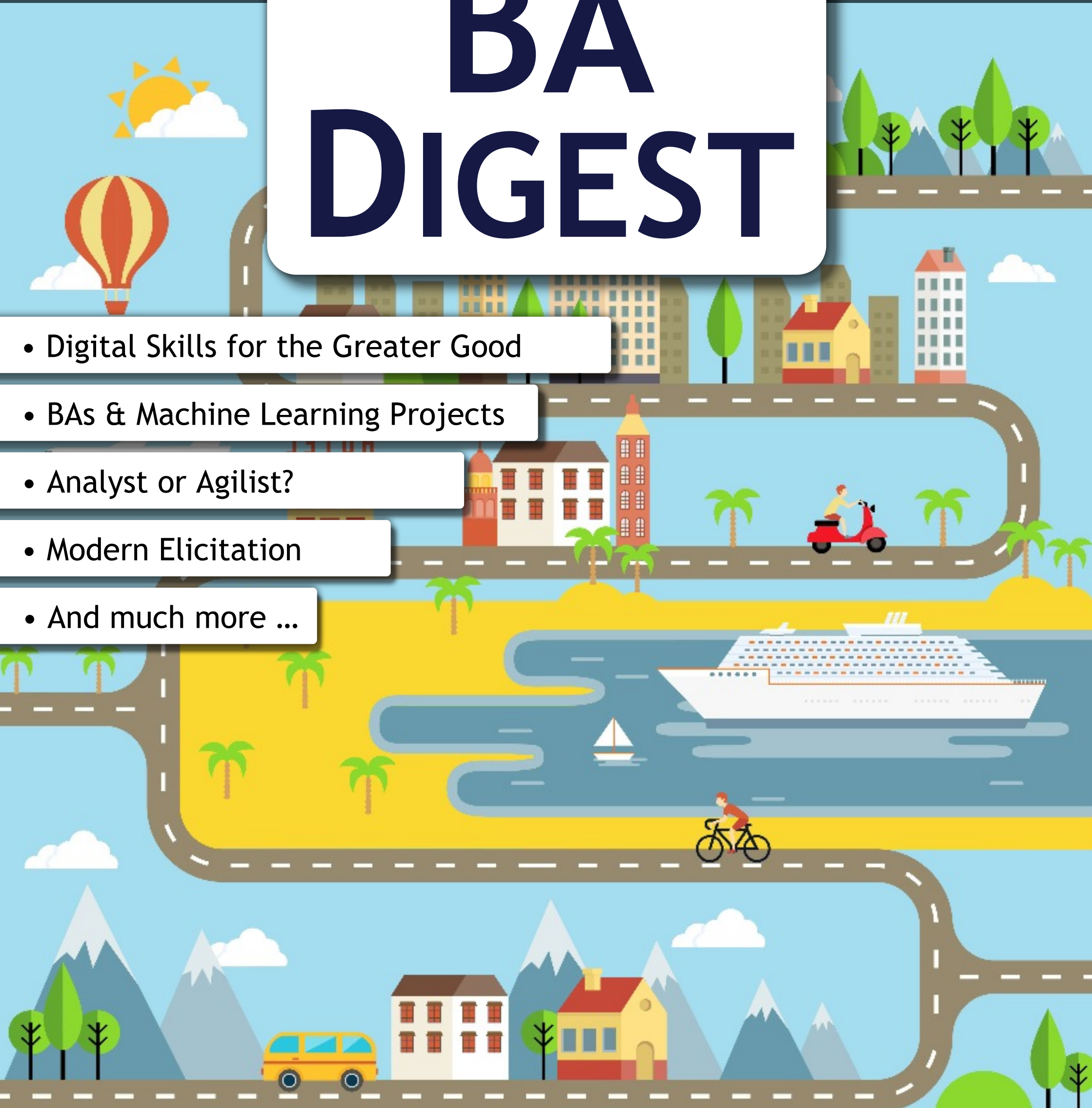
V 1.0

Q3 2023

BA DIGEST



- Digital Skills for the Greater Good
- BAs & Machine Learning Projects
- Analyst or Agilist?
- Modern Elicitation
- And much more …

Your regular round-up of useful BA content

BA Digest is published by Blackmetric Business Solutions
Subscribe for free at www.badigest.co.uk

Welcome

A very warm welcome to the Q3 edition of BA Digest. In this edition, you'll find a diverse range of articles from authors around the world. I hope that you find them useful and interesting.

One thing that people sometimes ask me about is why BA Digest exists in the first place. It is a good question, and the answer is half strategic and half serendipitous. We created BA Digest as an experiment, and it grew *far faster* than we ever could have imagined. The crazy thing is that it *shouldn't* work: A quarterly, long-form PDF magazine in today's attention-deprived world?! Who would commission *that* project?

Yet somehow, it *does* work. Probably largely due to the excellent and thought provoking content that authors so generously provide. Please do connect with the authors, and make a point of saying thank you to any authors whose articles you particularly enjoy. Believe me, they will appreciate it!

So what is the purpose of BA Digest? Our overriding vision can broadly be described in three words: Community, Connection and Curation.

The vision is very much for BA Digest to be a place where *anyone* can share their story. A collaborative space where folks who might be nervously submitting their first article can be confidently showcased on the same platform as someone who has written a book.

It's (hopefully) a place where people see people like them. And it hopefully helps people connect ("Oh, I love that article, so I'll connect with the author... then maybe *I'll* submit an article one day).

Perhaps for some folks it'll be a step towards other things. That article becomes a conference presentation, or a book, or something else. For others, it'll be CPD. Either way, there's kudos in being published in a grass roots, community-focussed journal.

It's deliberately, and by design, free. And FREE means no need to give your email address (unless you want to). The community *creates*. We *curate,* we create the space, the platform.

BA Digest now pretty much has a life of its own. And I'm excited to see where it takes us next.

Until next time

Adrian

Adrian Reed

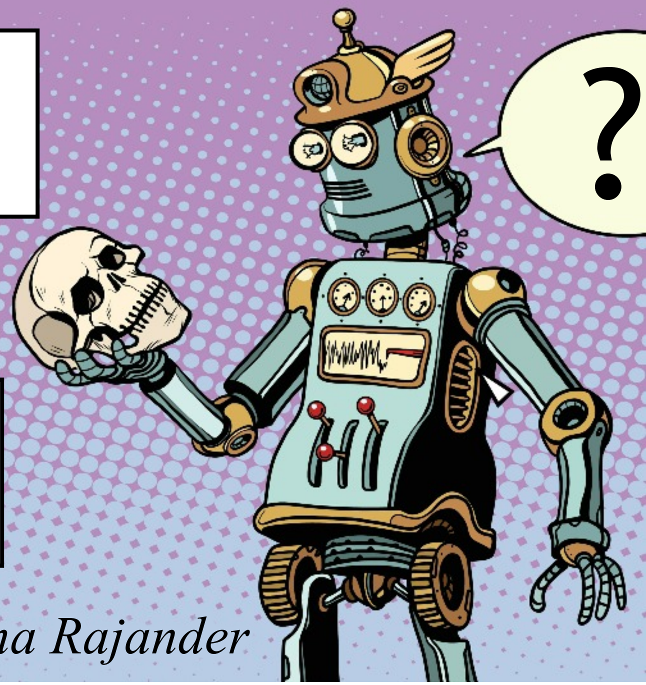
Editor-In-Chief, BA Digest
Principal Consultant, Blackmetric

ISSN 2753-7900

Contents

To Agile or Not to Agile:

An Iterative Dilemma



Anna Rajander

Project delivery is often presented as a binary choice between extremes:

- *Everything Waterfall* – all solution requirements are defined up-front or early in the project lifecycle, and the project follows a pre-defined, largely predictable process with outputs delivered in order.

- *Agile or Nothing* – the project uses a framework of agile ceremonies and rituals to continuously discover, review and reprioritise solution requirements, developing and refining outputs incrementally.

This binary view of project delivery is increasingly being challenged. Many initiatives involve the delivery of both digital products normally associated with agile approaches, and physical deliverables traditionally managed using waterfall methods (for example, a project to update a control centre, including software). In addition, many projects are required to follow prescriptive processes, such as governance and approval processes, regardless of the delivery approach used.

This article considers when and how agile and waterfall approaches can be used in combination to deliver projects. It discusses factors that can determine whether and when different approaches are combined on an initiative, as well as considerations for ensuring the delivery of holistic solutions that satisfy business needs.

Waterfall vs Agile

The relationship between waterfall and agile methods is sometimes presented as a spectrum, with 100% waterfall at one end, 100% agile at the other, and different ratios of the two in between.

Figure 1: A spectrum of Waterfall and Agile?

The implication is that agile and waterfall methods can be easily mixed, just like different coloured paints are combined to create new shades. The reality, however, is quite different. Anyone who has worked on initiatives that have combined methods will understand that waterfall and agile are less like coloured paints, and more like water and oil—no matter how vigorously you mix, there will always be some separation. This doesn't mean they cannot be used together on an initiative—far from it. However, it does mean that the points where the methodologies meet requires careful management.

It is important to realise that one method is not necessarily better than the other. Waterfall and agile both have their strengths. Waterfall is great for projects that use well-defined processes to deliver to a fixed and known scope, while agile is brilliant for initiatives looking to deliver a specific business outcome or solve a problem using fixed resources. It therefore makes sense to combine approaches where there is a mix of project deliverables: some with a fixed, known scope, and others where a solution is not well-defined. While this allows for the strengths of each method to be applied where it delivers the most benefit, it also adds complexity to many project activities - including requirements management.

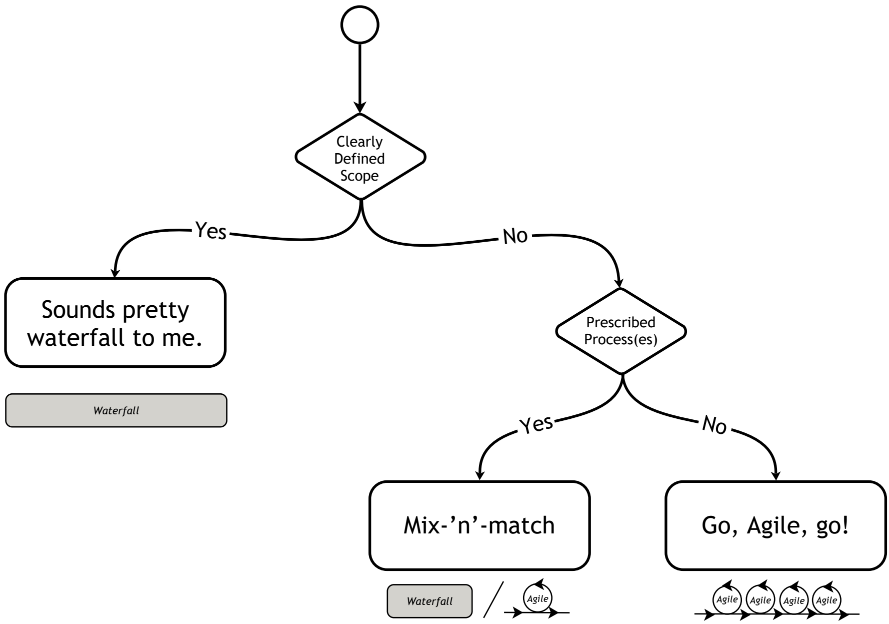


Figure 2: Selecting a delivery approach.

Figure 2 provides a suggested segmentation for understanding when to combine project delivery approaches:

- *Clearly defined scope* – where a project has a clear scope, all deliverables are well-defined, dependencies between deliverables are understood, and all solution requirements are known or easily discoverable, waterfall is likely the best delivery approach.

- *Flexible scope and processes* – where the product scope is flexible and there are no prescribed processes to follow, agile delivery is probably the best approach.

- *Prescribed processes, scope less clear* – a project may benefit from combining delivery approaches in cases where some deliverables have ambiguous solution requirements, but the project is also required to follow one or more prescribed processes.

The following describes these segments in more detail.

When to Waterfall

The continual process of discovery, assessment and communication required by agile frameworks creates a management overhead. In cases where the scope of a project is clearly defined, and solution requirements are either known up-front or easily discoverable, agile delivery is unlikely to add any additional benefit. For example, building a house has a defined scope with clear dependencies—the design comes before the slab, which comes before the walls, which comes before the roof etcetera. The colour of the bricks and the type of roof can vary, but these lower-level solution requirements should be easy to discover. For these sorts of projects, waterfall is likely the best delivery approach.

In cases where the scope is clear upfront, other aspects of the project will determine how it is best sequenced and executed. For example:

- Dependencies between deliverables.

- Whether or not the entire scope needs to be delivered at once, or if elements can be delivered in phases.

- Processes or constraints that impact the project, including governance processes, regulatory approvals, and availability of resources.

It is often assumed that using waterfall automatically leads to a constrained delivery process. However, there is still room for flexibility and creativity when using waterfall, including:

- Delivering aspects of the initiative early wherever possible.

- Using techniques associated with agile to confirm lower-level requirements and/or keep stakeholders informed and engaged (for example, spikes or prototypes).

- Using agile-like ceremonies, such as regular retrospectives, to review progress and keep deliverables on track.

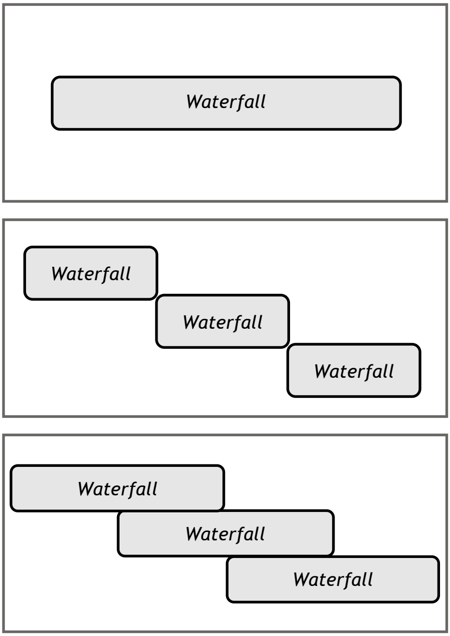


Figure 3: There is still a lot of scope for creativity in waterfall delivery.

When to Agile

The rituals prescribed by agile methods provide frameworks for constantly reviewing requirements based on available information, allowing for solution requirements to be discovered and prioritised as delivery progresses. This makes agile methods particularly useful for delivering workable solutions to business problems within given time/cost/quality constraints (See Kelly, 2019). It also makes agile frameworks particularly useful for the ongoing management of digital products, allowing for product value to be constantly assessed and enhancements made based on changing business and user expectations.

