

The case for an open methodology for Business Analysis ('open BA')

Ron Tolido

The Open Group 22th Enterprise
Architecture Practitioners Conference
London, April 28 2009



The mission of the Open Group is exploring new areas...

You are here: [Home](#) > [About](#) > Who we are and what we do

[Overview](#)
[Who We Are](#)
[What We Do](#)
[Vision & Mission](#)
[Management Team](#)
[Governing Board](#)
[List of Members](#)
[Legal](#)
[Interoperability](#)
[Contact Us](#)

[Vacancies at The Open Group](#)

About The Open Group

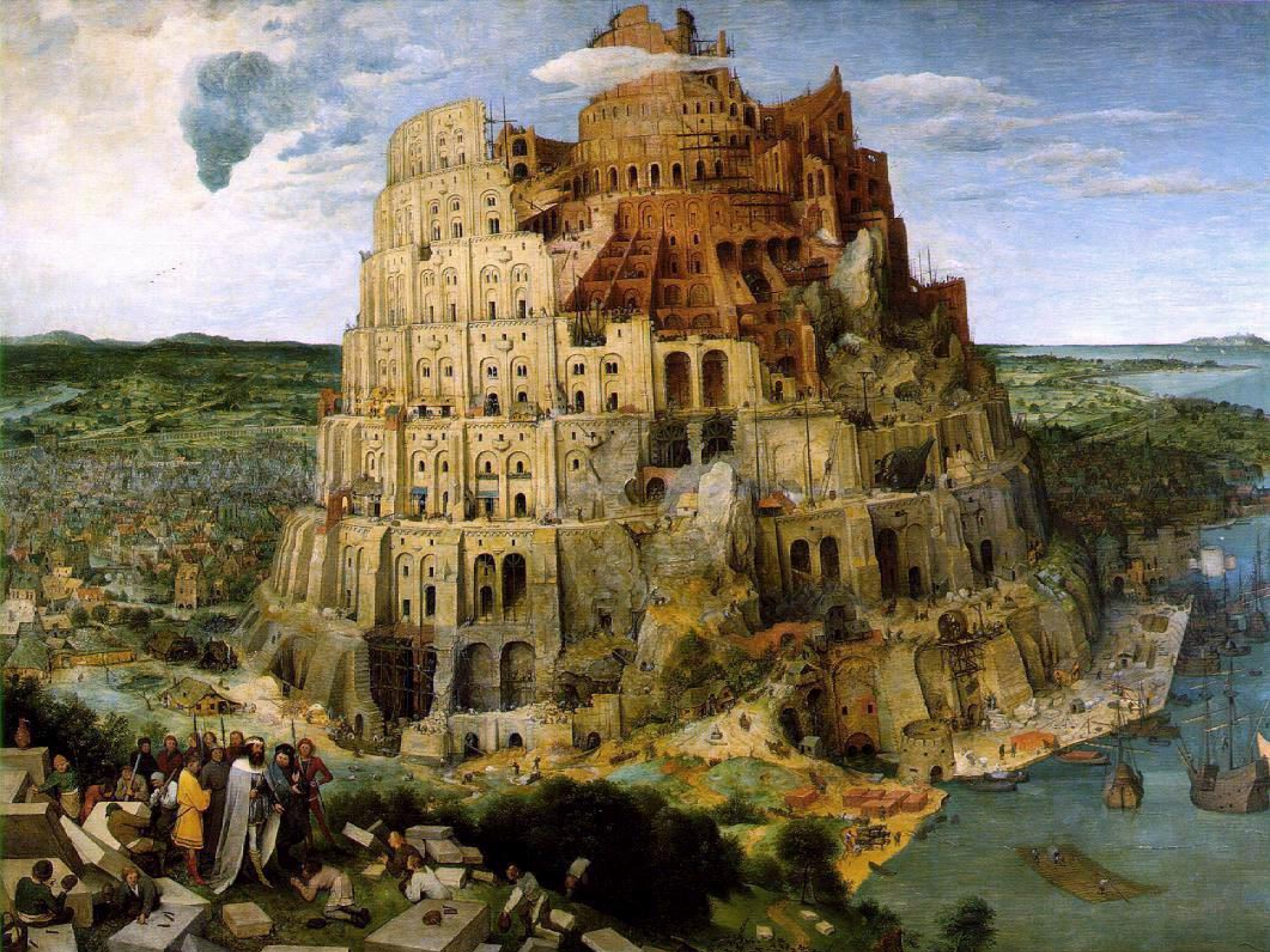
Who We Are

The Open Group is a vendor- and technology-neutral consortium, whose vision of Boundaryless Information Flow™ will enable access to integrated information within and between enterprises based on open standards and global interoperability.



The Open Group works with customers, suppliers, consortia and other standard bodies to:

