

Developing Your BA Workforce

Using IIBA Tools and Techniques

November, 2014



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



Liberty Mutual[®]

INSURANCE



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.

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 journey was like flipping a house!



Thought we were flipping this!



But Started with This!



Foundation



Foundation



Our Situation



Our Strategy



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

Assessment

Competency
Model

Certifications

REPs

Online
Library

Chapters

Annual
Conference

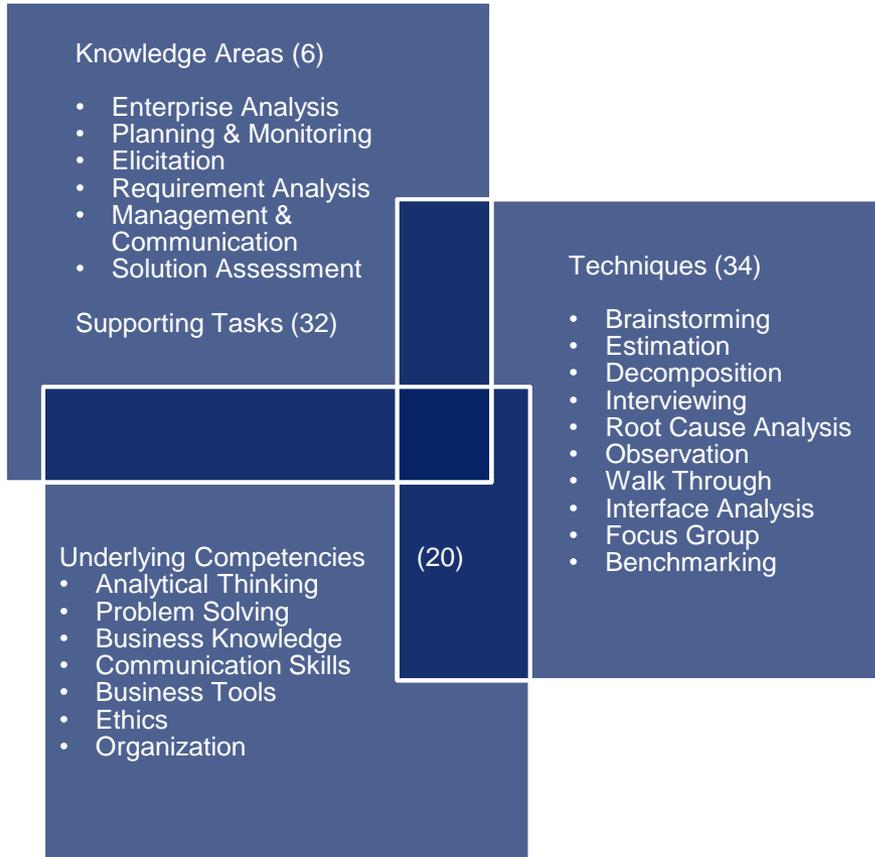
Webinars

Book
Store

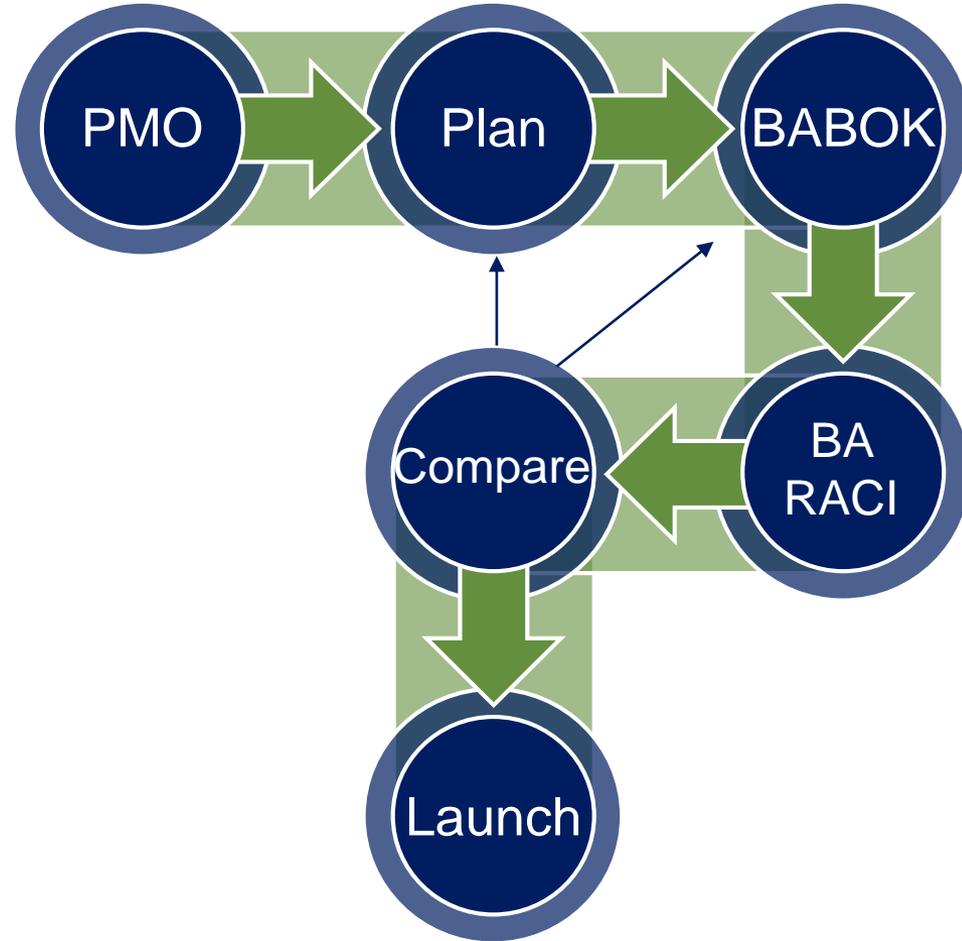
Career
Road
Maps

Job
Postings

IIBA BABOK



Integration



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

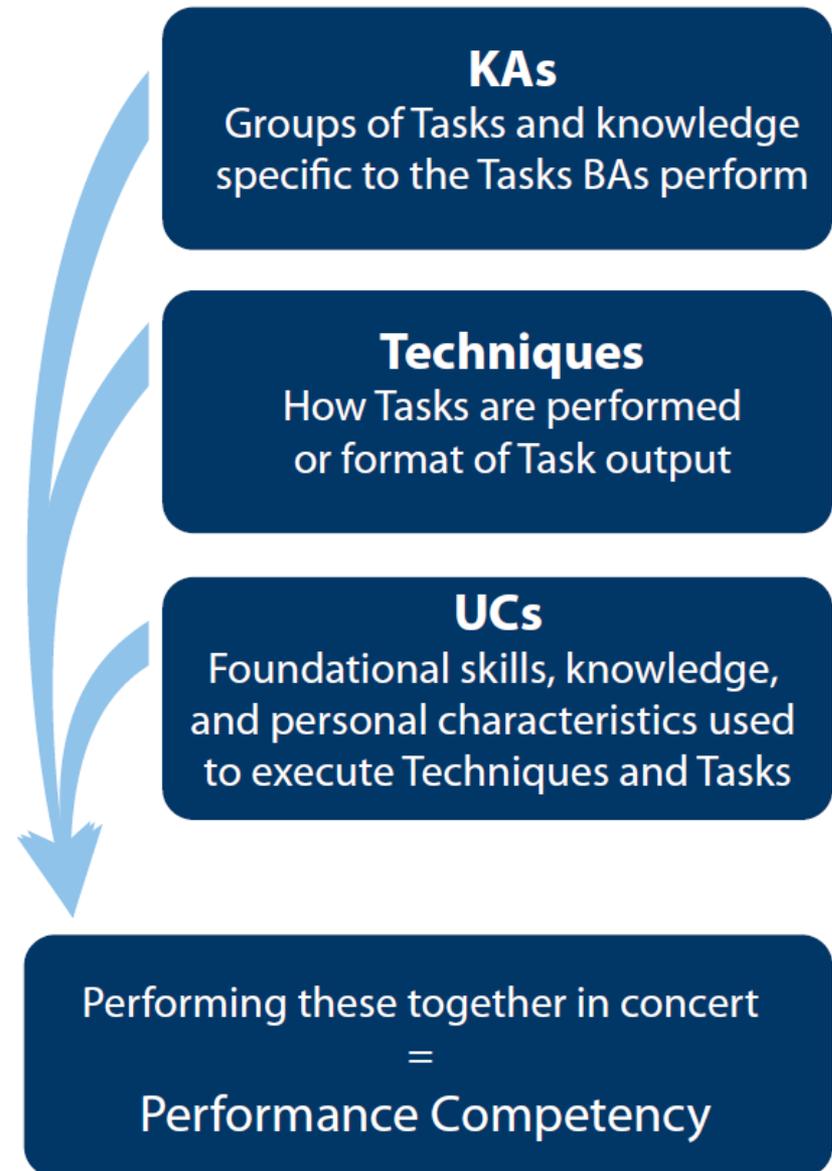


TABLE OF CONTENTS

Copyrights, Licensing and Permissions	3
PREFACE	6
About IIBA®	6
Development of This Standard	6
CHAPTER ONE: INTRODUCTION	7
What Is a Competency Model?	7
Using the Competency Model	7
Understanding the Model	8
CHAPTER TWO: THE BA CAREER	11
Business Analysis Career Introduction	11
Business Analysis Career Context	11
Business Analysis Role Context	13
Business Analysis Job Profiles and Career Paths	13
Business Analysis Career Paths	14
Generalist Profiles	14
Advanced Generalist Business Analysis Profiles	16
Specialty Business Analysis Profiles	19
Hybrid Roles	20