Agile delivery works best in cases where all elements of a deliverable—including all solution requirements and dependencies—are within the control of the agile team. This is because it allows the agile delivery team to establish a reliable agile cadence—a series of rituals and activities that occur on a regular, predictable schedule. The team can use this cadence to baseline work rates and set expectations in terms of the amount of work they can manage and deliver in a time interval. An agile team's work rate is monitored and communicated using agile metrics, such as sprint burndown and velocity.

When to Mix-and-Match

Processes that impact project delivery include:

- *Delivery processes* – where deliverables with a defined scope are delivered following a predetermined set of steps.
- *Approval processes* – where a project is required to follow enforced processes for it or any of its deliverables to be deemed acceptable, such as governance processes, investment reviews, or regulatory approvals.

These sorts of processes tend to have a defined scope and clear dependencies between tasks and, thus, are best managed using a waterfall approach.

Rigidly defined processes can pose a problem to agile delivery. In some cases, process timelines and outcomes may be very predictable, allowing dependent agile tasks to be appropriately sized, sequenced, and managed as part of agile rituals. However, in many cases, process dependencies become a barrier to effective agile delivery, particularly when timelines become protracted and unclear. The knock-on effects can impact the agile cadence, leading to:

- *Ineffective Planning* – dependency on external and/or protracted activities can introduce uncertainty into agile planning processes, particularly in cases where dependent activities are delayed by circumstances outside the agile teams control. This can lead to the agile team running out of valuable work and/or risk having to replan mid-sprint.

- *Useless Metrics* – trying to incorporate and track delivery of waterfall tasks that cross agile time intervals can impact metrics, making them less useful for monitoring agile team performance.

In cases where a project combines both waterfall and agile, it is beneficial to have some separation and manage the interfaces between the methods. This allows the project to be organised and sequenced in a way that minimises the impact of waterfall activities on agile delivery. Some examples of how such initiatives may be sequenced include:

- *An Agile Sandwich* – where agile activity is sandwiched between waterfall activity.

- *A Scrum-Fall* – where blocks of waterfall activity inform bursts of agile activity.

- *Drip-Feed* – where dependencies between agile and waterfall delivery are carefully managed to ensure agile teams do not run out of valuable work.

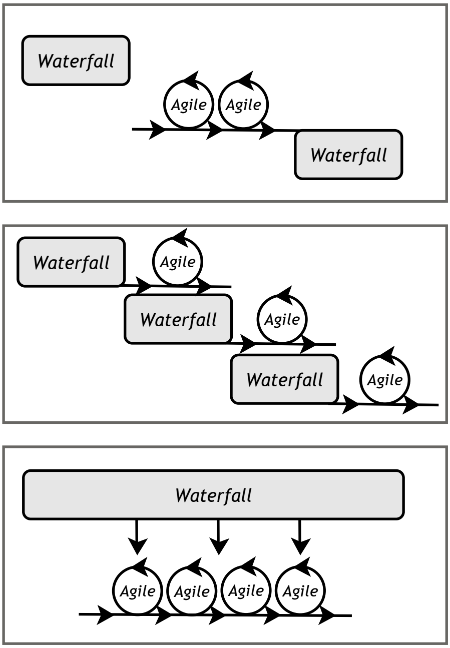


Figure 4: Agile Sandwich, Scrum-fall, or Drip-feed?

Why Is This Important?

Understanding the strengths of different delivery methods and how they are used in an initiative can benefit analysts in several areas, including:

1. *Requirements management* – business analysts can better manage dependencies between requirements

across the entire project, inform prioritisation, and identify risks that arise from combining approaches.

2. *Technique selection* – analysts can select the most appropriate technique for the task at hand.

3. *Planning and sequencing* – in cases where business analysts are shaping how an initiative is delivered, understanding the benefits and constraints of agile and waterfall allows analysts to recommend the best approach(es) and optimally sequence delivery.

4. *Respect for agile principles* – analysts can ensure agile elements of a project respect the agile analyst principles: See the whole; Think as a customer; Analyse to determine what is valuable; Get real using examples; Understand what is doable; Stimulate collaboration and continuous improvement; and Avoid waste (See IIBA, 2017).

Conclusion

Waterfall and agile delivery methods have their place—one is not necessarily better than the other. With projects increasingly containing a mixture of tangible, clearly defined deliverables, and ambiguous, digital products, it is becoming more and more necessary to design delivery environments that allow both methods to be used in combination. It is therefore important to be clear where, how and why each method is being used, and manage dependencies between delivery approaches so one does not unduly impact the other. In this way, projects can be designed and sequenced with a focus on delivering the right outcomes via the most effective method.

Anna Rajander is a Certified Business Analyst Professional and the 2022 recipient of the IIBA Australia Chapter Dr Cecily Macdougall Business Analyst of the Year award. She resides in Perth, Western Australia where she occasionally puts her thoughts and opinions about business analysis to paper. Connect with Anna on LinkedIn.

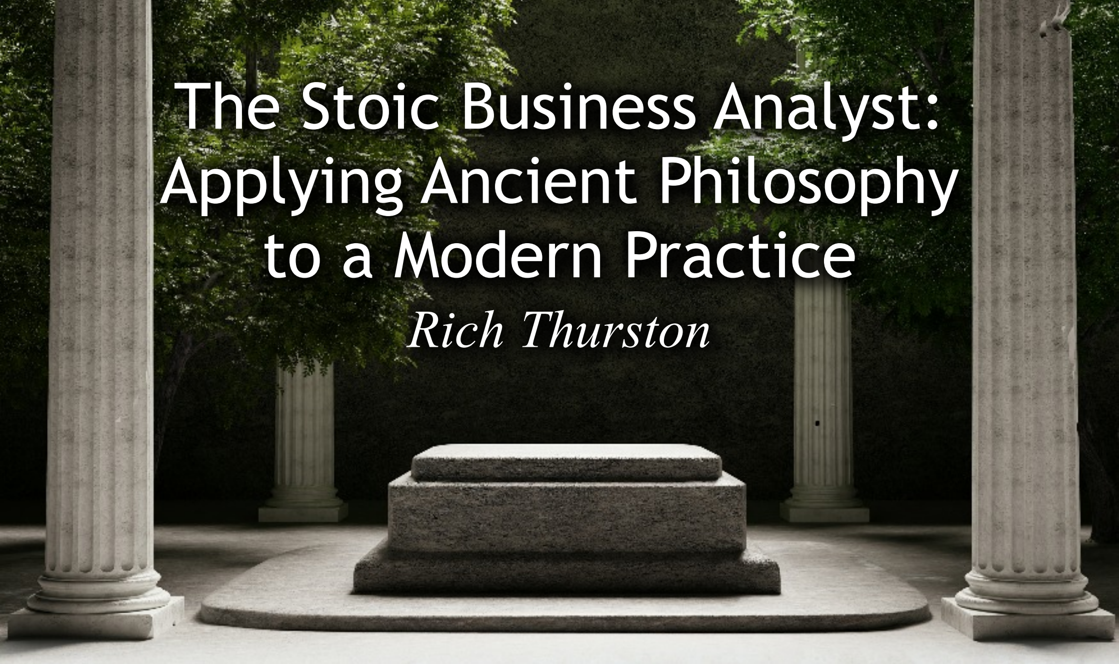
References

Kelly, A. (2019), The Art of Product Ownership, APress

IIBA (2017), Agile Extension to the BABOK Guide

The Stoic Business Analyst: Applying Ancient Philosophy to a Modern Practice

Rich Thurston



Stoicism is a school of philosophy originating from ancient Greece and Rome in the 3rd century Before Common Era (BCE). It centres around virtues of character and draws from logic, rationality and psychology, as it seeks to maximise positive emotions and reduce negative ones, like anger, anxiety or grief… and what exactly does this have to do with business analysis, I hear you ask?

Well, here are five Stoic tenets you may find surprisingly relevant:

1. "Memento Mori" – Remember You Too Must Die

This may sound morbid, but for the stoics, it was a daily reminder to not waste time on trivial things, and to instead treat time as the precious, limited resource it is. For BAs, it means protecting your time and prioritising it for things that matter, like co-creating value with stakeholders, documenting just enough detail when needed, or ensuring meetings don't become an exercise in organising more meetings. It encourages us to act with intention and maintain a sense of urgency. Although time should be spent on planning, root cause analysis, and careful consideration of options, at some point we need to take action, stop theorising and start delivering. Even if it fails, fail fast, but learn faster!

"Let us prepare our minds as if we'd come to the very end of life. Let us postpone nothing. Let us balance life's books each day…The one who puts the finishing touches on their life each day is never short of time."
- Seneca

2. *"Amor Fati" – Love of One's Fate*

Something happened we wish hadn't. What's easier to change—the past event, or our opinion of it? This mindset allowed the Stoics to welcome all life's experiences. They called this *'the art of acquiescence'*—to accept rather than fight. It means letting go and not worrying about the things we can't control, reframing failures as learning experiences and embracing uncertainty to become more adaptable and truly agile in the face of ongoing change. Practised Stoics would urge us to actually enjoy it! Marcus Aurelius said, *"The impediment to action advances action. What stands in the way becomes the way."* Whilst we may encounter problems we'd rather not, one could view these as inevitable and perhaps as a gift-in-disguise, since it's an opportunity to improve: an unhappy customer is a chance to re-engage or improve a product/service, an outage can lead to enhanced monitoring to make a system more resilient, and how many longstanding efficiencies were born out of the pandemic?!

"Don't seek for everything to happen as you wish it would, but rather wish that everything happens as it actually will—then your life will flow well."
- Seneca

3. *"Premeditatio Malorum" – The Premeditation of Evils*

Stoics imagined what could go wrong or be taken away, as a way of preparing for life's inevitable setbacks. They may sound like a pessimistic bunch, but it does make life easier if you can be mentally prepared for whatever it throws at you. This applies to anyone working in a change environment. We might model scenarios and perform 'what if' analysis to determine a sequence of events and to expose hidden rules or exceptions. We may identify risks and try to mitigate them, yet, sometimes things still go wrong. Say for example, your product design is agreed, but new regulatory requirements are raised, and the scope is doubled – What's the Minimum Viable Product (MVP)? What features are essential, and need to be in that first iteration? (*Must Have* requirements). What features are essential but can be delivered later? (*Should Haves*) and what features can be dropped altogether if time or budget don't allow? (*Could Haves* or *Would be nice to have but won't*). By applying a way of continuously organising, managing, and prioritising requirements, such as MoSCoW, and with some contingency planning, we should be better placed to resolve issues in a sensible, pragmatic way.

"I judge you unfortunate because you have never lived through misfortune. You have passed through life without an opponent—no one can ever know what you are capable of, not even you."
- Seneca

4. *"Sympatheia" – Mutual Interdependence*

Marcus Aurelius famously said, *"what's bad for the hive is bad for the bee"* and it's the same for organisations and teams… Collaboration is key—and us BA's should help facilitate it! Development teams are typically comprised of various roles, each with their own set of responsibilities and not one person can do it all, and neither should they. Teams benefit from a diverse input of stakeholders which best represent the customers or end-users they're serving. Don't be afraid to approach senior stakeholders, particularly if they have high interest and influence. Seek feedback from customers directly, validate assumptions and try to remove biassed thinking from the design of a product or solution. Only when working together, aligning towards the same goal, can we achieve success. *Sympathia* could also apply to systems thinking; If we focus on one component, we miss the bigger picture and the impact a small change in one area can have on the rest of the system. If, instead, we look at the system holistically, we can see patterns of interactions between components to understand the downstream impact of making such a change.

"Meditate often on the interconnectedness and mutual interdependence of all things in the universe. For in a sense, all things are mutually woven together and therefore have an affinity for each other."
- Marcus Aurelius

5. "Summun Bonum" – The Highest Good

Stoics believed we should aim for the highest good and for them, that meant living virtuously and if they did, everything else like happiness, success, meaning, reputation, honour and love would follow; and if they took shortcuts or acted unethically, *Summon Bonum* would not be attained. For BAs and other professionals, this means doing the right thing and acting with integrity, even if no one's watching. This can help build trust with stakeholders—remember, it can take years to build a reputation and just minutes to ruin it! Change can be difficult for some, and in these situations it's important to consider their perspectives. Say for example you're developing a new HR system; have you thought about training requirements and how colleagues can upskill using the new system, be it via eLearning or a reference guide? Perhaps, for those earlier on in the change curve, who may feel some sense of denial or anger, you could take time to demonstrate how it will benefit them and how it's an improvement from the old system. Requirements traceability is another thing that may seem like an administrative overhead, but it ensures not only are we building the product right but that we're also building the right product!

"The good or ill of a man lies within his own will."
- Epictetus

Rich Thurston is a Lead Business Analyst with 9 years' experience working in various domains within financial services including, insurance, telephony, and motor finance.

www.linkedin.com/in/richard-thurston-676b0484

Let Me Tell You a Story: The Importance of Starting at the Beginning

Debbie Thomas

Every story needs a beginning, middle and end. Let's face it, you can't have a complete story if you don't have all 3 parts. Each part of the story has important information, and all of this information contributes towards a coherent whole which is greater than the sum of its individual parts. Imagine walking into a play or film halfway through and trying to figure out what's going on, or picking up a book with the first chapters missing. If you were then asked to report back on the story or make a decision based on what you have seen or read, anything you concluded would likely be inaccurate because you missed key elements of the plot.

As business analysts (BAs), we are often engaged later in the business change lifecycle than we might like. This might mean that we are asked to retrospectively construct a business case or attempt to comprehend a perceived problem that has already been identified. However, this approach is inherently flawed. It will ultimately increase the risk of delivering the wrong solution, waste time and effort increasing the time to delivery and potentially result in low adoption rates. Even worse, it jeopardises the chance of realising the very business benefits that the change was intended to achieve!

Stakeholders who try to solve problems themselves before involving a BA can end up missing important details that help others to understand the full story. They may feel that they can speed things up by skipping workshops and other requirements elicitation and analysis activities. They may even use an intermediary to pass on information to the BA. However, this is likely to increase the risk of missed opportunities and inaccurate assumptions resulting in a solution that is not right for the business and creating more work (and rework) later down the line. The illusion of speedy delivery in the short term has a hefty cost in the longer term. It is worth exploring some of the factors that might contribute to this misconception.

