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Q1 2022

BA DIGEST

- Building an Artificial Business Analyst
- On Failure (and Showing up)
- 5 Ways to Be More Creative
- Diversity by Design
- And much more ...

Your regular round-up of useful BA content

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Welcome

Happy New Year! Welcome to the Q1 edition of BA Digest. I hope that you've had some time to relax and recharge over the festive period and that you're fully charged for the year ahead.

The new year provides us with an opportunity to think about personal and professional development. I hope that this quarter's BA Digest gives you food for thought, and perhaps highlights some topics that you might not have thought about. You'll find a range of topics in this edition, beyond those that might be traditionally thought of as business analysis related. I believe that it is so important that, as a profession, we look beyond the traditional boundaries when we think about how we might work together to help co-create positive outcomes with our colleagues and stakeholders.

If you are looking for some other thought provoking content, do check out our latest experiment BAhub.video. We launched this just a few weeks ago, and it is aiming to be an online streaming service that focuses on BA content. As with any experiment, I'm sure it will adapt and change over time, and if it works, we'll do more of it (and if it bombs we'll adapt it or retire it!). It's completely free, and no registration is required.

Talking of experiments, you may remember in the last edition of BA Digest we announced an experimental viewpoints section of the magazine. We invited you to submit your own thoughts and comments for publication, and I'm pleased to say that a number of you did (thank you!). I'm therefore pleased to say that the new Viewpoints feature debuts in this edition, you can find this on can find this on page 29.

Finally, please don't forget that we are always looking for content for BA Digest. You don't have to be an experienced writer, we proof-read and copy-edit all articles, and we'll help you through the process if you need it. All you need to start is a good idea. You can submit your article idea at: overto.link/write@digest

We hope you enjoy BA Digest. And if you do, be sure to pass a copy on to your colleagues, and encourage them to subscribe too!

Adrian

Adrian Reed

Principal consultant, Blackmetric

Editor of BA Digest

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It's Not You, It's Me – Imposter Syndrome

Joanne Fahy

OK, so first of all, let me just say, I don't think I should be writing this. Even as I sit here, staring at my blank Word document, after creating ten or more mind-maps to draw out what my article should say, I still don't think I should be writing this. And it's not you, it's not that I think that you won't want to read or listen to what I have to say and my opinions, it's me. A part of me whole-heartedly believes that I have nothing to say, no knowledge to impart. I have imposter syndrome. A fully paid-up member of the imposter syndrome club.

You all know the feeling. You ask a seemingly normal question and get 12 blank stares in return. Slowly the responses start to emerge, each one separated by a little more silence than the last. The virtual meeting is coming to an end and the heartfelt 'Goodbye!' and wave at the camera that we all do can't come quickly enough. Being the first one to leave as the sinking feeling sets in, the thought train of self-doubt having already left the station, long before the meeting ended. 'It was something I said or didn't say', 'I don't know what I'm doing', or 'that was a stupid question to ask', racing around your head. The following 30 minutes are then spent aimlessly switching between apps and tasks, trying to find some sense of purpose, something that you can complete easily to prove to yourself that you can do your job. Daydreaming about Zoom-ing your line manager and asking them to sack you now, rather than wait for the next appraisal. Does this sound familiar? If so, you're most definitely in the club.

So, what can be done about it? How can you overcome these feelings that you are an imposter in Business Analysts clothing?

Keeping It In Perspective

So what if you asked the wrong question, or didn't say something you should have? It's not life or death. As a Business Analyst we are in the privileged position of being able to help stakeholders through change and help these changes land more successfully. We are NOT however dealing with people's lives, and in the words of Steve Coogan "No-one died". So, if your inner perfectionist is holding your esteem to ransom, have a word with them and do what BA's do best:

1. Collect the evidence – did that meeting go as unsuccessfully as you thought it did? Did you get the outcomes you expected? Did you meet the objectives of the meeting? If so, it can't have been all that bad. I like to follow up with colleagues who attended and ask how they feel it went? Gathering feedback and collecting more evidence can help to chase away the doubts. Constructive feedback is also a gift, the gift of giving you something tangible to improve on for next time.

2. Analyse the evidence – looking at the evidence of the outputs of the meeting, and the feedback gathered from stakeholders, is there something that you can pin your imposter syndrome on? If so, what was the root cause of this? Why or how did this happen? In understanding why you feel the way you do, you have a better chance of avoiding this in the future, stopping that self-doubt train in its track with a more positive way of thinking.

3. Avoid assumptions – often imposter syndrome can come from comparing ourselves to our more confident, sure-sounding colleagues. These colleagues always know the right answer and know what to say, they are naturals and surely never suffer from imposter syndrome. In assuming that this is the case, without asking if this is the case, we build a picture in our heads that everyone else gets it but us, which is simply put, unevidenced and pure fiction. Ask these colleagues if this is the case, what advice can they give to help you? Most of the time, you will find out that they are humans too and suffer through bouts of Imposter Syndrome themselves.

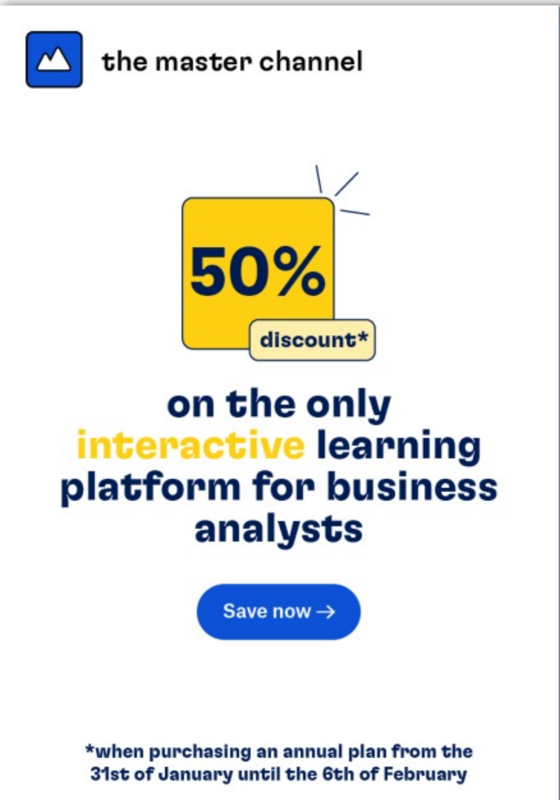
4. Recommendations for improvement – and finally, what are your recommendations for improvement? Considering the evidence, knowing the root cause, and understanding that you are not the only member of

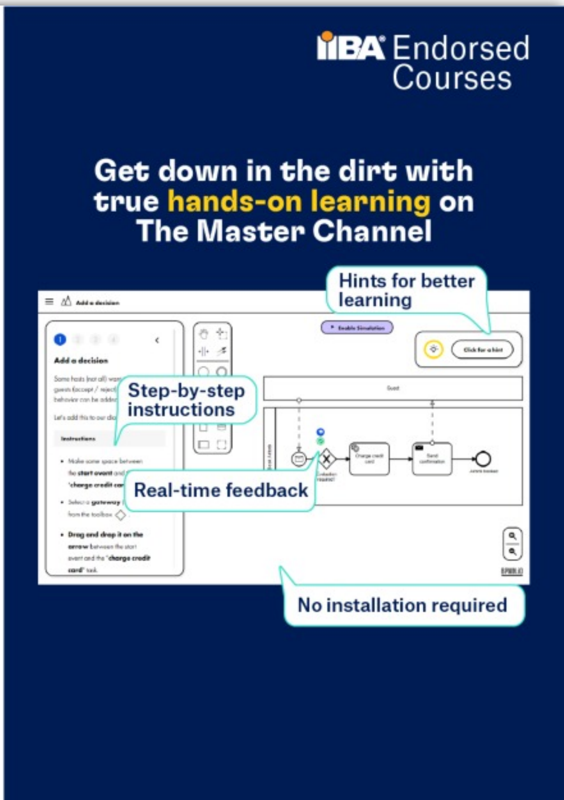
this exclusive club, what can you do to set your future self up for success? If you fear the long pauses, use the power of silence, and remember that sometimes people just need a moment to ponder your ever-so-insightful question. If you dread not knowing what question to ask next, try the 5 why's to get to the root of the problem being discussed or the solution being sought. There are lots of tips and tricks for getting the most out of meetings out there, try out some new ones and add them to your toolkit.

5. BE KIND TO YOURSELF – even the best laid plans can sometimes go wrong, and everyone has an off-day. Someone once said, 'if someone stole £5 out of your bank account, you wouldn't then throw the rest away', so on the occasion that it doesn't all go to plan, don't let one meeting ruin the rest of your day, for the sake of an hour, grab a cup of tea, do your superman pose and play your theme tune.

These are my tips for dealing with imposter syndrome, take them, or don't, what do I know? Like I said, I don't think I should be writing this.

Jo is a passionate business analyst who regards her 'professional nosiness' as one of her biggest strengths and particularly enjoys engaging with stakeholders, you can contact her on LinkedIn (www.linkedin.com/in/joanne-fahy)





Diversity by Design

Sherry McMillan

Designing for diversity isn't just the right thing to do, it's the profitable thing to do.

Diversity matters. It matters in companies; it matters in teams; it matters in products; it matters in design.

As Business Analysts, we encourage diversity of thought. We are practiced in the art of eliciting requirements from various stakeholders. We understand how the loudest voice in the room isn't necessarily the one that should get priority. We are leaders in gently moving teams away from 'how we've always done it'. We are the voice of the customer – <u>all</u> of our customers.

Business Analysts are uniquely positioned to make a huge difference in this world without having to step outside of our day jobs.

We can do that by advocating for the big IDEA (Inclusion, Diversity, Equity, and Access) in who we design for, who we design with, and in applying our BA skills to making our workplaces stronger and fairer.

