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Barbara Carkenord

Director of Business Analysis Practice

RMC Project Management

podcast

What good can *a business analyst do*

Mihaly: Hello everyone, you are listening a Stamford Global podcast, my name is Mihaly Nagy. It's a great pleasure to introduce my guest today, Barbara Carkenord from RMC Project. Barbara is a business analysis expert, she's been in business for over 25 years. She is one of the first persons who started business analysis training, and Barbara is also on a core member of the BABoK third edition, which is about to be published in December this year. I asked Barbara to join me today for a short conversation about what is business analysis, how business analyst can help organizations to complete projects and complete critical undertakings on time, on budget, of specifications, what's the role of BA overall in the organization and how BA can help Agile projects to be more successful. Barbara, welcome, good to have you here.

Barbara: Thank you, I'm glad to be here.

At least in Europe, the adoption of BA as a role in organization is not that widely adopted as in the US and in Canada. What are the typical symptoms you see when an organization should consider bringing in a new role, called a BA?

I think that in the US – and it started really strongly in financial services companies, banking insurance companies – we realized that the products were very complex and it became clear that the requirements were not consistent and complex enough to meet the needs. Our projects, while they might've come in on time and within budget, were not meeting the business needs. Business people were getting frustrated because they felt like they can bring in a project manager and they can do a new project, but it still hasn't solved their business problem. The business problem itself is where the BA focuses, a lot of times business analysts are involved even before a project gets started to go out to the business and

understand what the problem is. Sometimes business people have a problem, they don't know what the root cause of it is. An analyst is a good person to help them figure out what's really causing this and what might we do to fix it. And when we start a project that way and we have a better understanding of the root problem, we also analyze exactly what the impacts are going to be of a fix and solution, we're much more successful. And what we found in the early adopters of business analysis, is companies immediately saw benefits. It just started to grow, and a lot of companies now have career paths for business analysts, they really value their business analysts. There are a lot of job openings in the United States for business analysts, more than we can fill. So, it's a really growing career path for people, and turns out there are a lot of people that love to do this work, that love problem solving. Some of them were project managers, but now they are saying: "Rather than running a project I'd rather learn the business and be a problem solver for the business". We're seeing some shift in people's careers and in the way that they sort of want to grow in their career, so it's really a good thing, it's a great career right now in the United States.

We don't want to scare any of our listeners, you are not saying that project managers are not problem solvers, are you?

No, not at all. As a matter of fact, business analysts love project managers. Project managers are really good at getting things done, amassing the correct resources, doing a plan, getting things in the right direction, getting problems out of the way. Business analysts are not always so good at that, as a matter of fact, we need a project manager to push us a little bit sometimes. Sometimes we want to get too much information or ask too many questions and not get anything done, so having a strong project manager and a strong business analyst as a team, a partnership, is the

best way to really get a project to be very successful, and that's what we are seeing.

What's the best way to achieve BA and PM collaboration? Do BA and a project manager work together throughout the life cycle of project or when there is a business requirement you bring a BA to find out what actually needed to be done and handle it with their project team?

That is very dependant. In some organizations, BAs are involved before the project gets initiated, they might even work in the business area. Lot of BAs actually were finding our business people who are "power users" or "experts" in their own departments. They are good problem solvers and they say: "I need a project manager, because I don't know how to fix this, I know what we need to do, but I don't know how to get it done." In other organizations, the project managers also are playing the role of the business analyst, so they are going in initially and saying: "How could we fix this, what could we get this done?" That really depends on an organization, and there are a lot of people playing both roles. A lot of the skills that you need to be a good project manager are the same skills that you need to be a good BA. For example communication skills, being able to talk with stakeholders and understand complex problems, and do problem-solving, those are the same skills that we need. Whoever it is that gets involved early on, they recognize that they need both project management skills and business analysis skills, whether that's in one person or in two different people.

Very often the project manager himself fulfills the role of the BA in organization. What's the complexity, or what sort of size requires these two roles to be separated in organizations?

If you are working on a small project – we've been defining small projects as maybe ten people on your team – you may be able to be the project manager and also be one of the workers, one of the business analysts. Once it gets to be a little bit bigger than that, communication complexity becomes a real challenge and the project manager hands become full. The PM has a full time job, making sure that everybody knows what they are doing, and communicating and keeping things on track. I don't think they have time to do detailed requirements. It might be number of people, it might be the complexity of the project.

This also brings up another issue, does a project manager need to understand the product? I would say no – a good project manager could come in and manage a project even if they are not expert on the product. The business analysts must be expert on the product, he might be an architect or an engineer, or a software architect, somebody who really understands what it is that we are creating. That way the project manager doesn't have to learn all of those details, and they can focus on making sure the project gets done. There is a lot of different variations, and that's one of the hard things about this, companies have a lot of people doing business analysis. You might say that it's not big in Europe, but I would say that the job title may not be popular, but you have lots of people doing business

analysis work.