Common Misconceptions about BAs

A misconception that some stakeholders might have is that BAs only write requirements or act as "order takers". There can be a perception that "we know what we want so that's our requirements" or conversely "we don't need to be involved as the BA will write the requirements". We're good but not that good! Additionally, BAs are often seen as IT-focused particularly if their cost centre is IT rather than an independent department. This can lead to a perception that BAs are only concerned with the technical aspects of the project and not the broader business goals.

Another key misconception is that business analysis is a one-time activity—an activity that occurs when you have a project to deliver, effectively missing out on the identification of a business problem or opportunity and continual assessment of the effectiveness of the solution. The approved headcount of a BA team can be impacted by this misconception and could lead to more work that the team can cope with, leading to BAs being excluded because there is no one available at the right time—so again the initiative starts without a BA and we are back to where we started—in the middle of the story!

Of course, as BAs we know that we work with stakeholders to identify business problems and opportunities, analyse information, and recommend solutions that address the root causes of the problems rather than just delivering what the stakeholders think they want, but these issues only surface once a BA has been engaged and trying to go back to the beginning can sometimes be perceived as taking too long or a waste of time. Stakeholders get frustrated when a BA tries to challenge assumptions, ask questions or propose alternative solutions. This again boils down to perception and misunderstanding of the BA role.

Getting the Full Story: Overcoming Misconceptions

To overcome this challenge, it's important for the business to understand the role of a BA in the broader context of the organisation. It must be clearly articulated that BAs are not just part of the IT department; they are also part of the business. It is down to

BAs individually and as part of a team or practice—to crystallise and communicate the value that is added through business analysis.

We have already identified some of the perspectives held but there may be more and BAs need to create the opportunity to hear those perspectives before a stakeholder comes to them and tells them.

Marketing may not be in every BAs' skillset or an organisation's budget, but with the rise of internal communication channels, this is much easier than it may have been a few years ago. Using these internal channels to build relationships with stakeholders across the organisations on a range of subjects, not just business analysis, will help to build trust and credibility. This builds alliances with stakeholders and positions us as a valuable partner in driving business success.

The goal is to be able to identify the problem that needs to be solved, but beware! Some stakeholders' default is to try to solutionise or explain the opportunity they have already identified. When someone has already identified a preferred 'assumed solution', they might perceive analysis as a waste of time, so setting expectations of what to expect from their BA as early as possible is key. This involves explaining what we are going to do and what we need from them to do it. Explaining the importance and value of the analysis work, along with the benefits that it brings should overcome any misconceptions they may have.

We need to be able to define a problem that is specific and measurable, so start with *why*? "5 Whys" is a technique used by BAs but it can sometimes feel like you are dealing with a small child if you simply ask "why" after each response. This runs the risk of alienating the stakeholder before you have started. Try to think of different ways you can ask why; instead of asking "Why did the system fail?", ask "What happened just before the system failed?" This is just one example of a broader pattern: considering the world from our *stakeholder's* perspective, and ensuring that we communicate and engage in a way that works for them.

Conclusion: Analysis Relies on Hearing the "Whole" Story

Ultimately, it is our responsibility to ensure that we are involved in the entire story, from the beginning to the end. By helping the business to understand how we can help them identify the right problems to solve will ensure that sufficient relevant options have been considered, in a way that reduces wasted time and effort. This is just one way that we can make the most of our superpowers as BAs.

Debbie Thomas is a BA manager. Her career started as a manager of pubs and bars where she improved business and staff performance. When moving industries she realised that she was a BA! She now leads other fantastic BAs and shares her experience to mould the next generation of BAs.

Digital Skills for the Greater Good… BAs to the Rescue?

Sarah O'Neil

"How can I help?"—A question we hear so often. But just like "How are you?", it's a phrase that has lost much of its authenticity with each monotone repetition. For me, it's right up there with "no problem" when there is one and "bear with me" when you just can't bear it.

All that said, I would assume (criminal for a BA), that *you* do mean the underlying sentiment behind the phrase when you ask a member of your team or stakeholder if your help is needed. But how often are we offering our business analysis 'super-skills' to solve problems outside the day job? Are we doing enough? And actually, how much 'help' is feasible for us around our projects, life and headspace? I wasn't sure, so I went to find out.

In my former life in customer service, I asked the question a lot. To a lot of people, in a lot of different environments. In the call centre world, problem solving, root cause analysis and communicating with empathy (core BA qualities) were all a necessity. However, the ability to build long-term relationships which could help identify avenues to add extra value for each customer were limited by time constraints, demanding Service Level Agreements (SLAs) and inflexible training. Although keen to help Mrs Jones resolve her unknown telephone bill costs (after repeatedly redialling premium numbers to try and influence the Saturday night TV voting shows), the rigid process minimised the impact I could make and auto-pilot was engaged.

I reflected on how many times I actually *ask* the same question these days as a BA. I concluded that 'helping' for us is more of a mindset, a vibe, a life purpose. For good reason too, because as a BA, we are let loose into the wild (or 'empowered') to learn, explore and be generally nosey. Our freedom for creative thinking and solution mindset is uncaged.

Solving Problems outside of the "Day Job"

Despite my pondering, some of us out there *are* thinking big. Take John the solution architect at Hiscox UK. Hiscox loves original art, buys it and shows it off in the offices. Art is Hiscox's 'thing'. John, feeling the urge to raise some cash for a worthy cause, decided one day that he would add to the tourist attraction portfolio of York and provide guided art tours around the Hiscox office in York. Before Hiscox knew it (and after a bit of red tape no doubt) things kicked off with glee and the general public came toddling in one weekend to get in on the action and John made a few bob for SASH, a charity working to prevent homelessness in young people aged 16 to 25. In fact, John's raised over £25,000 when I last checked and had his name in the paper. It hasn't stopped there, to add additional 'wow factor' (continuous improvement), John's currently in negotiations to collaborate with the hotel next door for delightful pre-drinks. A solution and opportunity right on his own doorstep, that could make an impact. High five to John.

This is exactly the kind of wacky, creative thinking I think lives inside us all and needs to be explored on a larger scale. I believe we can all apply 'John levels' of creativity to defining our Corporate and Social Responsibility (CSR) objectives and sharing our skills with the next generation and wider community. I have also found it can pave the way for us to identify our own passion projects or side hustles in the process. When it comes to CSR and offering our skills, are we just missing opportunities that are on our doorstep?

A Personal Example

Rewind to early 2022, I felt I could give a bit more. I enjoyed my existing role so wasn't looking to move around, but wanted to expand my skills and behaviours outside of the bubble of my organisation. After searching for a local organisation I felt I could support, I picked up the phone to speak to Getaway Girls, a 35-year old charity in Leeds, UK, that supports girls and young women to live safe, happy and fulfilled lives. I spoke to Alia the operations manager who opened up about her personal journey from being a 'Getaway Girl' to now being a member of the management team, and crucially some of the challenges and constraints faced by the charity and the community it supports. I was hooked. My BA brain kicked in and the will to help was reignited.

Old faithful tools from our BA toolkit, POPIT, SWOT and PESTLE helped get us started and flush out gnarly problems, risks and opportunities. I dusted off my glorious BA box filled with giant sticky notes, coloured pens and it felt like the old days, but better. Early workshops made it clear that there were a number of solution options to explore in order to plug some gaps and support the charity's growth strategy.

After the first couple of months, trusting relationships were in flow with my stakeholders and my business knowledge was growing. The help was wanted and my stakeholders were engaged—a winning combination. I found that I could enhance and (dare I say) 'practise' BA qualities that I wanted to improve such as leadership, trialling workshop techniques, strategic thinking and overall I had the opportunity to use a more varied toolkit. Fast-forward to the present, we have now launched a growth project with a digital strategy at its heart, after identifying ripe opportunities for support and value-add services with the help of the local digital community. It's early days, but boy, is it making me a better BA and helping me explore my own skills whilst hopefully making a difference.

I should stress, it's not all 'happy path'. Impact assess yourself, your time, your work-life balance. You may find you can become a boss at managing your time better (another great BA skill) even when being busier. You may find where your passions within business analysis lie—and where they don't. You will definitely widen your community and stakeholder network and learn lots about people, processes and businesses that are new to you.

There's More than One Approach: Find the Right Route for You

But of course, one size does not fit all. There are many options here for using our skills for the greater good. That's where we need to think creatively, influence and band together, sharing fresh ideas about how we can make a wider impact. Selfishly (?), we also get to highlight the value of business analysis too in the process.

So what are the models for helping? Some people will be able to go fully pro-bono, but perhaps large organisations that need to give back may sponsor you to undertake similar work. Or simply do we need to emphasise the importance of business analysis within the charity sector? And do larger charities already invest consistently in their BA capability? What starts as an idea to donate two CSR days annually of yours or your team's time and skills to a grass roots organisation or any team in need, may grow into something much bigger.

It's fair to wonder how much impact we can make within a couple of days a year with our skills also. But if I recall correctly, the last few agile courses I have been on have all been two days long, and they were valuable to me. So your two days may be valuable to someone else who can then put the relevant learning into practice. Could organisations rotate help between people and roles? Who knows—the questions need to be asked and undoubtedly the answers will vary. The requirements of each recipient will be different and some will be glad of the help, and some won't want to go there. But we can always ask the question.

I do think I hit the jackpot that Getaway Girls had been wishing to partner with the digital community for a while and also wanted to review their organisation. They just couldn't do it because of the challenges we tweezed out in our workshops. I guess my lessons learned here are 'seek and you may find', 'ask and you may receive' and to my stakeholders 'take a risk'. If I had never picked up the phone that one gloomy day after the pandemic, I may never have got started. My life is enriched beyond measure and I have accelerated my own growth as a BA, enhanced my skills and put the spotlight on our profession in a small local way. Getaway Girls know what BAs are now- win!

There are many paths yet unexplored on how we can offer our digital skills in the wider ether and I'm excited that our community is able to make a difference. To close, I can only say, let's all 'Be More John'.

Sarah is a Business Analyst at Hiscox UK and also Lead Ambassador at 35 year old Leeds charity Getaway Girls. Sarah has a passion for supporting others and personal development, seeking out opportunities for collaboration with the BA and community.

What BAs Need to Know about Machine Learning (ML) Projects

Anton Reshetnikov

Business analysts (BAs), working on machine learning (ML) projects require a different set of skills from those needed for traditional software development projects. In this article, we will cover the basics of ML projects and what BAs need to clarify at the beginning of the project to ensure its success.

What Is ML and What Are ML Projects?

Machine learning projects are those that involve applying ML techniques to solve a specific problem or achieve a certain goal. ML is a type of artificial intelligence (AI) that enables computers to learn from data and make predictions or decisions without being explicitly programmed. ML algorithms can be used for various applications such as image recognition, language translation, fraud detection, and recommendation systems.

ML projects involve building models that can learn from data and make predictions or decisions based on that data. The project's success depends on several factors, such as the quality of the data, the choice of algorithm, and the model's ability to generalise to new data.

What Is Crucial to Clarify at the Beginning of the Project?

At the beginning of an ML project, several clarifications are crucial to ensure that the project's objectives are met. Some of these clarifications are the analyst's responsibility, while others require collaboration with the technical team.

1. **Project objective:** The project's objective must be clearly defined to avoid scope creep and ensure that the project meets stakeholders' expectations. For example, if the objective is to build a recommendation system for an e-commerce website in order to maximise sales revenue, it should be clear what types of products will be recommended, how recommendations will be generated, and what metrics will be used to evaluate the system's performance. As well as project objectives, thought should be put into the business objectives and outcomes that are being sought.

2. **Data availability:** The availability of data is crucial for the success of an ML project. The analyst needs to understand the data's quality, completeness, and relevance to the project's objective. If the data is incomplete or of poor quality, the analyst must work with the technical team to decide how to deal with missing values or outliers.

3. **Data preparation**: Data preparation involves cleaning and transforming the data to make it suitable for ML algorithms. The analyst must work with the technical team to decide which data cleaning techniques to use and how to transform the data to ensure that it meets the algorithm's assumptions.

4. **Algorithm selection:** Choosing the right algorithm is critical to the success of an ML project. The analyst needs to understand the strengths and weaknesses of different algorithms and select the one that best fits the project's objective and data characteristics.

5. **Model evaluation:** Model evaluation involves testing the model's performance on a test set of data. The analyst needs to work with the technical team to decide what metrics to use to evaluate the model's performance and what performance thresholds are acceptable.

6. **Model deployment:** Model deployment involves integrating the model into the production environment. The analyst needs to work with the technical team to ensure that the model is deployed in a way that meets performance, scalability, and security requirements.

Examples and Cases

Let's take a look at some potential examples of ML projects to illustrate the importance of clarifications at the beginning of the project.

1. **Fraud detection:** A bank wants to build an ML model to detect fraudulent transactions. The analyst needs to work with the technical team to ensure that the data used to build the model is representative of the types of transactions the bank handles, and that the model can detect new types of fraud that have not been seen before.

2. **Image recognition:** A company wants to build an ML model to recognise images of its products on social media. The analyst needs to work with the technical team to ensure that the algorithm used to build the model is suitable for image recognition, that the data used to train the model is diverse and representative, and that the model can generalise to new images.

3. **Speech recognition:** A healthcare provider wants to build an ML model to transcribe doctors' speech during patient visits to automate note-taking. The analyst needs to work with the technical team to ensure that the data used to train the model is representative of the doctors' speech patterns, that the model can transcribe speech accurately and quickly, and that the model can handle different accents and dialects.

4. **Customer churn prediction**: A telecom company wants to build an ML model to predict which customers are likely to churn. The analyst needs to work with the technical team to ensure that the data used to build the model is representative of the company's customer base, that the model can predict churn accurately, and that the model can provide insights into why customers are likely to churn.

Conclusion

ML projects require a different set of skills and knowledge from traditional software development projects. As a BA working on ML projects, it's crucial to clarify project objectives, data availability, data preparation, algorithm selection, model evaluation, and model deployment at the beginning of the project to ensure its success. By understanding these key aspects, BAs can collaborate effectively with the technical team and stakeholders to build ML models that meet business objectives and deliver value to the organisation.

Anton Reshetnikov works as a business analyst at Plata. He is experienced with mobile, web, desktop, and AI/ML-related projects for companies ranging from single-person startups to huge enterprises leading in their industries.

