



**Our Vision:**

To be the world's leading association for business analysis professionals.

**Our Mission:**

To develop and maintain standards for the practice of business analysis and for the certification of its practitioners.

## Letter from the President

### IIBA Webinar Series Launch

We finally did it! We now have not one but two webinars under our belts. And what a learning experience it was.

As you may know from past newsletters, members like you have been asking us for more professional development opportunities to help expand their knowledge of the profession and develop their business analysis skills. In fact, according to the results of the recent member survey, webinars and BA tools both ranked in the top five items that our members most wanted from IIBA.

At IIBA, we recognize the importance of professional development to our members. As Business Analysts, we are always looking for ways to expand our abilities and find tips and tricks that will help us perform our jobs better in order to increase the value we bring to our organizations. The new Webinar Series is just the first step in enhancing the output of the IIBA Professional Development program.

So how did we do?

Well... We had some technical challenges with the audio portion of the presentation, and therefore hosted a second webinar later in the evening. We were very pleased with the participation and enthusiasm of the participants—987 people attended the first session and 246 people were at the second session. Thank you to everyone who attended.

We received more than 80 questions from participants, in addition to those we were able to answer live. These included questions about:

- The Body of Knowledge
- The relationship between Business Analysts and Project Managers
- Career paths for BAs
- BA tools and techniques
- The overall role of the BA
- How BAs fit into the structure of an organization

For more detailed answers to these questions, please see page 4 of this newsletter. While we don't have the space to answer every individual question here, we did identify certain themes and will answer these collectively.



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## Ongoing Professional Development

The introduction of the IIBA Webinar Series was just one initiative in a long list of Professional Development projects we will be launching for our members. Here are a few others we are currently working on.

### 1. Business Analysis Tips

A selection of recommended tools, templates, tips and tricks that will help our members improve their job performance. Each month we will publish the "Tip or Technique of the Month", delivered by email right to your inbox. We will be polling our members to collect their personal best practices to share with everyone.

### 2. Business Analyst Career Ladder

At BMO Financial Group, the company for which I work, we have identified a career ladder or path for business analysts. The business analysis profession encompasses different job titles that reflect the maturing of the role, and through which any business analyst will move during the course of their career. This ladder represents the various job levels, provides job descriptions, and details the expectations of the role at each level. This document is now posted on the IIBA website – [click here](#) to view it.

### 3. Podcasts

One of our members has expressed interest in supporting podcasts, and we are excited to investigate this area and the value that offering this capability can bring to our members. We will keep you posted on this one.

As you can see, there is a lot happening in the Professional Development area at IIBA, so stay tuned for more exciting announcements.

We would like to take this opportunity to thank you for helping us reach yet another milestone in the development and growth of IIBA, as we strive to become a higher value organization for you, our members.



Kathleen Barret  
President

## The Next Generation Business Analyst

By Kimberly Terrible, President, KT Consulting, LLC  
VP of Education, Hartford CT Chapter

Many organizations are beginning to recognize the need for a role dedicated to understanding the needs of the business across the enterprise and ensuring the IT project portfolio is in alignment with the overarching strategic business strategy and goals (Business Architecture). In many organizations, Information Technology (IT) is not providing the right solutions because they haven't asked the question: "What is the business driver for this project and is it in alignment with the organization's overall business strategy?"

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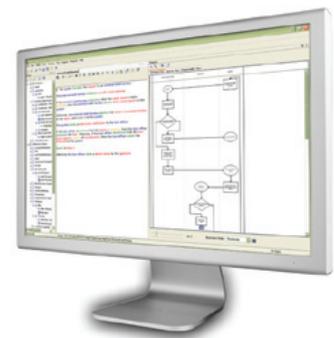
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In some cases, organizations have hired expensive management consultants to do this, but more and more they are realizing the need to have internal resources that understand the business and can document the Business Architecture before going to solutions (i.e. Infrastructure, Applications). The need for the role is not in dispute but the "title" can cause some heated debate. At the end of the day, whether the title is Chief Strategic Analyst, Strategic Business Analyst, Enterprise Business Analyst or Business Architect, the focus has to be on understanding the business first.

As Business Analysts, we have always been focused on understanding the business need first when it comes to eliciting, analyzing, documenting, and communicating software requirements, so it is a matter of applying those skills at a more strategic level within the organization.

In addition to focusing on understanding the business first, this role could potentially be tasked with monitoring projects across the organization to identify synergies among project teams, decomposing functional areas, and reviewing business processes to identify candidates for enterprise services from a Service Oriented Architecture (SOA) perspective.

