wrote a book about workshops. What inspired you to do this?

I learnt the hard way that BAs need superb facilitation skills. It was nearly 20 years ago and my workshop was heading towards being an unmitigated disaster! Luckily, I asked for advice and followed it and so the outcome was achieved, but it wasn't much fun. A lot has changed since those days. I've spent many years learning about facilitation theory and practice all over the world and have trained hundreds of people in how to use this to become even better at workshops. So many BAs are expected to run workshops with very little training or support in facilitation, if any, and so I decided that I really ought to write this book and hope that it would help BAs and others all over the world to get better at workshops.

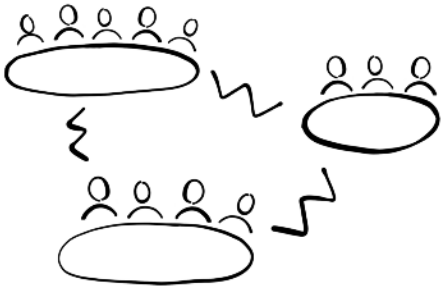
Throughout the book, you discuss real-world, virtual and hybrid meetings. For the uninitiated can you explain the difference between 'virtual' and 'hybrid'?

In my Virtual Leadership book, I define virtual as where at least one person is remote, although through the pandemic, I've noticed that people tend to use virtual to mean that everyone is remote from one another. 'Hybrid' is the particular case where some are together in a room (or rooms) and some are joining from afar via technology. A picture from Chapter 4 of my Making Workshops Work book shows three different versions of hybrid environments:

a) One physical room, plus virtual individuals



b) Many physical rooms, connected virtually



c) A combination of a & b

What are some of the particular challenges with 'hybrid' meetings, and how can they be overcome?

The biggest challenge is the lack of a level playing field for participants. This means that participants have very different experiences of the meeting. Those in the room have a built-in advantage: they can glance around the room and take in the body language of everyone there and pick up on the nuances and dynamics of conversation. They can chat in breaks over coffee or by the water cooler. This means that the first step to overcome the challenge is to level the playing field, reducing the built in advantage for those in the office. One way to do this is to ensure that everyone joins virtually. Another way is to have a strong physical reminder of all of the remote people in the room. Combined with a 'remote-first' policy, where participants not in the room are asked for input before others, this can go some way towards levelling the playing field. In-room buddies for each remote participant can help too.

What about conflict? With 'in person' meetings, where people are in the same physical room it's easier to spot cues such as body language. How can we (a) spot and (b) navigate through conflict in a 'virtual' or 'hybrid' environment?

First of all, we need to know that conflict is something that is absolutely part of projects and every BA should expect it and know how to deal with it, rather than dread it and try to avoid it. Given that conflict is difference, with added tension, we know that this will arise on

every project! Task and process conflict, where people disagree on how to go ahead, will usually resolve with dialogue and listening. This greater understanding then usually leads to better decisions, so don't be frightened of these types of conflict.

How can we spot conflict in a virtual or hybrid meeting? By being aware that it is likely and making sure that we are looking out and listening out for it. Have your antennae out and expect it, then you're likely to pick it up early and be able to work with it. Listen to words that people are using. Notice body language and facial expressions. Get people used to sharing how they really feel…

Relationship conflict can't be sorted in a meeting or workshop, so don't expect to do this. Instead, keep those who can't stand each other apart (perhaps virtual/hybrid helps here?) and get on with the work.

What do you foresee as the biggest skill BAs will need in the 'next normal'?

I think that facilitation has got to be pretty high up that list, along with listening. If you can facilitate a group and work to serve the group, designing engaging sessions for your participants, then this will be effective whether you are hybrid, virtual or in-person. I find that the sort of facilitation skills that I describe in my book work beautifully for smaller sessions, from designing for collaboration through to delivering engaging sessions. In the next normal, people are not always going to be in the room and so BAs need to be able to handle that too.

Thanks for taking time to answer our questions, Penny! Where can people find out more about the book and what you do?

To find the book, go to your favourite bookseller (online or offline). The Amazon links are UK: amzn.to/2UzLqFf USA: www.amazon.com/Making-Workshops-Work-Creative-collaboration-ebook/dp/B094W793ZX I'm passionate about BAs developing facilitation skills as it is transformative! You might like to join one of my learning labs to help you improve, especially if your company hasn't supported this in the past. I run these through www.makingprojectswork.co.uk but you can also connect with me as the only Penny Pullan on LinkedIn (let me know you've read this). BAs might also like my annual virtual www.basummit.com (which is free to join). My previous book, now also a bestseller due to the pandemic, is: 'Virtual Leadership: Practical strategies for getting the best out of virtual work and virtual teams', available from www.koganpage.com/product/virtual-leadership-9780749475963

I'm on Twitter too, @pennypullan

Formerly a BA, Dr Penny Pullan is now an expert in Virtual and Hybrid Collaboration. She's written five books, plus articles for publications (Forbes, CEO Today, plus BA Digest!) Penny consults and mentors people grappling with the challenges of our virtual and hybrid world, to enhance collaboration, confidence and effectiveness.



Process Improvement (Six Sigma)

Nnenna Stevenson

(Originally published on sapphirestevenson.com. Republished with permission.)

There's a common belief that IT is the solution to every business problem. However, having worked in the industry for almost a decade, I can assure you that it is a misconception; and this, in truth, is why Business Analysis exists— to confirm whether or not technology could solve an identified business problem by performing Root Cause Analysis (RCA) such as Problem statements, Ishikawa Fishbone Diagrams and 5-Whys techniques.

I was once contracted to analyse a company's current system. The managers complained that the current system was lagging and asked that I recommend a new system. But before I jumped onboard the "shiny new system" train, I conducted an RCA, which showed that even though the current system was bad, a major problem was with the current process— it was just as bad. Besides, it's often more cost-effective to improve a process than to build a new system.

The RCA I had conducted showed process flaws such as variations in services, as different parts of the company

worked differently and in silos, giving the end-consumers varying user experiences. Therefore, the system that had been built for one goal, was being forced to achieve more, due to the different ways of working in the company.

What is Six Sigma?

Six sigma is a Problem Identification, Quality Assurance and Process Improvement framework, which when applied accurately, promises 99.9996% accuracy, which translates to about 4 faults/flaws out of 1 million opportunities. This means that about 4 out of 1 million Starbucks coffees will be of low quality; that about 4 out of 1 million cars will be sold with a defect and that you can be sad for only 4 days out of 1 million days (I wish! Six sigma doesn't work on humans but you get the concept).

How is Six Sigma Applied?

Say I got contracted by Royal Mail (RM) for a Business Improvement project for an existing problem. I would apply Six Sigma:

- Existing process: I would use DMAIC (Define, Measure, Analyse, Improve, Control)
- New process: I would use DMADV (Define, Measure, Analyse, Derive, Validate)

D = Define

This is where I would describe the problem on the ground using techniques such as Problem Statements, or Business Scenarios. The aim is to capture the What, Why, When, Where, How it occurred, How often it occurred, in as much detail as possible. Another technique that can be used is the SIPOC, which helps to give a high-level view of the target process to be worked on, as well as to understand who is involved in the process (for further questioning). SIPOC represents **Supplier** (who brings an input that triggers the process), **Input** (the actual input), **Process** (what happens to convert the input to output), **Output** (the result after the conversion), **Customer** (the recipient of the output). Using the Royal Mail example, my SIPOC would be:

Supplier	Input	Process	Output	Customer
Sender	Letter	Drop-off at Post-box/Office	Incoming Letter	Royal Mail
Royal Mail	Incoming Letter	Sort, Transfer & Deliver	Outgoing Letter	Recipient

Due to the above, I know that I must collate pain-points and expectations from the Sender, Recipients, Royal Mail and that I must inspect the Pick-up, Sorting, Transfer and Delivery processes for flaws.

M = Measure

At this stage, the focus would be on capturing as much data as possible using techniques such as Observation, Shadowing, Gemba Walk (experiencing), surveys, interviews and focus groups. The aim of this stage is to document work breakdowns such as Flowcharts, Value Stream Maps (VSM) and preferably a Process Flow (using BPMN).

With the Royal Mail example, my aim would be to document data such as, how many staff work daily, how many items of post come in/go out, how long it takes to move an item of post from sender to recipient, how many contractors work, number of drivers, available time, how long it takes mail from London & Scotland to get to the Manchester branch for sorting, number of customer complaints, etc.

This is the evidence I need to back-up any transformation that may occur in the future, hence the reason this data is crucial.

A = Analyse

This is the stage where I would try to understand, gain insight into or make sense of the data to identify trends. An example of things I could notice is that deliveries take 4 days (average) during the weekends & 2 days (average) during weekdays (due to less staff working on weekends), that RM spends a lot of money on contract staff, that there is low staff morale due to heavily manual sorting processes, that mail from London and Scotland take too long to reach the Manchester branch, etc

I = Improve

Here, I would have sessions with Solution experts on identified problems to provide solutions such as buying more machinery to reduce the heavily manual process, identifying a new warehouse closer to London and Scotland for sorting, offering staff more incentives for weekend shifts so RM spends less on contractors, reducing staff participation on less busy days like Mondays (as no post is received on Sundays).

I would perform a Business Transformational Risk Assessment (BTRA) to identify potential risks that might negatively impact the roll-out of the new process. This could include identifying staff who may lose their jobs, and arranging for them to be moved to another section.

C = Control

At this stage, I would identify influencers in the company and make them the process owners, which would encourage their followers/friends to welcome the transformation project brewing. I would come up with strategies to ensure that the process doesn't deviate from standards. I would identify Key Performance Indicators to

allow the company to track and monitor the process, in order to easily identify when new improvements have to be made to sustain the process (Agile thinking).

Process Improvement is one of the most exciting and rewarding parts of Business Analysis because you get to see immediate benefits to the business through increased staff morale, more competitive edge, cost-savings to the business and greater customer experience.

As a BA, it is your job to challenge the status quo. Always have evidence to back up why you are making a recommendation— it should never be gut feel, especially when money will be spent on the solution. An ethical BA is a capital micro-manager, which means you must ensure to explore other solutions first, before accepting that technology is the answer.

Nnenna's a Senior BA, Product Manager and Product Owner, educated in Master's and Bachelor's of Computing, certified in BCS BA Practice, CBAP®, PS Product Owner, and TOGAF Enterprise Architecture with over 9 years' experience working within the IT project and agile software product delivery environment. Connect with Nnenna on linkedIn.



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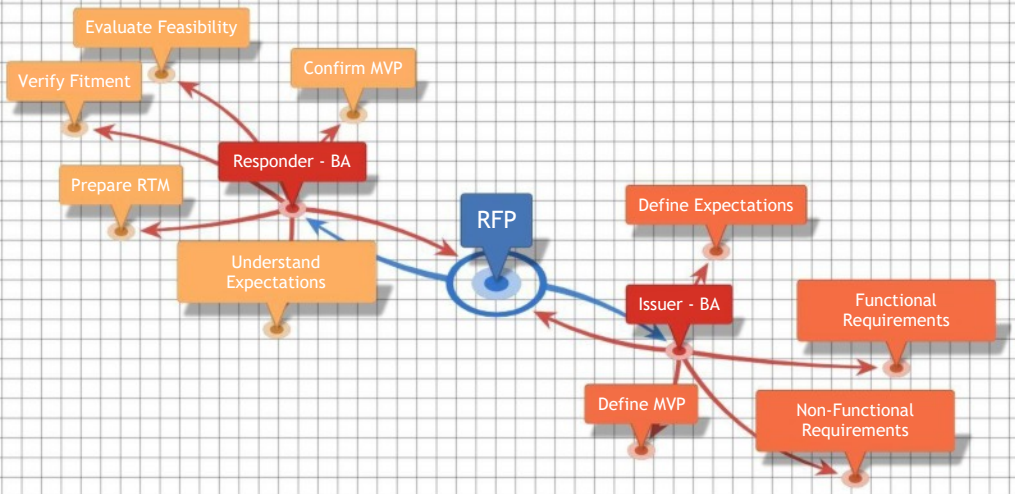
Business Analysts role in the RFP process (Request for Proposal)

Suhas Kerurkar



Business analysts are the least decorated warriors in the RFP process that defines the functional expectations and confirms the feasibility.