If you are a person who constantly answers questions with the phrase "it depends", you are probably a business analyst – this is because BAs don't commit to any answers without digging deeper, knowing and understanding exactly what the other person tries to communicate.

Beside gathering the requirements and translating the requirements of business to the language of the project team and the developers, what are the typical roles a BA fulfills?

The first thing that most business analysts will do is to understand the current business environment, or the current state, we call it "the as is". They might build business models, really getting a deep understanding of what the business does, why it does it, what are all the environmental issues around it, who are their external customers, really getting that deep understanding of the current state, so that when they go to fix or try to suggest a change, it's going to be a change that's going to work. Nobody in business loves when you come in, and in five minutes you say: "Oh, I know how to solve your problem." If it was that easy, they would've done it themselves. Business analyst says "First I must understand in depth what you are doing, then I'm going to look for alternative solutions". A lot of companies even in the US with lots of BAs, have this problem – they jump to the first solution that somebody thinks of, rather than looking at all the options.

There's usually lots of different ways that we could solve the business problem. We could make a process change, we could put a different person in a role, we could add software or hardware. BA will try to look at different alternatives and do some cause-benefit analysis, and help the stakeholders say which one of these is the best for this particular need, where we going to get the biggest value, what is the most efficient, maybe less expensive option. They do impact analysis, who are the people that will going to be involved in that change, how big of a change is this going to be for them, how difficult it is to change and so on.

They even start to think about how the transition is going to happen from the beginning, what are the organizational change management complications might happen. Then start working with the technical architect or engineer designer, that's going to be developing maybe prototypes for the new product, or the new solution and making sure that what they're designing truly is going to meet that business need. It's going to be useful to the business people so that at the end we have a solution that will serve the customers.

We like to see BAs get involved full project life cycle. A lot of BAs also do a lot of testing, we don't unfortunately have a lot of people in the quality insurance role in the United States, so a lot of BAs end up playing that role also. They do testing, they find defects, they try to resolve those. They also do some preparation of technical documentation about the product, they do training of whoever the product users

are going to be or the customers. After implementation they will also go out and make sure that the products are working the way the customers expected and maybe start to think about enhancement, so start another project.

Do the BAs sit in a kind of Center of Excellence like PMO? Considering their strategic involvement in the business, who do they report to and what is the best place to plug a BA in an organization?

If I could recommend something, we have a concept called “BA pairing” where we have two BAs working together. One would sit in a business and actually be an operational person who understands exactly what the customer needs and what they are doing. The other one would be a more technical person who understands the product development. They would work together to be able to build a product that best meets the needs. We don’t always get that ideal, but in the US we see maybe a little bit less than a half of business analysts actually reporting in the business units, or in the marketing, or accounting. The other half are in more the technical side, so they might be in IT, or engineering, or architecture. It’s a pretty even split. Same thing – where do they come from, where do BAs come from? They come from both sides, which is good because we need both sides of that equation to be able to be effective.

Many of our listeners are running project in an Agile way. They have the Scrum team and they have the product manager or product owner who eventually is kind of in between the development team and a customer. How does a BA fit in an Agile team and how is the role of a BA different from a product manager in that sense?

I was very disappointed when Scrum was announced and they didn’t have a business analyst role on a team because I was hoping that they would recognize the importance of a BA... But I do see a lot of people using Agile that are recognizing a value of having a business analyst on a team, whether they call it that or not. The product owner is a representative of a customer and as such they are responsible for prioritizing the features in the product, what we want to do first, what’s going to be in the sprint, or this release. A business analyst doesn’t make those kinds of decisions but they can help the product owner to do that. For example business analysts are very good at facilitation group conversations, bringing groups to consensus, helping them all see each other’s perspectives. A product owner is not just one person making that decision, they are able to make it with a group. I really see the role of the BA in an Agile project as being almost an assistant to the project owner, really helping them to analyze, communicate, prioritize... Being a product owner is a very challenging, difficult job, and a lot of times a product owner also has a real job in the business or working with the customers, so business analysts can really help them because they will understand the business needs. Again, a lot of the Agile team is focused on building a product but they don’t spend a lot of time focusing on what the need is. The business analyst would focus on that need. The BAs in an agile project are usually 2 or 3 sprints

ahead of the team. They are looking ahead, what’s the next thing, analyze, set the list of requirements, make sure that we understand what the impacts of this are going to be, preparing to that when the team gets there they can start build it.

In terms of a personality of the best business analysts, it requires a lot of analysis, thinking alone, looking through the processes how it will impact, what will it impact, and in what way. Those tasks tend to appeal more to someone with introvert personality. On the other hand BAs also have to be influencers, they have to sell and negotiate and motivate both business development team – a lot of tasks comes naturally to extroverts but might be a challenge to introverts. How do you effectively overcome this in a project?