CHAPTER THREE: COMPETENCY DEVELOPMENT	27
Introduction to Competency Development	27
Dreyfus Model and Levels of Skill Development	27
CHAPTER FOUR: COMPETENCIES	31
CHAPTER FIVE: COMPETENCY TABLES	43
Performance Competencies with Role Profiles Mapped to Dreyfus Levels	43
BA Role Profiles Mapped to Techniques	49
Techniques and Advanced Generalist Profiles	51
Advanced BA Profiles Mapped to Underlying Competencies	53
Techniques and Speciality Profiles	54
Performance Competencies Mapped to <i>BABOK® Guide</i> Underlying Competencies	56
Performance Competencies Mapped to <i>BABOK® Guide</i> Techniques	62
Performance Competencies Mapped to <i>BABOK® Guide</i> Tasks	68
CHAPTER SIX: CONTRIBUTORS	71



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	INDICATORS/OBSERVABLE BEHAVIOURS		
1.1	Business Analysis Planning and Monitoring (<i>BABOK® Guide, Chapter 2</i>) 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	<table border="0"> <tr> <td>Selects appropriate business analysis approach</td> <td> <ul style="list-style-type: none"> ▶ 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 to 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 </td> </tr> </table>	Selects appropriate business analysis approach	<ul style="list-style-type: none"> ▶ 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 to 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
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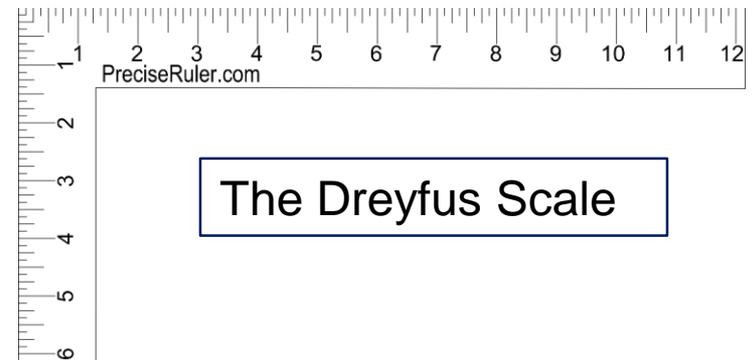
Expert

