Developing Your BA Workforce Using IIBA Tools and Techniques
Introduction

Rick O’Brien

Organizational Background
• Midwestern Indemnity
• Guardian Royal Exchange
• Liberty Mutual Insurance

Role Background
• Commercial Lines Underwriting
• Underwriting Manager
• Operations Management
• Project Manager
• PMO
• ITIL Service Manager
• Business Analysis Manager
• Business Analysis Director

Randy Cox

What I looked like a couple years ago! WOW - This has been a tough road!

Organizational Background
• General Motors
• EDS
• Whittman-Hart / marchFIRST
• Crosspoint
• Fusion Alliance
• Liberty Mutual Insurance

Role Background
• Manufacturing – Industrial Eng. / Supvr.
• IT Development / Management
• Sales – Account Executive
• Consultant
• Operations Manager
• Project Manager
• Business Analysis Manager
Quick Facts (YE2013)

$35.2 Billion Net Written Premium

5th Largest P&C Insurer in the World

3rd Largest P&C Insurer in the US

#76 on Fortune 100 List

Operate in 30 Countries

Our Principles

We behave with integrity.

We treat people with dignity and respect.

We attract, develop and engage talent.

We deliver an exceptional customer experience.

We continuously improve and innovate.

We execute thoroughly and seek excellence.
Our journey was like flipping a house!
Thought we were flipping this!
But Started with This!
Foundation
Our Situation

- Geographically Dispersed
- Multiple Backgrounds
- Generic Job Descriptions
- BPM, Tools, Artifacts
- On-Boarding Differences
- Limited Training Options
- Project Plan
- Strong SME
- Passionate

Passionate Strong SME
Our Strategy

Developing Our BA Workforce

- The IIBA
- The BABOK
- Competency Model and Assessment
- Success Profiles
- Coaching Culture
- Development Resources
- On-Boarding

The Foundation
Selection Criteria

- Energy
- Breadth (geographical and industry)
- Reputation
- Mature standards
- Continual improvement
- Certifications
- Company aligned
- Education and training
- A partner

Existing BA Standards & Resources

- BABOK
- Competency Model
- Assessment
- Certifications
- REPs
- Online Library
- Webinars
- Book Store
- Chapters
- Career Road Maps
- Annual Conference
- Job Postings

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## IIBA BABOK

### Knowledge Areas (6)
- Enterprise Analysis
- Planning & Monitoring
- Elicitation
- Requirement Analysis
- Management & Communication
- Solution Assessment

### Supporting Tasks (32)

### Underlying Competencies (20)
- Analytical Thinking
- Problem Solving
- Business Knowledge
- Communication Skills
- Business Tools
- Ethics
- Organization

### Techniques (34)
- Brainstorming
- Estimation
- Decomposition
- Interviewing
- Root Cause Analysis
- Observation
- Walk Through
- Interface Analysis
- Focus Group
- Benchmarking

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## Integration

1. **PMO**
2. **Plan**
3. **BABOK**
4. **Compare**
5. **BA RACI**
6. **Launch**
IIBA Competency Model

Knowledge Areas
• BABOK Knowledge Areas (BABOK Chapters 2-7)

Techniques
• Used to perform activities described in Knowledge Areas (BABOK Chapter 9)

Underlying Competencies
• The capabilities, skills, knowledge and personal characteristics that support the effective performance of business (BABOK Chapter 8)

Performance Competencies
• Fifty-three Performance Competencies are the base of this mode; categorized by BABOK Guide Knowledge Areas
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Competency Model

Level 4: Proficient

“A proficient practitioner has an in-depth knowledge of business analysis. He or she will be able to routinely produce high-quality work products in all but the most complex or exceptional of situations without supervision and can effectively guide or supervise the work of others. A proficient level professional will usually be able to intuitively assess the best course of action to take in a given situation and understand how and when to apply guidelines.”

Performance and Underlying Competencies with Indicators

1. PERFORMANCE COMPETENCY

1.1 Business Analysis Planning and Monitoring (BABOK® Guide, Chapter 2) is the knowledge area that covers how business analysts determine which activities are necessary in order to complete a business analysis effort. It covers identification of stakeholders, selection of business analysis techniques, the process that will be used to manage requirements, and how to assess the progress of the work. The tasks in this knowledge area govern the performance of all other business analysis tasks.

1.1.1 Selects appropriate business analyst approach

- Displays and maintains a high level of awareness as related to current industry and organizational trends, standards and disciplines being used to deliver new or enhanced business analysis approaches to solutions
- Utilizes expertise in plan-driven and change-driven approaches to lead teams to select approaches that best fit initiative needs
- Ability to determine when and how to modify a selected approach as necessary in order apply an appropriate level of rigor and best meet the needs of the area of analysis
- Effectively communicates approach to stakeholders
- Effectively gains needed stakeholder and team buy-in to the approach selected

The Dreyfus Scale
What is it?

- Excel Based Assessment Tool
- Links directly back to the
  - BABOK
  - and Competency Model
- Allows BA and Manager to discuss awareness and knowledge of IIBA standards

Customization

- Added Liberty Mutual
  - Business Applications
  - Processes
  - Tools
  - Artifacts
- Added Notes Column
- Added RACI Column
Technical/Functional Capabilities required for success

Business Process Design (Level 3)
Knowledge of business process design that enables a critical fresh look at key processes and focuses on optimizing organizational performance.