They could also be responsible for doing pre-project research and analysis before a project is ever approved to make sure the IT organization is investing in the right

projects at the right time. It is our hope that more diligent analysis upfront will ensure we are doing the right projects and will help Project Managers make educated projections around the time, resources and budget associated with a project.

In conclusion, it is important for organizations to begin to identify internal resources that can help create and evolve their business architecture, ensure organizations are doing the right projects (i.e. line up with their Business Strategy), and an overall analytical resource that can gather information, analyze it, document it, and provide recommendations. Who better than... YOU!!

It is equally important to begin to create a legitimate career progression for Business Analysts who are passionately committed to thoroughly understanding the business problem BEFORE employing an IT software solution. In the current environment, once a Business Analyst reaches a certain maturity in their career it is unclear what their next step is. Many move over into the Project Management discipline because in that role they can command a higher dollar figure. The Business Analysis profession cannot afford to lose these highly skilled professionals. We need to keep them and create an exciting career path for them. They are extraordinarily valuable to the future success of IT organizations.

## Contribution IIBA

### IIBA Membership Survey Results

By Kevin Brennan, CBAP®, Vice-President Membership

A few months ago, we ran a survey for current and expired members of IIBA to help us understand what we can do to improve the value that our organization delivers to its members. The response was overwhelming. Over 25% of our membership responded to the survey—that's over 1,800 people!

So, what have we learned?

Most current IIBA members joined looking for opportunities to network with other business analysts (over 60% of you cited that as a reason). A close second and third reason was to pursue certification and to take advantage of other member benefits. Also, most of you would recommend IIBA to other business analysts, although we hope to significantly improve that number over the course of the next year.

What can we do better? This year has already seen a major internal effort to improve the operation and support of

local IIBA Chapters, and we expect them to become an even better venue for networking and learning over the next year. The monthly webinar series has also been launched, with past seminars available to members free on the IIBA website.

In the course of the next year, several of the other initiatives you highlighted will start to roll out, although I can't promise you when—we've just started our strategic planning for 2009, after all! We'll be working to provide the membership with access to templates and sample deliverables, including business cases, requirements documents, process models, and other matters of interest to BAs. We're going to help provide information on best practices in business analysis where we can help people share their experiences and success stories. In the months to come, we hope to be announcing other programs as well.

Thanks to all of you for participating, and congratulations to those members who received a one-year extension to their current IIBA membership, Tom Karasmanis, Avinash Patharkar and Tamarsha Wilhite.

## Q&A from the IIBA Webinar “The Evolving Role of the Business Analyst”

By Julian Sammy, Chief Architect and Kevin Brennan, CBAP®, VP Body of Knowledge

Despite technical difficulties and relatively low audio quality, we count the first webinar as a resounding success. Over 1000 of you participated between the two sessions, and you asked a *large* number of questions. We’ve consolidated the questions into themes, and will answer them a few at a time, issue by issue, starting with the hottest topic:

**Q:** Project Managers vs. Business Analysts—Are We Allies or Antagonists?

**A:** There were many, many questions about the relationship between the PM and the BA. This is a big topic, so we’re planning to have a future webinar or podcast dedicated to this alone. There are a few points we can clarify now, though. Let’s take the questions one at a time.

### 1. **The PMBOK and the BABOK® have a lot of identical tasks. Where is the line between a BA and a PM? One person can do both, right?**

It’s important to recognize that Project Managers and Business Analysts have very distinct roles because they have distinct objectives. PMs are all about control: they ensure that the change is done right. BAs are all about value: they ensure that the right change is done. While the professions have overlapping skills and overlapping activities, these are used to achieve different objectives. This difference of purpose is the source of some serious conflict.

For example, the skills associated with planning are critical to both professions, but the level of planning expertise needed in project management is generally much greater than what a BA needs. This is because the PM must manage the relationships between many plans (development, testing, requirements), while the BA must (usually) manage a single plan. This leads to the next question.

### 2. **Who is in charge of scope?**

It depends on which version of “scope” you’re talking about. The PM is responsible for the scope of the project—all the work that needs to be done to make

a change. The BA is responsible for the scope of the business need—to ensure that as much of what business is trying to achieve is achieved. Who is in charge? Both.