RFP is a request in which the issuer asks responders to submit proposals demonstrating how a product or service they offer can solve the issuer's requirements. The key stakeholders of any RFP are executive managers along with program managers, marketing managers & subject matter experts (SME). Usually, business analysts are part of the SME's team on both sides of RFP i.e. issuer and responder sides.

Here are the high-level responsibilities which business analysts perform on either end of RFP.

Issuer Business Analyst

BAs provide the specialised expertise to define the expectations, functional/Non-functional requirements, and define Minimal Viable Products.

1. Define expectations: This is the most critical area of any RFP where a BA has to understand the need for RFP and properly document the same. This stage sets the base of the RFP.

2. Functional Requirements: This is 'business as usual' for almost all business analysts however this is quite different from the detailed requirements elicitation and analysis which BAs do for projects. The requirements at this stage could be at the concept level to check the functional availability in the market and will require forward-thinking to ensure product viability over a period of 5 to 7 years. It's advisable to provide as much information to vendors as you can as part of requirements that covers existing functionalities as well as new expectations.

3. Non-Functional Requirements (NFR): Key technical requirements along with in-house capability details need to be highlighted as part of the NFRs. All NFRs need to be documented clearly by their issuers with as much information as possible. This might include categories such as: performance, volume, compliance, certifications, configurations, integration, legal, privacy, reusability, response, stability, security (Note this is not an exhaustive list.)

4. Define MVP: It is unlikely that any single vendor will be able to entirely meet issuer's RFP expectation with available products or services that they offer. Considering this limitation, the issuer has to define the MVP (Minimal Viable Product) with which the issuer wants to go ahead for evaluation. The requirements outside of MVP can be followed by a proposed plan from the vendor. In other words, RFP should state the requirements in 2 categories as MUST HAVE and GOOD TO HAVE.

Responder Business Analyst

BAs from the vendor side will respond to the RFP, evaluate it and respond with the product's capabilities showing alignment against the client's expectations.

1. Understand Expectations: Another crucial phase of a RFP is where a business analyst from the responder side has to analyse and understand the expectations set in the RFP. The BA has to understand the expectations and clearly articulate how and whether requirements mentioned in the RFP are part of the offered products or not.

2. Prepare RTM: Once the responder decides to submit the RFP, business analysts will typically prepare the RTM (Requirement Traceability Matrix) between the functional/non-functional

requirements mentioned in the RFP and the product capability available.. This document helps to clearly articulate the feasibility of RFP success.

3. **Verify Fit:** The business analyst has to review and confirm the extent to which the requirements fit based on the RTM. Fitment can be categorised as full fit, fit with minor enhancements or needs substantial development.

4. **Evaluate Feasibility:** Product implementation feasibility has to be revalidated against non-functional requirements and feasibility should be confirmed for implementation.

5. **Confirm MVP:** The final stage for the business analyst is to confirm the MVP criteria is met before management responds to the RFP.

What are your thoughts on the role of business analysts in the RFP process and what are the areas which you would like to add to the list above?

Suhas Kerurkar is a consultant leading the BA team for a major middle east bank. Suhas has extensive experience in the banking industry with integration and transformation changes. Suhas's strength is applying his knowledge of Integration, business analysis and agile to help organisations deliver solutions above expectations.

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Risk is definitely not a FAD, and definitively not a topic going away. Just like other topics that have become more and more visible over the years, such as data analytics, and business architecture to name a few, you definitely cannot sleep on risk. If you really think about it, almost every process that is executed has some level of risk associated with it. The hope is that there are controls in place to mitigate the risk.

As members of project teams who work to develop solutions to solve business problems, often we are so focused on finding the right solution, we may not think holistically on what risks a particular solution may pose to the organisation. Furthermore, is that risk a risk the business is willing to accept, or prefer some other action or discussion to occur.

I remember when I first started working on projects as a project manager, developer, and/or business analyst, the main risk discussed was the "triple constraint". The triple constraint is a focus on scope, time and budget in regards to the project as a whole. There is a focus on not allowing scope creep, missing deadlines, and going over-budget. However, risk is more than that. There are many different types of risks to consider as solutions are considered, or chosen, to meet business needs. Such as, operational risk *(risk associated with the company's operations),* reputational risk *(a negative event that may threaten*

an organisation's reputation), credit risk *(risk of default on a debt)*, financial risk *(risk of losing money*), and compliance/regulatory risk *(risk of non-compliance with laws/policies that could result in fines or legal actions)* to name a few. When building solutions these items need to be considered.

For example, let's say you build a mobile app solution which allows individuals to quickly access all of their different email accounts in one place. The mobile app provides a phenomenal customer experience as customers rave about how it's so much easier to log into one interface than into multiple. You have multiple customers downloading the application and loving the experience. Then, 30 days later the customer is informed that in order to keep using all the functionality the application offers they have to pay a monthly subscription. Now, when the customer originally downloaded the app, this particular information was not disclosed. Customers thought the app was free with no strings attached. Customers were not aware there was a 30-day trial period unlocking all the features, and after 30 days some of the functionality would no longer work, unless they paid for the subscription. Here is where the risk comes in. Due to this experience, you may have imposed reputational risk, financial risk, and potential compliance/regulatory risk to the organisation. Customers are now upset after the 30 days and the organisation is receiving bad reviews, and you are losing potential revenue because you didn't disclose upfront all of the terms of using the mobile app. The focus was getting a product out the door to beat the competitors to market, or to stand out. It stood out alright!!! Just not in a good way.

When thinking of creating solutions to meet business needs, risk has to be a part of the conversation. You do not want to build solutions that pose risk to the organisation though you may have successfully installed the solution. Though the need may appear to be met, once risk enters into the equation, it may very well not be met at all.

There are many different ways to uncover risks, but here are a few ways to get you started as you continue to transform your organisation:

1. **Process Mapping** – process mapping is a great way to uncover risks, and determine if there are controls in place to mitigate the risk. As you review processes you can analyse each step to determine what could go wrong during that step. After, determining what could go wrong, you then determine what controls do you have in place to (1) stop something going wrong before it does *(preventative control)*, (2) advise someone that something has already gone wrong and it needs to be fixed *(detective control)*, and/or (3) put a control in place after analysis of the detective control, and the root cause has been determined *(corrective control)*. Process mapping is one of the most powerful techniques that allow you to uncover a lot, and normally a good first place to start.

2. **Failure Modes & Effective Analysis (FMEA)** – In addition, leveraging an FMEA to evaluate the process is a great way to have one centralised location to capture where failures may occur in the process, how severe those failures are, and how frequent those failures may occur.

3. **Past Audits** – if your organisation has had audits conducted in the past, this is another great place to review the audit materials to determine where risks have been found, and if there were sufficient controls to mitigate the risks. These reports can provide a lot of insight on where in the organisation problems have arisen in processes.

4. **Observation** – observing processes, and being a part of processes that are conducted in the organisation, can give you a hands-on experience to help you identify where risks may reside in the organisation. Put yourself in the shoes of the customer and determine if the solution you are interacting with is the type of experience you as a consumer would desire.

As you continue to build world class solutions, consider what risks the organisation may pose, and what controls need to be put in place to mitigate those risks. Risks are not necessarily a bad thing if controlled correctly, and depending on the type of risk being discussed. However, risks can become VERY bad when not identified and addressed appropriately.

Paula is a Certified Business Analyst, Master Life Coach, Certified Diversity & Inclusion Manager Coach and Career Development Coach, with over 20 years' experience working in corporate America in varied project roles/industries, while successfully running a consulting business that focuses on mind, body and soul. Find out more at www.paulaabell.com.

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Part 2 Ontology: What Are the Things That Are out There?

Nick de Voil

Imagine seeing a photograph of a match between Tottenham Hotspur and Manchester United. In it, a midfielder is controlling an aerial pass in front of a section of the crowd. Depending on their interests and background, different people seeing this might notice, for example:

- That this is a photograph of a sporting activity which they despise
- That this particular player is playing in this game
- The body position of the player, and their apparent skill level
- The "strip" being worn by the player
- The position of the referee
- That the supporters are those of one particular team

- That the supporters are wearing one particular type of shirt
- The facial expressions of the supporters
- Whether the supporters are seated or standing
- The messages on the advertising boards
- The technical quality of the photograph

The person who sees one of these things may not notice any of the others and may not be interested in them even when they are pointed out. The same applies in business situations.

In any problem situation, each of the people involved (we often refer to them as *stakeholders*) has their own subjective "take" on things. As observers of the situation, do we take each stakeholder's subjective viewpoint seriously enough? Do we treat it as something to be sought out, really understood and carefully analysed on its own terms?

We often automatically create our own synthesis of other people's perspectives, and then go on to assume our version is the objectively true one. This is normal human behaviour, but we will create better solutions if we resist the temptation to think this way, especially in the early stages of a project. Group Construct Analysis helps us to bring subjective aspects to the surface and keep them there.

In the first article in this series, we took a first look at Personal Construct Psychology, a theory used by psychotherapists to understand individuals and what goes on in their minds. We saw that a person's *construct system* is a set of ideas (*constructs*) that make up the way they go about understanding the world and acting within it. Constructs are bipolar: each one is made up of a thing and its opposite. Each construct is more or less closely related to other constructs in the system. This can be shown graphically using a *construct map* which relates the constructs to each other with lines or arrows. These connectors can be used to show a range of relationships between constructs.

The nature of a construct is partly a matter of the types of relationship in which it can participate. When we look at a construct map, we often find that we can see different regions, each emphasizing a particular type of relationship and giving the diagram a distinct flavour. Let's start by looking at the most fundamental flavour: *ontology*.

Ontology answers the question: what are the things that are "out there" in the world? Everyone has their own answer, even if they are unaware of it. Each person sees certain things and ideas in the world, and makes sense of them using their own set of patterns, such as categories, hierarchies, orders and rankings. We can show the constructs and their relationships on the map using a simple arrow notation and labelling the connections between constructs.

One basic type of relationship is a ranking – making one construct superordinate to another. This can mean various things, as shown in the illustration.

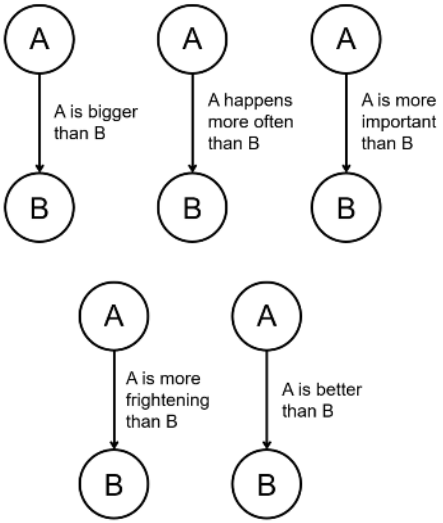

Figure 1: Ranking (constructs shown as circles for simplicity)

What we're trying to do here is reflect the relationships that people really have "in their heads". How exactly relationships might be represented in people's heads is a matter of intense debate and disagreements among psychologists, but I believe we can avoid going too far wrong if we keep it as simple as possible and avoid constructing elaborate referential structures. For example, a "resemblance" relationship is useful:

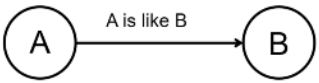

Figure 2: Resemblance

Two more commonly occurring types of relationship – inheritance and composition – will be familiar to object-oriented modelling practitioners.