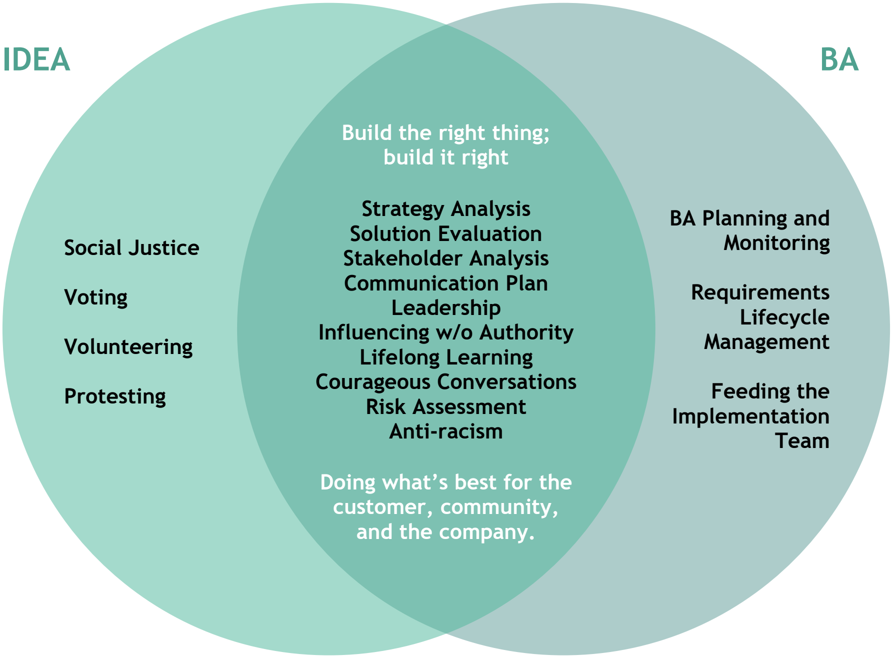
Don't Quit Your Day Job

As Business Analysts we are uniquely positioned to make a real, tangible, difference in this world while doing our day to day work. At its core, Business Analysis is about understanding the true problem to solve or the true opportunity to realise, and making sure that's what we build. In other words, to build the right thing and build it right.

There's a huge overlap between Business Analysis and the big IDEA. In fact, the two disciplines have more in common, than not.

Business Analysis & The Big IDEA Venn Diagram

There's more overlap than not.



IDEA - Inclusion. Diversity. Equality. Access

Sherry McMillan 2020

Who we Design For

"I don't want to be the exception to the rule; I want the rules to accept me." Arlan Hamilton

Circa 1600, William **Shakespeare** needed a large audience to keep afloat. So he wrote for the rich, the poor, and the 'middlings'. He was criticised harshly by the establishment, but ultimately had the largest, liveliest audience, and his work outlives all his critics.

KitKat had been in Japan since 1973, but not until they tuned into Japanese culture did their sales take off. In 2004 they embraced Japanese love of flavour variety and introduced the Green Tea KitKat. They followed that success with a myriad of flavours, finally took advantage of the serendipity of their name sounding similar to "Good Luck" in Japanese, and by 2014 were the top-selling candy producer in Japan.

In 1998 Sara Blakely was trying to find a mill that would manufacture her invention – **Spanx**. She knew that the products being offered to her didn't work for her. Her vision for her company was validated when she saw for herself that hosiery was being designed and manufactured by men. The mill operator who gave her a chance did so at the insistence of his 3 daughters. His company enjoyed the success of partnering with her. Sara refused to use the typical images on her packaging (the thin Caucasian woman) even though she personally fits that stereotype. Instead, she used drawings of women of all shapes, sizes, and colours. By 2013 Sara became a billionaire. She still owned 100% of her company until very recently when she sold it on her terms.

In each of the stories above, success was brought about by bringing in a factor of inclusivity to the design of the product – be it a play in the middle ages or undergarments in our lifetime.

Knowing your current audience and designing for them is just smart. Knowing your potential audience and designing for them, is even smarter. Who is in your potential audience but not in your current one? Is there any bias in your backlog?

Here are some practical ways you find opportunities to design for diversity:

Analysing Actors

The artefacts of Business Analysis are a gold mine for identifying who is being prioritised in your design. You can find diversity markers in your User Stories, Use Cases, backlogs, and more. Look for the WHO in:

- Use Case main success scenario and alternate paths
- Tickets in the backlog
- Tickets that get done
- Production support incidents and their response criteria
- Business Functions with approved work
- Business Functions with pending work
- In the RACI matrix, etc.

You can time-box a quick ad hoc assessment or you can commit to gathering deep and broad metrics.

Compare your results to the overall stats in your given marketplace (or the new one you want to enter) to get great insights into your product's readiness.

Keep in mind that a Business Function (functional area) or Business Unit (geography) may inherently over-represent a given demographic. E.g., is the organisation prioritising growth over savings? Is that the intent when Sales gets priority in the backlog over Finance, or is something else at play? If either group is over-represented by a particular demographic (e.g., gender) this may be an indication of unconscious bias.

Perfecting Personas

You can make profiles from data (personalising data groups) or you can interview actual users.

If they are all very similar, you might have a diversity problem in your design thinking, marketing, and/or your data collection methods.

The IDEA Check

You can add a checkpoint to your design process to ask some compelling questions like the following. This could be managed in a way similar to a Go/No Go where key stakeholders walk through a set of questions to answer together. However you use this, you'd want this checkpoint to be early in the design process.

- Are we building with our customer (and not just for them)?
- Do we understand all the personas we needed to build for? If not, could we work with a consultant for that demographic?
- Is a diverse team building the product?
- What if we added a new persona? What if we wanted to enter a new market or jurisdiction?
- What if we priced and/or marketed our product differently? Could we reach a new audience?
- What if the user had the same decision-making power as the customer? (If currently not the same.)
- Is our supporting documentation written in an inclusive way? Or are we accidentally showing a preference for a certain customer type? (E.g., are online help, release notes, and emails using gender-neutral pronouns? Could our desired customer base see themselves in the photographs used in our marketing materials?)
- What if the user is colour-blind, dyslexic, is arthritic, has speech, hearing, or sight impediments, etc?

About 25% of the population has some sort of disability.

The World Wide Web Consortium (W3C) provides web content accessibility guidelines.

Tools like the Deque Axe Chrome browser extension (Firefox and Edge) can be used to report a score on accessibility. You can challenge your organisation to reach and keep a score of 90 or higher.

Who We Design With

"What you do for me, without me, you do to me." Ghandi

If you work in a diverse team, reach out to your co-workers and ask if they face challenges with the team, the company, the product, or the industry. Listen hard (BAs are great at that) and then ask how you can help.

If you don't work in a diverse team, ask why! This is especially important if your design team doesn't include representatives of the very demographic you are designing for. You can represent your company at recruiting events. You can help **build a business case for diversity**. (Analysis of HR data can help provide insights and create change.)

If you are a hiring manager you can build and support diverse teams.

- Tell Talent Acquisition and Staffing Vendors that you're looking for diversity.
- Partner with someone who's different than you when you interview candidates.
- Take unconscious bias training.
- Look to see if code-switching might be impacting your hiring and promotion pipelines (tip: it has nothing to do with lines of code).

And, of course, you can speak up and challenge bias whenever you see it.

Finally, there are many wonderful organisations that could use your excellent BA skills. Consider volunteering.

In conclusion

"Never doubt that a small group of thoughtful committed citizens can change the world; indeed, it's the only thing that ever has." Margaret Mead

Designing for Diversity isn't always easy. With our jam-packed schedules, aggressive due dates, and complex workplaces, adding in more voices, and more checks, can be a hard sell. But the return on investment is inarguable.

I recently wrote a children's book and challenged myself to create a world in which any reader could see themselves. During the design process, a young beta tester looked at our character and said, "That could be me!" Later, a child of a different age and ethnicity looked at the same character and also saw himself.

By designing for diversity, we improved the user experience and expanded our customer base.

So, yes, indeed, that could be us – all of us.

Sherry McMillan is the Sr Manager of Business Analysis at Canadian Western Bank. You can find her on LinkedIn at www.linkedin.com/in/sherry-mcmillan

She is also a published children's author. Her book, What The Seal Saw, is available internationally. See www.whattheseal saw.com

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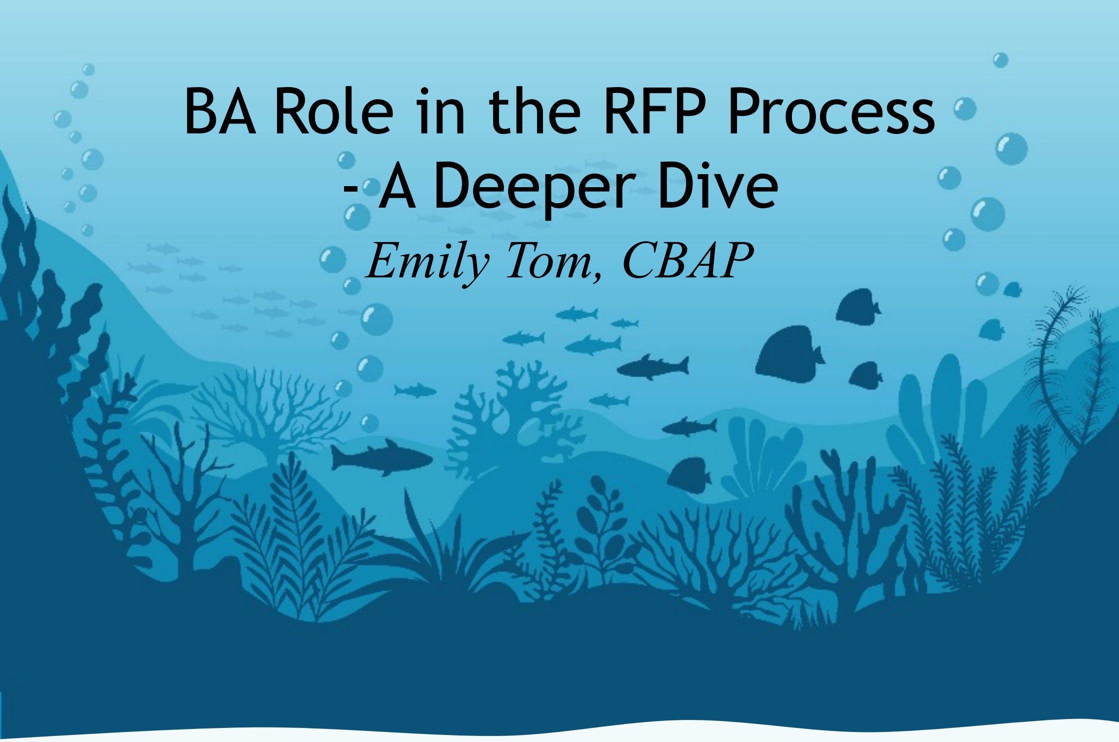

BA Role in the RFP Process - A Deeper Dive

Emily Tom, CBAP

I was thrilled to see an article by Suhas Kerurkar on “Business Analysts role in the RFP process (Request for Proposal)” in the Q4 2021 edition of BA Digest. It was a great overview of both the buy (issuer) side and the sell (responder) side of the RFP process. This subject is special to me since I’ve worked as a BA in procurement for about 17 years. Call me crazy, but being a BA in an RFP project is *exhilarating*. There are many parts of the process in which the BA shines.