Proficient

Competent

Advanced Beginner

Novice



Capability Assessment Tool

1. COMPETENCY	INDICATORS/OBSERVABLE BEHAVIORS	D	S	I	C	M	RACI	NOTES (Related Artifacts, Project Activities)
<p>D — I do not have experience in this competency S — I have some experience in this competency and am unsure if I perform this competency and indicators, I may need guidance from others I — I perform this competency and indicators independently based on my understanding and experience, I involve experts when needed C — I consistently perform this competency and indicators based on knowledge and techniques in the BABOK Guide M — I consistently perform this competency and indicators based on knowledge and techniques in the BABOK Guide and I am looked to mentor others in this area</p>								
<p>1.1 Business Analysis Planning and Monitoring – <i>BABOK® Guide (Chapter 2)</i> 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.</p>								
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<ul style="list-style-type: none"> Effectively communicates approach to stakeholders 								
<ul style="list-style-type: none"> Effectively gains needed stakeholder and team buy in to the approach selected 								
<p>1.1.2 Evaluates project complexity, assumptions, constraints, and dependencies</p>								

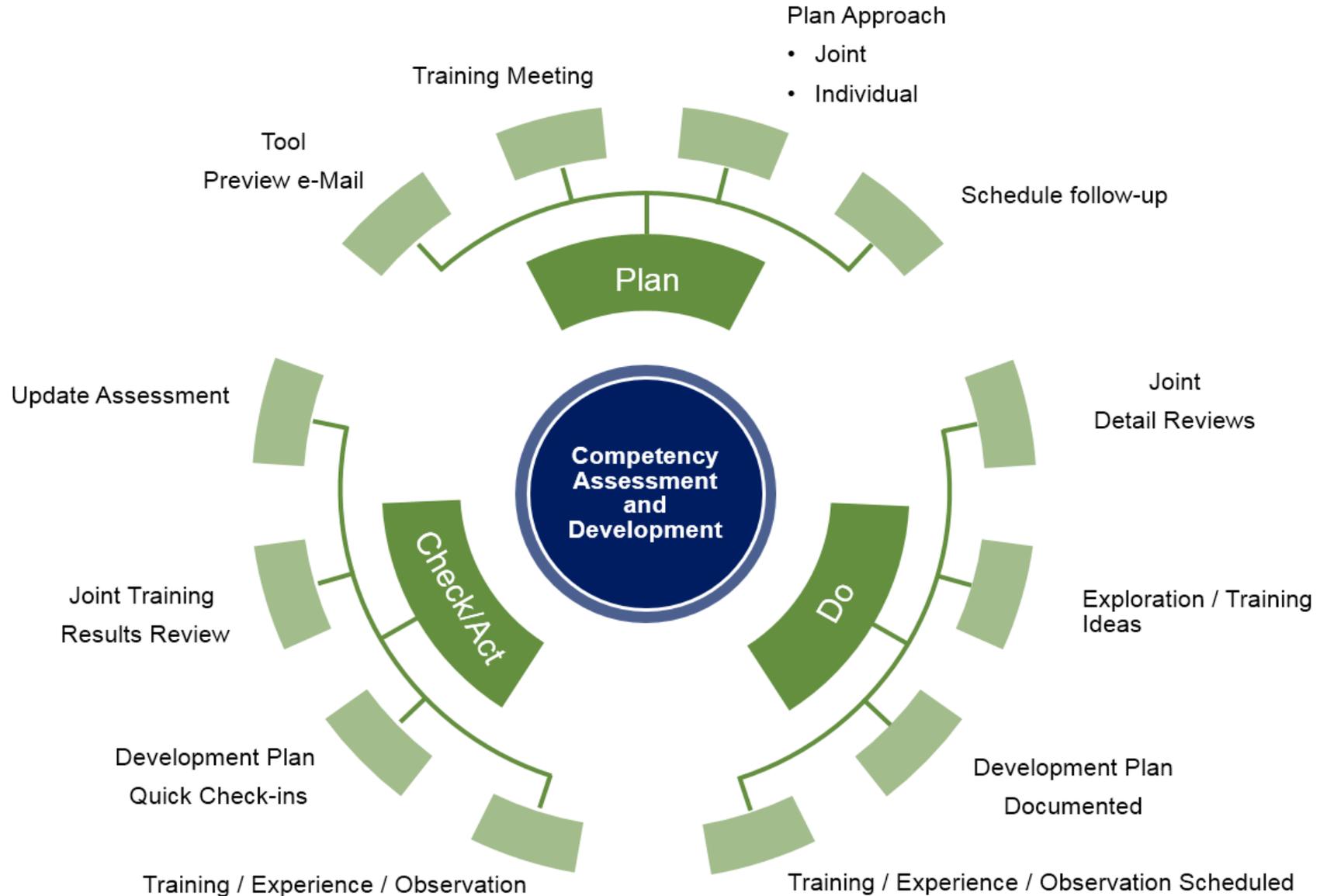
What is it?