- Capture, understand and address current and emerging requirements, and establish policies and share best practices
- Facilitate interoperability, develop consensus, and evolve and integrate specifications and open source technologies
- Offer a comprehensive set of services to enhance the operational efficiency of consortia
- Operate the industry's premier certification service



The Business Analyst according to ITSC....

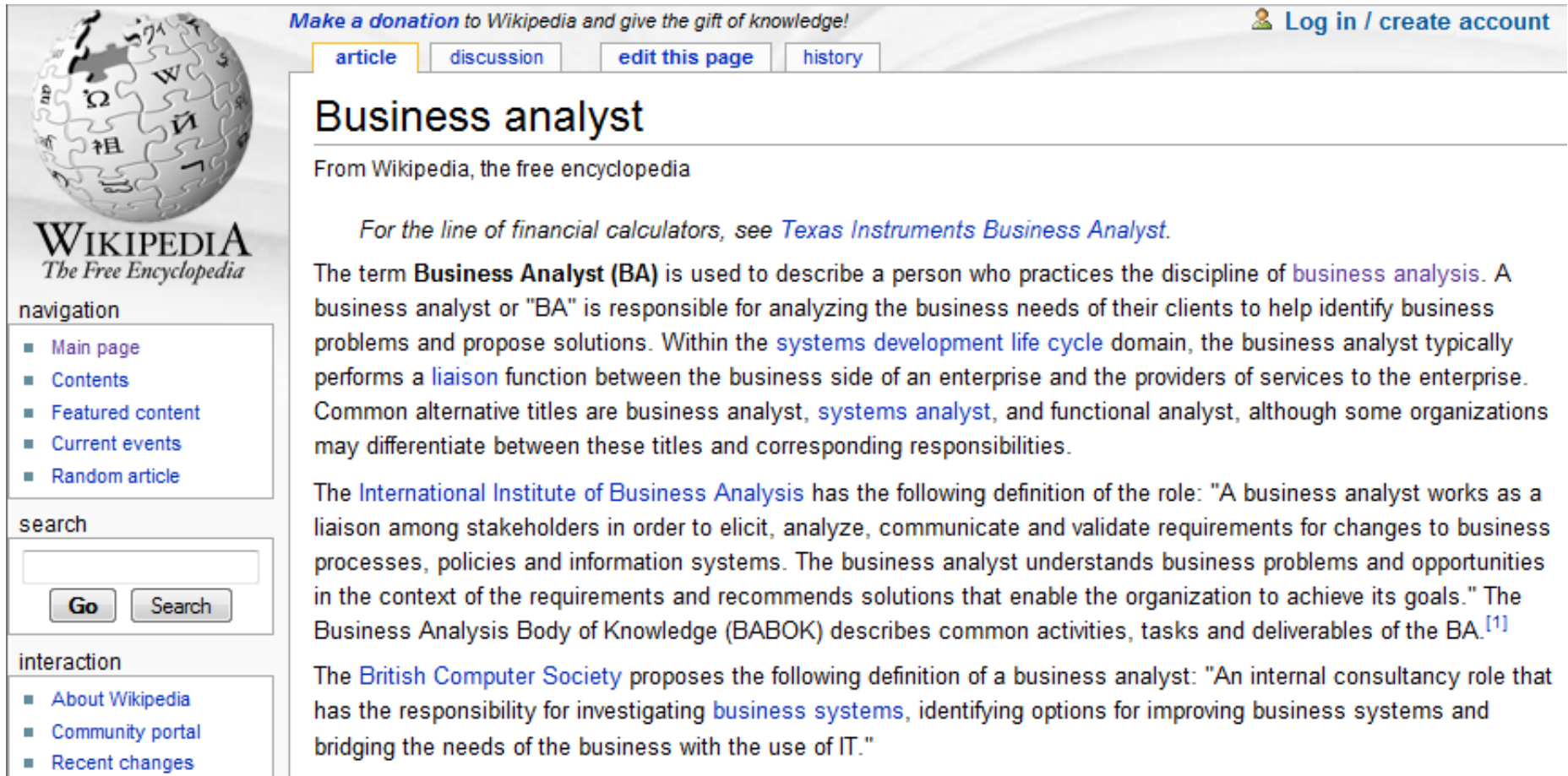
“...Specialists in this stream have expertise in analysis and description of business processes, and their translation into functional and non-functional IT requirements. Business Analysts act as the interpreters between the worlds of IT and business. Typical examples of the deliverables are functional and non-functional requirements, use-cases, process models and impact analysis”