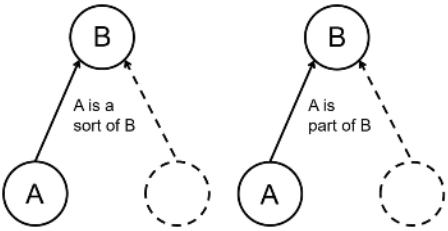

Figure 3: Inheritance and composition

Finally, we often come across the idea of things having a sequential order.

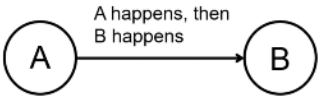

Figure 4: Sequence

This type of construct map has similarities to a couple of other well-known techniques: data model diagrams (such as entity models, class models and concept models) and mind maps. The key difference is that construct maps are focused entirely on understanding the subjective worldview of one or more people. They are fluid and tentative. A data model is an attempt to identify or design the underlying structure of concepts and their interrelationships objectively and correctly, using a rigorous set of rules. A mind map is a way of bringing clarity to an objective body of knowledge by imposing a structure on it which can be grasped by the maker of the diagram.

The map describing a stakeholder's construct system should only show things which we have heard them mentioning. We can elicit the information by interviewing and observation, paying very careful attention to exactly what is said. Where appropriate, we can "drill down" into an individual's construct system by using *repertory grid analysis*, which we will look at in a future article.

Nick is a director at De Voil Consulting. He specialises in helping organisations create people-oriented systems, products and services. He has trained thousands of professionals in business analysis, user experience, systems design, project management and agile development. Nick is author of the book "User Experience Foundations".

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VIEWPOINTS

Would you like to respond to an article you've read in BA Digest? Or perhaps you have an idea that you'd like to float with the BA community? Or maybe you'd just like to give a 'shout out' to a friend or colleague on their good work.

We're starting a 'your views' feature in BA Digest. You can submit up to 150 words, and we'll publish a selection of those submitted in the next edition.

Submit your viewpoints at:

overto.link/viewpoint@digest



Questioning the Unquestionable

Adrian Reed

One thing you probably don't know about me is that I was a backing dancer in the video for the 2001 hit 'Survivor' by Destiny's Child. One of the reasons that you probably aren't aware of this is that it isn't something that I talk about much as 2001 seems a lifetime ago and I've made a major career shift since then. However the second (and most important reason) that you probably don't know this about me is that it absolutely isn't true. Literally none of it.

That's right, I'm sorry to disappoint you, but I *didn't* make the career change from backing dancer to business analyst (if only). Yet, there was probably part of you that read that opening line and thought 'wow, backing dancer, I *wasn't* expecting that, how interesting!'. After all, it is a bizarrely specific claim isn't it? And you'd be forgiven for thinking "what *possible* motive would Adrian have to try to convince me that he was in a music video if this isn't true?".

This is actually one of my go-to 'bluffs' for those unimaginative ice-breakers where you have to list two truths and one lie. I've even created an entire backstory for it (and again, I cannot stress this enough: *this is not true and it is a complete bluff)*:

- It was filmed in Pinewood studios, in the same sound stage as James Bond
- This is because it's one of the few sound stages that has a tank of water

that can be used to create the illusion of being in the Ocean

- Don't believe me? Google it! And look at the video, there's an ocean…

- I'm towards the back. We were all wearing 'cargo-style' trousers

However, while the *bluff* isn't true, some of the accompanying spiel *is* true. Some scenes of James Bond films *were* filmed at Pinewood studios. The video *was* set on an island in the Ocean. The dancers *did* wear cargo trousers. These would be weirdly specific things to know if it wasn't true, wouldn't they? I mean, why on earth would I know these things if I *wasn't* an expert backing dancer who worked with Destiny's Child….?

The Logical Fallacy In Action

This is where we can uncover a logical fallacy. Just because certain accompanying facts are verifiable and true, doesn't mean the premise of an argument (or a statement of fact) is true if those do not actually relate to it. Sadly, knowing that Pinewood studios exists doesn't make me any more likely to have starred in a James Bond film, nor does it make it any more likely that I'm friends with Beyoncé. Yet dress it up in the way I mentioned early, and it might seem that it does…

Now, you're probably thinking 'how on earth does this relate to business and business analysis'. Well, one key thing that we do day in day out is *help people make decisions.* Part of this involves weeding out the noise, unpacking and analysing arguments and asking challenging questions. Sometimes, a stakeholder might create an argument that isn't an outright bluff, but it has similar characteristics. It has a massive logical leap which appears smaller because of the smaller chunks of (unrelated) verifiable information. This might be deliberate (subterfuge) or innocent (perhaps they've been misled themselves). Here's a few examples:

- **The copy & paste:** "The XYZ method worked in [an organisation in a different country ten years ago] and it worked really well. We should implement it here! (It's verifiable that the method was used elsewhere, and the success might be partly verifiable… but why should we conclude that the success is repeatable in a completely different context, culture and set of conditions?)

- **The elitist:** But *all* 'modern' organisations are [doing whatever], the way we do things is so old, and if you resist it you are out of touch. (Really? ALL organisations are doing it? What does 'modern' mean exactly? Even if that was understood, it might be verifiable that *some* are using whatever approach/method… but are others doing something else? And how do the success rates compare?)

- **The bandwagon:** "This solution is used by X% of the FTSE100…so we should use it". (And how effec-

tive is it? Do the 'users' actually like it? Will it meet our needs? And, assuming its not a commodity, could this actually be an opportunity to differentiate? Again, it *might* be the best option, but doing something just because others do it doesn't sound like a sensible strategy)

Of course, there's much more that could be written here about logical fallacies, cognitive biases, but I wanted to keep this article light. The key point is that as business analysts sometimes we have to question the seemingly unquestionable. We have to ask the 'difficult' and 'wrong' questions *with rapport and curiosity* that make us unpopular in the short-term, but popular and respected in the long term. Respectfully challenging, in a way that leads to better outcomes, will win us friends in the long term.

But, if you remember nothing else from this article, remember I ***wasn't*** a backing dancer in that 2001 video…

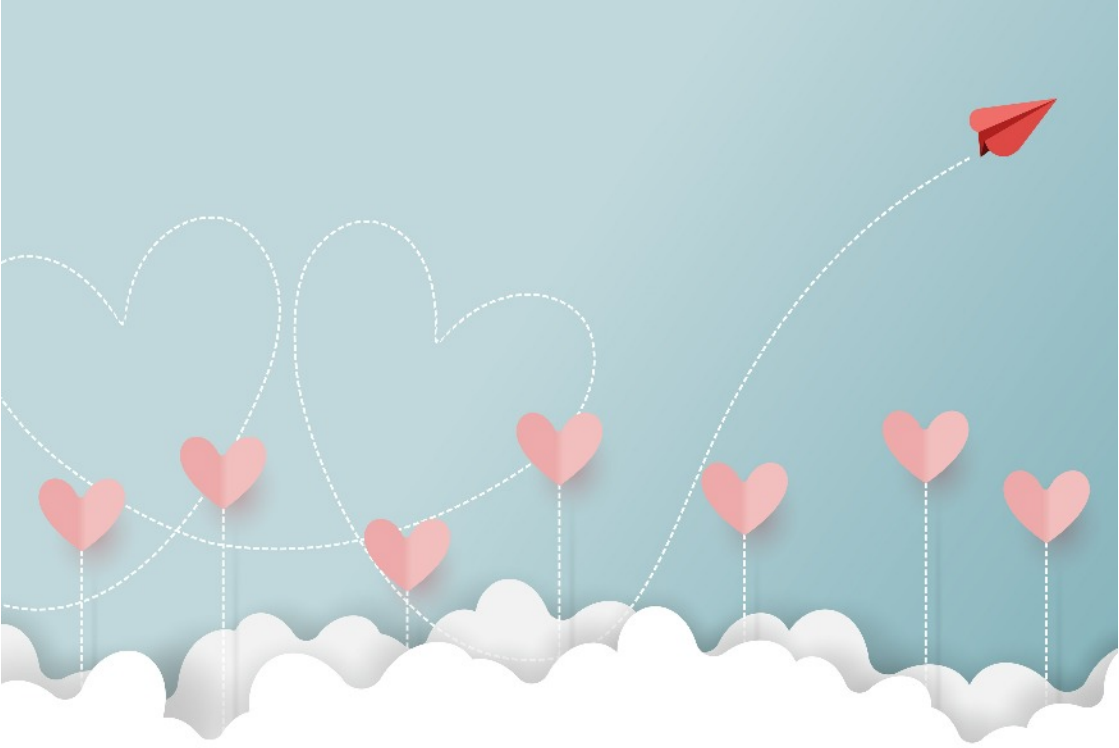
… or was I?

Adrian Reed is Principal Consultant at Blackmetric. He speaks internationally on topics relating to business analysis and business change. Adrian wrote the 2016 book 'Be a Great Problem Solver… Now' and the 2018 book 'Business Analyst'.

Connect with Adrian on LinkedIn

Check out Adrian's blog





Love in the Time of Covid - (YBA Blog Competition)

Joanne Fahy

It was a warm June day back in 2017 when I recognised the sinking, sickening feeling that was taking hold in my stomach as I listened to a colleague describe their role as a Business Analyst. I'd had stints in different roles and had always felt like something was missing, that I hadn't quite found the role for me. As that feeling took hold, I realised I had fallen madly, deeply, passionately in love. I had found my calling and knew its name, Business Analysis.

It was another 2 and a half years, and a sector shift, before I could act on this crush and embark on a Business Analysis apprenticeship. I was passionate about learning and putting my newfound skills to the test when suddenly, COVID hit. As my day-to-day work life moved off-campus to online, I was now learning how to be a BA and a virtual BA, at the same time. Much like trying online dating for the first time, adapting my techniques to fit virtually whilst honing new skills was a challenge.

So, for anyone new to the discipline, getting back into the saddle, or long-time admirers making the jump like myself, I've put together my tips for taking the first steps towards becoming a virtual BA:

1. **Don't overthink your techniques** – we all go back to our favourite opening lines, no matter how many first dates we've been on, and moving online needn't be any different. Tried and tested techniques that worked a treat in the office can be adapted to be just as successful, if not more so, online using interactive tools such as Miro or Mural. Although it can be daunting moving to virtual post-it notes, don't overthink it.

2. **Ask lots of questions –** now this seems self-explanatory, what BA doesn't ask lots of questions? BUT questions that could be prompted by slight changes in body language which would have been noticeable in person, can be a lot harder to pick up over a virtual session. No question is a stupid question!

3. **Debrief with friends –** get feedback from colleagues. Just as you might ask for romantic advice from loved ones, discuss your experiences with colleagues and get their perspective. Sometimes insight from an impartial party can give you the golden nugget you've been waiting for.

4. **Be brave, put yourself out there –** As the old saying goes 'you've got to be in it to win it'. Approaching the unknown online can be much more daunting than having a quiet conversation in person, but if you don't ask you don't get. In my experience, BA colleagues are more than happy to lend you their ear to discuss issues, ask for advice, or simply ask those burning questions. Networking online is easier than it's ever been, with the YBA network on LinkedIn, exciting online events such as Blackmetric's BA Fringe, and a whole host of free webinars and workshops available through BCS and IIBA, it's an excellent time to get involved and join in the conversation.