- 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

IIBA Competency Assessment – Individual



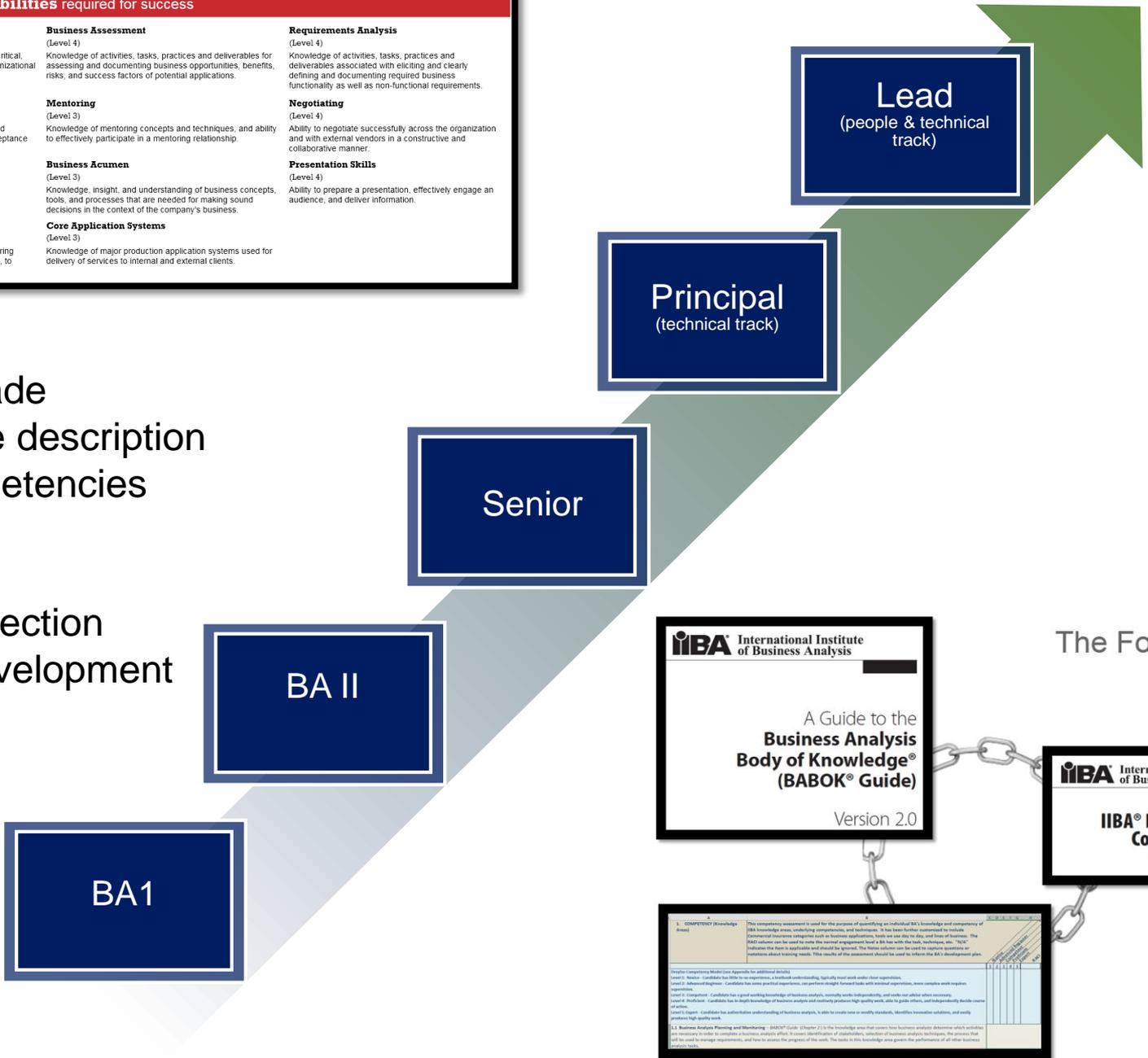
Technical/Functional Capabilities required for success		
<p>Business Process Design (Level 3)</p> <p>Knowledge of business process design that encourages a critical, fresh look at key processes and focuses on optimizing organizational performance.</p>	<p>Business Assessment (Level 4)</p> <p>Knowledge of activities, tasks, practices and deliverables for assessing and documenting business opportunities, benefits, risks, and success factors of potential applications.</p>	<p>Requirements Analysis (Level 4)</p> <p>Knowledge of activities, tasks, practices and deliverables associated with eliciting and clearly defining and documenting required business functionality as well as non-functional requirements.</p>
<p>User Acceptance Testing (UAT) (Level 4)</p> <p>Knowledge of and experience with activities, tasks, tools and techniques for designing, implementing and evaluating acceptance tests for end-users.</p>	<p>Mentoring (Level 3)</p> <p>Knowledge of mentoring concepts and techniques, and ability to effectively participate in a mentoring relationship.</p>	<p>Negotiating (Level 4)</p> <p>Ability to negotiate successfully across the organization and with external vendors in a constructive and collaborative manner.</p>
<p>Insurance Products (Level 3)</p> <p>Knowledge of insurance products, market segments and marketplace.</p>	<p>Business Acumen (Level 3)</p> <p>Knowledge, insight, and understanding of business concepts, tools, and processes that are needed for making sound decisions in the context of the company's business.</p>	<p>Presentation Skills (Level 4)</p> <p>Ability to prepare a presentation, effectively engage an audience, and deliver information.</p>
<p>Project Management (Level 2)</p> <p>Ability to plan, organize, monitor, and control projects, ensuring efficient utilization of technical and administrative resources, to achieve project objectives.</p>	<p>Core Application Systems (Level 3)</p> <p>Knowledge of major production application systems used for delivery of services to internal and external clients.</p>	

What

- By job grade
- Four page description
- Key competencies

Use

- Talent Selection
- Talent Development



Infrastructure



Integrated Project Plan

Product and Policy Administration

Project Dashboards ▾ Work Items ▾ Plans ▾ Source Control ▾ Builds ▾ Reports ▾

Work Items >

Epic 391371 ?

Summary: * Master - Project Plan

Overview Links Approvals History

Details

Type: Epic

Filed Against: * - Product Systems P

Planned For: DEV_AllYears

Owned By: Unassigned

Tags:

Priority:

Severity:

Description

No Description

Discuss

No Com

Add C

- 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

Requirement Management Plan

Liberty Mutual

<Project Name>
Requirement Management Plan
Version 1.0

Project Code: *To be provided by IT when project begins.*

Business Unit/Program Area (Customer):

Business Project Sponsor:

Business Project Sponsor Department:

1.0 Purpose
The Requirements Management Plan document helps plan for gathering and managing requirements. Individual components of this document may be housed separately and brought together in this document.
Criteria of effective requirements include:

Clear	Complete	Concise	Assignable
Comprehensive	Consistent	Accurate	Essential
Viable	Prioritized	Traceable	Verifiable