### 3. **Who is in charge of stakeholders?**

It depends on which version of “stakeholder” you’re talking about. The PMBOK and *BABOK*® both say that both are responsible for the stakeholders who have an interest in the project or in the outcomes of the project. This is a very broad definition, and covers a lot of people. Where the BA is looking for sources, reviewers and approvers of requirements, the PM is looking for influencers, decision makers and participants in the project. The actual humans involved may be one kind of stakeholder to the BA and another to the PM. For example, a VP in charge of a line of business may be a source of requirements to a BA, but an influencer to the PM. The methods of engagement will be very different in each case.

Practically speaking, the BA and PM may negotiate who is going to do most of the stakeholder management and communications for a project, and centralize the role to some degree. Even so, your relationship with your stakeholders is foundational to your ability to do your job, so you will have to retain some responsibility for your stakeholders.

### 4. **Who is in charge of planning?**

Both—but different plans. The purpose of planning is to mitigate risks and to enhance the chances of success. You plan to avoid or respond to the things that will go wrong, and you plan to build on the things that will go right. The BA is responsible for both of these plans as they relate to requirements activities. The PM is responsible for all the plans associated with the project, and for keeping them coordinated and harmonious.

### 5. **Who works for whom?**

The PM is definitely in charge. The PM is responsible for the triple constraint (project scope, time, cost). Since the scope of project requirements is a subset of project scope, the PM is in charge.

The BA is definitely in charge. The BA is responsible for the business need. Since project scope is a subset of the scope of the business need, the BA is in charge.

The trick is that this is not actually a conflict; it's a confusion of roles. BAs are in charge of making sure that the right work gets done (enterprise analysis) and that the outputs of any projects actually satisfy the business needs (solution assessment and validation). The PM is in charge of making sure the work is done right—the triple constraint.

The next hot topics were about careers and roles—what it means to be a BA and what it means to progress as a Business Analysis Professional. More answers next month!

## New Events Calendar

The IIBA is pleased to announce our new and improved Events Calendar on the IIBA website. Visit this page to find the latest educational conferences, webinars, and podcasts for the Business Analyst.

[Click here to visit the site.](#)

## Volunteer Profile

### Meet the Senior Leadership Team — Michael Gladstone

By Michael Gladstone, CBAP®,  
Vice-President Certification and Chief  
Information Officer



I became involved in IIBA after meeting Kathleen Barret at a dinner in early 2006. I was a strong believer in education and training for business analysts, having gone through a BA training program myself, so I volunteered for the Certification Framework Committee. The VP responsible for the committee asked if I would chair the group, and I accepted. When the VP resigned, I was asked to become a member of the Board and the VP of Certification.

Since joining IIBA, the largest initiative I have been involved in was the launch of the Certified Business Analysis Professional™ (CBAP®) program—everything from defining CBAP® requirements to creating the application form and assessment process, to assessing the applicants for the first CBAP® exam, and notifying the first set of candidates that they had successfully achieved the CBAP® designation.

The launch of computer-based testing for the CBAP® exam as of September 1, 2008 was another big step, enabling IIBA to expand the opportunities for candidates worldwide to take the exam.

Other goals I would still like to accomplish on the certification front are the launch of online applications for the CBAP® exam later in 2008, and the launch of a professional certification for BAs with less experience, perhaps in 2009.

I am now the organization's CIO as well, and I would like IIBA to expand the use of technology to ensure we better serve our stakeholders globally.

Why do I volunteer for IIBA? I started volunteering primarily to get involved in a professional association, and because of my personal commitment to the professional development of BAs. As my roles have grown and changed, so too have my reasons for volunteering. In addition to the initial reasons, volunteering provides me with the opportunity to do things that I would not have had the chance to do in my "day" job, but that act as professional development for my day job. This includes making presentations to the public, budgeting, program and policy development, strategic planning, IT senior management, and more.

To anyone who is considering volunteering for IIBA, I would say that I have gotten much more than I ever would have imagined out of being a volunteer. My engagement with the organization is certainly much higher than it would be otherwise, providing me with benefits I would not have otherwise realized. Also, my professional development has received a boost that just would not have been possible. Once you get involved, you never know what may happen!

Over the next 12 months what I wish for IIBA is that the organization continues to grow and mature, and that we are able to execute on everything we know needs to be done in order to take us – and our key stakeholders – to the next level as a professional, international association.

Michael can be reached at [Michael.Gladstone@theiiba.org](mailto:Michael.Gladstone@theiiba.org).