Let’s look into the instrumental role a BA can play in the “buy” side of a procurement. This phase of an RFP project can be complex, but there is a general sequence of steps:

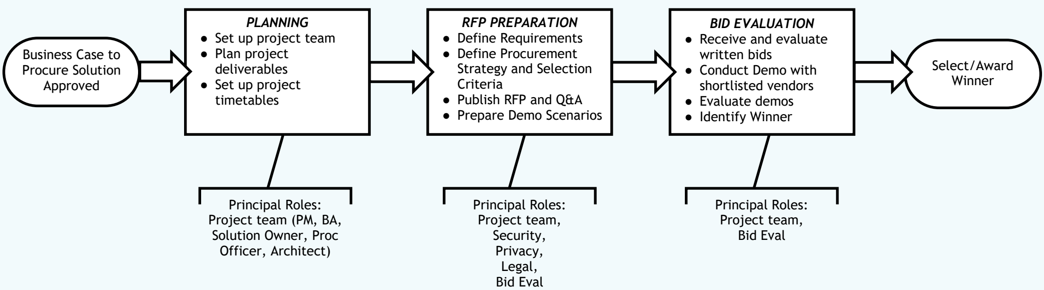

Figure 1 High-Level RFP Process and Principal Roles

Business Case

As a BA, you can make sure that the current and future states of the organisation's solution architecture / business architecture / business process are commonly understood by the business case stakeholders. You should do the reverse traceability to the business case as you are developing requirements for the new solution.

RFP Project Planning

With the project manager leading the RFP process as a project, the team will be able to collaborate with the appropriate stakeholders, nail the requirements and adhere to the timelines.

As an example, let's consider the purchase of a software solution. It is a complex procurement and both the written bid proposals and software demos should be evaluated.

Given the numerous roles involved, it is helpful to outline everyone's roles in a Responsible, Accountable, Consulted, Informed (RACI) chart. The following is an example of a RACI chart – of course, you'll need to adapt yours for your project and your team composition:

Task	Responsible	Accountable	Consulted	Informed
Solution Requirements Definition	BA	Own	Arch Security Legal Privacy Proc Typical Solution Users	PM
Prepare company background information to include in RFP	Own Arch Proc	Own	Legal	PM
Manage project	PM	PM	BA Own Proc	Solution sponsor
Choose procurement strategy	Proc Own BA	Proc	Legal	Solution sponsor PM
Develop selection criteria	Own BA	Own	Proc Arch Security Privacy	Solution sponsor PM
Publish RFP	Proc	Proc		PM Own Solution sponsor
Q&A	Proc Own BA	Own	Own Proc Arch Legal Privacy Security	Own Solution sponsor

Task	Responsible	Accountable	Consulted	Informed
Prepare demo scenarios	BA	Own	Own Typical solution users Proc	PM
Evaluate proposals, shortlist candidates	Own Evaluators	Proc		PM
Conduct and evaluate demos	Vendors Own Proc Evaluators	Own	Arch	PM BA
Select winner	Proc	Own	Legal	PM Solution sponsor

Abbreviations (main roles):

- Project Manager (PM)
- Business Analyst (BA)
- Solution Owner (Own)
- Procurement Officer (Proc)
- Solution/Enterprise Architect (Arch)

Defining Requirements

In Suhas Kerurkar's article "Business Analysts role in the RFP process (Request for Proposal)", there is extensive discussion about preparing the functional and non-functional requirements. I would also use the Benchmarking technique. That is, do some market research to see what solutions are available and try to find some client reviews of the solution (both material goods and services that they bought from that vendor).

Consult with the organisation's enterprise architects and solution architects to understand any technical constraints that apply or whether any components of the solution already exist in the organisation.

Procurement Strategy and Selection Criteria

This is where you get to apply some creativity and critical thinking. Since you will have done some solution benchmarking, you'll have an idea of the solution features. Without limiting solutions being considered, you need to think about who (which vendors) are viable candidates. Work with the procurement officer, the PM and the solution owner to determine the best procurement strategy. Will this be a public RFP, where anyone can bid, thus giving you lots of options? Or will this be an "invited" RFP where you invite only certain vendors to bid, thus only considering the serious contenders and saving time? Will there be a minimum number of points that a vendor must score in order to be considered? How much time will you give the vendors to submit a bid?

I also like the approach of accepting the top 3-5 bids for the next round, thus creating a shortlist of candidates for the next evaluation round. Practically speaking, objective criteria are evaluated through the written bids. The subjective criteria (e.g. is the tool user friendly) can be evaluated through vendor demos.

Work with the procurement officer, the solution owner and the architects to develop the scoring criteria (a.k.a. acceptance criteria). It's really a fine balance because the scoring criteria must not be too easy nor too hard to meet. You don't want *everyone* to score highly otherwise you won't have a clear winner, and you don't want them all to score so low that no one qualifies. This is where you should create some what-if scenarios, mocking up some bids to see how the candidates would score.

At the end of this task, you will have an ability to score each SMART requirement.

Publishing the RFP and Q&A

The procurement officer will take care of publishing the RFP or sending it to invited vendors. The BA can add value by participating in the Q&A. Vendors will often have questions for clarification on the requirements. In consultation with the other project stakeholders, you can prepare the answers using your excellent communication skills!

Demo Scenarios and Conducting the Demos

The purpose of this activity is to evaluate the shortlisted vendors by observing how their product works. Using your BA skills, develop demo scenarios that will help the evaluators discern between each of the products. Work on developing demo scenarios that align with the business process – but don't be too prescriptive on how each solution is supposed to function. Otherwise, you risk not being able to take advantage of new ways of doing things with the new product. You would also work with the product owner to establish acceptance criteria and scoring. The scenarios need to be sent to the shortlisted vendors ahead of time so that they can prepare their demos.

Selecting a Winner

As a BA, you can also analyse the evaluations to help the product owner identify the winner. You can validate evaluations against requirements, perform financial and risk analyses to prepare the business case for selecting a particular winner.

Conclusion

A BA can play a key role in the procurement process by drilling into the requirements, understanding the stakeholders, communicating requirements, identifying solutions and making business cases. For me, this is how we can use our BA skills in overdrive. See? I told you it's exhilarating!

Emily Tom, CBAP is an independent consultant based in Ottawa, Canada. She is also the Regional Director IIBA Americas Northeastern Region, supporting 18 IIBA chapters. She is passionate about promoting the business analysis profession and supporting fellow business analysts in their careers.

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Using Group Construct Analysis to Understand Stakeholder Worldviews in Ambiguous Situations, Part 3

Causation: What Makes Things Happen?

Nick de Voil

To achieve a shared understanding of a business situation, you might run a workshop with stakeholders. You would ask the participants to join you in various different types of activity, allowing them to express their feelings and opinions about the subject matter in a range of ways. Each activity addresses one facet of the subject matter. Examples of techniques, and the questions that they help you to answer, include:

- Stakeholder mapping – what sorts of **people** are involved in this situation?
- Concept mapping or mind mapping – what are the key **ideas** here?
- Breakdown structures – what are the **constituent parts** of things?
- Dot voting, “buy a feature” games, post-it ranking – what is the relative **importance** of things?
- Business process mapping, journey mapping – in what **sequential order** do things happen?

We generally tend to hope and assume that in business meetings we are dealing with objective facts. Actually, we usually aren't. If that were so, then every stakeholder with access to a common set of information would provide the same answers to our questions – and of course, they don't. As we've seen earlier in this series, each individual has their own subjective view of the world. Not only that, but in a social setting such as a workshop, each person is taking part in a game. It's a remarkable sort of game, because each person construes its rules differently. The main tool by means of which the participants negotiate their way through these multiple versions of the game is the language (verbal and non-verbal) that they use. If we really want to understand the situation, we have to grasp, not only each individual's subjective viewpoint – their construct system – but also the *group construct system,* which is constantly being reconfigured.

In the last article, we examined how an analyst can describe the things that make up the world as experienced subjectively by a person. We referred to this topic as *ontology.* Ontology is about "things" or ideas, and the way those things can be related to each other. We identified a number of possible types of ontological relationship between two things. For example, thing A may be more important than thing B, it may be like B, it may be part of B, or it may be a sort of B. One of the most fundamental aspects of the way we experience the world is the passage of time, so another important type of relationship is sequential order: A happens, then B happens. All these different types of relationships can be shown on a construct map.

This article focuses on another type of relationship we can show diagrammatically on a map – *causation.* Causation is about things that make other things happen. Just like all the other types of relationship mentioned earlier, business analysts are familiar with this idea in various guises. For example, a process trigger is a thing that makes another thing happen. As analysts, we like to categorise things neatly, and we would say that "things that happen" can include events, tasks, processes, activities or episodes, but not entities, states or conditions. However, when mapping subjective worlds, any of these things can be considered something that happens.

Why do we care about causation? It turns out that beliefs and arguments about causation are extremely important to our work as business analysts:

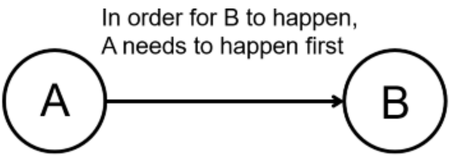
- We often need to think about what the consequences of taking a particular action will be. We do this when predicting a stakeholder's likely reaction to a project, evaluating alternative solution options or assessing the forces influencing acceptance of a business change.

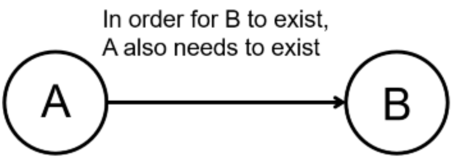
- We sometimes need to reflect on something that has happened, or that might happen, and ask ourselves what caused it. We do this when carrying out root cause analysis.

- Perhaps most frequently, we need to think about what needs to happen in order to achieve a particular aim. We start off by defining an objective, and then work backwards from the objective to identify things that need to happen first. Examples of techniques using this kind of thinking are PERT and benefit mapping.

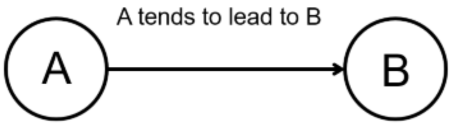
On our construct map, we can show causation the same way we show ontological relationships, by drawing an arrow between two constructs and annotating it if necessary.

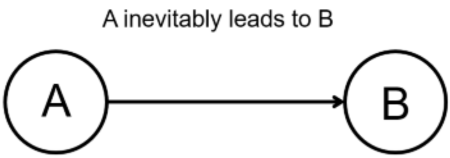
Some of the relatively sophisticated thinking techniques that we use in workshops use relationships that are typical of group thought processes and tend to be the result of careful reflection, for example:





By contrast, when we are mapping the construct system of one individual stakeholder, we can often identify relationships between constructs that could be described as assumptions or even prejudices. These may become apparent at any point during interaction with a stakeholder, so it helps to be alert for them. They tend to be more straightforward:





The full set of causal factors at play in a subject area can be considered as a system in itself. The discipline of System Dynamics (as described by Jay Forrester and others) is all about describing these systems of objective causal factors. The idea of mapping a person's subjective ideas and beliefs about causal factors in this way was first proposed by Colin Eden in his SODA method. Group construct analysis takes this further, by distinguishing the various different types of construct relationship, by making sure that subjective factors are treated appropriately, and finally by considering *rhetorical* aspects – the way in which people use group constructs to promote their agenda in an organisation, which we will discuss in a future article.