I love this new book “Quiet” talking about the value of introverts. How we need introverts and extroverts. We need people who are really good in doing the selling and the persuading and the talking and again the idea of pairing, we all have to work together. Some BAs are more extroverted, some are more introverted so you’ll often times see them kind of become friends – I will do the thinking and I will do the modeling and I will lay this out, and then I’ll have someone who is more comfortable engaging in talking – but actually I think one of the myths about introverts is that they don’t like to talk to people, that’s not true.

They like to talk about complex, interesting topics, they don’t like small talk. If you go to a group or a conference with BAs it will be kind of quiet because they are not really good at saying “How’s the weather, what did you do last night”. But once you start them talking about the particular topic and problem they get very engaged and they really enjoy that. A BA has to sort of be able to do a little bit of a small talk, maybe to force themselves to get to know the stakeholders but once they get engaged they communicate extremely well.

They are also are extremely good listeners, that’s a great thing about introverts and why I think a lot of BA are. They will listen more than they will talk and that’s what they should do because they are asking customers and business people “What do you need, what is your problem, how can we help”? They have to be very good at listening whereas sometimes extroverts are not listening as much and they are telling you what they think you should do. It’s an interesting personality trade, I think BAs tend to be quiet and might be perceived as reserved or even shy. This is because we want to know everything before we speak, and we never can know everything. We don’t tend to brag about what we know because we always think there’s a little bit more I can find out, and I don’t know everything. So BAs are very humble, they need to brag a bit more to let people know the value that they are adding because they tend to say “Wow, I did a great job but I could’ve done a little more”. They are great people, great value...

In terms of a role in an organization some of our listeners might say “We have BAs in our company, but we don’t call

them BAs". We might want to look them a more strategic way and this really gives this role a visibility it deserves. What would be the best way to really get the organization start on rolling out business analysts role and function?

A big part of it is simply starting to talk about analyses work. We always talk about what people do, what we can visually see – I wrote a document, or I built something. Analyst is sitting and thinking and we often times don't recognize that as a value of a work. We have to start talking about what does it mean to analyze, what does it mean to study, what does it mean to think? The more we start to talk about that, the more we realize that it is extremely valuable, and it's what a lot of our organizations are missing. We are not making good decisions because we don't take the time to think them through. Part of it is really just talking more about that and BAs also really show their value by asking a lot of questions and that's why you always get the answer "it depends". If you ask me a question I will always give you the answer "it depends". I will have five or six questions that I can ask you and say "How many people are involved, what's the complexity of it, where is it going to be used". I can start helping you better understand what are you asking me for instead of you asking me how long is this going to take. I can ask you back "How many people do you want to use it, where's it going to be used and what it's going to look like". I can start to get you to think and analyze along with me. We come to the better decision together. I love the word "analyses" and any time people can get their job title adjusted, get the word "analyst" in there, it's a step in the right direction. In the United States we have business analysts, business systems analysts, system analysts, financial analysts and all kinds of titles that recognize that analysts are very important people roles in an organization. That's another big change with project management, the word "manager", "project manager" means you are managing people. Business analysts typically don't manage people, they analyze and problem solve, so it's a different type of role.

There is also clear career path for business analysts and there are very senior people. However when somebody has a job of "analyst", they tend to associate it to a fairly junior role. In BA you fulfill such a critical role in terms of connecting the dots and finding out what the business requirements are. What's the typical career, what sort of career perspective the BA have?

I've heard that in different countries sometimes the word "analyst" is not considered a senior level person, it's more of a junior level. That's not as much true in the United States, analysts are more highly valued. We see a lot of organizations that have junior level intermediate, senior level business analysts and they often become consultants, or internal consultants or client relationship managers, enterprise architects, enterprise analysts. They continue to move up and view bigger problems and more complex problems. There's a lot of room to grow in a lot of organizations doing that type of work.

To those of our listeners that are interested in getting more

of a professional recognition for business analyses, what's available now in terms of certification?

PMI has just announced a new certificate in business analyses, it's called "Professional in Business Analysis PBA", that's going to be available starting in October of this year. There's also a big professional association for business analysts called IIBA, International Institute of Business Analysis. They have actually 3 different levels of certification – an academic certification for people in university; a CCBA, a certificate of competency that requires about two and a half years experience; and then they have a C-BAT, certified business analyst professional, which is a very senior level, requires at least 5 years of experience. There's a whole range of options, the British Computing Society also has a business analysis certification. There are some other smaller organizations that also offer some certification, but there's a lot going on in this field. It's very exciting, there's a lot of opportunities for people that are interested in learning more about it.

Barbara, thank you very much for your time.

Thank you, I enjoyed it.