With adaptability, analysis, and creativity being 3 of the top 20 skills in demand in the workforce, it's certainly the right time to investigate and pursue a budding romance with Business Analysis. (see www.indeed.com/career-advice/finding-a-job/in-demand-skills)

(This blog article won the hotly contested Young Business Analysts (YBA) blogging competition.

To find out more about the YBA group, check out the LinkedIn page)

Jo is a passionate business analyst who regards her 'professional nosiness' as one of her biggest strengths and particularly enjoys engaging with stakeholders, you can contact her on LinkedIn

(www.linkedin.com/in/joanne-fahy)

To Gamify or Not: A Guide for Product Teams Pondering the Value of Gamification

Oluwakorede (Olu) Asuni



Let's gamify the journey/product, is a call I see made on a regular basis, in boardrooms of all sizes.

Often, if the decision to gamify gets workshopped further, it ends up being merely the aim to slap a wheel for customers to spin, or a wall to crush or some other gimmick to reveal a predetermined prize.

Whilst I am tempted to chuckle, most times, what is at stake is more important than chuckling, so rather, I do what I am about to do in this article: shed some light on the subject, philosophy, and best practices for successfully crafting effective gamification experiences that don't leave customers feeling gamed.

First, not all journeys, projects or products need gamification to succeed. A lot of products that will fail, will fail whether you slap a game on top of it or not. Bad products are bad candidates for gamification. Bad products should not and most do not scale – if in doubt, then humour me and point at a Ponzi scheme that has stood the test of time and whose victims have continued to recommend it to friends and family.

Second, gamification isn't exactly about gaming your audience into taking actions they normally will not take because it does not benefit them (and that only benefits you and/or your business). Rather the point of gamification is to nudge your customers or potential customers into taking decisions/actions

that will benefit them and that will allow you as a result to capture some value.

Additionally, gamification isn't about the gimmick being deployed – the wall being crushed, or the wheel being spun. It is about addressing the underlying motivation(s) or lack thereof in the mind of the customer on the journey leading to and going past the wheel spin or wall crush.

Gamification is about appealing to and marshalling core motivations in the audience with a view to driving the audience into taking specific actions which though may not be convenient, is the right action for the audience. Some argue, it is the lever to tip people over the line of completing important but difficult decisions.

So perhaps, a key starting point is to determine whether gamification is required to build stickiness in a product or not. A set of guidelines I have found useful are as follows:

1. **Establish the core vision of the product/project** – why are you building the product? What are the key goals it should achieve? If your primary answer is 'to make money' chances are gamifying the product will end up being (and seen as) a desperate attempt to make money without a recourse to how that may affect the customer. Indeed, even the most altruistic endeavour MUST pay for itself otherwise it runs the risk of running aground. But if the product does not add any value to the customer, then they are better off not built, not to speak of being veiled in a gamified experience.

   So how does your core vision answer the question: does the product deliver some real value to the customer? (Yes/No)

2. **Are there emotional barriers in the way of the customer adopting your product/service over others?** Will the citizen vote for the baker (for treats) and not the doctor (who prescribes bitter pills and knows a thing or two about public health)? (Yes/No)

3. To get the customers to select the doctor over the baker, which of the core drives in the Octalysis* gamification framework do you need to leverage (none, some, or all?)

4. Will allocating points, badges and the use of leader boards help mobilise the core drives you have identified in the previous step? (Yes/No)

If you struggle to honestly answer question (1), you may need to do some soul searching, until you can. Otherwise, a

decision to add elements of gamification to the product may end up resembling a pig with lipstick – customers will see through the efforts and will not bite, worse you may suffer reputational damage which may be tough to come out of.

If there are no emotional barriers for the customers to navigate, then making the right decision about your product or its objectives may come easy to the customer. As such, you may not need to add gamification elements to the product. Rather, go on and build an epic product that solves some real problems for the customer.

If however, there are emotional barriers – as is always likely to be the case – then it is important to understand these barriers, their underlying triggers and how these relate to each of the 8 core drivers identified by Yu Kai Chou in his Octalysis framework.

Finally, are the identified core drivers addressable without the overarching presentation and use of a wheel to spin or a wall to crush for points, or for badges, and/or inclusion on a leaderboard? For example, will clear, sincere and direct marketing communication help break down the emotional barriers? Or address the identified core drive(s)? If yes, then you may not need to add any element of gamification – rather just go forth and market to the customer in a way that reduces the resistance they may otherwise have.

However, if game mechanics are an absolute need, then proceed to craft an experience that uses points, badges, and/or leaderboards in a way that it nudges your target to take the decisions that are good for them or take actions that helps them create value and allows you to capture value as a result.

Remember, customers often eventually find out that they are being tricked, so resulting to trickery eventually comes back to bite you – if in doubt, ask the Volkswagen executives whose SUVs were found to be lying on emission tests.

Olu leads business analysis work for a fintech business based in South Africa. He fancies himself a polymath interested in morality and ethics, emergent technologies, and strategy. He's completing an MBA at the Henley Business School of the University of Reading and consults with small businesses and individuals about appropriate technologies.

Note:

*Octalysis is regarded by some gamification practitioners as master model for evaluating core motivations in users. You can read more about Octalysis here: https://bit.ly/3kfTG7X

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Business Analysis & The PMO: What Is the Connection?

Nicole Reilly



Back in May 2016, I wrote a short post about business analysis as a skillset for a strategic PMO. In that post I suggested that business analysis approaches could be applied by the PMO when looking to address the strategic alignment, prioritisation and selection aspects defined by P3O®.

PMO is often a confusing acronym for those not immediately involved in the profession; the "P" can stand for project, programme or portfolio, whilst the "M" usually stands for management and the "O" could be office, organisation or officer depending on whether a team or person is being referenced.

P3O® (a registered trademark of Axelos) describes Portfolio, Programme and Project Offices as "the decision-enabling and support business model for all business change within an organisation." These models require links into the wider organisational business model, and senior managers need to understand what value and benefits they will get from their investment; this requires a clear understanding of the problems to be solved or opportunities to be maximised by those proposing the implementation of a P3O® model.

I had been thinking about an update to my 2016 post for some time, particularly since earlier this year when the PMO Competency Framework was finally published – an initiative that had been in development for more than 3 years with much input from the practitioner community.

The PMO Competency Framework recognises four different types or "contexts" of PMO operations typically found in organisations today; project, programme, portfolio and Centre of Excellence.

- A **Project** or **Programme Management Office** is usually temporary, set up to support the delivery of a specific change initiative.

- In contrast, a **Portfolio Management Office** is a permanent construct established to support the definition and delivery of projects and/or programmes across an organisation, division, department, region or business unit as a collective portfolio of change initiatives.

- A **Centre of Excellence** is a type of permanent PMO which is focused on the definition of processes, templates and tools (standards) on behalf of an organisation which are applied across projects, programmes and portfolios alongside training and knowledge management. It may also provide strategic oversight, scrutiny and challenge across the organisational portfolio.

Portfolio Management Offices often incorporate Centre of Excellence functions, and it was this type of operation that I was thinking about as the "strategic PMO" in my 2016 post.

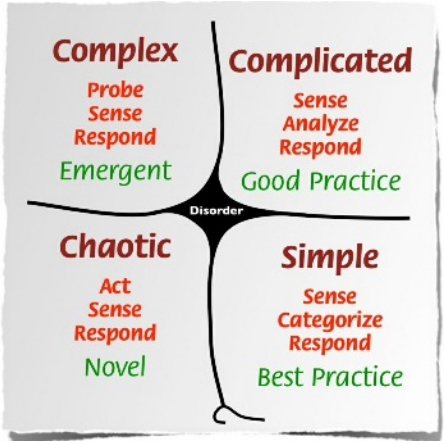
The PMO Competency Framework also defined six further competence frameworks relevant for PMO roles, one of which is Business Analysis - so business analysis IS now regarded as a relevant skillset for the strategic PMO!

Credit: Eileen J. Roden, Carol Hindley, Lindsay Scott, The PMO Competency Framework: by the profession, for the profession (United Kingdom: House of PMO, 2021). Used with permission.

Of the four competency domains listed by the PMO Competency Framework as applicable across all operational contexts, PMO Management and P3M Enabling are the ones that seem to align the most with my thoughts in the 2016 blog post.

The **PMO Management** competency is concerned with the full lifecycle of each office – set up, run, transform and close – plus the services that office provides, with a focus on value and benefits for stakeholders.

There is no "one size fits all" approach to PMO design; when establishing a PMO much emphasis is placed upon the environment in which that PMO will operate, to ensure that the structure and service provision is appropriate. Snowden's Cynefin Framework can help the PMO to improve its understanding of the operating environment by characterising the context so it can assess and respond appropriately.



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ramework#/media/File:Cynefin_framework,_February_2011_(2).jpeg -

In a Simple/Clear operating environment, stakeholders often have a good idea of the services they expect and there is a well-defined corporate governance structure to integrate with, along with optimal lines of communication and decision-making. Best practice approaches are often very suitable here.

Complex or Complicated environments usually require more interpretation and validation of stakeholder requirements before the range of services offered can be defined, whereas in a Chaotic environment the PMO may have to accept a higher degree of flexibility and agility around the services provided - at any given point the needs of its customers and what they perceive as valuable could evolve! Disordered environments are unlikely to recognise projects, programmes or portfolios as a structured method for change initiatives.

With reference to the Business Analysis Body of Knowledge (BABOK®), the Business Analysis Core Concept Model (BACCM™) and the Requirements and Design Cycle are both useful for those seeking to develop the PMO Management competency. The Business Analysis Core Concepts of Change, Need, Solution, Stakeholder, Value and Context are crucial elements to consider when designing a PMO; similarly the Requirements and Design Cycle illustrates how a requirement leads to a design for a PMO service (solution) which may then lead to the discovery and analysis of more requirements.

Some of the key skills required to undertake effective assurance activities as part of the **P3M Enabling** competency will be familiar to business analysis professionals:

- Active listening
- Asking powerful questions
- Communicate and present
- Critical analysis
- Solve problems
- Exercise professional judgement

A key outcome of assurance is providing confidence to sponsors and stakeholders that a change initiative is aligned to the organisation's strategic objectives – and remains so throughout the delivery lifecycle. Effective assurance activities are independent of any delivery organisation and should integrate with existing corporate governance structures.

Governance Frameworks ensure that appropriate stakeholders take decisions about whether to start, continue, alter scope or stop change initiatives which no longer align with those objectives. Those decisions will be based on the actionable insights derived from data and information gathered by a competent PMO professional, accompanied by the application of appropriate knowledge and wisdom.

The purpose of Decision Making - a core competency within the Analytical Thinking and Problem Solving category of Underlying Competencies in section

9 of the BABOK® – is described as "being effective in understanding the criteria involved in making a decision, and in assisting others to make better decisions." PMO professionals need to enable effective decision-making by ensuring that:

- appropriate stakeholders are represented in the decision-making process;
- those stakeholders understand the decision-making process and the rationale behind the decision;
- the pros and cons of all available options are clearly communicated to stakeholders;
- the decision reduces or eliminates uncertainty (risk), and any remaining uncertainty is accepted;
- the decision made addresses the need or opportunity, and is in the interests of all stakeholders;
- stakeholders understand all the conditions, environment, and measures in which the decision will be made;
- a decision is made.