## Chapter Spotlight: Halifax, Nova Scotia, Canada

By Brenda Boon, CBAP®, President – IIBA Halifax Chapter

*This month's chapter spotlight is on the Halifax, Nova Scotia, Canada Chapter. Although it wasn't officially the first chapter in IIBA history to be chartered, it was among the first three, and later chapter startups can learn from their experience. Following is the background on the Halifax Chapter and what they went through to become a chartered chapter.*

Halifax founding chapter members Brenda Boon, Brad Dyke, and Madonna MacDonald met in February 2005 to discuss the opportunity to establish a Halifax chapter of IIBA. Although this small group later grew to almost 20 participants at their kick-off meeting, few were members of IIBA and none belonged to a chapter. This pioneering group did not have the luxury of asking IIBA for a list of local/regional members to invite to their meetings, but they were grateful for the support of then SLT member, Glenn Brûlé.

In the early days, the group participated in breakfast and dinner meetings with the Bluenose PMI chapter, and in several other professional organization team meetings. They were very creative and formed an in-kind marketing agreement by partnering with Saint Mary's University.

Halifax petitioned for their chapter to be chartered in late August 2005 and received their official charter in September 2005. Since then, the chapter has held three key events:

- Two highly successful CBAP® study group series. One was held as a face-to-face meeting, the other was held virtually.
- A CBAP® exam writing event held at Saint Mary's University, March 3, 2008. The chapter ensured that the 21 examinees had the option of attending a pre-exam session that included tips on how to write the exam, and a session on yoga exercises to help relieve tension in the neck and shoulders during the test. Applicants were from Halifax, Nova Scotia; Saint John, New Brunswick; Montreal, Quebec; Toronto, Ontario; Kansas City, Kansas; and Brazil.
- Professional Development Summit 2008 held on April 29. Over 90 professionals from the Halifax Regional Municipality attended this chapter-organized full day event that included nine one-hour educational sessions

and two keynote addresses, with speakers from across Canada donating their time. The chapter partnered with CIPS Bluenose and CMC-Atlantic, both Halifax professional organizations. The Nova Scotia Community College (Waterfront Campus) donated the use of their facility.

In early 2006, the chapter began issuing memberships, and has grown to approximately 30 members. Although they have paid chapter memberships and an active group of members, Halifax is currently trying to formalize the value of local chapter membership. The chapter has initiated a business plan with ideas on how to increase membership. This includes a schedule of fall and winter activities for members, and a plan to attend various organizational team meetings to talk about IIBA, how the organization can help business analysts, and the benefits the local chapter has to offer.

With all this hard work behind them, Halifax urges other chapters to consider the following:

- Ask for help. A small group can achieve results on their own, but it can be easier and more effective to use the support that is available, including assistance from other chapters.
- Offer support and services, and volunteer to attend meetings at organizations where BAs are employed.
- Keep your chapter active. Halifax hosts a bi-monthly dinner event starting in September each year.
- Consider using in-kind marketing agreements to acquire a meeting facility.
- To achieve financial success, be sure not to overspend when forming the chapter.
- Sponsorship is very important. Halifax developed an approach to obtaining Premiere Chapter Sponsorship and has been fortunate to have obtained Nexient Learning in their first year and the Barrington Consulting Group in their second.

For the future, Halifax would like to see a graduated certification process with a junior certification for BAs who have skills but have not achieved the full hours of experience

**Please visit our Blog for the latest on *BABOK*® 2.0.**

required for CBAP® certification. They would also like to see the CBAP® designation become widely recognized, and have employers understand the benefits of hiring BAs who have earned the CBAP® designation. The Halifax Chapter will certainly be around to see these goals realized, as they have endured the tests of pioneering a chapter and have matured as an organization.

Requests for chapter spotlights should be sent to [chapter-council@theiiba.org](mailto:chapter-council@theiiba.org).

## Questions, Comments, Concerns?

If you would like to contact the editorial staff regarding future topics or suggestions, or if you would like to unsubscribe, please contact us at [IIBANewsletter@theiiba.org](mailto:IIBANewsletter@theiiba.org).

## Endorsed Education Providers (EEP™) Update

### New EEPs

The IIBA is pleased to present several new Endorsed Education Providers (EEP™) listed below.

#### Dimension Data Learning Solutions

[www.ddls.com.au](http://www.ddls.com.au)

Sydney, Australia

#### Provider Summary:

Delivering comprehensive IT education, covering a myriad of areas, DDLS is the training provider for companies wanting to understand new technologies and apply best practices. This can be seen through its acclaimed and respected IT Infrastructure Library (ITIL) training and VOIP training. Being Microsoft's largest training partner in Australia, DDLS also has in-depth Microsoft Office and MCSE training courses. Having serviced 80 of Australia's top 100 ASX listed corporations, we are confident in our ability to meet the training needs of individuals and organisations nationally. Whether it be on our own premises in Sydney, Melbourne, Brisbane, Perth, Adelaide or Canberra or at your site(s), our commitment to delivering quality training leads the market. DDLS is continually focused on providing effective learning solutions through public courses, certification training packages (e.g., for MCSE & CCNA) and customised training.