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

Ethics & IT - Why Does It Matter Now?

Dr Liz Calder

Ethics is a human concept, a shared understanding of what is appropriate behaviour. Your personal ethics depend on where you grew up and live, your culture, your time in history and your life experience.

Most people express their work ethical stance primarily through the companies they choose to work for. Will they work for companies that make armaments or that sell alcohol or tobacco? Will they work for charities?

And it's not as if the modern workplace is ethics-free. The domains of medicine, law, and teaching operate within strong ethical frameworks. But in other areas, the emphasis is very much on consumers taking responsibility for their own decisions.

So, what is changing? Why is the IT industry rumbling with talk of ethics and ethical frameworks? For me, there are a couple of catalysts.

1) The massive increase in computer processing power. We can manipulate and analyse data in ways that we could only dream of a decade ago. Even though it was both legal and possible, it was simply too much effort to do.

From HAL in 2001: A Space Odyssey, to C-3PO in Star Wars, the idea of a helpful personal computer is a science fiction staple. In real life ("IRL") we have adopted virtual assistants by the million, to tell us what the weather is like and play our favourite music. But these helpful computers are not 'ours'. They belong to commercial organisations who take terabytes of personal, and potentially private, information about us in exchange. They use this information to predict and monetise our behaviour in ways society never anticipated and that most people neither understand nor benefit from. And so, we must be ethical in our system and artificial intelligence initiatives to ensure that privacy is protected and we don't treat people as saleable commodities.

2) The increasing use of psychology and neuroscience to influence behaviours in IT systems. Humans believe they're logical and can weigh up information and assess any risks they're taking on. In truth, we're easy to manipulate without necessarily realising it is happening.

The modern field of UX/UI embraces this understanding of our psychology to make website and app navigation as effortless as possible. Decisions about where to put items on a screen, which items to put next to each other and even the colours to use makes them simple to navigate. The result is that many of our choices happen on a subconscious level, and we're often not aware how we came to a decision. The downside is then that these same techniques can be turned against us.

When we refer to Millennials and Gen Z as 'tech savvy' we don't mean they know how to code apps, but that they understand the unwritten rules of how apps drive behaviours using social influencing and gamification in a way that much of society still doesn't.

Because unfortunately, not all users of IT systems have the cognitive ability to critically assess what they're being expected to do and why. People who use apps and IT systems have a range of cognitive ability and the ethical impact of design choices and influencing techniques on individuals across the whole range of abilities must be considered. Everyone must be able to make the correct choice for them.

So, when it comes to ethical behaviour at work, I see it largely falling into 3 buckets.

1) Illegal behaviour. Here there are laws designed to protect customers and breaking those laws comes with known consequences. I won't talk on this further as the understanding of this should be clear.

2) Actively unethical behaviour. A choice is made to deliberately trick or disadvantage customers, or manipulate them into doing something they would not do given either the time or information needed to make an informed decision.

3) Unintended consequences. Here there is no intention to disadvantage or manipulate customers but, through a lack of consideration, some people are treated unethically. For example, streaming music apps are great for the listener but the artists that feed this revolution are paid only fractions of a penny for each stream.

Consider the budget airline that in 2018 was condemned for deliberately splitting up groups to force them to buy seats to sit together. That wasn't how the rule started. Originally, you were simply not guaranteed a seat with other members of your party, which customers were happy to accept in exchange for a cheap flight. If seat allocation was random, then you would expect occasionally to be sat with other members of your party. However, over time, passengers noticed they were NEVER sat next to members of their party – even if those members were small children. The booking system deliberately separated them.

This is a creeping unethical behaviour that appears to have moved from "unintended consequences" to "actively unethical". One can imagine how a series of small changes, built up into something unethical. While most people would baulk at creating a system to divide parents from their children, small changes over time allow us to get used to the *status quo*. Because then the next change "isn't that different, is it?"

Implementing ethics can't be a one-off activity at the beginning of a project, it's something we must track over the lifetime of a product. Periodically we need to take a step back and look at the cumulative effect of "improvements" to check they still align with the values we espouse.

I've talked about ethics as something necessary, but what can you do as an individual? Here are some practical suggestions.

- Does your company have an ethical framework? Many organisations do, especially those that work in a compliance area.
- Does your company have stated values? How can you use these in your project teams?
- Use existing tools and techniques in your business analysis. The PESTLE technique is a tried and tested method of looking at a solution in the wider context of organisations, customers, and society.
- Investigate ethical frameworks you can work within. They will provide you with a framework in which to examine your projects and identify risks of unwanted consequences.
- Beef-up your stakeholder analysis. To understand the consequences of a piece of software on people, we have to know who it affects. We must look wider than the target audience in our benefit case. If any individual can use it, then looking at stakeholder "edge cases" is critical.

In a fast-changing world where IT is bulldozing the boundaries of what is possible, we must all take ownership of the ethical impact of the products we create.

Dr Liz Calder moved from academia into IT, loved it, and stayed. She's a consultant BA working in Life Sciences and STEM, fascinated with human psychology and behaviour, and the intersections with IT - whether that's reactions to change, team development or less conscious behaviours like cognitive biases & ethics.

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Life Lessons from the Road: Use Goals to Drive Your Journey

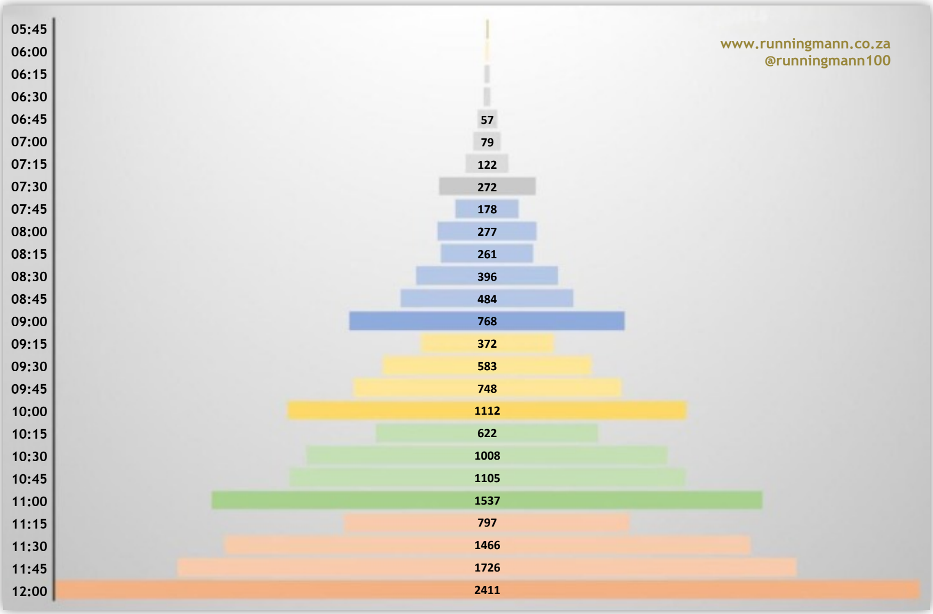
Stuart Mann

When it comes to major undertakings, we're often told "It's a journey, not a goal." However, I'd argue that goals are vital to ensure that you make progress on your journey – and I've got the data to back this up!

Working in the corporate world, I've been on the receiving end of major change management transformations – and in several cases I've been partially responsible for inflicting them on sizable chunks of the workforce.

Studies suggest that up to 80% of organisational change initiatives fail. I contend that one of the major reasons for this dismal performance is that we place all the emphasis on the journey at the expense of the goals. Goals give impetus to the journey and without goals your journey is likely to result in aimless wandering in the wilderness.

Who better to highlight the impact of goals on performance than 20,000 Comrades runners!

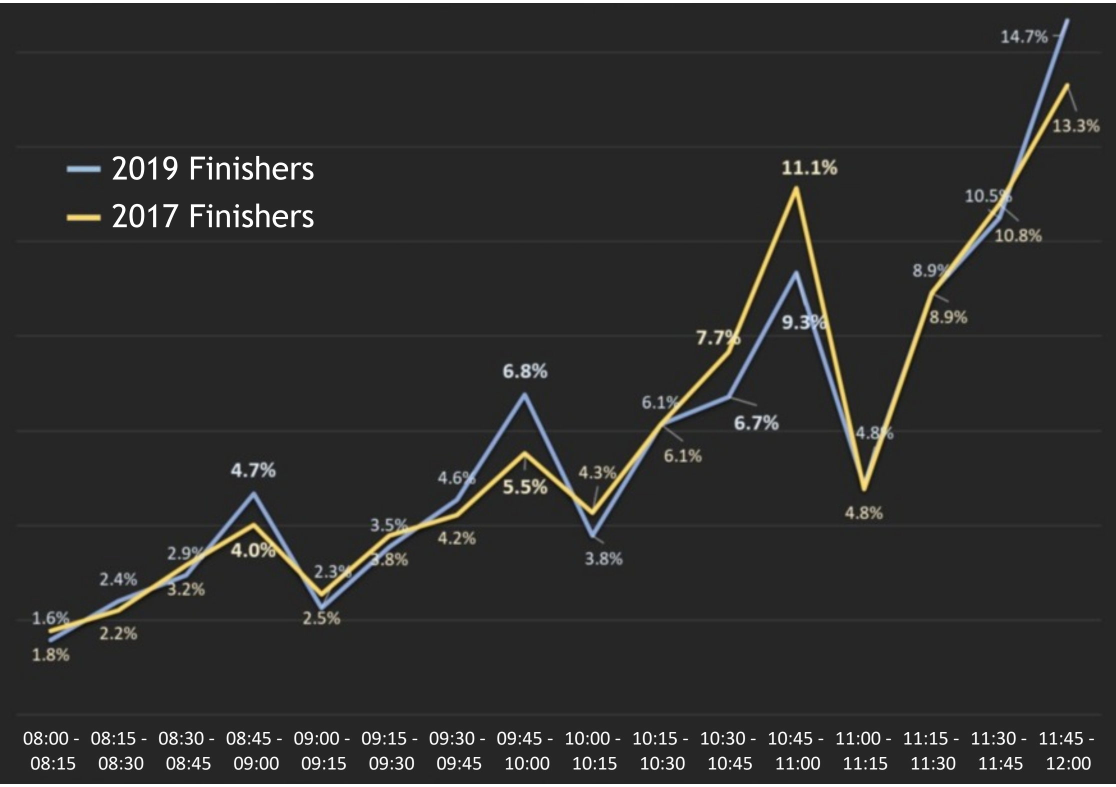


Number of Comrades 2019 Finishers by 15 Minute Splits

The above graph, shaped in an interesting Christmas tree, pagoda pattern, plots the number of runners that crossed the Comrades 2019 finish line in 15-minute intervals. No surprises that the ‘love handles’ are the last 15 minutes before each medal cut-off.