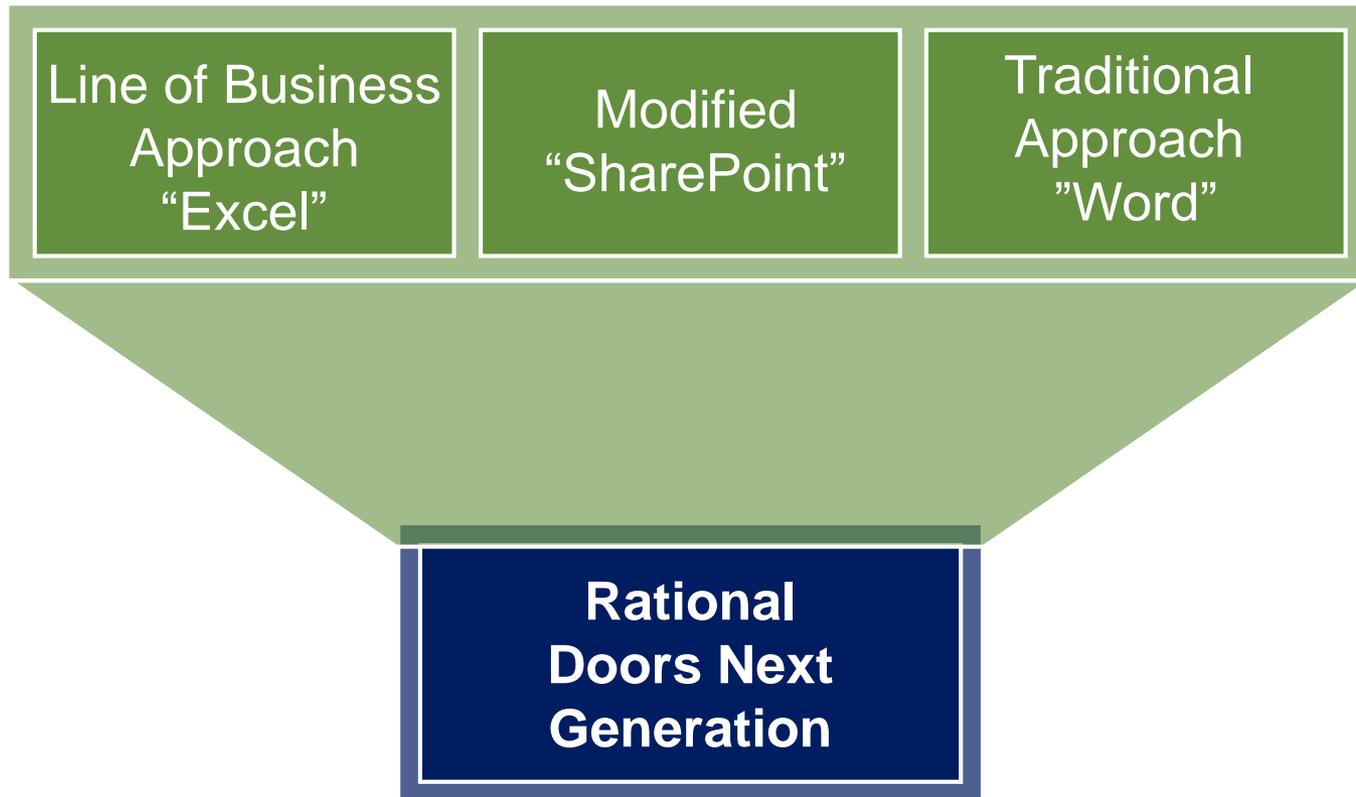
2.0 Definitions, Terms, and Abbreviations

Abbreviation/Acronym	Definition

Bottom-line:

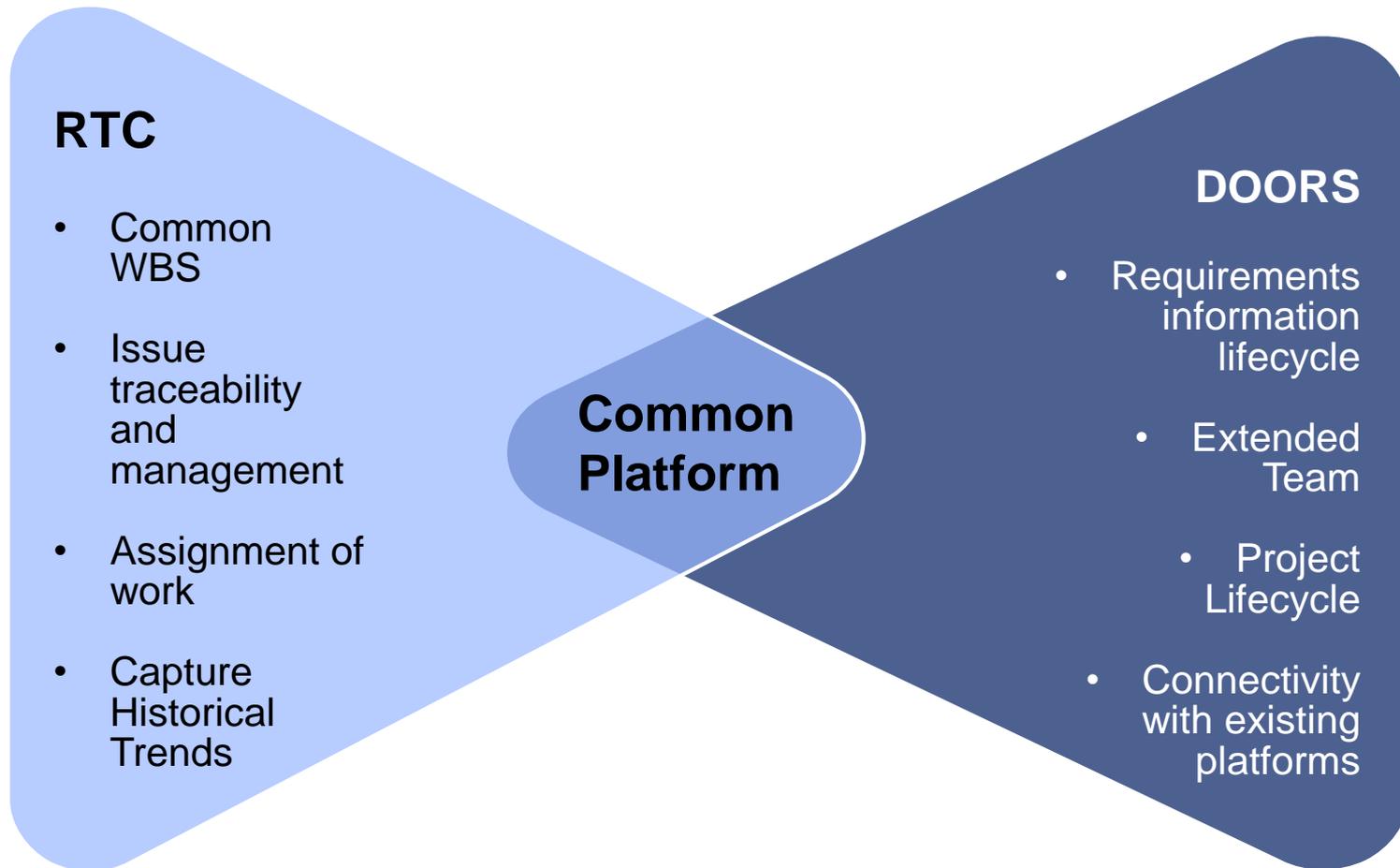
Plan Before versus Reacting Later!