User Acceptance Testing (UAT) (Level 4)
Knowledge of and experience with activities, tasks, tools, and techniques for designing, implementing, and evaluating acceptance tools for stakeholders.

Insurance Products (Level 3)
Knowledge of insurance products, market segments and marketplaces.

Project Management (Level 2)
Ability to plan, organize, monitor, and control projects, ensuring efficient utilization of technical and administrative resources to achieve project objectives.

Business Assessment (Level 4)
Knowledge of activities, tasks, practices, and deliverables for assessing and documenting business opportunities, benefits, risks, and success factors of potential applications.

Monitoring (Level 2)
Knowledge of monitoring concepts and techniques, and ability to effectively participate in a monitoring relationship.

Business Acumen (Level 2)
Knowledge, insight, and understanding of business concepts, trends, and processes that are needed for making sound decisions in the context of the company’s business.

Core Application Systems (Level 2)
Knowledge of major production application systems used for delivery of services to internal and external clients.

Requirements Analysis (Level 4)
Knowledge of activities, tasks, practices, and deliverables associated with eliciting and clearly defining and documenting required business functionality as well as non-functional requirements.

Negotiating (Level 4)
Ability to negotiate successfully across the organization and with external vendors in a constructive and collaborative manner.

Presentation Skills (Level 6)
Ability to prepare a presentation, effectively engage an audience, and deliver information.

What
• By job grade
• Four page description
• Key competencies

Use
• Talent Selection
• Talent Development

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Infrastructure
Integrated Project Plan

1. Universally Accepted Approach – PMO / BA / IT
2. Common Platform / Location
3. Comprehensive Material
4. ReUse
Requirement Management Plan

What?
"Identifies the process and procedures used to plan, develop, monitor and control requirements in all stages of a project’s lifecycle. BABOK 2.0"

Why?
• Improves quality
• Provide guidance
• Improve efficiency
• Improve accuracy
• Increases maturity level
• Strengthen partnerships

How?
A requirements management plan (RMP) describes the:
• Approach
• Definition of requirements
• Prioritization process
• Requirements change process

Bottom-line:
Plan Before versus Reacting Later!
Business Requirement Specification

Line of Business Approach “Excel”

Modified “SharePoint”

Traditional Approach “Word”

Rational Doors Next Generation
Work Management System

RTC
- Common WBS
- Issue traceability and management
- Assignment of work
- Capture Historical Trends

Requirement Management System

DOORS
- Requirements information lifecycle
- Extended Team
- Project Lifecycle
- Connectivity with existing platforms

Common Platform

Rational Team Concert

Rational Doors Next Generation
Decorating – the PEOPLE Side
## Keys to the BA Success

### 360-Assessment
- Peer, Self, Manager and Customer Review
- Confidential
- Foundational Questions - Behaviors
- Survey Format – SharePoint
- Targeted – Concise

### Customer Satisfaction Survey
- Project Milestone Driven
- Quick / Easy
- Addresses critical “targeted” areas for feedback
- Feedback Capable if Requested

### Onboarding BAs
- Provides detailed support for leadership that is:
  - Consistent
  - Concise
  - Reusable
- One place for everything
- Partnered with HR

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**Coaching Culture**
BA 360

A tool to help measure skills that represent our **BAs Attitude!**
Customer Service Survey

- Self – Administered by the BA
- Automated email with instruction to customer
- 2 Levels of questions
  - Mid-term
  - Final
- Is traceable to the customer for feedback and follow-up

Customer Satisfaction Survey

- Timeliness
- Quality
- Technical / Business Competency
- Teamwork
- Communication
On-Boarding & Mentoring

The Society for Human Resource Management defines onboarding as "the process by which new hires get adjusted to the social and performance aspects of their jobs quickly and smoothly, and learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization."
Establishing a Coaching Culture

- **Recognize**
  - Assess Performance
  - Root Cause
  - Prioritize High Impacts
  - Professional Development Needs

- **Engage**
  - Plan Interactions
  - Ask Open-Ended Questions
  - Share Perspectives + Insights

- **Explore**
  - Determine Options
  - Set SMART Goals
  - Gain Commitment
  - Developmental Activities

- **Execute**
  - Inspect Progress
  - Positive and Constructive Feedback
  - Re-Ragnar
It Looks Better but we still have more to do!

Maintenance and Refinement of Processes
Changes in Staff and Resources
New Ideas

Reorganization
Customer Expectations / Refinements
Challenges
Key Learnings

- Effort
  - A small (7), diverse, enthusiastic team
  - Persistence

- Partnering
  - IT – access to the corporate copy of the BABOK
  - PMO – integrating key BABOK activities into the standard plan
  - HR – led to creation of Success Profiles & Talent Selection tools
  - Management – volunteered Coaching Culture training

- Integration
  - Be prepared to explain the strategy internally
  - IIBA products and tools may not be widely known
  - We found IIBA products:
    - Accelerated the effort
    - Customizable – make them your own
  - Use existing tools and methods as a place to begin
  - Provide a roadmap to help people understand
Contact:

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