ITSC Conformance Requirements V1.0

A banner for the IT Specialist Certification Program. The text "IT Specialist Certification Program" is displayed in a large, bold, black font on the left side of a light blue background with a subtle grid pattern. On the right side, there is a photograph of several framed certificates or diplomas hanging on a wall.

IT Specialist
Certification Program

... and according to Wikipedia



The screenshot shows the Wikipedia page for "Business analyst". At the top left is the Wikipedia logo, a globe made of puzzle pieces with various characters. Below it is the text "WIKIPEDIA The Free Encyclopedia". To the right of the logo is a navigation menu with links for "Main page", "Contents", "Featured content", "Current events", and "Random article". Below the navigation menu is a search box with "Go" and "Search" buttons. To the right of the search box is an "interaction" menu with links for "About Wikipedia", "Community portal", and "Recent changes". At the top right of the page is a banner that says "Make a donation to Wikipedia and give the gift of knowledge!" and a "Log in / create account" link. Below the banner is a row of tabs for "article", "discussion", "edit this page", and "history". The main content area has the title "Business analyst" and a subtitle "From Wikipedia, the free encyclopedia". The text of the article discusses the role of a business analyst, mentioning the International Institute of Business Analysis and the British Computer Society.

Make a donation to Wikipedia and give the gift of knowledge! [Log in / create account](#)

[article](#) [discussion](#) [edit this page](#) [history](#)