Business Requirement Specification



Work Management System

Requirement Management System



Rational Team Concert

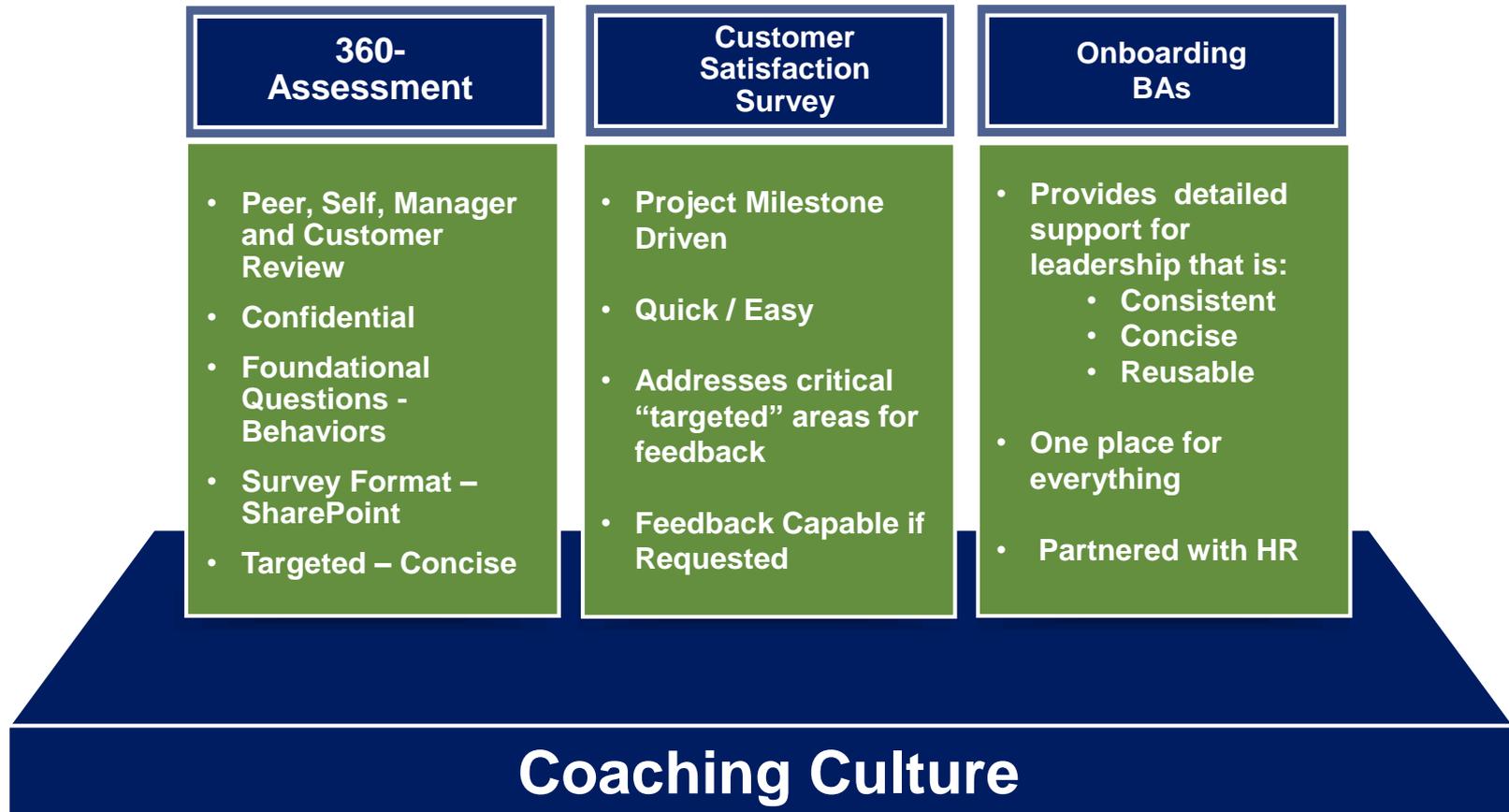
Rational Doors Next Generation

Decorating – the PEOPLE Side



Organization / Feedback / Resourcing

Keys to the BA Success



BA 360

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



Background
360-Assessment is a method of systematically collecting opinions about an individual's performance from a wide range of coworkers. This could include peers, direct reports, their manager, and their manager's peers—along with people outside the organization, such as customers or subject matter experts. The benefit of collecting data of this kind is the person gets to see a panorama of perceptions rather than just self-perception, which affords a more complete picture.

The results from a 360-degree evaluation will be used by the person receiving the feedback to plan and map specific goals in their development.

Confidential
This assessment will be kept confidential with no names or position/ranking being shared to the recipient.

Foundation
All questions have been taken either from the Liberty Mutual Individual Contributor Framework Capabilities Required for Success or the IIBA Competency Model.

360-Assessment

New Development BA Team

Name of person you are surveying:

You are (Choose One)