You can contact him on LinkedIn at www.linkedin.com/in/mr-anton-reshetnikov/

How to Use Your Business Analysis Skills to Manage Your Career (Part 3)

Araceli Higueras

Welcome to the third part of "How to use your business analysis skills to manage your career".

In this series of articles about using **your BA skills at the service of your career**, I have been bringing to you some of the similarities between coaching and business analysis, with the intention of conveying some ideas that will make you realise that your business analysis skills can be readily put at the service of your career, not just your daily work.

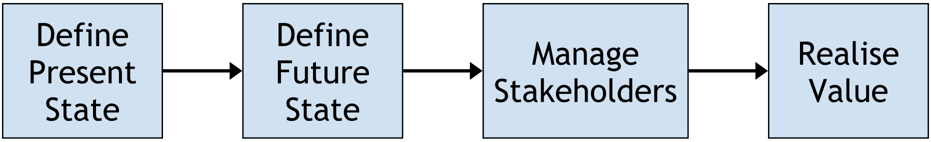
It is not necessary for you to **become a coach** (*although I recommend that you learn the skills!*) or that you **hire somebody with coaching skills** as a business analyst (*even if I find working with people with coaching skills great*!).

I am writing this article as an executive coach with experience since the beginning of 2009, albeit part-time, because I am also a business analyst in my 'day job'.

In my previous two articles, we looked at analysing present state and articulating **desired future state**. I encouraged you to have an understanding of your **goals** and drivers, your **values** and the **impact** that you want to have.

In the second article we looked at **stakeholder analysis**, what it means in the context of your career.

In this one, the last article of the series, I will focus on **business value realisation**.



This journey is summarised in the diagram above.

In this article we'll look at how to communicate your results, in relationship to your objectives. We will also look at personal brand and business value realisation, the two most important elements that you'll need to communicate.

First Things First: Keep Track of Goals

By this stage of your career management work, I expect you have some clarity about your intended future state. The vision of what your intended future state is can be turned into **specific goals that you can track** against.

The most important aspect of tracking is making sure that you have information (evidence) available to you when you speak to your stakeholders (please see the article part two of this series).

You are likely to be familiar with the RACI matrix and will surely be aware of the need to identify those stakeholders who must be informed, consulted, those who are accountable or responsible for parts (or all) of a project that you are involved in.

This relationship and communication also applies to engaging them into your personal career, not just your professional projects. That's why in the second part there was advice on how to engage with stakeholders and this engagement is done on the basis of your personal brand and your mission. To add to this advice I strongly recommend that you find a way to weave evidence about how you/your work is progressing towards your goals into your conversations with stakeholders.

What Type of Goal?

It has been reported that during a visit to the NASA Space Centre in the early 1960s, President Kennedy noticed a janitor carrying a broom. He interrupted his tour, walked over to the man and asked: "what are you doing?" The janitor responded: "I'm helping put a man on the moon, Mr President."

Let me be direct: it is in your benefit to look at end-to-end processes and be able to link your work to the company's strategic goals. Please remember this story and articulate your contribution, the contribution of your work, towards the organisation's strategic objectives.

Who Is Responsible?

Organisations can be complicated and we can become embroiled in work that changes hands and involves any number of people. Take exquisite care to recognise the contributions of others and to claim work that belongs to you.

Keep Impact in Mind

"So what?"

You must have heard this question many times.

Don't let your stakeholders walk away from interactions with you with it in their minds. Particularly if you're sharing your achievements. Make sure you put into practice all the research and analysis that you did in the previous article and **communicate to each person the relevance of what you have achieved in terms of their goals**.

What Next?

These are not reading articles, these are ***'doing'*** articles. Next is, if you haven't started, changing the way you lead your career by putting into practice these suggestions. Do you need a hand? Do not hesitate to reach out.

Araceli is a BA, coach and copywriter. She loves crafts, is a keen sportswoman and a languages enthusiast.

She works as a product owner at Global Relay, serves as trustee at ICYE-UK and is on the leadership team of London's chapter of International Association of Women.

Connect with Araceli:
www.linkedin.com/in/aracelihigueras

You can read the previous articles in this series by accessing the BA Digest archive

BAs Don't Gather Requirements Anymore: What It Means to Do Modern Elicitation

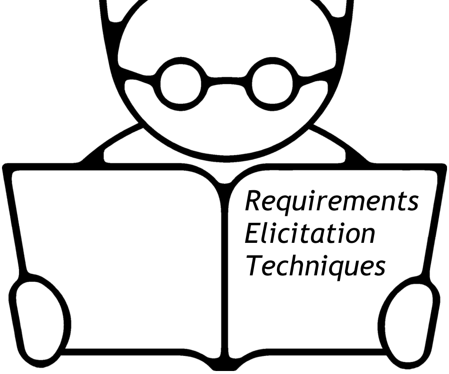
Nuno Santos

"People don't simply "gather" requirements. Requirements aren't lying around waiting for the business analyst to collect them." Karl Wiegers

I couldn't agree more with Karl. But what does that mean in practice?

There may have been times in the past where business analysis was (incorrectly) seen as a passive discipline. Some might have viewed that a business analyst's job when "gathering" requirements, most of the time, was attending meetings where they interviewed a group of people. Typically these people had significant roles in the product team (although most of the time they wouldn't be the future users of the solution) and the business analyst would simply be a clerk and register all their dictated "wishlist" items.

Of course in this case we are talking about bespoke requirements engineering. Alternatively, it may be oriented to a combination of known customers, or to a mass market where customers cannot be clearly pinpointed, also referred as market-driven requirements engineering.



Both these approaches are based on the premise that your sources know what they need and dictate the solution, yet how often is this actually realistic? More often there will be experimentation, change and the need for flexibility. Business analysis has never been passive or rigid, and requirements engineering is an ever-developing discipline! It's important that we keep up to date with emerging trends and practices.

With the emergence of agile development methods, there was a shift from project thinking to the product mindset. Additionally frameworks like Dual Track Agile from Marty Cagan's book "Inspired" influenced organisations to split their efforts into *product discovery* and *delivery*. The main shift on the premise of product delivery, compared to bespoke or market-driven requirements engineering, is that teams have to discover what the user's problems are based on a set of assumptions and validate if a delivered solution contributes to the desired outcome. For business analysts, this means being involved in both the discovery and delivery processes, and it requires a shift in how requirements are elicited and managed. BAs need to challenge stakeholders' perceptions on any assumed solutions and get to the underlying need using modern requirements techniques. They have to discover the requirements rather than gather them.

Discovery Techniques for Elicitation

In this sense, the **observation** technique is still key. It is important to pay a visit to your customers or users, and in doing so you will likely discover that the observed process is not as linear as initially described. Stand together with the users and identify pain points and points for improvement by simply observing or asking this directly. I have written an article that can be found in BA Digest Q2 of 2022, with tips for performing Observation, called *You Can Rely on Data (and That's Fine!) But Your Eyes Are Better*.

Another recent approach for defining the problem is **"Jobs-To-Be-Done" (JTBD)**. Based on jobs theory and outcome-driven innovation processes, JTBD encourages us to appreciate why a product or service was "hired" (a JTBD metaphor) includes not only the functional dimension, but also the circumstances and emotional dimensions. The book "Jobs to be Done – Theory to Practice" by Anthony Ulwick describes a framework that you can use to define your *jobs*, from setting your different customers, the different kinds of jobs (core, related, emotional, consumption chain and purchase decision jobs), and setting the desired outcomes. Clayton Christensen's book "Competing against luck" provides many cases of JTBD and how they were used in comparison to other problem/opportunity framing approaches. A great template from Jurgen Appelo to write the JTBD can be found here.

Interviews are a crucial part of the elicitation of a product or service's requirements. Author Teresa Torres has described a set of "continuous discovery habits". She advocates engaging customers not only in the early stage of product development, but also at a continuous cadence (preferably a weekly one). This enables their actual needs to be discovered and adequately framed. The main shift in doing interviews is that questions don't focus on what customers *want*. Rather, questions should focus on their past experiences to discover an opportunity. Also, a common mistake is to have interviews around the solution to be developed. But an approach from Rob Fitzpatrick, the "Mom Test", teaches us differently. This metaphor suggests that if you were to ask your mother about a solution, she will always like your idea. But asking the right set of questions can make her tell what you really *need* to address.

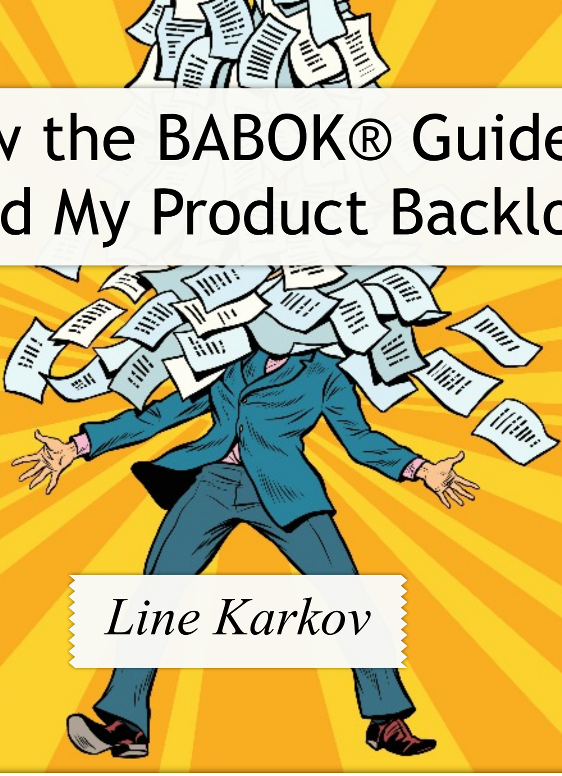
Teresa Torres has described a technique that is used together with the customer interviews known as **opportunity solution trees**. Opportunity solution trees are a visualisation of potential solutions to a customer problem. They involve breaking down the problem into smaller opportunities, generating multiple solutions for each opportunity, and then evaluating and selecting the most promising solution.

The last technique I want to discuss in the article is **user story mapping**. This is a technique where team members collaboratively discover how a set of user stories solve a customer problem. The method consists of sequencing the user's activities, and allows further elicitation to take place so that detailed stories and tasks can be captured. This in turn ensures that the solution will support the user's activities that were presented.

Conclusions

Product discovery focuses on ensuring the customer receives a product or service that they value. It does this by understanding their problems, needs, and behaviours, and then creating solutions that are aligned with these factors. Instead of creating a Business Requirements Document (BRD), which can be limiting and inflexible, product discovery leads to the creation of a product backlog that is based on customer feedback, insights, and experimentation. In product management, backlog items are viewed as hypotheses to be validated, rather than fixed requirements, allowing for greater flexibility and adaptation to changing customer needs. Doing product discovery is indeed a shift in requirements elicitation, and the techniques in this article are some examples of how discovery is very different from "requirements gathering".

Nuno Santos is a Senior Business Analyst in Natixis in Portugal, and you can contact him on LinkedIn at www.linkedin.com/in/nunoasantos



How the BABOK® Guide Saved My Product Backlog

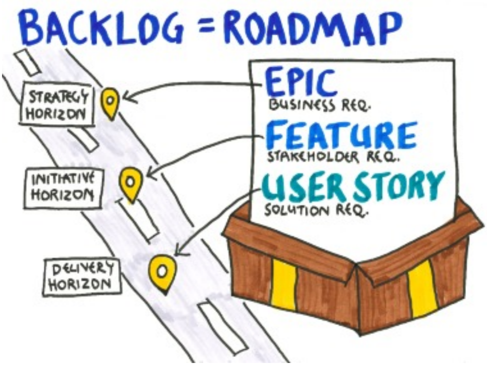
Line Karkov

Are we more focused on burning down a product backlog than on the bigger goals and value we deliver? This was one of the questions raised by Allan Kelly on a Blackmetric webinar titled "Moving away from backlog driven development – a new chapter in agility?" on December 8, 2022. He argued that the backlog has become a bottomless pit, where we lose ourselves in the detail and lose sight of the higher level vision, value and goals.

My answer to Allan's question is that it's not always necessary to move away from the backlog. However there is huge benefit in ensuring the backlog is well-structured so that it:

- Captures strategic product goals, as well as testable acceptance criterion
- Keeps down the total number of items on the backlog

That structure is illustrated in the diagram below. In this article, I will elaborate on it.



Structure Is the Key to a Healthy Product Backlog

The structure of the set of requirements is dictated by the backlog, which typically has a hierarchy in three levels. Epic, feature and user story is the terminology used in Azure DevOps, which is our tool for backlog management. When information (primarily models) is stored outside of the backlog, it must be possible to link to it from the backlog, so that the overall requirements architecture is maintained.

These three levels can be aligned to the requirements classification schema specified in the International Institute of Business Analysis (IIBA®)'s Business Analysis Body of Knowledge (BABOK®) Guide. Within BABOK® the core requirement types are defined like this:

- Business requirements: statements of goals, objectives, and outcomes that describe why a change has been initiated.
- Stakeholder requirements: describe the needs of stakeholders that must be met in order to achieve the business requirements.
- Solution requirements: describe the capabilities and qualities of a solution that meets the stakeholder requirements.

Business requirements

They are documented as epics and can include Objectives & Key Results (OKRs) or benefit hypotheses. For both, there are best practices that can be adopted and built into the work items on the backlog. The diagrams from design thinking can also add value to business requirements, e.g. customer journey maps.

Stakeholder requirements

Epics are broken down into features. Stakeholder requirements can be described with all the classic requirements models: processes, information models, decision models. Good stakeholder requirements ensure that we have the right user stories to build the product. I know that it is usually said that the user story is the centre of conversation with the team. I focus just as much on stakeholder requirements. This ensures that we also have the investigative spikes and technical work covered that can be required if the team is working with new technology or a new domain.

Solution requirements

Features are broken down into user stories. If a user story does not support a feature, then it is out of scope. It is as simple as that. My primary focus here is: How will I test this user story?

One Size Doesn't Fit All Backlogs

Backlog management tools can be customised so that the appropriate attributes for the product are captured. For example, I can add a field (or change the label on an existing field) if I want links to OKRs to be part of the work item by default. Or I can add a drop-down list to my features with the departments of our organisation to document ownership of a stakeholder requirement.