More runners sneak in between 7:15 and 7:30 for a silver medal than in the preceding two hours. The pattern continues for every medal category all the way through to the final 12-hour Vic Lapham medal cut-off. Without fail, the final 15 minutes of each medal cut-off dominates the finisher number stats. It is quite incredible the effect that a small piece of metal (and the bragging rights that go with it) has on the Comrades runners.

Perhaps an even greater illustration of how goals impact performance was the introduction of the 10-hour Robert Mitshali (named after the first black runner to compete the Comrades) medal in 2019. The graph below, comparing the 2017 and 2019 “up” run finishers, illustrates the impact that the a new medal had on the Comrades field.



Comparison of the finishing times between the 2017 and 2019 Comrades 'up' runs

The percentage of runners finishing in each 15-minutes segment is almost identical except for a few significant deviations. The biggest shift is that a significant portion of the field who usually finish in the last 30 minutes before the 11-hour bronze medal cut-off are now able to lift their performance to earn the new sub 10-hour medal.

As one of those runners, I can personally attest to the power of the medal. 2019 was my tenth Comrades. In all my previous runs, I'd never run a single step up Polly Shortts (the last and most famous of the big hills on the "up" run). I normally look forward to a nice long walk when I reach Pollies. However, in 2019 I managed to run the whole damn thing. Why? For a shiny new medal.

How can you get a lazy, complacent ultra-marathon runner to run up Polly Shortts? Lure him with a new medal.

I think this says a lot about stretch goals and how to motivate your staff. Very often managers set stretch goals that are completely ridiculous. If you'd offered me a significant financial incentive to run a sub 7:30 silver medal time, sensible Stuart would know this is way beyond his reach and wouldn't even try*. However, if you make stretch goals realistic you can get a lazy, complacent ultra-marathon runner like myself to run up Polly Shortts.

> ** They do say that "every man has his price" and for the Running Mann it would be a lifetime supply of free beer. If I was offered a lifetime supply of free beer to run a silver Comrades stupid Stuart would likely give it a shot and die trying.*

Now I am not saying that journeys are not important – but it is the goal that gets the potato off the couch. A significant portion of the Comrades field started their journey on the couch watching the ultimate human race live on television. They get inspired and think "I want to run the Comrades Marathon." They pick it as a goal. The goal is what drives the change in behaviour, the journey is a natural by-product which results in a change in lifestyle.

It is the goal of crossing the finish line that keeps the Comrades runner moving forward, even when the body and brain says they've had enough. The journey is what they reminisce and talk about afterwards.

Getting to the start line of Comrades is both a journey and a goal.

The lines are blurred. Getting to the start line of Comrades is both a journey and a goal; getting to the finish line of Comrades is both a journey and goal; and before the last drop of sweat has dried after crossing the finish line at Comrades, most runners are already discussing new goals to continue their journey.

Perhaps the simplest way to explain the connection is that the journey is what you'll tell your grandkids about in 40 years' time, the goal is what gets you out of bed for a training run before dawn on a miserable winter's morning. Without clear goals, you're likely to hit the snooze button and there'll be no good stories to tell your grandkids.

Stuart Mann is an agile coach at Vitality Group. He writes a popular blog (runningmann.co.za) and is a frequent presenter at conferences where he typically provides a different perspective on traditional topics. You can connect with Stuart on LinkedIn or Twitter.

Sketchnote by: @TheVisualJam

Meetup.com / TheVisualJam

Grant Wright and Paddy Dhanda are co-founders of The Visual Jam, an organisation whose mission is to unleash the creativity in every one of us.

You can contact them on LinkedIN (Grant at www.linkedin.com/in/grantwwright and Paddy at www.linkedin.com/in/paddy-dhanda)

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VIEWPOINTS

Would you like to respond to an article you've read in BA Digest? Or perhaps you have an idea that you'd like to float with the BA community? Or maybe you'd just like to give a 'shout out' to a friend or colleague on their good work.

We're starting a 'your views' feature in BA Digest. You can submit up to 150 words, and we'll publish a selection of those submitted in the next edition.

Submit your viewpoints at:

overto.link/viewpoint@digest

Like a scalpel, SCRUM is a precision instrument. Used well it cuts through unnecessary activity to maximise delivery per unit cost. Used on inappropriate problems or without the right preparation it causes a bloody mess.

SCRUM suits being the continuous improvement wrapper around a product with a run-and-improve budget not the more traditional cost-benefit-analysis budget.

Some see SCRUM as a cheaper 'no documentation' approach, relying upon the shared memory of a team without the smallest set of documents to manage delivery risks and scalability.

Some think that you can run SCRUM with a no-contact development team that receives user stories as small fixed-price work packages.

Some even think that you don't need a BA because the Product Owner can do it all.

There is a real risk of the BA role becoming 'discontinued' by bad SCRUM. BAs as servants need all their influence-from-the-middle skills to prevent this from happening.

Mark Lodge

As a trainer and coach of Business Architects of a large company in Belgium, I want to improve the 'métier' of our architects. Therefore, we can learn (a lot) from others.

Yves Houtevels

One can take up training, learn new technology, or be certified, but the knowledge is valuable when you get an opportunity or platform to showcase what you have learned or trained on.

Divya Kishore

I would like to respond appreciatively to the article highlighting different types of project risk in the last edition. I was in the middle of a project years ago when I identified that as a direct result of changes we were making, a completely different part of the business (not represented on our project board) would be negatively affected. I tried to raise this as a risk on our log – but the project manager stopped me! It was not a threat to OUR budget, timescale or scope – in fact fixing the issue could BECOME a threat to all of those things. So they hushed it up and told me not to mention it. The completely foreseeable consequences ensued… I think now I would have more courage and alert the affected team anyway, but it's not a comfortable position to be in. I wish more PM's recognised other kinds of risks!

Caroline Westbrook

Creating a Business Analysis Capability

Nyasha Mzezewa

Create a business analysis capability they said. It will be fun they said. Well it has been a very insightful journey, although still in its infancy. Other colleagues have tackled different components of this large pie and now it is my turn. Thankfully, they did an excellent job of it!

Who?

A capability is defined as "the quality or state of being capable" (Merriam-Webster.com). For organisations involved in Business Analysis this would translate to how well our analysts are able to execute analysis functions, and by extension how well the organisation is perceived to be at performing these functions. Whose perception you may ask? In this era of customer centricity, it is crucial that the customers of this service be fully engaged and on-board. The customers are of course – our valued Analysts. **The Business Analysis capability serves the analyst community both within and outside of the organisation.**

Why?

One may ask why a business analysis capability would be beneficial to the analysts and the organisation. Why would an organisation spend time and money in what many may see as "Don't the analysts know what they want to achieve in their careers? Aren't they already qualified in this field?" Well yes – many analysts are indeed motivated, qualified and goal driven; however, navigating "what next" and "how do I get there" in organisations can be a minefield. Often career paths are obscure, and one needs to know that everyone in the organisation is aligned to the same metrics.

When?

While an organisation is small the need for a well-defined capability may be overlooked. This does pose a challenge later in the lifecycle as no organisational norms have been created and normalised and the analysis practice is akin to the wild west – everyone for themselves. This makes defining offers and approaches difficult, potentially hampering the growth of the organisation and the retention of experienced analysts. It is thus important to start as soon as possible, iteratively changing and adapting the components of the capability for it to remain relevant.

Where?

The business analysis capability must not be a paperweight, instead it must meet the analysts' needs where they need it most – at the coalface of project delivery this must be supported and supplemented by more focused and internally focused sessions. A generic template approach, while useful at the conceptual level, will leave your stakeholders screaming at your analysts for using templates for the sake of it. Instead, as each project engagement begins and ends it is crucial that the relevant capability components and reviews take place. Key considerations could be:

- Is this toolset what I need to achieve the project outcomes?
- What skills do I as an analyst leave this project with?
- What support and strategies do the organisation need to develop for this project to be a success?

How?

"In order to know where you are heading, it is important to understand where you are." In analyst-speak, we need the as-is! As a starting point, a good understanding is needed of how well your analysts can perform the standard analysis functions and how effectively the organisation utilises these to solve problems and create real customer value. Furthermore, how engaged are our analysts and how empowered do they feel in deriving customer value and most importantly, self-actualisation for themselves?

Wake up Neo
(What does this all look like in the real world?*)*

We are an established but small organisation in South Africa with a mix of experienced and developing analysts. The work done by my predecessors sets us in good stead as far as understanding the organisation delivery and approach perspectives. Work has also taken place recently to refine the offering for the market and to better position ourselves for new work. The working models and environments are ever changing with COVID enabling a fully remote and hybrid approach to delivery.

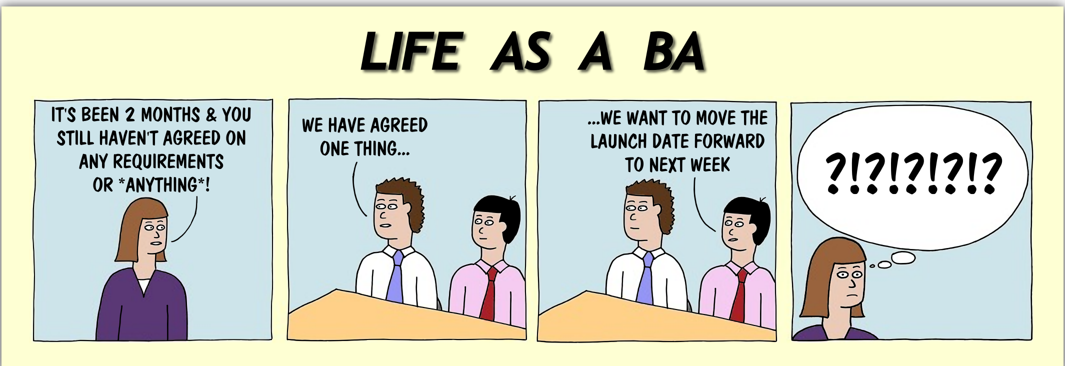
First steps will be engaging with the analysts to understand what motivates and drives them and finding how we can bring their passions (from a work perspective) into the delivery space. Tools and techniques are ever evolving, and this offers us an opportunity to ensure that the team have what they need to get the job done, whether remotely or in a hybrid model.

Certifications as ever are key, we will be continuing to align our training approach and career paths with the relevant qualifications and certifications in the market. Ensuring the analysts have a solid base to work off; a specialist or generalist path will be further defined, and every attempt will be made to ensure the analysts get the requisite product and project exposure they need.

Prescriptiveness is not on the menu as we recognise that each analysts' desires and journey are different; while we are one team, we are all individuals, what binds and guides us is the common pursuit of delivering business value through applying fit-for-purpose tools and techniques within people, process, and technology realms.

As we roll this out to the team, we will need to check how effective we have been and as always look for areas of improvement while keeping a unique way of doing things.