Business analyst

From Wikipedia, the free encyclopedia

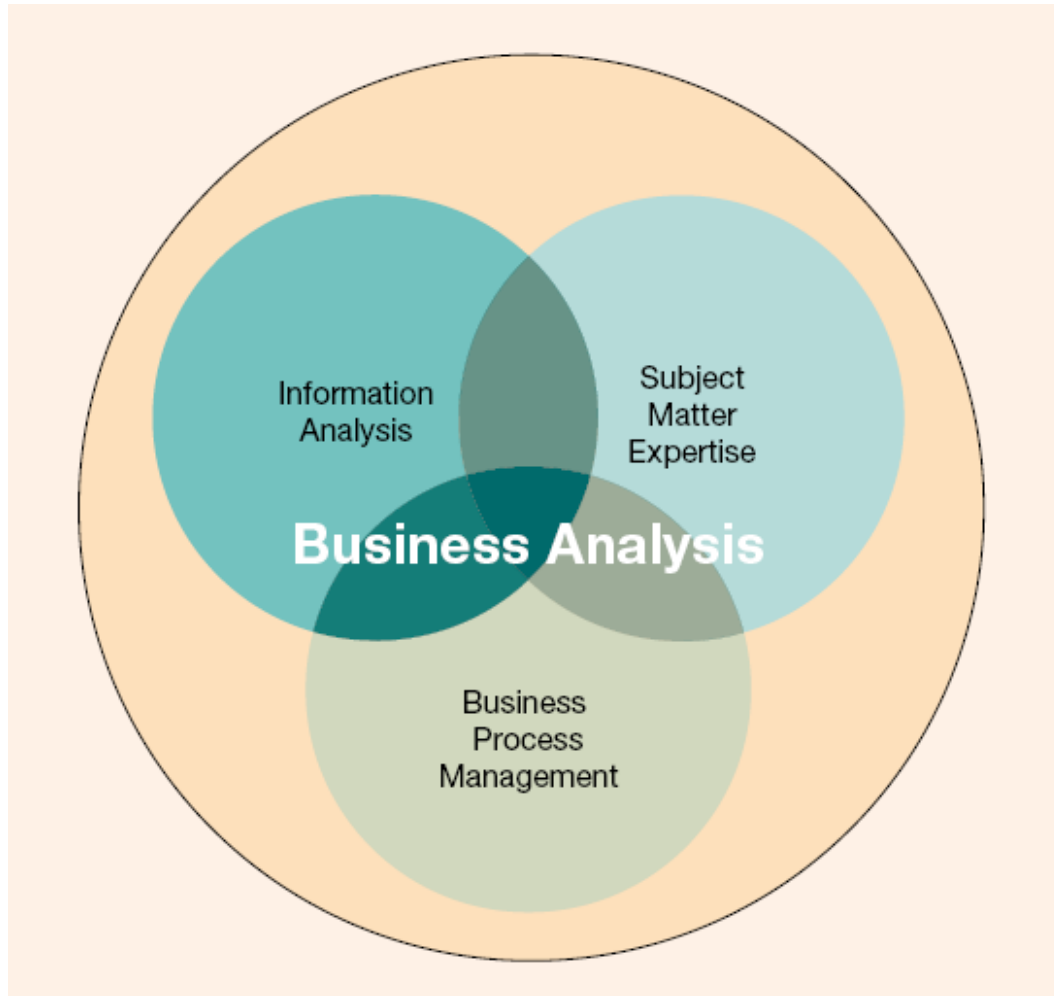
For the line of financial calculators, see [Texas Instruments Business Analyst](#).

The term **Business Analyst (BA)** is used to describe a person who practices the discipline of [business analysis](#). A business analyst or "BA" is responsible for analyzing the business needs of their clients to help identify business problems and propose solutions. Within the [systems development life cycle](#) domain, the business analyst typically performs a [liaison](#) function between the business side of an enterprise and the providers of services to the enterprise. Common alternative titles are business analyst, [systems analyst](#), and functional analyst, although some organizations may differentiate between these titles and corresponding responsibilities.

The [International Institute of Business Analysis](#) has the following definition of the role: "A business analyst works as a liaison among stakeholders in order to elicit, analyze, communicate and validate requirements for changes to business processes, policies and information systems. The business analyst understands business problems and opportunities in the context of the requirements and recommends solutions that enable the organization to achieve its goals." The Business Analysis Body of Knowledge (BABOK) describes common activities, tasks and deliverables of the BA.^[1]

The [British Computer Society](#) proposes the following definition of a business analyst: "An internal consultancy role that has the responsibility for investigating [business systems](#), identifying options for improving business systems and bridging the needs of the business with the use of IT."

Core competences of business analysis...



... indicate different breeds of business analysts...

Business-oriented business analysts

Cross-functional business analysts

Functional business analysts

Financial business analysts

Human resources business analysts

Marketing business analysts

Other functions: sales, operations, etc.