Seeing Both the Forest and the Trees

A backlog is effectively managed using the three planning horizons: strategy, initiative and delivery. These horizons are defined in the Agile Extension to the BABOK® Guide. Business requirements are planned on the strategy horizon, stakeholder requirements on the initiative horizon and solution requirements on the delivery horizon. This means that it’s necessary to refine backlog items on all three levels of abstraction simultaneously. It also means that backlog refinement can take place in a prioritised order. When a stakeholder has a new user story, it needs to be assessed. It is important to determine if it is a user story or really a feature, or maybe just necessitates an additional acceptance criterion to an existing user story. And if it does not support any benefits or OKR in any of your epics, well then it is just out of scope. With a well-structured backlog, making this assessment is possible, and it’s possible to place any input at the appropriate level of abstraction. This also means that the product backlog can clearly link to a delivery roadmap. This is achievable with a hierarchy of iterations so epics and features can be scheduled with high level iterations (e.g., an iteration for Q3 which is then broken down into the sprints in Q3).

Conclusion: Don’t Stop Improving!

Structuring a backlog is a good investment because it ensures that the team are working on the right thing at the right time. Just remember that this should also develop iteratively. Use the default setup provided by your backlog management tool for your Minimum Viable Product (MVP), then evaluate what else you need and adjust. When you do retrospectives, remember to also include improvements of how you work with the product backlog. To understand this in more detail, and for structured guidance, I recommend looking into the first knowledge area of the BABOK® Guide (Business Analysis planning and Monitoring). This knowledge area also includes planning for stakeholder engagement and requirements governance, which are not covered in this article, but also important for healthy product backlog management.

Line Karkov is a business analyst and product owner from Copenhagen, Denmark with more than 15 years’ experience. Her professional areas of interest include product ownership, visual thinking and specification by example. Please reach out on LinkedIn: Line Karkov | LinkedIn

Business Analyst or Business Agilist?

Hannah Pearson-Coats

Being a business analyst on an agile team is typically fun, fast paced, and highly collaborative, but it can be difficult to know where your role fits. And worse, every organisation approaches business analysis and agile slightly differently, so there's no one-size-fits-all approach.

Never fear! There are many ways that you can incorporate agile thinking into your work. Here we'll dig into a few of the ways that you can do just that. By the end of this article, you will have learned how business analysts can be—and should be—**instrumental** in supporting agile values on a team.

But first, a bit of history.

The *Agile Manifesto* was written and signed by a group of 17 thought leaders from across the software development sector in 2001.

Together they published the *Manifesto for Agile Software Development* which declared: "We are uncovering better ways of developing software by doing it and helping others do it."

The most widely known part of the manifesto are the 4 value statements, which are:

1. Individuals and interactions over processes and tools
2. Working software over comprehensive documentation
3. Customer collaboration over contract negotiation
4. Responding to change over following a plan

So ... how do these Agile values apply to us as business analysts? Let's dig in.

Individuals and Interactions over Processes and Tools

Everyone needs good processes and tools to perform well. No Formula One team, for example, would "wing it" during a pitstop. They rely on high-quality tooling and a routine practised again and again to the point of being second nature.

But unlike the pitstop team where "good" is measurable and known, in all likelihood you and your team cannot build the same solution you built for the last problem and expect it to work. Contexts differ, and therefore each new situation is unique.

Building good solutions can be hard work. To enable value to be realised, you need input and engagement from everyone in your team and more. Processes and tools may support this, but they don't create it alone. The key ingredient to success is your **team** and how they work together.

The first agile value encourages you to broaden your focus from your own part, to a team-wide perspective! It means working—and engaging—with your team: prioritising their understanding over rote repetition of some set process.

Ultimately, people are the key to building great products. If you don't get that part right, even the best tools and processes won't be much help.

In practice this looks like:

1. Get to know everyone involved really well
2. Prefer whiteboarding and chats over sending emails
3. Create opportunities to talk and, more importantly, **listen**
4. Build strong relationships with stakeholders

Working Software over Comprehensive Documentation

As a BA, you know the joy of polishing a report, submitting a review, or finalising a tranche of requirements. You know that feeling you get when it is *done and dusted*. Phew! Go you!

That's because this is how you contribute. All the documentation and all the artefacts you create are part of a complex process: a wonderful, necessary, messy part, but *not the whole of it*.

You cannot maximise value on your own. You must collaborate.

This second agile value puts the focus squarely on the actual solution as the most valuable artefact a team can create: the working solution itself. Until then, everything is prep work.

Remember, if you work in a highly-regulated environment such as banking or government, then achieving working outputs might involve all sorts of comprehensive documentation: business cases, market scans, detailed requirements, and more. That's absolutely okay! The second value simply asks that you don't *value* the prep work *over* the actual solution, not that you don't *do* the prep work.

In practice this looks like:

1. Ask, "How does this help us get to working outputs?"
2. Get feedback from your stakeholders on your outputs and your approach.
3. Flex your documentation to suit the environment.

Customer Collaboration over Contract Negotiation

Much of your BA work—scope definition, requirements, acceptance criteria, and more—is intended to record formally the shared understanding in an unambiguous manner.

The reason your work is so important is because shared understanding is vital to the success of a project, and also incredibly difficult to establish.

The gulf of understanding between your customer and your team is often significant. Your customer won't understand the complexities of the technology with which your team works, and your team is unlikely to understand the operational realities your customer faces in their job.

Because you play a key role in defining and documenting scope, your ability to enable collaboration across that gulf of understanding is immense. You have an outsized influence on how involved—or distant—the relationship between your team and the customer is.

This third agile value encourages you to enable a collaborative approach over an us vs. them transactional relationship.

In practice this looks like:

1. Use plain language in documents and communication
2. Maintain regular contact with clients and stakeholders
3. Facilitate conversations between the team and the customer
4. Help each side to appreciate the perspective of the other

Responding to Change over following a Plan

You and your team often solve complex

problems where not everything is known up front. Discovering new information is practically guaranteed on an agile project, from a previously-unidentified business rule, to another integration point to migrate or a new dependency on another party.

When new information is uncovered, the fourth agile value tells us to deliver the best outcomes *to the customer* rather than insisting that "we all agreed to X."

Applying this value also involves inviting feedback and immersing yourself in your customer's world enough to be able to identify when something might need changing. Because the earlier you uncover new information, the better.

And it means ensuring that plans are outcome focused and flexible enough to cope.

In practice this fourth Agile value looks like this:

1. Encourage feedback at all stages to minimise risk of rework

2. Provide opportunities for customers to check progress

3. Take an incremental approach to defining requirements

4. Remain open to things changing

5. For each change, ask: "What will the impact of this change be?"

Wrapping It up

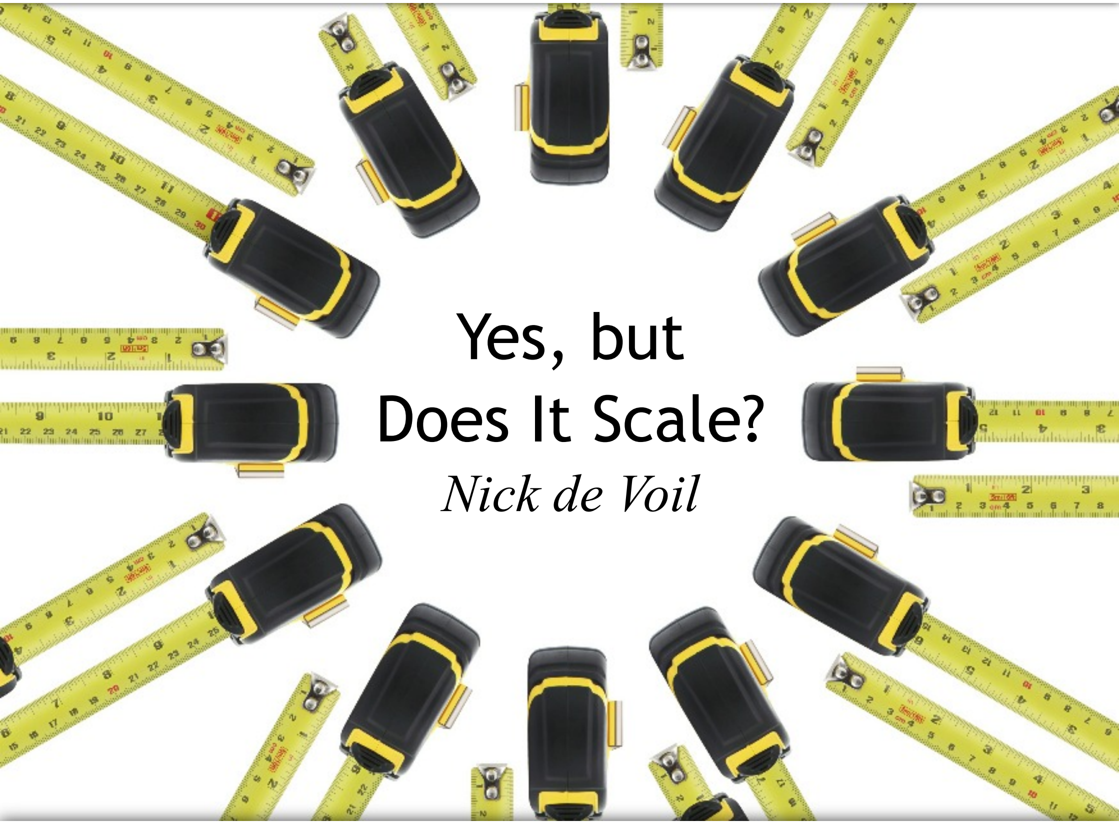
Clearly, there are many ways to incorporate agile thinking into your role as a business analyst. Here we have highlighted just a few of the ways to do so. The bottom line is this: you have considerable influence on your team's agility. You are instrumental in supporting—or undermining—an agile approach.

With great power comes great responsibility. Use your power wisely.

Hannah Pearson-Coats is a senior business analyst based in New Zealand, and founder of Jimmy Consulting. She is endlessly enthusiastic about Agile approaches to business analysis, tackling big problems, and getting stuff done.

She'd love to connect on LinkedIn.

Using Group Construct Analysis to Understand Stakeholder Worldviews in Ambiguous Situations, Part 9



Yes, but Does It Scale?

Nick de Voil

There are some intriguing expressions that we use sometimes. Have you ever said something like one of these:

"I'm in two minds about that"

"There's part of me that agrees with you"

"My heart says X, but my head says Y"

"I'm going to channel my inner <insert other person's name here>"

These snippets all illustrate something rather surprising: each of us, although clearly an individual, sometimes feels as if **there is more than one person inside us**. These different characters may be present at different times, or they may be there simultaneously. Sometimes they're having a conversation; sometimes they disagree with each other. We might feel that each of them is very much a part of us—or one of them might feel like an intruder from outside.

There's no shortage of theories and frameworks relating to this, in fields as diverse as neuroscience, psychotherapy, philosophy and theology. Take a few examples, each of which is worth at least a whole article to itself:

- Transactional Analysis, invented by therapist Eric Berne, suggests the participants in an interpersonal situation will cycle between different "ego states" - the *Parent*, the *Adult* and the *Child* - each of which has a distinctive voice;
- Philosopher and anthropologist George Herbert Mead developed an influential theory of the *self*, which he conceived of as a dialogue between the "*me*" (the so-called social self) and the "*I*" (the individual's response to it);
- Literary-theorist-turned-neuroscientist-turned-philosopher Iain McGilchrist argues persuasively that the two hemispheres of the human brain work in similar yet fundamentally different ways, and are both "always on", with unpredictable consequences.

Why am I mentioning this? Well, for one thing, it's yet another reason why we shouldn't be at all surprised if our stakeholders appear to change their minds, or behave differently in different situations, or be inconsistent in other ways. You might feel that they resemble the poet Walt Whitman:

Do I contradict myself?
Very well then I contradict myself,
(I am large, I contain multitudes.)

Read on for the second reason.

Previously in this series, we've looked at how to model a person's "construct system"—the elements of that individual's worldview and the relationships between those elements. I've suggested that it is possible to use the same approach to model the shared construct system within an organisation—hence the name "Group Construct Analysis" (GCA). But this raises a few questions:

1. Is it even appropriate to speak of a group's construct system in the same way that we speak of an individual's construct system?
2. Can we be sure that an apparently shared construct has the same meaning for all members of the group?
3. If so, how are constructs communicated and coordinated amongst members of the group?

Let's address each of these issues.

Are Individuals' and Groups' Constructs the Same Sort of Thing?

The first question is a legitimate challenge to what I'm proposing, i.e. effectively the re-purposing of a well-established technique in a different context from the one for which it was originally intended. The answer is: yes, it *is* appropriate to speak of a group's construct system in the same way that we speak of an individual's construct system. There are at least three good arguments for this:

- As described above, the mind of an individual is not "atomic"—arguably, there are multiple agents operating simultaneously. Even within one person, in a sense what is happening is a social process, as suggested by the title of Marvin Minsky's book, The Society of Mind.

- An individual doesn't dream up constructs in isolation. The construct system is largely the result of a socialisation process which starts in early childhood and continues throughout the person's life.

- Thought processes are not restricted to the mind of one individual. A team or organisation can be considered an entity that thinks. This was shown by cognitive scientist Edwin Hutchins in his studies of *distributed cognition* on board a naval vessel. Different members of the team take responsibility for specific cognitive tasks, and the information necessary for co-ordinating the tasks is stored and shared via *boundary objects*. A good example of a boundary object would be a Kanban board.

What If Shared Understanding Is Just an Illusion?

From a theoretical point of view, this is an interesting question. Is my idea of the colour red the same as your idea of the colour red? But for practical purposes we know that, if we put the effort in, we can often be fairly confident that we have achieved shared understanding. This is something that business analysts are good at: we create artefacts such as system models and requirements documents which act as effective boundary objects, and we know how to cross-check (validate) our understanding with others. In any case, the continual examination and comparison of constructs that goes on in GCA tends to bring differences to light—it's all about analysing things that are normally left un-analysed. It's not a precise science where there is one "right answer". Construct systems are not static but in a state of permanent flux.

How Do Groups Communicate and Coordinate Meaning?

Of all the ways in which people in a group bring their construct systems into sync with each other, four types of *resource* are of particular interest to business analysts:

- **Settings, objects and tools**: Places, physical objects and digital tools are powerful constraints on the way we work. They provide a framework for the group construct system.

- **Techniques and process**: "The way we do things"—whether a professional technique, a documented business process or a more informal convention—is another relatively fixed and visible point of reference.

- **Language**: The language that we use is itself a construct system. It seems fixed, but it is actually flexible. In using it, we create and maintain the construct system of the group.