Shorter prioritisation cycles and demands for increased visibility of the pipeline of initiatives show that expectations of the Portfolio Management Office to play a more strategic role are greater than ever as we deal with the impact of the global pandemic - and the changing business needs of all types of organisation regardless of size or geographical location.

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Nicole Reilly is an PMO professional of 25 years' experience across a broad range of industry sectors. She specialises in providing organisations with independent, pragmatic advice about project portfolio management (PPM) tools, focusing on the right fit for their business.

You can connect with Nicole on LinkedIn:

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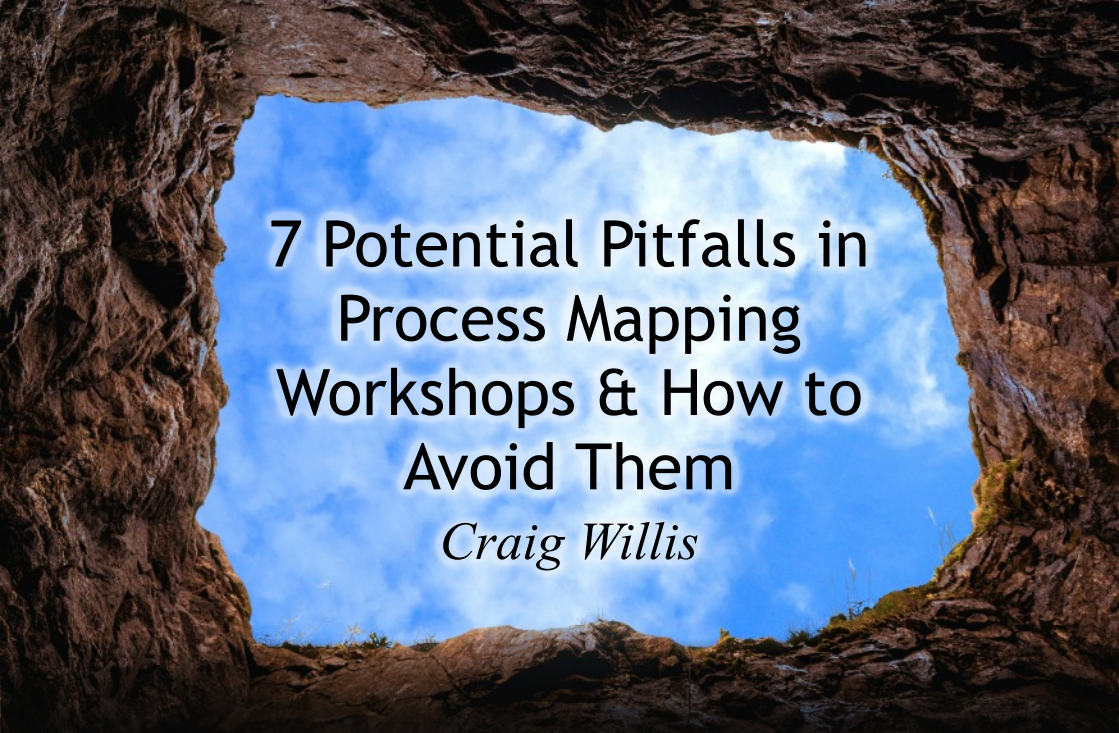

7 Potential Pitfalls in Process Mapping Workshops & How to Avoid Them

Craig Willis

As a business analyst, facilitator or process analyst you have no doubt run process workshops to gather information and build solutions to business problems. You have probably even experienced some of the unfortunate situations below in the past.

In this article I'll share the most common things that can go wrong during process mapping workshops and provide tips to help you overcome them. After reading this you'll be armed to win over the audience and ace your next workshop.

No Clear Purpose or Objective

Let's get this straight, you've invited people to this workshop but haven't given them a clear reason to attend? It always sounds obvious in hindsight, but this is very common. A meeting invite appears in your inbox, you're free so you click accept… Then you just turn up.

Without a clear purpose and objective people will turn up unprepared. You'll then have to use valuable time explaining why they are there and what you aim to get out of the session.

Don't be surprised if people can't answer questions or need to leave the room to grab documents and other information they should have brought along.

If you're going to the trouble of booking rooms and inviting people to give up their time make sure you also let them know why you're asking them in the first place. It only takes a minute and will avoid wasting time during the session.

No Ground Rules

You know how the meeting goes, everyone is talking over each other, someone is on the phone and anyone not talking is reading emails. It's tiresome and frustrating and a waste of everyone's time.

This is what happens when you don't set ground rules up front and get everyone to agree to them. Ground rules can be simple and it's all about getting everyone to agree that they are there to work together.

Example ground rules can include, but are not limited to:

- Set phones to silent
- Take calls outside
- One person talks at a time
- No question or idea is stupid
- Everyone is equal
- Park unanswered questions after 5 minutes

Create a slide or poster with the ground rules displayed and talk people through these at the beginning of every workshop. Make sure they all agree and if the rules aren't followed at any time point to them as a gentle reminder.

Most people, having agreed to abide by the rules, will follow them.

The Technology Doesn't Work

You've got your introduction prepared, your slides are ready to go, the audience is waiting in anticipation, then you plug in the projector, and nothing happens. You check the cables, the settings and everything else you can think of.

This situation doesn't only mean you are starting on the back foot, but your workshop participants will quickly lose interest. It looks unprofessional and makes people feel like you are wasting their time.

Before you start any workshop make sure the technology works the way you expect it to. Go there early, or even the day before, and test it. Make sure you have the right technical contacts so you can call someone to get problems resolved quickly.

No Parking Lot / Bench

Have you ever been part of a meeting or workshop where a side conversation has dominated the session? When this happens other participants quickly start to lose interest and disengage. All that effort to set up the workshop and get it going is wasted.

A Parking Lot, or Bench, is a place to capture items that need further discussion but are not central to the workshop objectives. Any disagreements or related actions can be captured here to be dealt with later.

The Parking Lot is a great tool to diffuse tense situations and disagreements between individuals and keep things moving.

Ideally the Parking Lot should be visible to everyone, a flipchart or whiteboard is perfect. Refer to the Parking Lot in the Ground Rules so that everyone knows what it is and what it's for right from the beginning.

No Workshop Owner

The Workshop Owner is someone from the relevant part of the business with authority to make key decisions during the workshop. Typically, you are there mapping processes and facilitating the session as an outsider. Either you're an external consultant or an Analyst from another part of the business.

You should work with the Workshop Owner to make sure things run smoothly. They help you manage challenges, especially if they relate to things outside of the process you are mapping. They will help select items for the Parking Lot and ensure that those things get actioned afterward.

No Agreed Next Steps

Having got almost to the end of your workshop the last thing you want is all that hard work to go to waste. So, before you finish, make sure you have captured and agreed all the actions and next steps.

Throughout the session there were lots of questions and ideas. Some of these may have been captured on the Parking Lot and some elsewhere. Make sure that anything that needs to be done is assigned to someone. Get their agreement and commitment before assigning the task. If possible, agree on a date when you'll follow up to check.

No Follow Up

If you've gone to the trouble of agreeing actions and next steps then make sure you follow them up. This ensures that the participants know you will do what you say. You never know when you may need to ask for their time again and they will want to know it wasn't wasted.

You will also need to make sure you have completed any work you have agreed to do. Finish off the process maps in good time and share them with the participants and anyone else that needs to see them.

There's a good chance some stakeholders, especially if they were not in the workshop, will have feedback. Make sure you incorporate this, or organise a further short session to share significant changes with the rest of the group.

Final Thoughts

I've listed some of the many things that could go wrong during a workshop but do not panic! Success really hinges on being clear about the purpose of the workshop and being well prepared.

Workshops are great fun, engaging and very informative for everyone involved. If they aren't it's normally because of one of the reasons above. If that happens you'll know where it went wrong and make sure the next one is even better. Good luck!

Craig Willis is the CEO of Skore, the Process Improvement Software Platform. Designed to be used and understood by everyone in the organisation, Skore's simple two shape system enables you to effortlessly map and manage processes in workshops whilst gaining valuable insights into the business.

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Event	Date & Time	Link
Plotting A Career Path Through Business Analysis, Architecture, Change and Beyond *with Lisa Woodall*	Recording Available Now	Watch Now
Everything's Relative (a fresh look at agile estimation) *With Stuart Mann*	Nov 8th 18:30 - 19:30 (UK Time)	More Info
Exploring The BA Role In Agile Discovery *An Interactive Panel with Angela Wick, Allan Kelly, Angie Doyle & Howard Podeswa*	Dec 2nd 18:30 - 19:30 (UK Time)	More Info

There will be many more events to come too, so be sure to keep a regular eye on our website!

Selecting a Requirements Management Solution - Our Journey

Shamaila Jawaid



Our organisation is responsible for comparing how much electricity generators and suppliers said they would produce or consume with the actual amounts generated and consumed. We then calculate a price for the imbalances and charge organisations accordingly. The rules and obligations for electricity balancing and settlement in Great Britain are underpinned by various industry processes and systems. As the industry evolves, these rules change, which need to be reflected in the related regulatory documents, processes and systems. They often impact the similar processes and capabilities.

These rules and obligations are spread across multiple documents on our website as well as within team network drives. Work on recent scale industry change has resulted in hundreds of requirements spread across various Excel sheets. In parallel we also need to consolidate and manage the business requirements for re-platforming our core settlement systems.

We set out to implement a requirements management solution that enabled us to efficiently and consistently define, maintain and collaborate on these business rules and requirements. Given the scale and complexity of change and the

current manual way of working, we were able to demonstrate the case for a scalable and efficient solution.

Evaluating solutions

We had some experience of using a product management solution. While this was a great tool for collaboration, we found that it didn't meet our needs for organising and structuring our requirements. The main customers of our requirements include industry participants, legal teams, development partners and product teams.

We researched the market and identified 5 tools and evaluated them against criteria that was important to us, such as:

- Re-usability of existing rules and requirements to adapt them to evolving regulatory requirements
- Traceability, from regulatory documents / business outcomes through to design and test materials.
- Collaboration on requirements
- Ease of use
- Adaptability for different project needs (e.g. a traditional business requirements document versus user stories)
- Auditability
- Exporting requirements
- Integration with our tool ecosystem – Enterprise Architecture and Workflow Management tools
- User Management

Upon successful selection of a solution, we then embarked on a journey of learning and implementation.

How did we implement the solution?

Working with our implementation partner, we first had to work through our processes so that we could configure the tool in the best way possible. As we were due to go through organisational change where working practices would evolve and change, this was not straightforward. We worked as a team to configure the solution and were trained as administrators on it. Subsequently, we organised training sessions with those involved in the BA process such as subject matter experts, collaborators and reviewers. Most importantly, we tried it out on upcoming projects and created a culture of sharing our learning within the team. Below is a list of some of the actions we had to take

- User management processes and licencing needs – determine level of usage, i.e. floating and dedicated licences, and type of users (creator, contributor, reviewer, approver, admin etc.)
- Configuring templates – setting up the repository so it can be exported with our branding and recognised requirements format, as well as templates for individual business requirements and user stories with acceptance criteria

- Considering how we organise our requirements – e.g. enduring repositories for product areas and change specific repositories to create new and amend existing requirements that can be merged into the enduring repository

- Amending our framework, process and guides to remove the traditional requirements template and reference the work we do

- Consolidating / migrating requirements spread across various locations / documents – we are doing this on a change by change basis

- Constant learning, adapting and embedding. There can be more than one way to configure the tool or use its capabilities' to achieve an outcome, so thinking about the best way was essential. For example, we achieve traceability through additional fields or setting up upstream and downstream relationships. The two approaches provide different benefits.