#### Endorsed Courses:

[Fast Start in Business Analysis](#)

[Survival Skills for Analysts](#)

[Mastering the Requirements Process](#)

### BA-WORKS

[www.ba-works.com](http://www.ba-works.com)

Istanbul, Turkey

#### Provider Summary:

BA-WORKS is one of the leading technology companies solely focused on Business Analysis consulting and training. We provide professional services to define and manage business requirements

#### Endorsed Course:

[Business Analysis Professional Test Preparation](#)

### MGR Consulting

[www.mgrconsulting.com](http://www.mgrconsulting.com)

Chicago, Illinois - United States

#### Provider Summary:

MGR Consulting provides training in Facilitation, Strategic Planning, Data Modeling, and Leadership. Business Analysts and others use our facilitator training to enhance their ability to develop requirements. Business analysts use our Data Modeling training to better understand the modeling technique to use for developing requirements. In addition, MGR Consulting provides consulting and facilitating services.

#### Endorsed Courses:

[Data Modeling Made Easy](#)

[FoCuSeDTM Facilitator Academy](#)

## Sponsorship Update

The IIBA welcomes the following new sponsor:

[Axure Software Solutions, Inc.](#)

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You can view all of our sponsors on our website at [www.theiiba.org](http://www.theiiba.org)

## Upcoming Events

### IIBA Webinar Series

IIBA is pleased to be hosting a monthly Professional Development Webinar Series.

The Webinars will be presented by members of the Senior Leadership Team (SLT) and other invited guests on topics of interest to BAs. This is your opportunity to increase your knowledge and develop your BA skills by virtually attending interesting and relevant presentations about the business analysis profession.

For more details, please visit the [Webinar](#) page on our website.

### Other Events

Please visit the [Events Calendar](#) on our website for an up to date listing of upcoming events including Conferences, Webinars and Podcasts.

## Advertise in the IIBA Newsletter

### Policies

The IIBA will only accept advertisements from organizations directly related to the IIBA's mission of providing information valuable to our readers. The IIBA reserves the right to reject advertisers who offer products or services that directly compete with those offered by the IIBA. All ad copy and design must be approved by the IIBA's marketing committee. Content for ads should keep in mind the international nature of the IIBA. However, ads specific to a certain geographical area may be approved on a case-by-case basis. Such advertisers should also consider individual chapter newsletters.

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1/2 page (none on front page)	\$600
Full back page ad	\$750

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Be sure to include the size of the ad you are interested in placing, a short company description and the newsletter issue in which you would like to advertise.

## Volunteer Opportunitites

### Become an IIBA Volunteer

The IIBA Volunteer Program continues to move ahead. The office has recently completed a phone survey of all volunteers and we are confident that the results of the survey will allow us to better serve our volunteers. Please look for highlights of this survey in our October issue.

All members interested in Volunteering should check out the [Volunteers page](#) on the IIBA website.

## Newsletter Giveaway

### Play to Win!

In the July Newsletter we published the new IIBA Board of Directors' Organizational Chart. How many VP's are there?

The correct response was: 4

Our winner is Wil Wolitski from ASKcc in White Rock, British Columbia, Canada.

Congratulations Will! You have won an IIBA T-shirt!

#### Now here's your chance:

On what dates were the SLT's Second Quarterly Strategic Planning Meeting of 2008 held in Toronto, Ontario?

Please email your responses to [IIBANewsletter@theiiba.org](mailto:IIBANewsletter@theiiba.org) by Friday September 26th, 2008.

### Social Networking

To make it easier for IIBA members to contact and communicate with each other, we've set up some official IIBA groups on two major networking sites.

You can join by visiting the addresses below:

Facebook:

<http://www.facebook.com/group.php?gid=2357784892>

LinkedIn:

<http://www.linkedin.com/e/gis/3849/741FCE17E900>

We hope to see you there!

### What in the World are IIBA Members Reading?

As an international association, the IIBA is interested in discovering what business analysis related magazines, trade journals, periodicals and more our members around the globe are reading.

Send us the names of your favorite publications, along with a website link (if available) and why you like it (in about 100 words).

Please send the details to [IIBANewsletter@theiiba.org](mailto:IIBANewsletter@theiiba.org).



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