- **Stories:** Language can be used in many ways, but there is evidence that one particularly effective vehicle for sharing meaning is storytelling. Identifying stories and distilling their meaning into constructs is an important part of GCA.

Paying attention to the way meaning is being created and shared through these resources helps us to identify and track the constructs as they develop. We'll discuss each type of resource in more detail in future articles.

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". Contact Nick via LinkedIn

You can read the previous articles in this series by accessing the BA Digest archive

Business Analysis and Cybersecurity – What Is the Root Cause?

Bindu Channaveerappa

In this three-part series, we are looking at why cybersecurity should be an intrinsic part of business analysis. In the previous article, I outlined the problem by looking at a couple of cyber incidents, recognising that cybersecurity is more than just IT, and the impact is significant if we get it wrong. Looking at the potential causes for the breach in both incidents, it can be ascertained that the underlying cause was the lack of awareness or not having a security mindset. Research has repeatedly shown that most cybersecurity incidents are due to a lack of awareness, and "people" are the weakest link.

Taking a Step Back to Gain Perspective

In this article, we'll take a step back to gain perspective on the root causes of this mammoth issue which is affecting everyone professionally and personally. Understanding the background will help us to evaluate *why* a change in focus towards cybersecurity is necessary.

I started my career as a consultant analyst developer during the late 1990s. My job was to work with clients, understand their business requirements, design a database, build a system to meet their business needs, and prepare manuals and train users to use the new application. I was doing all of these things on a standalone computer. All my code, executables, operating system, and database, including the customer data, were in one physical system.

The only vulnerability apart from securing the physical equipment was using a floppy disk, which was used to copy data in and out of the computer, and could potentially corrupt the files if it contained a virus. Even if a file was corrupted by a virus, anti-virus software was available which could clean the data. This solution could be replicated, on any other infected computers within the organisation. One solution for all computers.

Later, computers were connected as clients to a server creating local and wide area networks. Today with the advent of the Internet and other technological advancements, systems are distributed across the globe. For instance, customers can initiate a transaction in a location on a gadget and complete the same transaction in another place and at a different time.

Across the Spectrum of Change

Technology has advanced from wired, to wireless to wearable. It is conceivable that technology may be implantable in the future! Imagine the potential weaknesses or vulnerabilities in a globally distributed system. What can go wrong in this new landscape? The list of potential vulnerabilities is seemingly endless. It is easy to see why so many breaches occur, and why we seemingly hear and read about them almost every other day.

In a truly interconnected world, there is no one solution to this cybersecurity challenge. Unlike the times when information was passed between systems by floppy disks and dial-up modems, vulnerabilities in this new landscape come with their own risks and impacts. There are additional legal and compliance requirements to adhere to requiring different defence solutions, which could be technical and non-technical. Some of the solutions might involve people management, process management, disaster recovery and business continuity and more besides.

Throughout my journey as a BA, I've adapted to the progressing technology and changing business needs. As the businesses started to expand, a shorter list of user or system requirements back then also started to expand, into Functional Requirements (FRs) and Non–Functional Requirements (NFRs). Historically, security was considered as a type of NFR, usually restricted to roles and permissions. With the increased cybersecurity threats, this view on security is no longer sufficient.

Expansion Is the Future

In recent years, user experience enhancements have been made by pushing out system boundaries.. Disrupting and challenging the status quo and using technology in new ways within the business ecosystem has become the default way of thinking for innovative organisations. **The more technology expands, the more vulnerable the ecosystem gets, and the more security controls are required**.

Today robotics and AI have become part of many people's lives, whether robotic dogs patrolling the parks or Alexa and Eilik (a mini robot) on our desktops or personal assistants for homes. This is the beauty of technology. However, as the saying goes, when we pick up one end of the stick, we also pick up the other end. Along, with technology comes cybersecurity. Research from Gartner brings forth four emerging technologies and trends for 2023. Two of the four concern cybersecurity. The "smart world" - a fusion of physical and digital experiences, and the "transparency and privacy" of personal data collection.

BAs and Cybersecurity

What can (or should) BAs do? Or does the problem exceed the scope of business analysis? A key question to ask is “who is responsible for cybersecurity?”. This is a tricky question to answer.

Imagine a customer walking into a store, accidentally falling due to a slippery surface or stumbling due to some obstruction. Who do you think in this situation is responsible for the accident? Is it the cleaner, staff, security guard, store manager, senior management, etc? Who in your home is responsible for securing the doors and windows or valuables? Now that you have gained a broader perspective on the topic, take a moment to ponder this question. Who is responsible for cybersecurity?

The answer, perhaps, is that *everyone* has a responsibility to consider cybersecurity. Yet, as it has often been said “everyone’s responsibility is nobody’s responsibility”. With such a crucial area, it’s essential that somebody picks up the baton. As business analysts, we are well-placed to step up, ask the difficult questions, and ensure that cybersecurity is kept firmly in the spotlight.

In the next article , we'll look at the role of BAs in protecting the organisation's information and intellectual property.

Bindu is a BA consultant and director at IIBA UK chapter. She's a keen advocate for making cybersecurity inclusive within mainstream business analysis. Bindu was part of the team authoring IIBA's cybersecurity certification. She is creating a cybersecurity training course focussed around Business Analysis which will be available soon.

Scaling Agility: Thinking Beyond Agile Frameworks

Mike Burrows

Introduction

The most common approaches to scaling agile might be summarised as follows:

- Scaling what is fashionably termed *mindset*, the hope being that greater awareness of agile values and principles will naturally lead to good results
- Attempting to replicate the practices of team-level agile frameworks at higher organisational levels
- Using a scaled process framework, with longer value streams, more parallel activity, and larger and more structured backlogs

These approaches are not mutually exclusive. Separately or together however, it seems their results could best be described as "mixed" at best. Indeed, their weaknesses are apparent:

- In the absence of some joined-up thinking and adequate feedback mechanisms, the mindset-first approach can be unsettling enough to make further change more difficult
- With similar consequences, replicating solutions for their own sake is a poor basis for meaningful change
- In the absence of counterbalancing forces, tendencies toward bigger and harder-to-change commitments have obvious implications for agility

It is time I believe to invoke some deeper thinking on organisation, where the fundamental units are not a framework's concepts or practices, its process flows, or its work breakdown structures, but *relationships*.

Relationships scale because they exist naturally on a spectrum that easily encompasses all organisational structures, formal or otherwise. At their most granular, there are not only the relationships that exist between people, but finer-grained relationships between for example people and their work, their personal workloads, and their preferred ways of working. At larger scales, there are relationships between organisational units, between those and their respective products and services, and with their customers and markets. Other, more abstract relationships exist at every conceivable scale, between for example the conduct of value-creating work and its coordination.

These relationships come in several kinds, and in organisations of any size, their actual instances will be many in number. This might seem a backward step into complexity (and I use that word advisedly), but these relationships can be surprisingly easy to organise. Moreover, the model that organises them not only remains useful at every possible scale, it also helps us work on the relationships that exist between scales, with significant benefits for agility.

At Every Scale

The Deliberately Adaptive Organisation takes the classic Viable System Model (VSM)—a model that some (not entirely unreasonably) might regard as intimidating—and summarised it in terms of three "spaces":

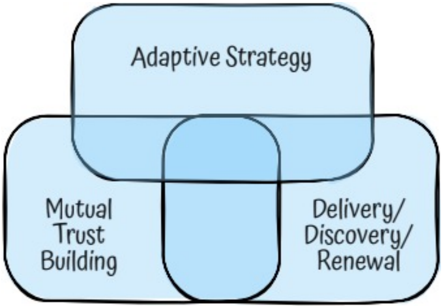


Figure 1 . The three overlapping spaces of the Deliberately Adaptive Organisation

1. **Delivery/Discovery/Renewal:** three different kinds of value-creating work, this space also encompassing how commitments are organised around and the work coordinated (agile parallels are obvious here)

2. **Adaptive Strategy:** creating and exercising options, managing the balance between delivery, discovery, and renewal, and attending to more existential matters – things like purpose, values, and focus

3. **Mutual trust building:** going out of one's way to ensure that the two other spaces have the internal and situational awareness they need to perform

Even before drilling into these overlapping spaces (they are so intimately related that certain elements of "classic" VSM are shared between spaces), it can be fruitful to consider the relationships between them. For almost any scope at any scale—sub-team (the intersection of team and some business domain, for example), team-of-teams, something bigger, or some cross-cutting concern—wherever there exists (after John Boyd) the *"drive to improve our capacity for independent action"*, we can ask whether the relationships between spaces seem balanced, healthy, and productive. Does one space seem to dominate the others? Is another ignored? Are the interactions between them appropriate to the needs and capacities of both sides? What impacts do these relationships have on their participating spaces over time, with what effect on their ongoing development? And with what implications for agility?

It is a well-worn path to map the Viable System Model's six *systems* to the organisation's formal structures of delivery and governance. Unfortunately, this becomes increasingly difficult at the finer granularities essential to a more complexity-aware approach. Starting instead with the three-space model of the Deliberately Adaptive Organisation, we can apply it with little difficulty even where the six systems aren't formally recognised. But they are there and their relationships are there to be found! Once surfaced, people close enough to them to recognise their own relationships with them are then more able to act on them together. Even when the scope in question exists as little more than an interesting possibility, there are valuable conversations to be had.

Between Scales

The relationships between different organisational scales are amenable to the same kind of treatment. Informally, we can ask whether they seem to be balanced, healthy, and productive, working to the benefit of both sides. Helped again by the Viable System Model, the Deliberately Adaptive Organisation identifies four aspects to these inter-scale relationships, each important for agility:

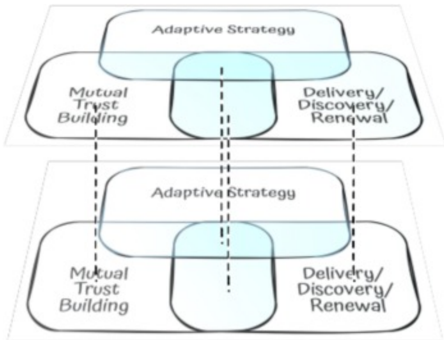


Figure 2 . Clockwise from front: Structuring, Translating, Reconciling, and Connecting

1. **Structuring:** optimising the correspondence between an organisation's structure and that of its challenges, such that most new challenges will readily find their appropriate home

2. **Translating:** progress and issues translated efficiently between scales, each scale working in its own domain language and with its own strategy

3. **Reconciling:** both as the work progresses and in response to surprises of any kind, ensuring that the strategies of related scopes and scales remain mutually coherent

4. **Connecting:** for reasons both of internal integrity and situational awareness, taking the time to nurture interpersonal and inter-unit relationships in every direction

Discussion

I believe that the Deliberately Adaptive Organisation's relational perspective is under-represented in the agile scaling frameworks. It may even seem foreign! To be fair to them, the literature doesn't help as much as it might, but given the weaknesses identified at the beginning of this article, I hope it can be agreed that more needs to be done. Coupled with a participatory approach, framework-provided knowledge might then be applied a lot more contextually.

For Further Study

A very early version of the Deliberately Adaptive Organisation may be found in the closing chapters of my book *Agendashift: Outcome-oriented change and continuous transformation* (2nd edition 2021), with some early clues in *Right to Left: The digital leader's guide to Lean and Agile* (2019, audiobook 2020). A more definitive book is not expected before 2024, but the model is already the centrepiece of the Agendashift Academy's fourth and most advanced module, Adaptive Organisation: Business agility at every scale.

The Viable System Model was described by Stafford Beer in *Brain of the Firm* (1972) and *The Heart of Enterprise* (1995). On the grounds that it's incomprehensible without the first two, I can't honestly recommend his much shorter book *Diagnosing the System for Organisations* (1985); instead I would recommend the Patrick Hoverstadt's much more modern treatment *The Fractal Organization: Creating Sustainable Organizations with the Viable System Model* (2008).

Agendashift founder Mike Burrows works at the intersection of Lean-Agile, strategy, and organisation development in the pursuit of the 'wholehearted' organisation. Author of three books, he is recognised for his pioneering work in Lean, Agile, and Kanban and his advocacy for participatory and outcome-oriented approaches to change, transformation, and strategy.

Go Against the Flow, like Florence

Danny Kalkhoven

Maybe you recognise this in your work as a business analyst: "it doesn't feel right, but it's what the management wants, so . . ."

As BAs, we are hired to investigate and analyse, and usually we do not stop until we have found the real problems or improvement opportunities. We want to do our job in an objective and neutral way, without making assumptions about what the solution will be.

But what if you were instructed to superficially reach a conclusion which meets the hidden objectives of only some stakeholders? For example:

- Funding is needed for continuation of a project, so you are put under pressure to show progress (even though progress hasn't really been made). The dashboard must show a positive trend.
- A stakeholder feels that a new web interface must be developed, and is keen to ensure that user surveys support their view. You are asked to 'interpret the feedback' in a favourable way.
- The parameters for comparing the possible IT solutions must be lined up and weighted so that the cheapest solution will get chosen (irrespective of whether it is actually effective or not).

Maybe you recognise this dilemma: go along with the flow, or keep to the best professional (perhaps even ethical) behaviour. Perhaps you have even asked yourself: "what will happen if I go against the flow?"

Learning from Florence Nightingale

Inspiration for these thoughts come from something I read about Florence Nightingale. The only thing I knew about her (until recently) was that she is often cited as one of the founders of modern nursing. Florence Nightingale gave nursing a favourable reputation and became an icon of Victorian culture, especially in the persona of "The Lady with the Lamp" making rounds of wounded soldiers at night.

But what I didn't know: she was also a statistician who worked with data to acquire knowledge and trends and she even used data visualisation and charts. For example, she used the technique that we would now call a pie chart to support her reporting on mortality rates in the Crimean war. Crucially, her analysis showed that changes that she implemented had reduced the number of unnecessary deaths. She used visualisation to convince non-statisticians and non-medical practitioners of the importance of the changes. The Science Museum makes the following observation.

"With her mortality diagram, Nightingale wanted MPs and army officials to get a quick visual understanding of the scale of the problem, counteracting their entrenched belief that soldiers died from wounds rather than unsanitary hospitals."

So we could even argue that she was one of the first business analysts: investigating, analysing and using information about a problematic situation to propose and implement improvements. Her conclusions were contrary to common knowledge, but she let the infographics support the message.

Now I don't want to directly compare us as business analysts with Florence Nightingale, but there is a connection: the usage of that powerful tool "information". Sometimes this information might lead us to make recommendations that aren't expected, or even that contradict common knowledge.