- Integration with our wider applications and work management tools

- Listening to user feedback (e.g. on the review process) and making tweaks in the tool or process to make it more user friendly

Did we achieve the intended benefits?

We set out to increase efficiency and reduce unnecessary manual effort in the end to end change process / agile product development process. We've found that a dedicated requirements management solution has provided greater visibility and better collaboration on requirements. While the evaluation criteria is based on best practice, simply having a database of requirements for multiple initiatives, in a single location that can be grouped, categorised and organised has supported more efficient working.

The ability to incorporate templates within a business requirement or user-story is enforcing consistency and the review feature allows for all comments to be managed from a single location.

Specifically, our solution enforces a short title for each requirement to support navigation of items in a tree structure. This has led to an improvement in the way we communicate requirements by ensuring the essence of the requirement is stated up front.

I don't think we can ever go back to siloed documents again!

However, it's not been without its challenges. As the organisation moves towards a new structure and ways of working, we've integrated our solution with a recently implemented backlog and product management tool. As each team has different needs there has been confusion on when to use each type of solution.

We've applied the principle that our requirements management solution is the enduring, reusable repository of requirements across all products; and our product development tools used for

visualisation of work to develop these products. The lifecycle of a requirement can vary as needed by the teams, but it must be categorised and organised in our requirements management solution to enable future re-use, alignment and assessment of changes.

The number of core users has also increased over a short period of time, and keeping up the learning and embedding has not been easy.

Spotlight on specific capabilities

Here are some of the features that stood out for us:

- Configuration of 'item types' i.e. Business Requirements, User Stories, Capabilities, Business Rules, including adding and removing fields to support traceability
- Re-use and sync – we can re-use requirements across multiple projects and identify when they are in sync / out of sync
- Baselining a set of requirements and comparing those baselines
- Managing and comparing versions of individual requirements
- Collaboration on individual and groups of requirements
- Merging and branching of requirements across workspaces
- The ability to manage upstream and downstream relationships
- Unlimited read only access
- Organising and tagging items
- Importing requirements into a folder structure
- Dedicated review feature for collaborative reviews

What's next?

As the team learns to use a wider range of capabilities of the solution, our focus will be on supporting the integration with agile workflow tools in a way that supports our product teams in the best way possible, as well as continuous knowledge sharing. Other potential improvements include combining our requirements data with analytics tools to help customers filter and search for requirements in a way that suits them, building our reusable library and considering how we best use our solution in a multi-vendor environment.

If you would like more info on any of the above, please do not hesitate to get in touch. I would love to hear from you to share ideas and experiences!

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Digital Transformation: The Emperor Is Naked!

Adrian Reed

A term that seems to have taken increased prominence over the last decade or so is *digital transformation.* It has become such a frequently used part of the organisational lexicon that it is rarely questioned. It's a term that is accepted, it sounds like something that is self-explanatory and somehow *obvious*. I mean who *doesn't* want a *digital transformation?* In the next breath there will be the inevitable cliches of Blockbuster, Netflix, Uber and others (cliches, by the way, that I am *just as guilty* as anyone as using…).

Within the business analysis community I hear a lot of discussions about how to work within a *digital transformation programme,* whether the tools and techniques are different to "other" types of initiative. I occasionally hear debates about whether there should be a "Digital BA" role. These are sensible questions for us to ask ourselves—but shouldn't we start by asking *what does digital transformation actually mean anyway?*

Far be it from me to reinvent the wheel. A bit of research will uncover scores of books and papers about this topic, here are two definitions that I find particularly interesting.

Digital transformation:

"…involves the usage of new technologies to drive significant improvements […]. This includes capitalizing on new opportunities as well as effectively transforming existing businesses and technology that enable them."

— Anup Maheshwari (Maheshwari, A., 2019 "Digital Transformation", Wiley)

"…encompasses the profound changes taking place in society and industries through the use of digital technologies. At the organizational level, it has been argued that firms must find ways to innovate with these technologies"

—Gregory Vial (Vial, G., 2019 "Understanding digital transformation: A review and a research agenda" in Journal of Strategic Information Systems)

Now, it's hard to argue with either of these. Yet, haven't practically *all* projects that involve information technology in the last 40 years met these definitions? Here are some (deliberately provocative) examples:

- Banks providing automated teller machines (ATMs)
- Electricity companies moving from manual records to batch processing with punch cards and stored data on magnetic tape
- Banks offering automated services via touch-tone phones (in the 1990s)
- The online services provider Compuserve offering FTP and Gopher access *(this actually happened, look it up, it's fascinating)*
- Shops implementing electronic point of sale (EPOS) systems so they can better track stock and predict demand
- Just about every project you (or I) have ever done that have seized an opportunity (or protected against a threat) by using technology

I know, I know, there *are* projects that deal with entirely manual information systems. Yes, there are industries that still (sometimes for good reason) have stacks of paper files *or* where there's little technology at all. But in our worlds as BAs, in my experience it's normal to have at least *some* technology as part of the future state. It might not be sexy, it might not be Netflix or Uber, but pretty much everything we do has an element of 'digital', surely? So why the excitement over 'digital transformation', and the suggestion (from some) that it is somehow new and more important? Or are there really people working on purely 'analogue' projects, writing their documents on a typewriter and making edits with correction fluid?

The Emperor Has No Clothes!

I'm being deliberately facetious of course. In practice, I find that at least some organisations use the term *digital transformation* to mean "moving the boundary of automation closer to the customer" often combined with

"changing the business model", and this last part is often more important than it appears. **Let's be honest, the often-cited examples like Netflix and AirBnB were *just as much* about business model innovation as they were about technical innovation.** Imagine if Netflix had reused Blockbuster's business model (You can rent any film for £3.99 per night!) rather than a subscription based model…. History would likely have been very different.

And of course if the automation boundary is moving closer to the customer (for example, customer self-service), then user experience, customer experience design and similar topics are important. But is this really anything new? Surely whoever designed the first ATM had to make sure people could actually use it? It's important, but is it new?

So, as in the classic Hans Christian Andersen story of "The Emperor's New Clothes", with 'digital transformation' I think the emperor really is naked! There's nothing fundamentally new or different about *how* they need to be approached. That's not to say projects *have* always been approached in the right way in the past. As with so many things *context* is what matters, there's no 'one size fits all' approach and (in my view) there never has been.

It Reinforces The Strategic View, Innovation & Customer Insight

However, some things have changed:

- Speed of technological change
- Ability for new entrants to disrupt (some) industries
- Societal fashions, trends and expectations

What this highlights is the need for the *strategic* business analysis before, and throughout change initiatives. Scanning the external environment, using techniques such as STEEPLE (and others) to understand what is coming and how the organisation *and the specific initiative* might respond. It also highlights the need for *innovative thinking*, re-designing work and really understanding customers, users and beneficiaries of the services we define.

Plus of course stakeholder engagement. And perhaps a question we should ask of our stakeholders is:

"When you say digital transformation, what type of digital transformation is that?"

Adrian Reed is Principal Consultant at Blackmetric. He speaks internationally on topics relating to business analysis and business change. Adrian wrote the 2016 book 'Be a Great Problem Solver… Now' and the 2018 book 'Business Analyst'.

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The Other Side of a Business Analyst

Judy Alter AKA "The Optimistic BA™"

When thinking of a Business Analyst (BA), many people think of business models, requirements documents, workshops, data flow diagrams, Visios, and more. I agree that in most cases, this description is correct. I am thankful that no respectable person thinks of a BA as a note taker or just a bridge between the developer and the stakeholders.

What I feel is the most critical skill for a BA are the soft skills. About 85% of what a BA does relates to soft skills. If a BA can't relate to the people, they will not be successful. A study published in 2020 by Zety asked employers, "Which skill set is most important?" The study's findings were that employers hire for soft skills almost twice as much as hard skills. The results showed Hard Skills – 39% and Soft Skills – 61%. To read more about this survey, here is a link.

It was great to see that the one thing I believe in the most was validated. Many of my courses and presentations tie into or are about something related to soft skills. As the last eighteen months have gone by, many of my BA buddies have talked about the importance of soft skills. I have had to keep a straight face as I was shocked more than anything. It has also made me happy when some of the well-known BA speakers compliment me on what I've done with soft skills.

I feel that people are more excited to talk about hard skills. I have challenged anyone to tell me about a project where the BA didn't communicate with another person. No one has or will win this challenge. As you look at what BAs do on requirements elicitation, workshops, observations, and meeting with stakeholders, those activities require excellent people skills.

BAs need to be great communicators and collaborators. The foundation to succeed with that is to be a great listener. It would be best if you listened to understand, not to reply. The BA can nod, smile, and use other visual clues to ensure the speaker knows you are engaged. You can study facial gestures either in person or if the speaker has a camera on. Even if the cameras are not on, the BA needs to focus on voice clues.

For successful communication, the BAs need to follow the three C's. They

are Concise, Clear, and Complete. Your communication only requires the number of words necessary to make your point. The communication needs to be as transparent as clean glass. Finally, it needs to be complete, so everyone understands what is required and when it needs to be completed. The Three C's apply to both verbal and written communication.

BAs need to be great collaborators as they need to bring groups of stakeholders, customers, vendors, etc., together. The BA needs to figure out which stakeholder is the key because that is the main person they need to please. It is not always the top-ranking person, but this is the one you need to make friends with. Get to know this stakeholder as a person and share something about yourself. You don't need to do lunch every day or go on a trip, but if you go to this extra effort which will pay off as the BA gains their confidence and trust.

The easiest way to do this is to ask them about a favorite sport, activity, or even their family. If you are in person, notice the personal items in their office or cube. If virtual, see the room they are in and ask them about a picture. You would be amazed how they warm up to you with this. If you work with the same stakeholders, you will get to know them on a deeper level. BAs who go from area to area with different stakeholders can do the same thing but just a little quicker. Many BAs don't do something like this, and I feel they are missing out.

Once you know what you need to communicate to your stakeholders, do you use the same method for all stakeholders? If you answered no, you are correct. The standard rule is the higher position a stakeholder has; the less detailed the communication needs to be. The end-user needs all the details because they need to be able to use it. They can also review the documentation to determine if anything is missing. The earlier that happens, the easier it is to make changes.

Before I conclude, I want to share the most important thing about what a BA needs to do to succeed with people on a project. Treat every person you talk with as they are the only person in the world at that moment. By connecting with them like this, you would be amazed how that makes them feel and increases their confidence and trust in you. You can also use this on family and friends. It is a great thing to make someone's day, and it is free. I owe this to two of my BA friends who do it in different ways. I don't think they realised how this was so important until I explained it to them. This little tip has helped to make me a better person along with a better BA. I hope you enjoyed reading this as much as I enjoyed writing it.

I always enjoy new connections:

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Dust Coat on and Fine-tooth Comb

Danny Kalkhoven



Recently a study appeared in the magazine 'Nature' in which researchers showed that people systematically overlook subtractive changes. When asked to improve something, most people tend to add elements to it, even if would be more effective to take something away. When I read that, it occurred to me that I also have a (slight!) tendency to make things more complex. For example, I might add a feedback-loop and an extra check in the workflow…

In the old days at tech university, we had the magazine 'Elektuur', full of diagrams for building all kinds of electronic devices yourself. If you connect all the components of the schematic on a printed circuit board, you get, for example, an amplifier, radio or time switch. These were often impressive schematics, full of feedback loops, resistor bridges and capacitors. At the electronics lab was this assistant, who always wore a blue dust coat with an impressive row of ballpoint pens in his breast pocket. It was advisable to check the schematic with him before building it. He would then look at it, take a pen and start scrapping. “That capacitor is not necessary, this resistor bridge is not needed …” and other such improvements. Based on his knowledge and experience, he went through the design with a fine tooth comb. The result was invariably a more compact and more stable design.