IT-oriented business analysts

Generalist business analysts

Information business analysts

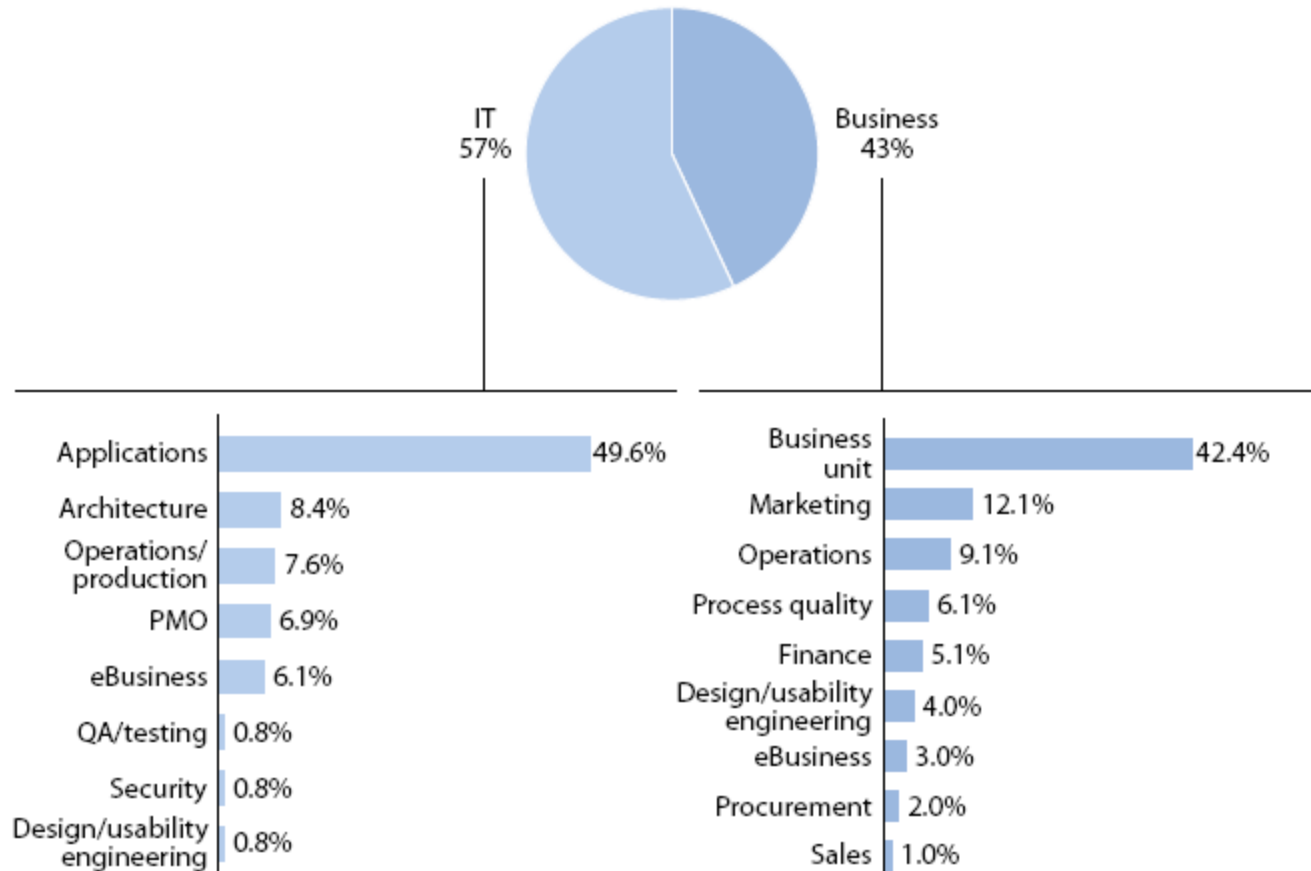
Process business analysts

Experience business analysts

43178

Source: Forrester Research, Inc.

.. reporting into both IT and business...



Base: 230 current business analysts

Source: September 2007 Global Business Analyst Online Survey

*"Other" responses not shown

43178

Source: Forrester Research, Inc.

Why 'Open BA': distributed sourcing...