Nyasha is a Principal Consultant and Capability Lead for Business Analysis and Architecture at Analyze Consulting. Certified in PRINCE2 and Agile Product Owner certifications, his next target is TOGAF. With over 15 years of experience working within IT project delivery, connect with Nyasha on LinkedIn and let's chat all things analysis.



Communication Isn't Free: The Burden Has Shifted

Adrian Reed

One of the first jobs I had was at a small insurance brokerage firm. As archaic as it sounds, back in those days, memos were physically *printed* and sent between offices in the mail (in fact, there may have even been the occasional handwritten memo sent). We didn't have email, so if something was urgent, the only real options were to pick up the phone or send a fax. Every day, the post arrived in a big batch, and at the end of the day outgoing correspondence was collated and sent out in a big batch. If you wanted to keep a copy of something that you'd received you had to, well, make a copy of it and decide where and how to file it.

In that type of environment the *cost* of communication was very transparent. Every single inter-office memo sent increased the company's postage cost, required additional paper etc. If you were replying to a memo sent to multiple recipients, you'd think long and hard about *who* needed to receive the reply. Absolutely nobody wants to spend any longer at the photocopier than they need to (and let's face it, photocopying *anything* back then was potluck, with seemingly a one in ten chance the machine would jam or destroy your carefully printed original document in the sheet feeder). Because there was an inherent cost (and inconvenience) in communicating between offices, this type of communication tended to be considered, concise and some might say overly formal.

Fast forward to today and the economics of communication have changed drastically. I can send messages to friends all over the world by WhatsApp instantly at no additional cost beyond my usual internet connection fee. It's possible to hit 'reply' to an email, and it's no more expensive to send a reply to one or one hundred people (both are free). The frequency and velocity of communication has increased. We're all dealing with more and more correspondence every day. There's email, Slack, Teams, WhatsApp, SMS, Telegram, Facebook, Twitter and the hundred other 'apps' that have probably launched in the time it took me to write this blog… And this is a *positive* thing, it breaks down boundaries and enables people to easily collaborate. Nobody would want to go back to the inefficiencies of relying on post and fax.

However free messaging isn't really free—done badly, it shifts the cost from the sender to the recipient. Let me explain what I mean…

Reply All: The Bane Of The Corporate World

Let's imagine you receive an email addressed to twenty people in your email box. It asks a simple question or something similar that the *sender* cares about but the *recipients* don't. Some people will hit 'reply all', without thinking, and in doing so will start to flood other recipients' email boxes. Then people will "reply all" to those "reply alls" and the cycle continues. "No big deal", I hear you saying "it's easy to hit delete…", which is absolutely true… except of course that won't be the *only* email that you receive that day… there will be others and suddenly they're all snowballing too and suddenly you can't even see where to *start* in your inbox. Plus your phone is pinging with all sorts of messages—many of which, frankly, don't seem the least bit important to you…

Why is this happening? Well, a social scientist would likely attribute many reasons. However, I posit one reason as being that the *cost of communication has shifted*. Think back to the days of paper memos. To 'reply all' to twenty people you'd have to print out a reply, photocopy it, put those replies in twenty envelopes and either put a stamp on them or send them for franking. You really *wouldn't* do that unless you really needed to. If you needed to find a piece of information, you'd look for that piece of information. As a last resort you'd pick up the phone or write to someone and ask them to send a copy.

Today, with many communication channels, it is so easy, convenient and cheap (free) to communicate that there's virtually no reason not to. But this *shifts the burden from sender to receiver.* "Ah, I could look up that bit of information… but Jenny will know it, so I'll just break her concentration by sending her an email and then an instant message when she doesn't reply quickly enough".

Avoiding The Shifted Burden: Being A Better Communicator

In the old-world, the cost of sending stuff meant there was a natural pause to think whether it was really necessary. And if it *was* necessary, the wording and clarity would be important (get it wrong, and you'll get a query back, and since everything is going by post that's another few days' delay…).

Now the burden has shifted to the *recipient.* There's *no* cost of sending stuff, so lots of stuff gets sent. It saves time for the sender to hit 'reply all' rather than carefully considering who needs to be on the distribution list… but it costs the time and attention of the recipients. This has reached the point where there are well known strategies for turning off or batching emails to avoid distractions to actually *get some work done* during the work day.

But here's the thing: as business analysts and change professionals we deal with other 'time poor' professionals all the time. If we can learn to be better communicators, and if we can save them time, they'll thank us. Rather than adding to the noise, we can help cut through it… imagine being the one person whose emails get instantly opened by an executive because they are always relevant. Asking questions like "do they really need to receive this?", "is this the channel that they would prefer?" and getting *feedback* is beneficial.

And if nothing else, pause and think before hitting 'reply all'.

Adrian Reed is Principal Consultant at Blackmetric. He speaks internationally on topics relating to business analysis and business change. Adrian wrote the 2016 book 'Be a Great Problem Solver… Now' and the 2018 book 'Business Analyst'.

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Lessons Learned – A BA Perspective

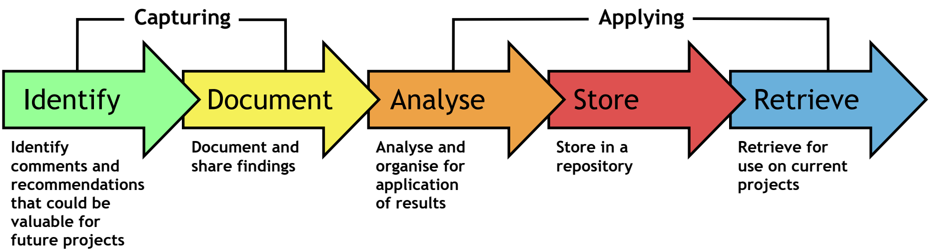
Rebecca Chatfield

I'm sure practically everyone has heard the terms "Learnings" or "Lessons Learned". Most often attributed to project management in the BA world, there is always something to learn by experience in all fields of human endeavour. There's one common theme that emerges when we're reflecting on what we're doing or delivering:

How do we learn from this? How do we do it better?

How do we take what we learn and use it for the future?

Sandra F Rowe in her conference paper "*Applying lessons learned*" illustrates the learnings process as:



*This process can be summarised into two main parts: **capturing** and **applying** lessons learned. Capturing lessons learned includes the first two activities: identify and document and applying lessons learned includes the last three activities: analyse, store, and retrieve. The more discipline and effort you place in capturing of lessons, the more prepared you are to apply the lessons learned* (Rowe, 2008, p. 5).

It is said that madness is defined as "*doing the same thing over and over again but expecting different results*". So how do we avoid this madness and make our learnings work for us? Let's look at some key actions we can take to capture and manage our learnings.

Capturing Learnings

1. Gather and understand learnings

Learnings are typically captured after the project has finished, in the form of PIRs (Project Implementation Reviews) run by the Project Manager or leadership team. These sessions are often left to the last minute and viewed as a tiresome tick box exercise. Consider instead the following:

- **Capture early, capture often** – don't wait for the end of the project to capture and communicate lessons learned. Regular Retrospectives allow us to share and implement learnings "on the go", quickly improving ways of working and celebrating the wins when something positive is achieved.
- **Embolden your people & have a plan** - ensure that anyone involved in projects or in day-to-day business operations is empowered to speak up and contribute learnings. Communicating a plan for learnings shows that feedback is purposefully asked for and action will be taken.
- **Gather learnings broadly** – include a wide range of stakeholders, not just your immediate team. Everyone will have something to contribute from their perspective and experience and it's valuable seeing the same events from different points of view.
- **Discuss learnings** - ensure they are clearly explained with details, rather than just one-liners (e.g. I've learned how to manage vendors more effectively). You could use the People, Processes, Technology Framework to help categorise learnings and demonstrate how they impact or can be applied in the context of your organisation.
- **Ask why?** Look at what was <u>planned to happen</u> versus what <u>actually happened</u>. Use root cause analysis or cause and effect techniques to better understand what went wrong (or right!) and how this contributes to understanding why events transpired as they did.

2. Prioritise Learnings

Once you have gathered your learnings and provided some context and detail, it's time to prioritise which learnings are the most important or have the most impact when implemented. Prioritise learnings using:

- **Value**: can we save money, time, and effort by implementing these learnings? Demonstrating the value of learnings helps make your case for implementation more compelling.

- **Risk**: can learnings mitigate any known risks or highlight any new risks we have not captured before?

- **Quick wins vs longer term**: some learnings will be more complex to implement. Use a T-shirt Sizing model to help quickly prioritise your learnings.

Apply Learnings

3. Implement Learnings

Implementing learnings is challenging, no doubt. It is more than just storing and retrieving them somewhere to dust off occasionally or tick a PIR box. It requires planning and effort to implement learnings in a way that is practical and effective. Some key concepts are:

1. **Accountability** – Having someone (or someones!) accountable for implementing learnings will ensure your organisation can leverage the best outcomes from this process. It's not just the project manager's/project team's job to gather and implement learnings – it is a role for everybody to take on and benefit from.

2. **Inclusion** – is there a way to include learnings in new projects/initiatives as part of project set up or lean canvas? It's ideal that you make sure that what you learned on your last project can be applied to any new projects or to your continuous delivery processes to avoid making the same mistakes or, to use the good stuff you did last time to improve projects or ways of working.

3. **Sharing** – make learnings available to everyone in the business/organisation where appropriate. Ensure they are easy to find and access. Remove any barriers to capturing and sharing learnings across business teams or divisions. Are there learnings that apply across the business? Communicate learnings by delivering practical sessions to demonstrate the value of learnings. There may be similar projects happening in other divisions that could benefit from your learnings.

The BA perspective

The BA role gives us unique insight and the best opportunity to identify and capture learnings.

As BAs we also have lots of techniques available to us to contribute to the assessment and understanding of the learnings we've gathered, for example:

Six Thinking Hats

You could use "Six Thinking Hats" to help categorise and understand learnings. In a session discussing learnings, allocate a "hat" to different individuals so that each point of view is explored. Each "hat" should explore the learnings according to their theme (Process, Benefits, Facts etc.) and this provides a really holistic and robust discussion framework.

The 5 Whys

This technique is a simple way to help get to the root cause/s of a learning. Ask "why" this learning came about? What is the problem we're trying to solve? It may take more than 5 whys to get to the root cause, but it's a great way to generate discussion and help guide you through a root cause analysis process.

In conclusion…

By having a plan to regularly and effectively capture lessons learned as part of projects and everyday business activities, you can minimise risk, improve processes and better engage your stakeholders and colleagues to actively participate in maximising their ways of working. Use your BA skills and techniques to help with assessing and understanding learnings.

Assign and take ownership, embolden your colleagues to contribute their experience and views. After all, there is always something new to learn, and you don't want to miss out on the opportunities that learning affords.

Rebecca Chatfield is a Senior Business Analyst working at Close Brothers. You can find her on LinkedIn www.linkedin.com/in/rebecca-chatfield-767b1252 for a chat about change and transformation anytime.