Another example: at the Oscars in 2017, the movie La La Land was mistakenly declared the winner, while Moonlight should have received the Oscar for best picture. This mistake happened even though there were a series of security measures built in to prevent problems . For example, on each side of the stage there was an accountant with the same series of envelopes. (That way, if one fails to reach the stage, there's always a backup on the other side). A third set of results was with the notary. But things went wrong on stage and the wrong movie was declared the winner. This should of course not happen again, and that is why the Oscars organisation has improved the procedure by introducing an additional check.

In our work as business analysts we should be aware of this, and try to get away from the “addition bias”. Yes,

some processes need checks or feedback loops, but not always.

An example: in many financial procedures the team lead (or even the department head) has to approve certain decisions or transactions. So every now and then you see someone walk up to that desk with a stack of forms, and the team lead quickly signs them all off. Job done.

It might be tempting to include this check in the design of the digital workflow procedure that you are implementing. It's an extra check, so it helps for a better quality, right?

Well, maybe not! Take a step back, and ask yourself: this check, this additional element, is it necessary, does it add value? What would happen if I take it out?

Well, it actually improves the process. It will be quicker for one thing. And does that team lead really check all these forms carefully? No, they are signed off almost without looking at it, trusting that all is good, checked by the employees themselves. So the speed goes down, and the quality does not increase as a result of this step.

Remedy: subtract instead of add!

When you take it out, it might be a bit of shock for some stakeholders. But you can explain that the people are already trusted to do the job correctly, and that it's very rare for the check to lead to corrective actions. Mind you, I am not suggesting that legal obligations or standard accounting procedures should be neglected. When a 4-eyes principle is mandatory, it needs to be included. But maybe that second pair of eyes does not always need to be the team lead. Many of our processes hold checks or extra steps that were added because of this "additional elements is better" bias.

A lesson I took away from the article and the book that explains and illustrates this bias:

Put on your imaginary dust coat and walk through the designed process with a fine tooth comb. Ask yourself what real value the steps and checks add, why they are there, and what would happen if you take some out. You'll be surprised how much more compact and robust many (of your own) designs can be!

I know I did…

More to find out:

- "Subtract, the untapped science of less" by Leidy Klotz (ISBN 978-1250249876)
- Nature volume 592, pages 258–261(2021)
- Tim Harfords "Cautionary tales" podcast no 3 ("La La land")

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Up to £50k (depending on experience)
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Location: *Sheffield/Homeworking*

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British Business Bank Careers (changeworknow.co.uk)

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The 'Job Vacancies' section is a new feature within BA Digest.
The employers advertising jobs in this section have agreed to:

- Identify the hiring company and location
- Specify the salary or salary range
- Make it clear if the recruitment process involves more than one interview
- Give feedback to anyone who gets to interview stage and not "ghost" any candidate

If you have a BA job to advertise, and can agree to the terms above, contact us to find out how to advertise in the next edition of BA Digest.

www.blackmetric.com/contact-us-2/

Coller Capital

Company: *Coller Capital*

Role & Salary: *Senior Business Analyst (Contractor)*
Up to £750 per day

Location: *London*

Job Description: Exciting opportunity to join Coller's Technology group as a Senior Business Analyst on the firm's Data Transformation Programme. This role is a bridge between the business and the technical stakeholders of an ecosystem of off-the-shelf and bespoke solutions. The Senior Business Analyst will translate business needs through requirements into solution specifications taking into account taking into account people, process, technology and data perspectives.

Recruitment process will be two rounds of interviews

Coller Capital - Senior Business Analyst

Coller Capital

Company: *Coller Capital*

Role & Salary: *Business Systems Analyst (Contract)*
Up to £500 per day

Location: *London*

Job Description: Coller Capital are looking to hire a Business Systems Analyst into their IT function on a Contract basis. This role is a bridge between the business and the technical stakeholders of an ecosystem of off-the-shelf and bespoke solutions. The Business Systems Analyst will translate business needs into a prioritised backlog of user stories taking into account people, process, technology and data perspectives.

Coller Capital - Business Systems Analyst



Product Ownership - Resistance Is Futile

Marcus Udokang

"All the world's a stage, and all the men and women merely players", so said Shakespeare. Like in a play, each of us in a Scrum team has our role. The Product Owner is no exception. Don't think of disbanding this role on a Scrum team, as some organisations might do. Resistance is futile. A Scrum team needs to embrace this role. A Product Owner is as much an actor and contributor in building a Minimum Viable Product as anyone else on the team.

But, what is the crux of the Product Owner role, and why do we need it? Let's take a closer look at this question. First, let's back up a bit. Without adding fuel to the fire, ask whether a BA should also be on a Scrum team? Well, no one title is mentioned on a Scrum team, whether BA, Product Owner, or Developer. Not naming job roles is the traditional convention for a Scrum team.

We know that Agile inherently tries to minimise requirements documentation and potential roadblocks between the

business and technical teams. BAs are traditionally known for being requirements junkies and for bridging that gap between business and technical teams. Does this mean there are now minimal or almost no duties for a BA on a Scrum team? This also begs the question, where does the BA fit in a Scrum team? Without focusing too much on a BA, let's see not only what a Product Owner does on the Scrum stage, but how the BA can be an indispensable actor on that stage, too. The end result should make the Product Owner role far more irresistible.

Product Backlog

The receptacle for requirements in a Scrum team sits within the Product Backlog, which is managed by the Product Owner. In that sense, like a BA, a Product Owner is a connector between clients/business, and the technical team. The PO prioritises backlog items with a focus on the value side, and adding value to the user experience. Scrum is product-centric, not project-centric. This doesn't automatically exclude the value of a BA. On the contrary, it enhances the BA role because it allows both the BA and PO to hone each of their roles with a concentrated effort, to dig deep to deliver greater value to the customer.

Owner of the Vision

The Product Owner essentially is the owner of the vision, which is articulated to the team, based on a good understanding of the product and the needs of the customer, for whom the product is being built. Both the BA and PO are practitioners of change. However, for the PO that change is exclusive to the product, to the exclusion of anything else. To make any changes the PO is that one voice speaking for the many on the team. The PO must consult the team, understand and assess the impact of any potential change to the product, and be able to communicate the necessity for these changes to the customer.

If there is any uncertainty, the PO should be the central de facto decision maker, because he or she knows all the apparent actors, what they want, and what value they need. The PO has a well-defined acceptance criteria. It's this knowledge that determines how to refine the prioritisation of the backlog items, and gives clarity to the developers on how to build features or components. Minimising waste by capturing a succinct user story will allow for a smooth flow of delivery. Think of a story as a placeholder for a conversation we can have later. And, that delivery helps shape the vision of the PO, that helps bring the product to fruition.

Communication

Product Ownership is all about communication, with a dose of passion. It's all about individuals and actions over processes and tools. To deliver early and often, stories are truncated into bite-sized chunks, so each story takes just a few days to tackle. A just-in-time fashion allows for attending to product and user needs so much more effectively. Backlog grooming should include estimation of stories, splitting stories, and acceptance criteria for those stories.

The team, developers, stakeholders, or anyone in the loop should attend a one hour weekly meeting. A frequent feedback loop of steady delivery to end users or other stakeholders, with constant communication between the PO, the developers and the stakeholders is key. The PO sees the big picture, taking into account any risks, whether business, technical, cost or schedule-related.

The PO is there to avoid gold plating, that is, doing more work than necessary. Inefficient resources could make assumptions that are not correct, which can add to gold plating. If a missed requirement is discovered, verify it with the PO.

Driving the Product

When it comes to sizing a story, as you understand more, complexity changes, and the understanding of the story changes. Some might see this as changing the scope. Have the mindset to understand the end goal, which is to continuously deliver useful products. The PO is driving where the product is going. He or she is responsible for iteration goals, defining epics, stories and success criteria. The PO is all about expectation management, and is the voice of the customer.

And, involved POs have direct access to the BA, with a concrete idea of where to move next. The BA in a sense is the facilitator for the Product Owner, a critical role providing solutions to deliver value, and managing the BA artifacts and process flow. The BA provides enough information for the PO to make the right decisions.

The Product Owner needs to constantly communicate progress and perform regular retrospectives, while defining expectations. Common vocabulary needs to be used to have the team on the same playing field. POs are creative problem solvers, with a strong technical background, and can easily see different points of view.

Conclusion

As in any play each actor has their entrances and exits. Know when and how to use the PO role, for it can play many parts. It is one of the most important roles on a software team. In short, the Product Owner role is very much needed. Embrace it, for resistance is futile!

Marcus Udokang is a Business Analyst, Project Manager, writer and presenter. He is also host of the Podcast and YouTube channel The Inquisitive Analyst, which focuses on the triumphs and challenges within the BA and PM fields.

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An Introduction to "Citizen Developers"

Lawrence Reid

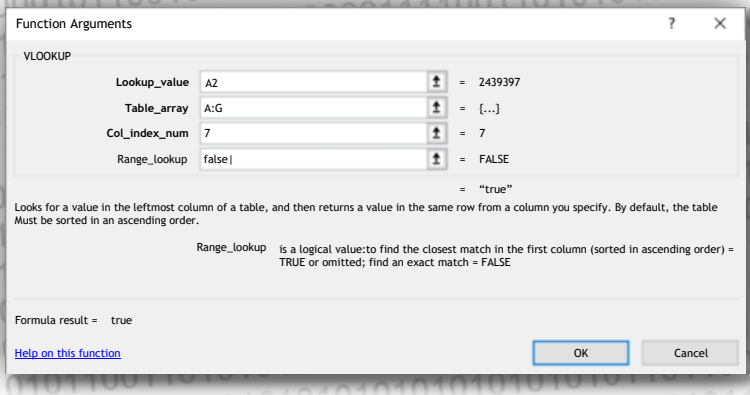


Citizen Developers are business power users of technology that can imagine, learn, and apply new technologies. We are undergoing another technology paradigm shift. There are many contributing reasons for the shift. One of the major reasons is that the demand for highly skilled developers is out passing the supply of new developers. Another reason for the shift is the rapid maturity of No-Code and Low-Code development platforms. According to Gartner Group, "by 2024, low-code application development will be responsible for more than 65% of application development activity." With the right guidance from IT, Citizen Developers can help close the application development gap.

All applications don't require the same scrutiny for development. Highly complex applications, or applications that require substantial integrations or security measures, still require specialised developer skills. Many applications are temporary or only require a simple interface to collect or display data. This is where Citizen Developers fit in.

What is the difference between No-Code and Low-Code? All BAs should have a strong understanding of Excel. Here is a simple example comparing No-Code and Low-Code using Excel's function "VLOOKUP".

A No-Code version of VLOOKUP is clicking the function icon, selecting VLOOKUP from a list of functions, and filling in the parameter boxes. Behind the scene Excel is translating the parameters in the form into a Low-Code version which is represented as "=VLOOKUP(A2,A:G,7,FALSE)".



Alternatively, one may type the same Low-Code formula "=VLOOKUP(A2,A:G,7,FALSE)" directly into the cell. I know this is a rather simplistic example, but it does emphasize the subtleness between the two.