- We see a surge in demand for the expertise of the business analyst; a surge that has gone hand in hand with the growing popularity of various sourcing models and the increasing dependency of business change on technology. When a sourcing model is applied to an IT or a business process, this effectively creates a supply side and a demand side within that process. This is also the case in complex, networked collaboration between several organisations. BA expertise is called on to build the crucial interface between this supply and demand and therefore is an important enabling tool to achieve 'boundaryless information flow'.



... a new emphasis on corporate governance and performance ...



... and lean' process control...

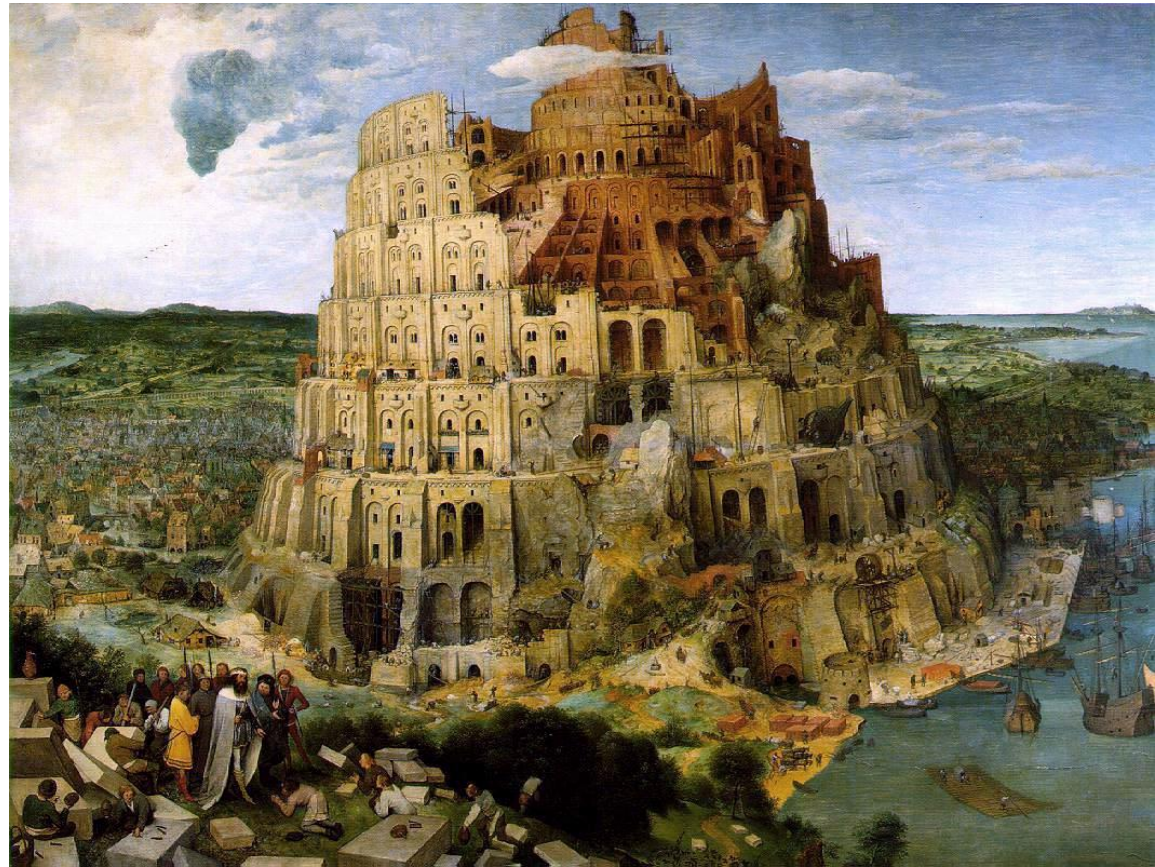


... and the rapid evolution of Business Technology solutions...