Self
Manager
Peer
Customer
Other

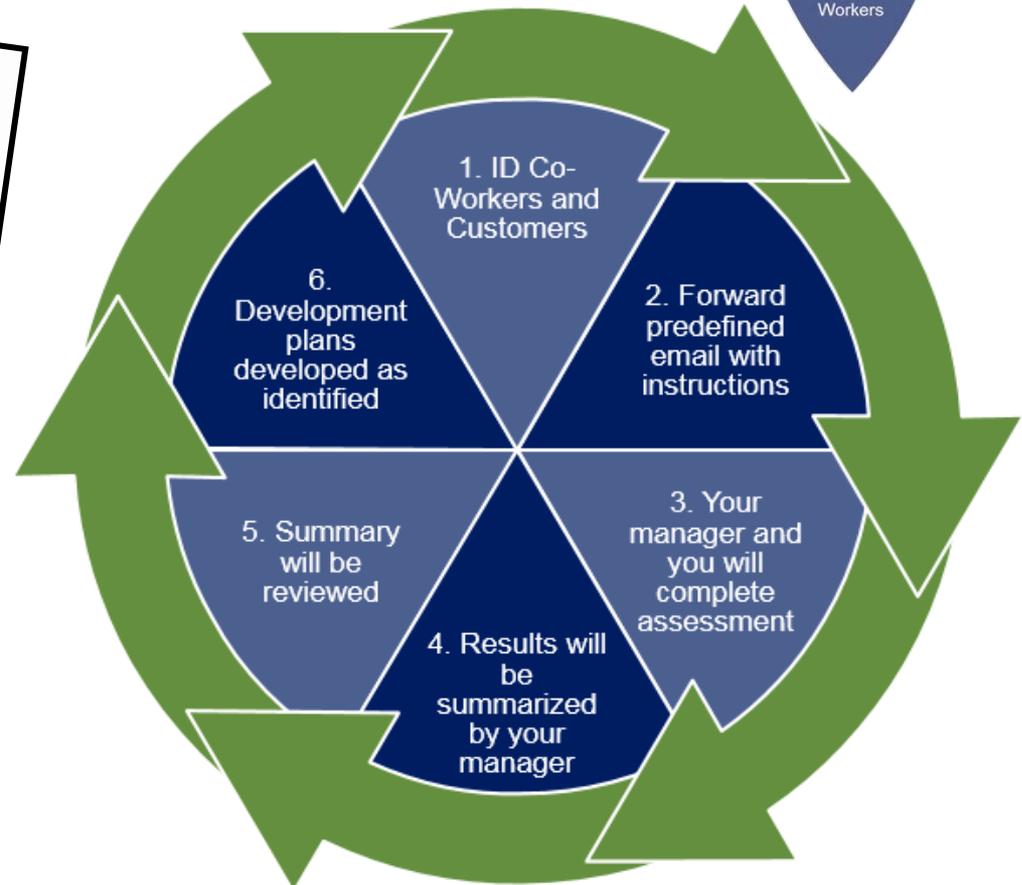
There are 15 questions to this survey. Please check which comment best describes the behaviors this BA demonstrates.

(Personal review comment)

Question 1:
Addresses customer needs by following established procedures and involving the right people at the right time.

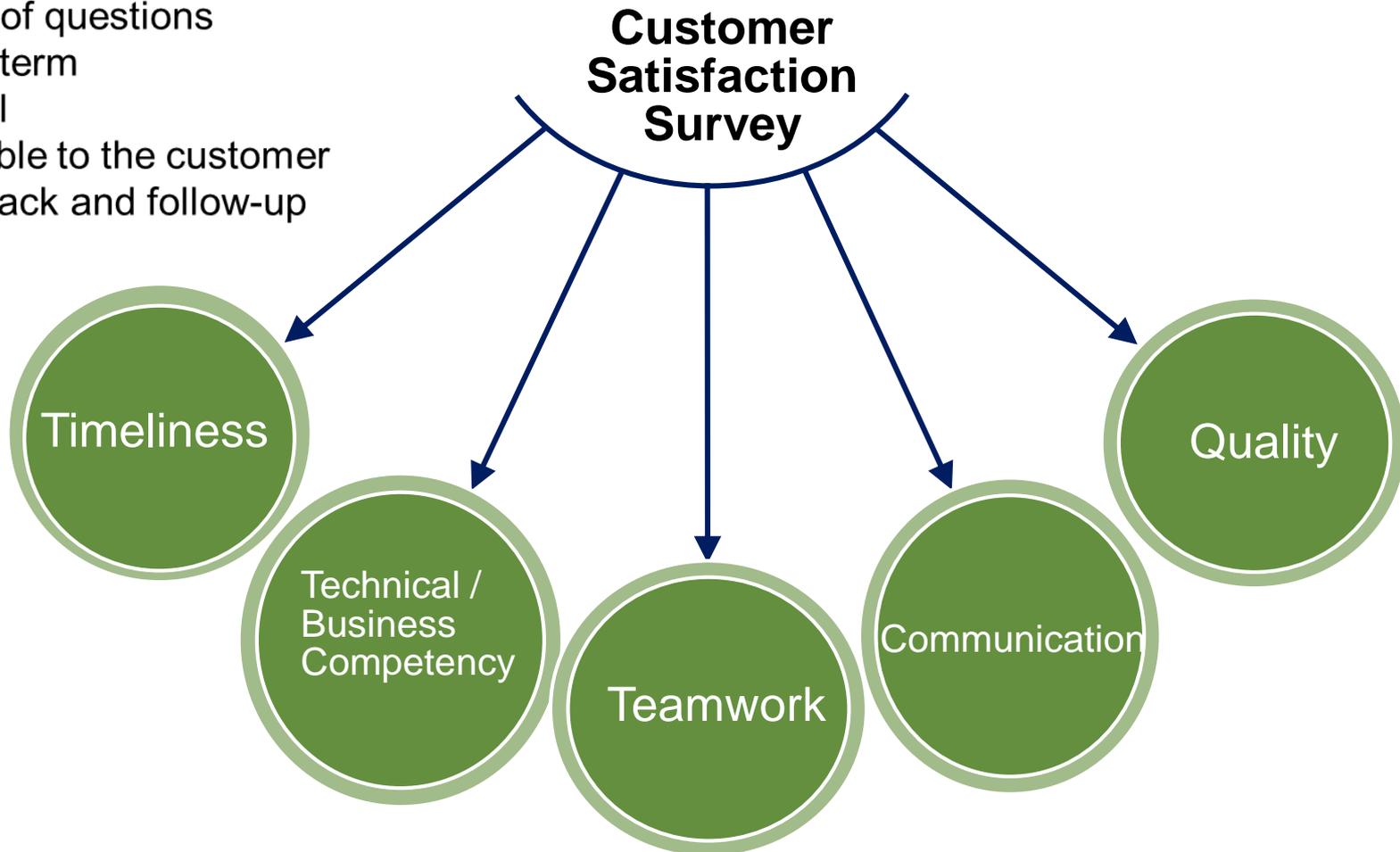
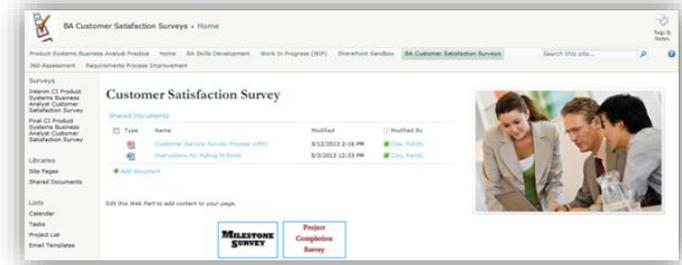
Not Applicable Strongly Disagree Disagree Agree Strongly Agree