There are now several No-Code Low-Code development platforms that allow "Citizen Developers" to create complete applications with no code at all or simple edits to formulas like Excel's VLOOKUP. Imagine the power and flexibility of these platforms that can start by connecting to your data source, whether Excel or a corporate database on the premises or in the cloud. The application templates can generate and publish applications for desktops, tablets, and phone form factors. The platform will analyse the data and automatically generate a simple, yet complete, application to display the data in a scrollable list view of items with additional forms to display and edit details of each item.

Customising the base applications can be as simple or complex as your needs require. Existing forms can be duplicated, and new or existing text labels or data controls can be dragged into position. The labels and controls can be updated by changing property settings like the label's text to display, or the data source field connected to the data controls. Updating the navigation can be as simple as updating the properties of the navigation icons to point to the correct form by selecting the form from a list or typing it in as with the Excel VLOOKUP example earlier. With a little extra effort and modifying code samples, this application can even send email notifications.

Where to get started? Does your organisation already subscribe to one of these development platforms? If so, ask to get access to the platform and training. If not, there are several vendors providing No-Code Low-Code development platforms. Search for "Citizen Developer" or No-Code Low-Code. The platforms I am most familiar with are Microsoft Power Apps and Salesforce, and there are many others. Platforms vary in capabilities, security, stability, and of course pricing. Start with a free trial. Follow

their examples to get an understanding of their capabilities and limitations.

Think of simple examples in your organisation to leverage what you learned from the vendor's samples.

- What are my appointments today?
- Which items are approaching low inventory levels?
- What would be useful in a dashboard?
- I would like to be notified when…

Continue to build your skills and capabilities that can be leveraged for more complex projects.

Many organisations are recognising the benefits of increasing their technology density. The synergy of learning and sharing of process improvement and automation through technology, empowers the individuals and the organisation. Organisations are forming multi-discipline teams to identify and analyse existing processes and applications for opportunities which improve efficiencies or generate new capabilities. Team members may include business analysts, project managers, subject matter experts, and other departmental stakeholders from Operations, IT, HR, and Finance. Organisations that learn together, grow together.

Like all corporate project teams, these new teams need a sponsor, and a stated purpose of how the team will provide value to the organisation. These teams may conduct surveys or workshops to brainstorm ideas for potential projects that may be candidates for No-Code Low-Code applications. The best candidates for early apps will have low technical requirements and low risks. Technical requirements measure the complexity based on variables like the number of data sources, departments impacted, and the level of programmer experience required. Risks are measured on variables like read-only to fully editable access or the sensitivity of data from not critical to classified, etc.

I believe that Business Analysts are critical for the success of these projects and are positioned to gain the most in skills, experience, and exposure.

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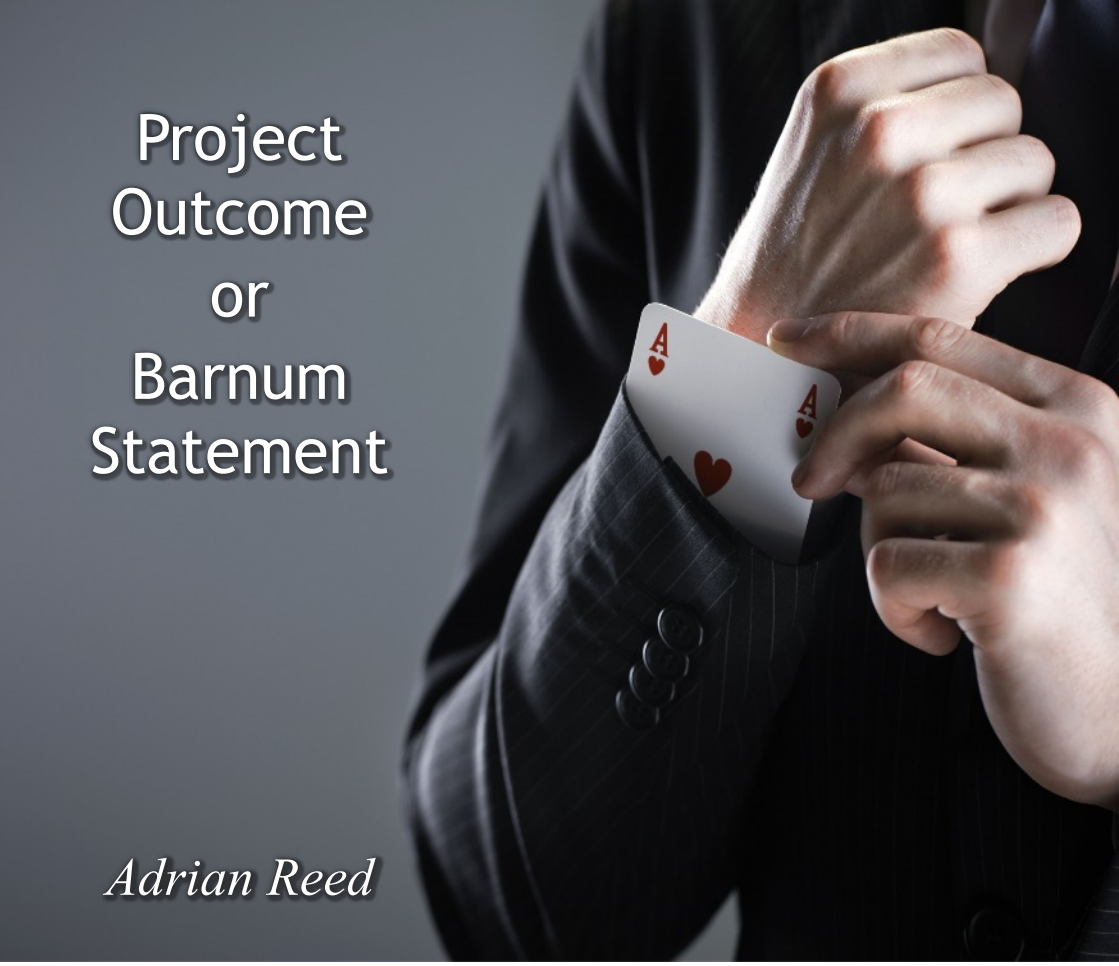
Project Outcome or Barnum Statement



Adrian Reed

One of my more unusual "claims to fame" is that I've performed magic in front of a paying audience at Caesar's Palace, Las Vegas. I've also performed the same act in London, Johannesburg and Minneapolis—although all of this becomes *far less exciting* when you find out it's actually a presentation that draws similarities between business analysis and magic (and there are a surprising number of similarities….)

Preparing for that presentation meant that I carried out research into various branches of magic and I was particularly interested in *cold reading.* This technique is used by magicians who want to appear to be able to read a subject's mind. There are a whole range of ways of achieving this effect, from illusions and misdirection to clever language patterns and use of psychology. One that particularly stood out to me was the *Barnum Statement*.

Barnum Statements can be described as:

"…artfully generalised character statements that most people will accept as reasonably accurate" (Rowland, 2015)

A good Barnum statement may well *feel* personal, but it actually applies to a significant chunk of the population. It somehow simultaneously feels specific but actually says very little. Take the following statement:

"You enjoy elements of your work, but sometimes feel held back. You sometimes feel you have untapped creativity that you want to unleash"

Does this resonate with you? I suspect at least *part* of this statement resonates with a whole number of folks in the business change community. Who *doesn't* sometimes feel held back? Who *doesn't* feel that they have untapped creativity that they want to unleash?

Politics: It Can Mean Whatever You Want It To Mean

Arguably, one of the reasons that techniques like Barnum statements work is they are beautifully non-specific. They allow the subject (whose mind is being 'read') to project *any meaning onto them* that they want. They are easy to agree to, they *feel* so personal, so targeted… but they're not.

Being provocative, it could be said that similar language patterns are used in Politics. Broad and aspirational statements that are very difficult to disagree with, are repeatable 'ear worms' but could be open to many different interpretations. Now I'm just *not brave enough* to quote any *recent* political slogans here (it would distract from the core message of this blog), so here's a randomly selected slogan from the 1992 UK General Election:

"It's time to get Britain Working Again"

What does this *actually* mean? If you read this and you're unemployed, you might assume it's about job creation. If you read it and you're concerned with government bureaucracy, you might think it's about getting 'Britain working' by streamlining processes. If you are craving the simplicity of the past you might centre on the word 'Again' and assume it means moving back to simpler structures and different social norms.

So what does it mean? Who knows…. I suspect a politician would argue that the mechanisms for delivering that statement is in the manifesto. The manifesto that, let's face it, very few voters will actually read.

Business Is Political Too

So what has all of this got to do with business change, product and service design? Well, often large programmes of change start with an aspirational goal. A set of 'strategic imperatives' or desired outcomes. The challenge is then to understand *what* capabilities are necessary to achieve those outcomes and *how* we'll go about doing it.

Yet, we should watch out for 'Barnum Statements' in organisational change contexts too. Statements that seem specific but are open to multiple interpretations. They might creep in completely unintentionally, or there

might be a broader political motivation. Ponder over the following statements: I suspect different people would draw different interpretations to what these mean:

- Becoming an organisation that thinks "digital first"
- Cultivating a winning culture
- Becoming the best place to work
- Creating true customer delight

The danger is that different folks will (quite understandably and rationally) project their own meanings onto this. Even if other documentation exists, much like the voter who hasn't read the manifesto, they 'support' something based on *their understanding* of what it means (rather than the detailed intent). Then conflict will ensue when we actually try and define and deliver something to achieve it. No wonder we spend so much time navigating disagreement….

Understand Different Perspectives

As business change professionals, one thing we spend a lot of time doing is *understanding different possible perspectives/purposes.* Whether it's using techniques like CATWOE or PQR (both forms of 'root definition' from Soft Systems Methodology), 3Es (efficacy, efficiency, effectiveness) or UCOB we have a whole range of tools at our disposal that we can use to assess and tease out different possible perspectives. It's important that we use these at the *strategic level* as well at the detailed level of requirements or granular changes.

We should expect that there will be different interpretations of what a desired future state should look like. Consensus is unusual, and successful change is about arriving at what has been referred to as an 'accommodation'; a situation that everyone can at least accept and commit to (see for example, Checkland & Poulter, 2001). Of course consensus is better, but in most large-scale changes some folks are happier than others. We might think scanning all the old paperwork is a benefit, try telling that to the person who has worked with those paper files for the last 40 years… **We should be bold and have the courage to cultivate conscientious conflict and accept that consensus is unlikely.** We should help organisations navigate through and get beyond conflict, ensuring that a diversity of relevant voices are represented (especially those that are normally forgotten about).

A potential antidote to misunderstanding and mechanism for achieving an 'accommodation' is *co-creation.* Having a broader set of stakeholders involved with the *definition and agreement* of outcomes will reduce (but not eliminate) the risk of miscommunication. It's rarely possible to have *everyone* at the table, but ensuring there is enough; a 'critical mass' will really help. This doesn't just apply to strategy at organisational level, it is equally valuable when discussing the *'change strategy'* (see IIBA, 2015) that a particular initiative is pursuing.

Let's face it, you've probably found yourself working on a really tricky project haven't you? And it was painful, and you had to work long hours?* Perhaps it was built on Barnum Statements… and perhaps as a community of professional practitioners we can help avoid this.

** Bonus points if you spotted the Barnum Statements in my closing paragraph!!*

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Note: "It's time to get Britain Working Again" was a slogan for the UK Labour Party (ref: Wikipedia). Discussion of the slogan itself was not intended as any critique/support or otherwise of any political party or political philosophy.

Adrian Reed is Principal Consultant at Blackmetric. He speaks internationally on topics relating to business analysis and business change. Adrian wrote the 2016 book 'Be a Great Problem Solver… Now' and the 2018 book 'Business Analyst'.

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