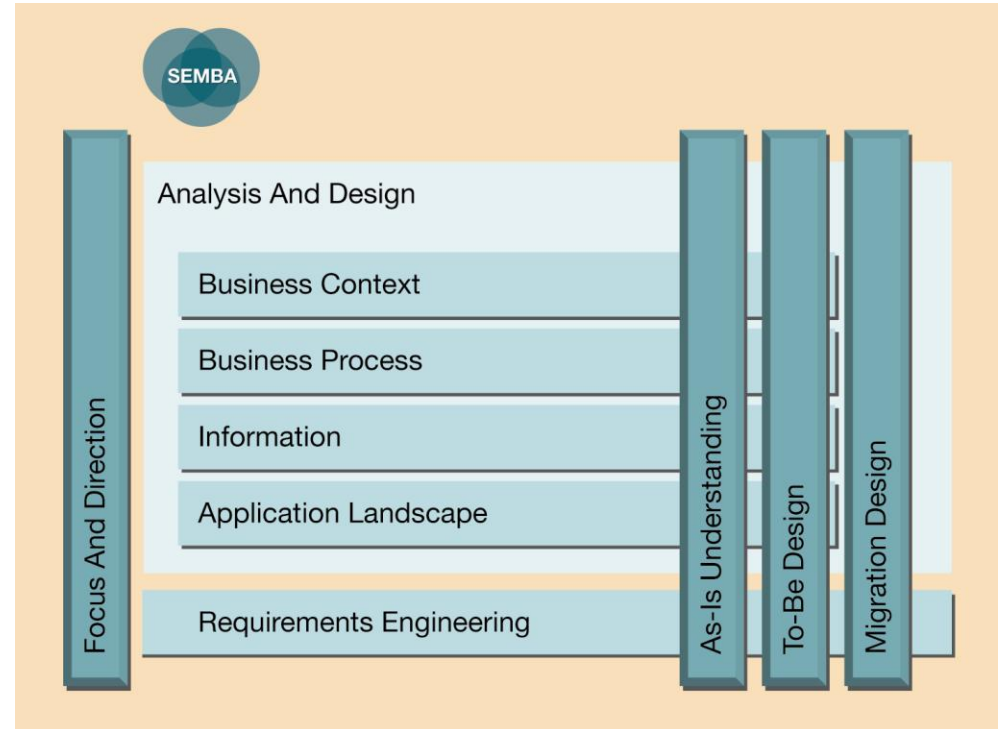
... make standardisation crucial

- ❑ This growth in demand so far, however, has gone without a parallel effort towards standardisation in methodology. Different BA specialists use different methods; different methods apply different terminologies; scope and depth varies across the board. Today we start to see the offshore trend moving into the BA domain itself: we feel that standardisation becomes inevitable.



The initial input is in Capgemini's SEMBA * ...

SEMBA is a methodology consisting of a clear framework, well founded in proven architectural approaches, enriched with Business Process Management principles and addressing the effective use of Subject Matter Expertise. This methodology is developed by reusing and integrating existing proven approaches and combining these with best practices. The result is a comprehensive, clear and simple to use methodology for BA.