Going against Common Knowledge

Back to the question: "what will happen if I provide honest conclusions to my stakeholders, but those conclusions aren't what those stakeholders want to hear?" From personal experience I can tell you: if you take the easy route, you may get positive reactions, but it will not make you feel good in the end, and it is also likely to lead to bad outcomes for the organisation. It might avoid short term pain, but it can lead to issues that are much longer term in nature. Imagine if a bad decision was made when procuring a software system: the pain could last for *years.*

Ultimately, it's important to remember that BAs are hired to be critical and honest, and this sometimes involves going against the flow. A good BA will investigate, research, analyse and then propose the solution opportunities. When that solution is not "what we wanted to hear", you might be appreciated just for that, being critical and honest!

From personal experience I can tell you that if you have done your homework, if you stick to the message because of your analysis and findings, you will be appreciated for that. Because it is the information (in models, reports, infographics) that lead to the conclusion. Not the other way around.

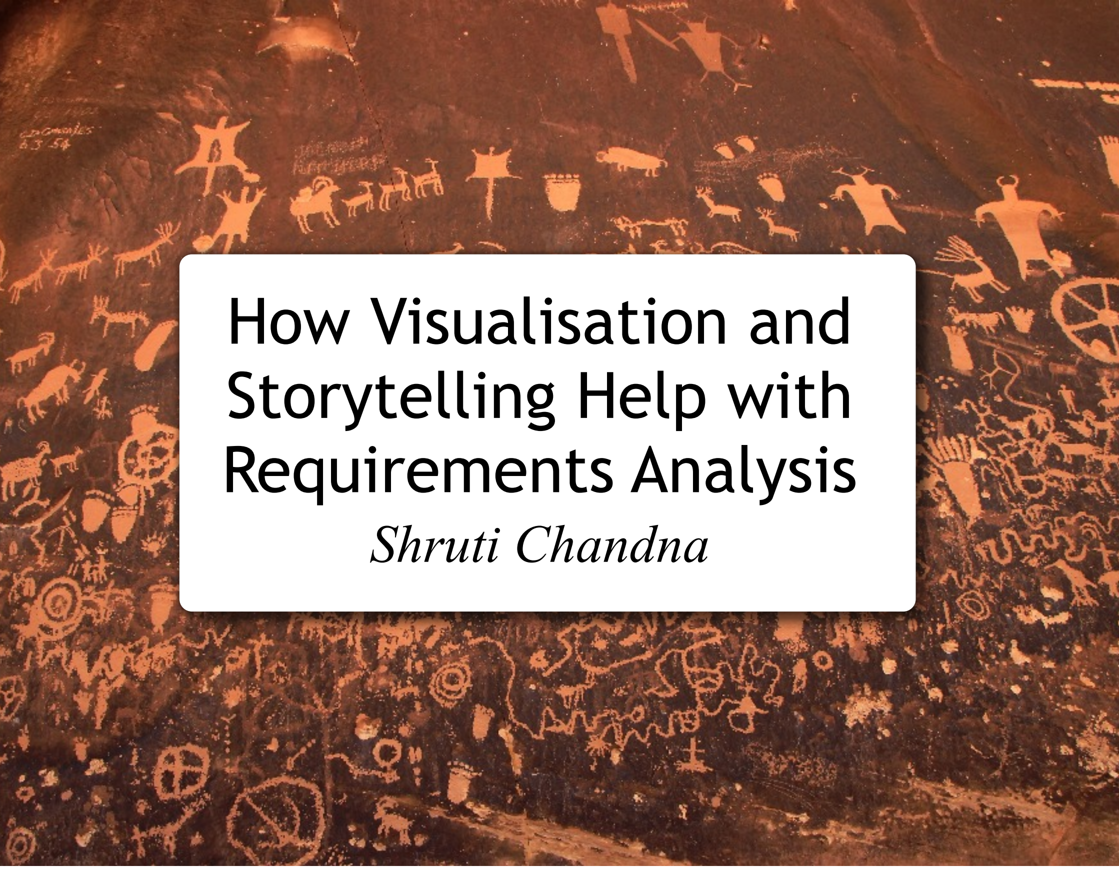
Our work as BA's involves one of the powerful tools that were invented: Information.

Use it wisely, like Florence!

Danny Kalkhoven has worked in banking, insurance and health care environments as a business analyst for over 20 years, and is a trainer for a series of BCS Business Analysis courses in NL. This combination of activities is great, they profit from each other!

Contact:

linkedin.com/in/dannykalkhoven



How Visualisation and Storytelling Help with Requirements Analysis

Shruti Chandna

In complex software development initiatives, misunderstandings between the software development team, client and other stakeholders can be a common problem. These types of misunderstandings can lead to project failure.

Whether a project is progressed with an agile or waterfall methodology, requirements elicitation is central. Thorough requirements analysis provides the foundation for effective project execution. PMI's 2017 report 'Pulse of the profession' showed that, of projects that were deemed a failure, inaccurate requirements gathering was a contributory factor in 39% of cases.

Hence, it is very important to gather and analyse requirements properly and figure out any gaps in understanding with stakeholders at an early stage.

But HOW?

In ancient times, we used to express our ideas and thoughts through visualisation and stories. Similar fundamentals can be applied in the context of business analysis and software development, visualising requirements, and using storytelling to help convey the message clearly and thoroughly. Most importantly it helps us to figure out the gaps at an early stage.

Visualisation and storytelling in a BA context can help with:

- Understanding a current scenario
- Analysing the root cause of the problem
- Overcoming misunderstanding
- Exploring potential 'to be' solutions
- Validating the scope with stakeholders
- Obtaining approval

In my projects, I use the following techniques to clarify ambiguous requirements and ensure that we end up with valuable working software.

Start with Understanding the Requirement through Domain Storytelling

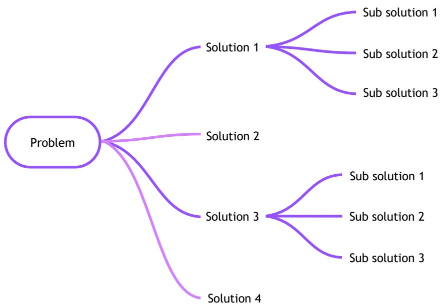
Domain storytelling is a modelling technique suitable for use in a workshop that helps participants understand how people and/or software systems work and interacts with each other. It clearly defines who the actor is (includes people or software systems), what the overall objective of the work is, and the activity that is being performed. It also helps to uncover the sequence of the work.

This technique helps foster a clear understanding of the current scenario, as well as a concise understanding of what the client is looking for.

To undertake domain storytelling, draw the entire story and flow in front of the stakeholder. This will ensure that any gaps are identified at an early stage. You can find out more about this technique, and see examples on the domainstorytelling.org website.

Create a Solution Tree to Prioritise the Solution

Once we understand the requirements and problems of the client, it is necessary to evaluate possible solutions. Not every solution is worth developing, we need to define and prioritise potential solutions so that the most effective and valuable option is chosen. A solution tree can help filter down the options. An example is shown below.

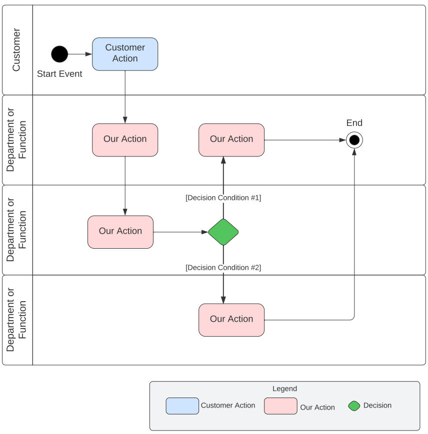


A diagram like this can be used during discussions of the pros and cons of each solution, helping with the early assessment of potential options.

Create a Process Model to Define the High-level Solution

There is a saying in the software development industry , "It's not technical bugs that make a project fail, it's bad communication and misunderstanding in the solution that makes the project fail". To help solve this problem, process modelling enhances business process visibility and ensures there is a clear view of the desired workflow.

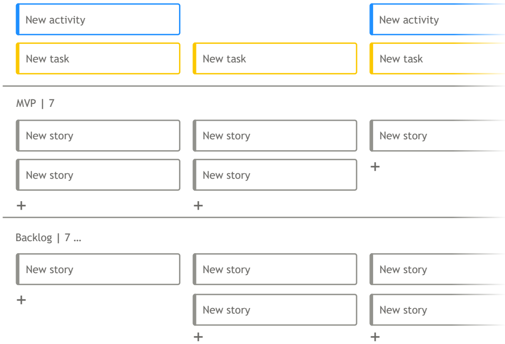
A process model can help to discuss and validate the high-level process with the stakeholders and can be used later to deep dive into each process step. The visual nature of a process map helps stakeholders to envisage how the solution will work and provide feedback.



Create User Story-mapping to Visualise the Detailed Scope

It is very important to discuss and finalise the scope of development with the stakeholders, this ensures that everyone is on the same page. User story mapping provides an alternative for agile teams to discuss and visualise their backlog items. User story mapping uses the concept of user stories to communicate user needs in terms of user value.

In this the team considers the main types of activities that will be undertaken by the user, then creates a sequence of the process and for each task, subtask or story that is created. User story mapping helps in finalising scope and MVP development of the solution.



Conclusion

Effective conversations cannot be solely replaced by written, formal specifications. As business analysts it is very important for us to get early feedback and iterate based on the feedback we received from the stakeholders to deliver value.

Visualisation in various stages of requirement elicitation helps us to collaborate with different stakeholders, uncover any gaps, iterate when and wherever required and ensure that the right solution is built.

Shruti Chandna is a business analyst at Nagarro. She writes about strategies and analysis techniques. You can find her on LinkedIn at Shruti Chandna | LinkedIn

BA Back Stories

Fabrício Laguna

Interviewed by Christina Lovelock

In May 2023, the Brazilian BA embarked on a business analysis world tour, taking in four conferences across the USA, Canada, Belgium and the Netherlands! Covering wide ranging topics including ChatGPT, BA Core Concepts, Scrum and Star Wars. You never know what you will get with Fabrício, but it will always be interesting, informative and entertaining.

Inspiring and encouraging other BAs is really important to you, so what inspired you to become a BA?

I started my career as a programmer, I studied computer science. After university I started working freelance, creating software for a publishing company. In the middle of the project there was an older man, a very skilled man, skilled in dealing with people. But I noticed that he was not up to date in technology. It was the last Millennium, so it was the beginning of Java and I was programming Java and I was feeling pleased with myself because I was on the top of the wave of technology! I saw that my colleague had difficulty even configuring his e-mail software because he was so outdated with technology. But he was so much more important than I was in that specific project because he was the analyst. He had skills for connecting people, enabling decisions and understanding the business and that's what they really needed at the time. He was not called a business analyst, but that's what he was. At some point my colleague had to leave for another project, because the company was asking him to create another system.

He said "Now, going forward you are going to be responsible for interviewing the users and taking the requirements". We didn't use the word at that time, but that was what he was asking me to do: interview the users and understand what they need. I said "Oh, I can't do that! I'm just a programmer, I'm not an analyst" and he told me "Never say that again, an analyst is just a programmer that got punched in their head so many times that they learned!". So I looked at this guy and he was older than my father and I thought "Well, if I want to be employed when I am his age, I better learn more skills than just software coding". After all, Java is a top language now but I don't know if it's going to still be the main language in a decade. Technology is changing ever faster, so a lot of what you have learned has to be thrown away. I saw that his skills were less volatile, they could be used in the longer term: working with people, understanding needs, getting people together, finding an agreement… those skills sounded very useful and not so volatile, and I realised "I should learn those skills!".

I started working in that direction, trying to become an analyst and after that I created my own company, a software house. In that company I had a partner who was very skilled technically, so I started looking more at the analysis side. I was responsible for talking with the customers and understanding their needs. I decided to study for a Masters' in business administration. In doing the MBA I saw that what I was learning in school was not as useful for my own company, because it was very small, but it was changing the way I was seeing my *customers'* companies. I could use those learnings and techniques to better understand my customers and provide them not just systems, but guidance and understanding of their business. So, almost without planning I started to become a business analyst. My career accidentally made me a business analyst and that conversation with the older colleague made me look for other skills that today we call business analysis. I was already teaching software engineering and requirements related courses and so someone told me "Oh! There's an organisation created in Canada which is trying to do the kind of stuff that you're teaching", so I became aware of IIBA®, started studying and fell in love with the profession.

Which aspects of business analysis do you most enjoy?

I would say strategic analysis and trying to connect people and engage stakeholders in understanding. I'm not an analyst who works for a big company, I have my own company and I usually work as a consultant and trainer. When I'm called in as a consultant, they're not hiring me because of my subject matter expertise but for my business analysis skills. It's very interesting when I enter a meeting with a lot of people who know the subject matter and I can lead them to an agreement and conduct the meeting, and at the end of the meeting they're thankful for my help. They might say "this was a very productive meeting and we're so glad that you were here to help us" but all the information was already there! What I am bringing to the table is the techniques that help people to communicate, to engage and to create something from the information they already have. I believe it's very beautiful in our skill set and in our mindset that we can help people to understand each other and find an agreement.

Is there something that you wish we could change about the profession?

I really don't like to see business analysis as just a job role or job title. In a lot of situations when people talk about business analysis they stop talking about the *discipline* of business analysis and start talking about roles and responsibilities. That really restricts business analysis. It's hard because there's so many different business analysts around. There's some organisations where business analysts are just writing software requirements, other organisations where they are writing processes or defining business rules, in other organisations they are defining strategy and business cases. Those are very different business analysts. I really would like it if business analysis could be seen not just as a profession, but as a *mindset* that every business professional could use. I believe we could have a wider community of practitioners using business analysis in their own profession and for their own tasks.

I believe every profession could use business analysis as a mindset. When I see business analysis as a mindset, I don't think it makes the business analysis profession unnecessary, it just changes the way that business analysis professionals should work. Instead of being the bottleneck of all information, where only the business analyst can do the magic of business analysis, a business analysis professional should be someone fostering the business analysis mindset into the whole organisation. They should be coaching people, so everyone can use business analysis in their own situation.

I sometimes try to change the approach to make our community become bigger. But I also understand that people who come to conferences like BA & Beyond, where we are right now, or people who join an IIBA® chapter, they are joining a community and have this sense of belonging. Sharing the professional job title brings that sense of belonging very strongly.