Citations

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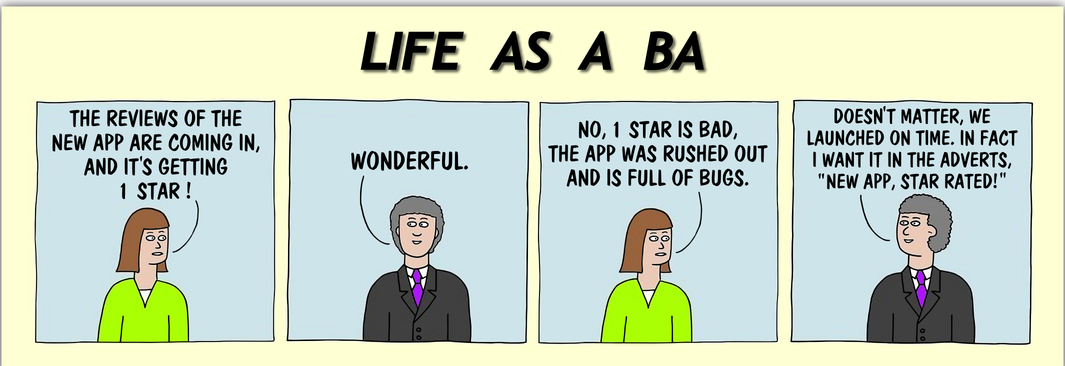

A Great Tool, but It Could Be Your Downfall

Danny Kalkhoven

Do you recognize this:There is a new tool to draw and annotate all kinds of models, and it is great!

It's not too expensive (maybe even open source), it works intuitively, and it's just what you need in order to create that storymap/wireframe/swimlane/datam odel etc. It can relate meta-data across models, it keeps a terminology list and has lots of other features. So you are definitely going to use it for your next assignment. But first you need to get familiar with it, so you dive in.

And here is where the pitfall is. Believe me, I know. I have been there.

After all, your next assignment is unlikely to be about creating great looking models and fancy charts,or about delivering a good comprehensive set of terminology, or even a perfect set of interrelated attributes in several different models. Your next assignment is probably first and foremost about listening to the client/business representative/stakeholder, or whoever you need to go to in order to get an understanding of the issues at hand. In reality it might be that paper and pencil is enough to support you with that, or a whiteboard and some coloured markers.

An anecdote to illustrate this: some time ago I had the pleasure of attending a lecture by Edward de Bono, at that time already a very famous “creative thinking guru” in his 70s. As I entered the hall, on stage was a very old-fashioned overhead projector, nothing more. I remember thinking, “huh? Where is the laptop for the PowerPoint sheets, the slide remote, etc…”. And then Edward appeared without a laptop, without paper, with just a set of coloured pencils in his hand, and sat down beside the projector. He put a roll of blank acetate over the projector and started to talk. And started to draw.

Then he rolled the acetate to a clear spot and made another drawing as he explained another thought.. And so on.

We (a large group of people, including many young students) were all fascinated by his talk. The power of his ideas, illustrated by those simple drawings he made on the spot was all that was needed. No fancy PowerPoint with built-in animations and movies.

Back to our BA work: the value of illustrating a flow of information is NOT in a perfect straight horizontal arrow. It’s in the arrow itself, even when it is a slightly irregular, not quite horizontal line. Because it simply illustrates a flow of information, or a relation, or whatever your model illustrates. It is the effectiveness of the model that you need to be thinking about, not about the perfect line colour, size and thickness. Yes, I am exaggerating, but hopefully you see my point.

Great tools are tempting. And therefore dangerous. The temptation is that the tool creates the notion of “when it looks good, it is good”which is misleading. A flimsy sketch of a well-designed process is far better than a beautifully composed drawing of a badly designed process….

Later, when you think you have a complete and synchronised idea on the matter, you can go on and make your perfect models. With that great tool. That is, if you really want to, and if they are needed at all :-)

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Event	Date & Time	Link
BA Open Mic *An immersive, informal and interactive chance to discuss all things BA related*	Jan 20th 18:30 - 19:30 (UK Time)	More Info
Untangling The Mess: Product Ownership, Product Management & Business Analysis *with Kevin Brennan*	Jan 26th 18:30 - 19:30 (UK Time)	More Info

There will be many more events to come too, so be sure to keep a regular eye on our website!

Swan-feeding and Organisational Status Junkies

Adrian Reed

At a park near where I live there's a large pond which is inhabited by many swans. The swan population varies depending on the time of year, but at the moment there's somewhere between 40-80 there, including some juvenile (grey) swans. If you've never sat and watched a community of swans, I'd highly recommend taking some time to do it.

One thing that I find particularly interesting is when somebody comes to *feed the swans*. Generally, the swans will be unevenly distributed across the pond, and some will be on the land. There's plenty of weed in the pond for them to eat, and on the land there's plenty of grass. So each swan has to make a decision: go for the easy food, or not.

I've no idea the extent to which swans *actually* have decision making abilities (I'd suspect they have very little in the way of logical cognition) but it's noticeable that those that are in easy swimming

distance will float up to the person with the food, others won't.

Watching the feeding frenzy is fascinating. The swans crowd in, and each swan (presumably) wants as much food as possible. Observe this for long enough, and in my experience you'll see that different swans appear to act differently:

- **Early opportunists:** Some swans act quickly and try to get as close to the food, attract the attention of the person feeding them (a gentle peck on the leg has even been known).

- **Collaborators:** You sometimes see a fluffed up 'alpha' swan patrol the perimeter, chasing others away other birds (presumably ensuring that its juvenile swans/cygnets get sufficient food).

- **Status junkies:** Bizarrely, some tussle to the front and pick fights and peck the necks of others, chasing them far away in the process. In doing so, they miss out on the opportunity of food altogether as by the time they get back they are at the back of the tussle. It's literally lose/lose: I can only assume that they get some kind of 'swan status' from doing this.

Organisational Swan-Feeding: Get Beyond The Squabbling

I was watching this a few days ago and it struck me how some teams, individuals and organisations appear (to me) to follow similar patterns. In particular, some individuals and teams spend so long fighting each other (or an external perceived enemy) that they miss out on the opportunity to get on and do some really cool stuff. There's always another smart and witty rebuttal to send; another authority or "big box consultancy" report to cite. An argument that is 99.9% sound can be picked apart and things can get delayed *again*..

These are the metaphorical 'status junkie' swans fighting each other for the food, vying for attention and prestige. Yet, while armchair commentators are squabbling and trying to dictate how work should be undertaken, in reality most practitioners are just quietly getting on with it. Like the swans that *do* get the food, they have tuned out the noise and are finding ways of collaborating. In our world this might involve finding new ways of working with stakeholders in the best way they can and getting stuff done. Listening to others, sensing trends, trying stuff, repeating the stuff that works and adapting. Cultivating new ways of engaging and participating with others, and sharing that knowledge with the wider community. Ignoring the 'methodology wars' and accepting there is no silver bullet and no "one size fits all" solution. And frankly, there are many folks doing this in a pretty graceful swan-like way (even though the occasional aggressive 'swan' tries to derail them)

Of course, there should be conversations about how tools and techniques adapt, and analysis is as key as it's ever been. But surely we are in a world *beyond* where our opinions are solely shaped by whatever BigBoxInc™ is trying to sell us this quarter? Where our connectivity gives us the ability to create a *global* community of practice that isn't centrally controlled by some unelected profit-making behemoth who wants to 'sweat its assets', and sell stuff to anyone who will buy? Peer-to-peer exchanges and learning are surely often more current and relevant?

It's an individual choice, and a lot depends on context. It's by no means binary and there's no absolute "right" and "wrong". But as change practitioners, in my view, we need to be those listening carefully and deliberately tuning out the noise, even when the noise seems unbearably loud. In doing so, we help our organisations stay focussed and deliver.

Adrian Reed is Principal Consultant at Blackmetric. He speaks internationally on topics relating to business analysis and business change. Adrian wrote the 2016 book 'Be a Great Problem Solver… Now' and the 2018 book 'Business Analyst'.

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The Dot Collective - Lead Business Analyst

On Failure (and Showing up)

Lior Locher

This article is the result of a failure. I put myself out there with some of my work, and got rejected. And then I shared it on twitter with the hashtag #ShowUp. This generated interest, which led to this article.

It would have been easy to NOT post that. I could have hidden under the table and pulled down the table cloth (other coping mechanisms are available). I chose not to. I showed up with a failure. It led to a whole different piece of magic that keeps on giving. It also led to new client conversations.

Showing up often feels risky. A lot of cultures reward fitting in, not standing out. And if one stands out, you'd better be good. At least that's what we see other people share. Over on LinkedIn where everyone is "humbled by" their latest award-clutching picture. Or on Instagram where we all look great, filters applied, our good side in the perfect light. Authenticity is both a commodity and a privilege. Some people take up to 15 selfies before choosing the perfect one to look nonchalantly spontaneous in. We are all social media managers now.

Reality is different. We compare someone else's expertly curated high-light reel with our own hard graft and laundry pile. Our social media part time job makes us miserable. Our real-time efforts to make something happen aren't all smooth. We often fail because new, good, risky things often do – at least at first until we have figured out what works. We want to learn and grow in secret and then come out as a polished debutant, stunning and ready. At the same time we are told to "share our work", "work out loud", build engage-ment alongside our process so we have an audience by the time we are finally awesome.

It's terrifying.

We want to be good kids, and be rewarded for it. We want to be liked. We want to be successful, to not get kicked out of the group and fed to the wolves. Loser is not a term of endearment. We treat failure as an airborne disease we are afraid to "catch" if we stand too close for too long. We want to work with, hire, rent to, befriend and date winners. Or people who look like winners, which in the age of social media is kind of the same thing.

In our dreams, we are all above average.

This, of course, doesn't check out. It's not how this works.

Maybe it's healthier for all of us to be a bit more real. To cut each other some slack. To honour the process and the graft that got someone there. To support and celebrate those of us who try, who get up again. Those are the courageous ones. Let's honour those that tried and didn't have a happy ending, that didn't have a turnaround, monetised possibly. They keep mopping up the spillage in silence as they try and get some semblance of their old life back with a CV like a pile of scrambled eggs and a trashed credit rating. They are a part of us too, no matter how much we think ignoring them will help quieten our fears. They are a part of us. They are us.

Showing up is easier when it looks good. And yet, the less glamorous side is a part of the narrative too. Its details are shared in anguished or embarrassed calls with a close circle, for those lucky enough to still have one. The difference between a successful person who finally made it and now can show off their scars with the benefit of hindsight and who have lines to sign their books, and your unsuccessful uncle/auntie/cousin/friend that people don't know how to talk to anymore is often a mix of luck and time. It's often as basic as that. Forget your insta-fuelled mindset talk. There's a chance that both did the work, and both showed up in some way. Chances are, you're one of them. Chances are you are both. Multiple times, in different ways, across the course of a long, varied human life lived fully. There are no guarantees. That's the bad news.