Optional Feedback / Comments



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



On-Boarding & Mentoring

myConnections Home 6 Content People Places Search myConnections

Connect **CI Business Analyst Onboarding** Following in 3 streams Leave this group

Overview Activity Content People Action Lists Reports Calendar Actions About Share Manage

ONBOARDING TOOLS

- HR Manager Onboarding**
 - Before They Arrive
 - Week 1 Onboarding Checklist
 - Week 2 Onboarding Checklist
- Departmental Onboarding**
 - New Development
 - Policy Administration Support
 - Policy Automation
 - User Acceptance Testing
- RIT - Request IT**
- Training Recommendations:**
 - New Development
 - Policy Administration Support
 - Product Automation
 - User Acceptance Testing

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."

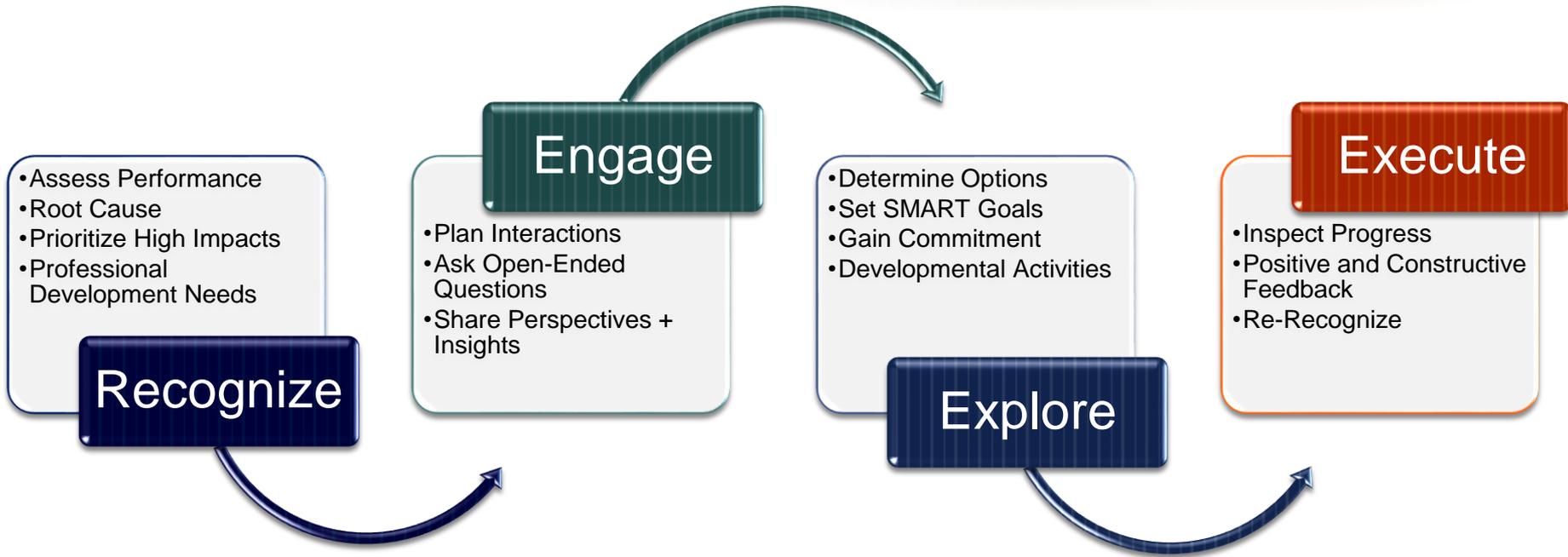
- Welcomed**
 - I felt welcomed to the organization
 - I was provided with information explaining my job and my department before my first day
- Connected**
 - Joining Liberty was the right decision for me
 - I had prior exposure to the company as temp/intern
 - I joined for career opportunity and company reputation
- Informed**
 - I was given training to help me understand how to do my job
 - My manager and I reviewed specific performance objectives
 - My experience matches the expectations I had

VALUABLE LINKS

- LM's BABOK 2.0
 - BABOK Overview
 - Aclea "Kick-Start" Materials
- BSA 360 Community
- IIBA - International Institute of Business Analysis
 - Boston IIBA Chapter
 - Central IN IIBA Chapter
 - Cincinnati IIBA Chapter
 - Seattle IIBA Chapter
- IIBA Competency Model
- IIBA Assessment Tool
- Workforce Management Materials
 - Success Profiles
- Recommended Reading

WHO WE ARE

Establishing a Coaching Culture





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



Foundational

- ✓ BABOK
- ✓ Competency Model
- ✓ Competency Assessment
- ✓ Competency Assessment Guide
- ✓ Success Profiles
 - Technical/Functional
 - Inter-Personal
- ✓ Role & Responsibility

Infrastructure

- ✓ Standard Project Plan (IPP)
- ✓ Requirement Management Plan
- ✓ Business Requirement Template
- ✓ Work Management App
- ✓ Governance via PMO
 - Centralized Storage
 - Change Management

People

- ✓ BA 360 Performance Assessment
- ✓ Customer Service Survey
- ✓ On-Boarding App
- ✓ BA Training Curriculum
- ✓ Establishing a Coaching Culture

Future Plans

- BABOK Version 3
- IPP Investment
- Capability Maturity Model
- Requirement Management App
- Talent Selection Guides
- Talent Assessment App
- BA Boot Camp

Contact:

Rick O'Brien PMP, AU, AAM, ITIL

Director - Business Systems Projects

CI Product Systems Business Analysis

richard.obrien@libertymutual.com