I have been working to change the way people see business analysis, to look at it as a mindset so we can bring more people with us. At the same time, I can perceive that it makes the sense of connection weaker if we just share a mindset. Perhaps I'm not as much of a member of a shared community as if it's my job role. People can engage more if we're talking about job roles.

So I'm not certain about this, it's a dilemma, I want to make the community bigger, I want to open business analysis up for more people and I have been working in this direction because I really believe it's valuable for a lot of people, not just professional business analysts. But I don't know how to deal with this dilemma, it's always on my mind and we all need to talk about this more!

I see in the BA School Day initiative, that we are encouraging people to become business analysts and we're talking about the profession and I would also like to encourage people to develop a business analysis mindset independently of the profession. Those are two very different approaches, two very different conversations and one is very broad but the other brings more sense of community.

What's something you wish you'd known earlier in your career?

It's always a challenge, but I wish I could understand better how valuable my skills are. Sometimes I over-valued them, sometimes I under-valued them. It has brought me some complications when I over-valued, as I lost opportunities to engage in something because I asked for a higher price; sometimes I under-valued myself, and I could have been better placed and better rewarded for what I was offering, but I didn't have the vision. This has not ended because we're all changing, we all have to evaluate ourselves and say “how valuable am I in this situation”. As I don't follow a career path within a company, I am always selling myself as a consultant, so I feel it very clearly. But someone who is in a career within a company also has the same situation because when they're looking for a step up in their career or a change in their salary they always have this dilemma of “am I valuable? Should I be negotiating this?” and so I don't have the answer but it's always hard to approach this situation and that's something I would have liked to know earlier!

How did you figure out what your strengths were?

There's something interesting about strengths and weaknesses. I like to say that my strongest power is also my strongest weakness. I am very good at concentrating, at working at something and I don’t get bothered by everything that's happening around me. So I can be very focused on something, I believe it's a kind of a superpower, especially when you have to write something or do analysis, I can just ignore everything around me. But that's my weakness as well, so if you try to talk to me when I'm doing something, I can’t do two things at the same time! So understand how you work and try to use it as a strength and try to avoid situations where that thing is a weakness, I believe that's important.

I do have another strength that I feel differentiates me from other professionals in my area. I studied computer science, I like technology, but have also always done theatre, so I like communicating and performing. It's part of the culture of my family, since I was four years old and my sister created a play and we invited all of our neighbours to watch! So I'm technically skilled, but I'm also an actor and someone who can communicate well, so I have tried to use those two forces in my career. I have delivered training, given speeches and created videos. Sometimes people ask me how I create videos like that, but I have been creating videos since I was five! I was that guy with the camcorder recording everything and creating stories…I was a YouTuber before YouTube existed!

Uniting skills that you have that are very different, creates a singular person, something that is not common. I try to get people to think about their best combination of skills.

Is there something that you are particularly proud of from your career so far?

I'm very proud when my students come to me and say "I learned so much from you, you made a real impact on my professional life". A lot of years ago another teacher told me something I always remember. I gave one of the first presentations for IIBA® Brazil. I went there to explain what business analysis is. There was another guy who was a very skilled business analyst, he was also a teacher, someone I admired as a teacher. I explained business analysis for the audience and I tried to explain it in the most simple way. That's what I am always trying to do, make things simple in an approachable way so people can understand. He already knew everything that I was talking about but I just presented it in another way that he was not used to, because that's my way of explaining things. After presenting, he called me and said "Can you learn Mandarin to teach me, because you explain things so easily, I feel that I can learn it from you!". So that's something I'm proud of, bringing information in an approachable way that people can learn and understand easily.

Is there something either a person, event, a book or other resource that has helped you and that you want other people to know about?

The BABOK® - that's the easy one! Let me think about another one that's not so easy…the first presentation I did at BBC was called "The Virtues of Business Analysis" and I learned about virtues from a book called A Small Treatise on the Great Virtues, by André Comte-Sponville who is a philosopher. He explains what a virtue is and describes the biggest virtues, and learning from that I defined what I call it the five virtues of business analysis:

- **Humility** - I believe that to do business analysis this is not about what *you* think, it's about what *others* think; it's not about your needs, it's about the needs of others. You must be open to see other perspectives and that demands you must be humble to do business analysis.

- **Simplicity** - if you want to do good business analysis you have to express yourself in a way people can understand. Simplicity is not easy to find, it actually takes a lot of work to explain something simply, so most people can understand it.

- **Prudence** - understanding pros and cons and understanding what's the most valuable solution for a specific situation. If you're doing business analysis you are evaluating and analysing the situation, everything around it and trying to define the most prudent solution, making the best decisions.

- **Good faith** - if you're doing business analysis for your own interests you're not doing good business analysis. If you come to your stakeholders and they don't trust you, they won't share information with you, they won't allow you to do business analysis, so they must see that you are acting in good faith: looking for the benefits for your stakeholders, not lying to them, not looking for your own benefits. In the BABOK® guide we have ethics, and it's related to that.

- **Compassion** - this is the most important one for me. When you look at the root of the word compassion, passion means feeling, especially suffering, and con means 'with'. So compassion is feeling together, feeling what the other feels, suffering with the others. So if you have compassion for your stakeholders, all the other virtues come forward because you act in good faith.

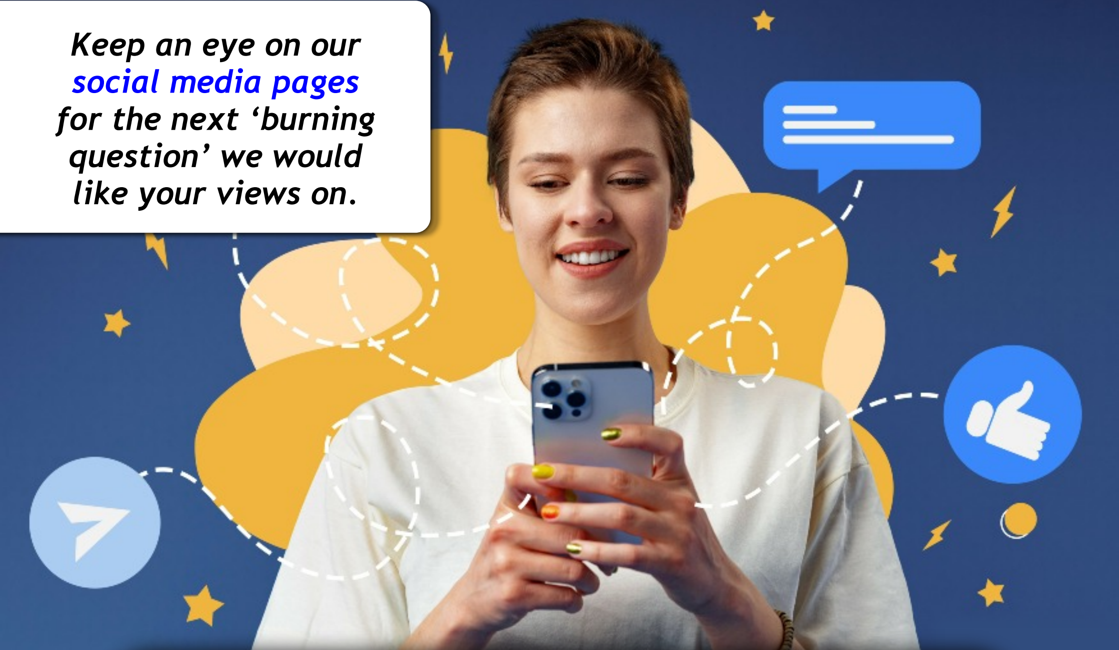
Compassion is not the same as empathy because empathy just means I can put myself in another's shoes. With compassion, I can feel the other's pain as if it was mine, so I will work to diminish that pain. I will work in good faith, and I will try to find the best solution for them, so I must be prudent to do that, and I want them to understand what I'm telling them so I must look for simplicity when I'm talking to them. It's not about my feelings but the feelings of others, so I'm also going to be humble and try to develop humility. So this book is much broader than business analysis, but it has shaped my mind and I would like to share it with you.

Connect with Fabrício:
www.linkedin.com/in/fabricio-laguna/

About the interviewer:

Christina Lovelock is a BA leader, author and coach. She is active in the Business Analysis professional community and champions entry level roles. She is co-author of the BCS book Delivering Business Analysis: The BA Service Handbook. She would be delighted if you would like to connect! Linkedin.com/in/christina-lovelock

*Keep an eye on our **social media pages** for the next 'burning question' we would like your views on.*



VIEWPOINTS

On social media, we posed the question ***"Elevator pitch: How would you describe the BA role to someone who has never heard of it before?"***

As an optional challenge we added the idea of submitting your answers as poetry (limerick, haiku, free verse or any other kind).

So we'll start with a couple of business analysis haiku.

You have a problem
We can confirm that it's real
Then help you fix it

Lewis Aguirregoicoa

A silent moment,
Asking the awkward questions
The answer appears!

Dave Beckham

The BA role is a bridge of understanding,
Connecting stakeholders, what is outstanding.

It takes their needs, their wishes, their contributions,
And turns them into tangible solutions.

They relieve the tensions and problems that once stood,
And create something that's for the business's good.

With their skills, expertise and techniques,
Looking into contexts and delivering the value that business seeks.

Without BAs, stakeholders can be lost in translation,
But with BAs, solutions can have a stronger foundation.

Erivan de Sena Ramos

A business analyst is a bilingual individual who speaks both "technology" and "business". Being bilingual means, not only do you understand two languages, but you are able to emote and translate in the best way possible to ensure the message is not just related but also understood and well received. A business analyst can consume, translate, and even predict business needs and convert this into technological deliverables that will ultimately deliver value to the end users and the business.

Christelle Govender

We are the entrepreneurs within Change. By that I mean we work to identify the niche and opportunities or look to explore or accentuate areas undervalued or underappreciated that can make a massive impact

Carl Wrigley

There once was a BA like you,
Who had tools and knew what do to.
Like business detectives,
They gathered perspectives,
On what, why, where, when, how and who

Our BA validated the goal,
With big pictures and needs of the whole.
Fearing not the requests always asking for more,
Replied our BA, "is it valuable, needed, are you quite sure?"
And upset those who sought to bamboozle.

Unsatisfied with "just let it be"
Our BA found improvements, some which were free!
They described what was wrong with today,
Outlined options and cost of delay,
For the org, people, process, not just the IT.

And though some thought it was strange,
They supported the team through the change.
Our BA managed conflict and worked at great pace,
To package up neatly in a sound business case,
Some things which one might rearrange.

Or for those who value brevity ...

Doing the right thing
And doing that thingy right
A guru of sorts

Angus King

There was a change that needed to be done
The requirements had hardly begun
So I did business analysis
Asked questions until paralysis
But the improvements were second to none

Ian Whitlock

Do you remember that period of planning out your future goals and you are at a crossroads?

You don't know if you should further your education or go straight to professional training, and you are unsure of the resources required for either.

As a BA, I come up with arguments for both options and their pros and cons. Then I lean towards the option I feel might be more suitable to achieve your goals while backing it with facts.

I might involve your parents, teachers, etc. to aid in this decision setting as they know you and will give valuable input. After coming up with my justification I will show you which option I believe you should choose to achieve success in your chosen career path.

My job as a BA doesn't end there, I will continue to monitor your career trajectory and provide any recommendations when needed.

Kafilat Oluwasola

Imagine building a house from scratch. You need a bridge between the homeowner's vision and the construction team's skills. That's what a Business Analyst (BA) does for organisations.

In this analogy, the BA acts as the architect, understanding business goals and translating them into plans. They gather information from stakeholders as an architect does from homeowners.

Like a blueprint, the BA creates documentation to guide the team. They ensure all components are in place like an architect ensures the right materials and measurements.

The BA is the team liaison throughout the project, facilitating communication and resolving conflicts.

The BA ensures the final product aligns with the initial vision, meets objectives, and delivers a successful outcome-like a well-built house fulfilling a homeowner's desires.

Daniel Grist

In the world of business, I'll explain,
A role that drives success, they maintain.
The Business Analyst, with skills so rare,
Unraveling complexities with utmost care.

We are detectives of data, sharp and keen,
Turning chaos into insights, unforeseen.
From stakeholder whispers, we draw,
Requirements that become a guiding law.

We bridge the gaps between teams diverse,
Translating needs with skill and verse.
Our analytical prowess, radiant and strong,
Solving problems diligently, all day and night long.

We streamline processes, like a steady stream,
Bringing efficiency, like a blissful dream.
With strategic vision, we lead the way,
Guiding businesses to a brighter day.

So let us applaud our Business Analyst might,
Our impact profound, a true guiding light.
For in this world of commerce and trade,
Our role stands tall, never to fade.

Harpal Lidder

As a BA, I work with people to understand their problems and to help them do their jobs better. I work with other people to create solutions that will solve those problems. My success is their success

Tom Tomasovic

When someone in a meeting says "Someone should look into that", that's what Business Analysts do.

Stewart Engerer

Imagine you hired an IT services company to put your potentially big idea into real life.

You will start with two needs:
1. To create an app cost-efficiently and get to market as soon as possible
2. To create an app that won't fail

Unlike project managers - leaders of efficiency to make your bill be backed with the job done the most productive way, business analysts are leaders of effectiveness, so the job is done on the right things.

On the product you need, on the features that won't be wasted - business analysts will be the advocates on a development project; they will protect your interests first. And it's all for you to get more relaxed as the project goes on and know that you are not alone in seeking to maximize the value and care for your end users and customers.

Yevhen Kliukin

Thanks to all the authors who kindly allowed us to use their content.

Anna Rajander
Rich Thurston
Debbie Thomas
Sarah O'Neil
Anton Reshetnikov
Araceli Higueras
Nuno Santos
Line Karkov
Hannah Pearson-Coats
Nick de Voil
Bindu Channaveerappa
Mike Burrows
Danny Kalkhoven
Shruti Chandna
Fabrício Laguna & Christina Lovelock

Layout & Design

Matt Smart

Licensed Artwork & Photography

Image Credit: © Julien Eichinger— stock.adobe.com #171655696
Image Credit: © kucherav— stock.adobe.com #105306958
Image Credit: © Julien Eichinger— stock.adobe.com #65946682
Image Credit: © Julien Eichinger— stock.adobe.com #155813634
Image Credit: © splitov27— stock.adobe.com #268749015
Yayimages.com


Support in any way you can.
There are many ways to donate,
one way is via DEC.org.uk
But whatever you do… do.
#BAsStandWithUkraine