Ultimately, all we can do is **our** part of the deal. Do the work (whatever that is in your context), and show up with it. The rest is not in our hands. Support those who show up. Support those who do the work and are still too scared to show up. The future is always infinite and some of it is fabulous. That's the good news. And when it's fabulous you'd want to be there. Wherever you stand right now, you unlock what happens next by showing up. Show up.

Lior Locher is a coach, consultant and speaker and works with individuals, start-ups and social businesses. Their work is based on values, on going deep and then making it practical. Find out more https://liorlocher.me Their books "The DIY Phoenix" and "Values-based" are both on Amazon. Their TEDx talk is here.

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A Tale of Wonder and Warning of Citizen Developers

Lawrence Reid

No-Code and Low-Code are not just marketing buzzwords and hype anymore. Examples of what automation tools can do with No-Code or Low-Code are amazing. It makes me wonder what I can automate. Which of my repetitive tasks can be automated? Which of my processes can be simplified, streamlined, or even eliminated?

If This, Then That ifttt.com is a platform that has applets to get you started quickly with automating your tasks. Here are a few examples.

- Record completed tasks in Trello to a spreadsheet in Google
- Share files in Slack from a Dropbox folder
- Tweet your Instagrams as native photos on Twitter

Salesforce and Microsoft have their respective training platforms too that include modules on task and process automation.

- trailhead.salesforce.com
- learn.microsoft.com

These tools remind me of when I started automating my accounting tasks many years ago. I learned how to export and import information between systems to avoid error prone data entry. I was further amazed at what I could do in Excel's Visual Basic for Applications (VBA) with my first experience in no code development. I just turned on the VBA macro recorder, performed my tasks like importing and formatting data for financial statements. I learned the low code aspect of reading the recorded VBA macros and making simple edits. I was off to the races. I automated my tasks and then tasks for other departments.

I also found informative courses on citizen development from the Project Management Institute www.pmi.org. The goals of these courses include establishing common language and standards for citizen development. These courses explain the five stages of the Citizen Development Maturity Model which are: discovery, experimentation, adoption, scaling, and innovating. I completed foundations and practitioner courses. The practitioner course went into more detail.

- Citizen Developer Foundations
- PMI Citizen Developer Practitioner
    - Project Delivery
        - Hyper-Agile Software Development Lifecycle (SDLC)
        - Ideation 2.0
        - Suitability Assessment
    - Capability Development
        - Business Analysis
        - Enterprise Risk Requirements
        - Application Development

This is where the warning fits in. As an accountant I understood processes and could think logically through their automation. What I did not know at that time was the software development life cycle and best practices. I was only working in Excel and Microsoft Access and did not realise the importance of building in a development environment and demonstrating with stakeholders in a user acceptance and testing version. I had not planned for scalability, training, or maintenance. Although automating my tasks made me more efficient, I unknowingly put the organisation at risk when there was no one to maintain the automations.

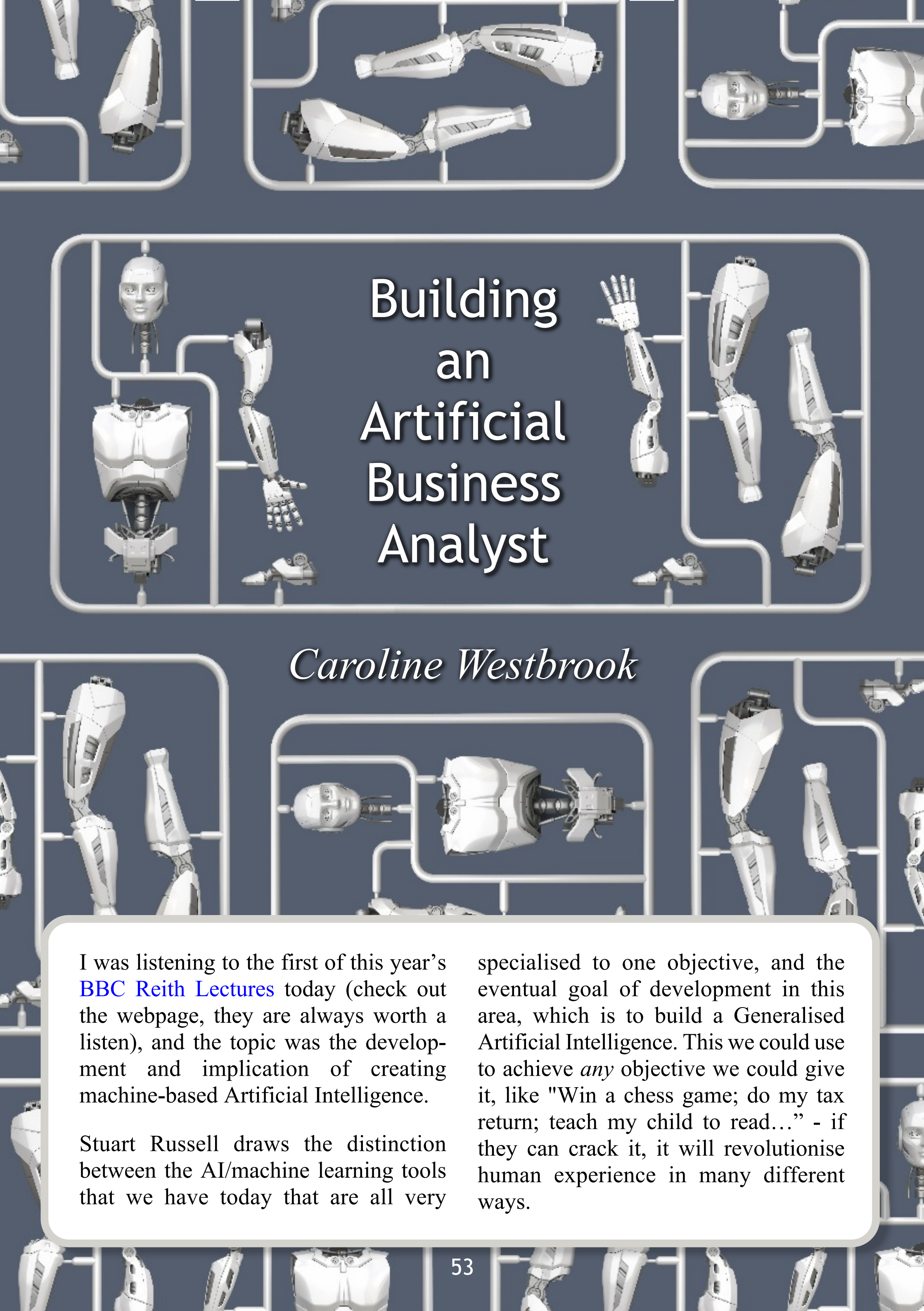
I unknowingly developed shadow IT systems. Shadow IT is the use of information technology and systems without IT department understanding and approval. Back then the downside of my Excel automation was the lack of IT support and many of the tasks reverted to the manual processes. Today the risks are higher. Cyber security is a real threat. The automation tools mentioned previously like IFTTT, Salesforce, and Microsoft are excellent at simplifying the sharing and updating of information. Unfortunately, they are vulnerable for sharing information with unintended consequences or updating information incorrectly. To avoid, or at least minimise risks it is important to involve IT throughout the citizen development process. The IT department can provide guidance and review procedures to minimise the risks of accidentally exposing sensitive information or corrupting data.

Citizen development should not be done in a vacuum or silo. Don't go it alone. Involve other stakeholders for their unique skills or knowledge. Whether you call your group a Fusion Team or a Squad, consider including these personas: pro developer, citizen developer, subject matter expert, project manager, and a business analyst. I believe that business analysts are critical for the success of these projects and are positioned to gain the most in skills, experience, and exposure.

Microsoft provides an illustrated guide to fusion development that depicts the process to transform business apps with fusion teams.

Now that you have your team established and IT's guidance, what do you want to build?

Connect with Lawrence on LinkedIn



Building an Artificial Business Analyst

Caroline Westbrook

I was listening to the first of this year's BBC Reith Lectures today (check out the webpage, they are always worth a listen), and the topic was the development and implication of creating machine-based Artificial Intelligence.

Stuart Russell draws the distinction between the AI/machine learning tools that we have today that are all very specialised to one objective, and the eventual goal of development in this area, which is to build a Generalised Artificial Intelligence. This we could use to achieve *any* objective we could give it, like "Win a chess game; do my tax return; teach my child to read…" - if they can crack it, it will revolutionise human experience in many different ways.

It suddenly struck me as I was walking along listening to this, that what they are building is actually an artificial Business Analyst! He stated that what they need to fulfil the dream of Gen-AI is a system that can fill in the gaps (on its own) between any stated objective and the real requirements that sit underneath.

The example he gave was that of the myth of King Midas, who was a greedy and foolhardy man who prayed to the Gods that anything he touched would turn to Gold. The ancient Greek Gods (probably laughing behind their hands as they love playing tricks on idiot mortals like this one) granted him his wish – exactly to the letter. If you don't already know the story, he was first of all delighted with his gift, but it very quickly went sour when he turned his wife, children, food and drink into solid gold. He died shortly afterwards in misery and hunger.

According to the lecture the goal of AI is to create a system 'intelligent' enough to prevent us fulfilling our objectives in this stupid way – and that is exactly the goal that BA's have! Midas was like our nightmare senior stakeholder, and the Gods like our most mischievous developers. The role of a BA is to inject rationality and better requirements into the project – "Are you **sure** you want your family and food to turn to gold? What is the problem you are trying to solve here? Maybe setting up a diversified investment portfolio would be a safer solution…?"

The other example given is the quest to build self-driving cars. A stakeholder might say "Build me a car that will take me to the airport". What the teams at Google etc. are now struggling with is all the nuances that sit underneath that basic request. You probably don't want your car to just drive in a straight line to the airport, crashing through houses, schools and playgrounds along the way. You probably don't want your car to drive at its maximum speed along every road. You probably want it to swerve if a harassed parent steps out in front of you pushing a buggy, but what about avoiding a cat, or a dog? …and what about a rat? …or a hedgehog? The list of questions is almost endless! AI needs to be able to comprehend and solutionise all of these unspoken requirements on its own.

It seems to me that what the scientists and developers in this field are trying to build is **not** Artificial Intelligence, they are building **Artificial Analysts**, that can understand our 'wants', and the 'needs' that sit unspoken underneath them.

Hopefully they don't succeed any time soon – I have a few more years left in my career! But when someone asks you what a BA does, maybe you can now say "we are the Non-Artificial Intelligence in the project system."

Caroline is a Business Analyst with a background working in Customer Services. She has worked for social housing companies, but now works in Higher Education for Imperial College. You can connect with Caroline on LinkedIn: www.linkedin.com/in/caroline-westbrook-349035b9

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