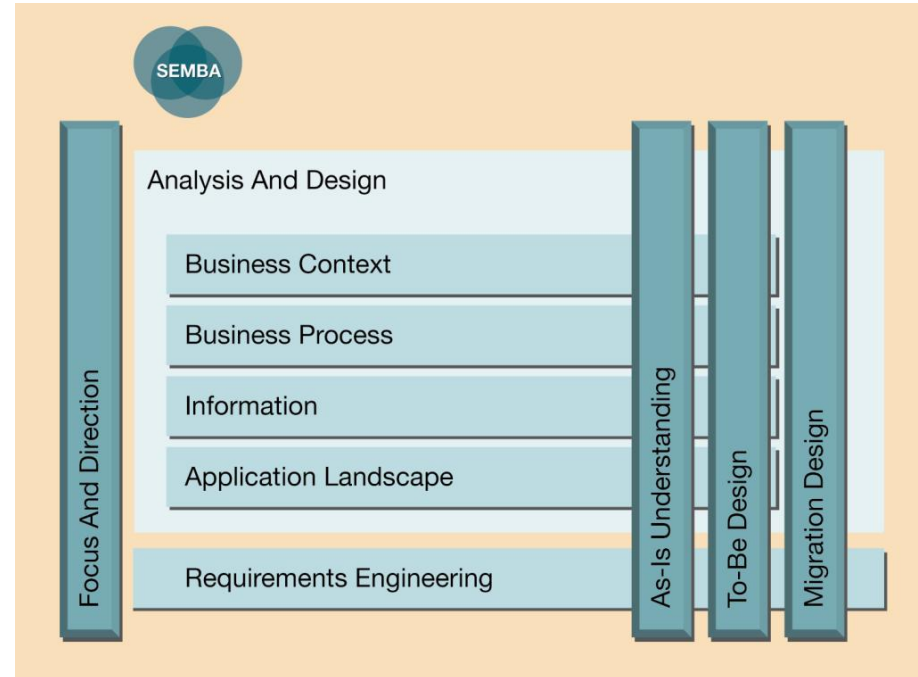
* ... but input from other members on its way...

.. which has some clear differentiators

- ❑ Holistic approach
- ❑ Incorporates all phases and streams, rather than subsets
- ❑ Scalability through Focus & Direction phase
- ❑ Strong emphasis on Migration Design and Roadmaps
- ❑ 'Holographic' structure enables different views and levels of detail, also supports both linear and iterative approaches
- ❑ Extensive use of reference models and roadmaps
- ❑ Tool-independent method, e.g. use of modelling tools such as Aris, Websphere Business Modeller, etc.
- ❑ Completely built on open Eclipse Process Framework standards for methods engineering and support

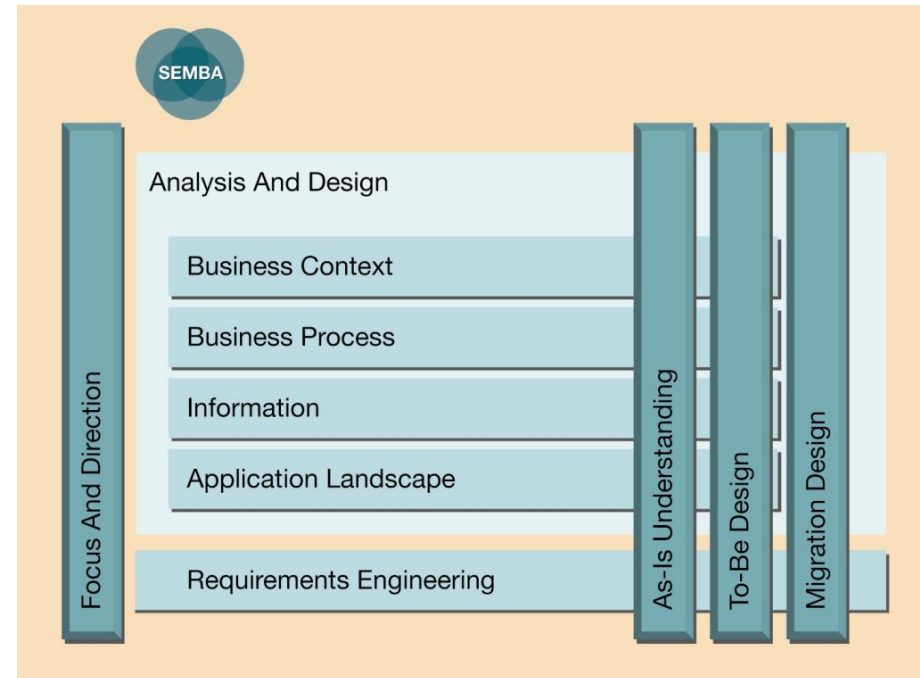
Phase: Focus and Direction

Understand what is to be done and map change drivers. Define solution approach: scope, depth, granularity, iterative / linear. Collate a prior history. Use streams and phases to scope. Inventorise sources of information, e.g. Reference models and roadmaps.



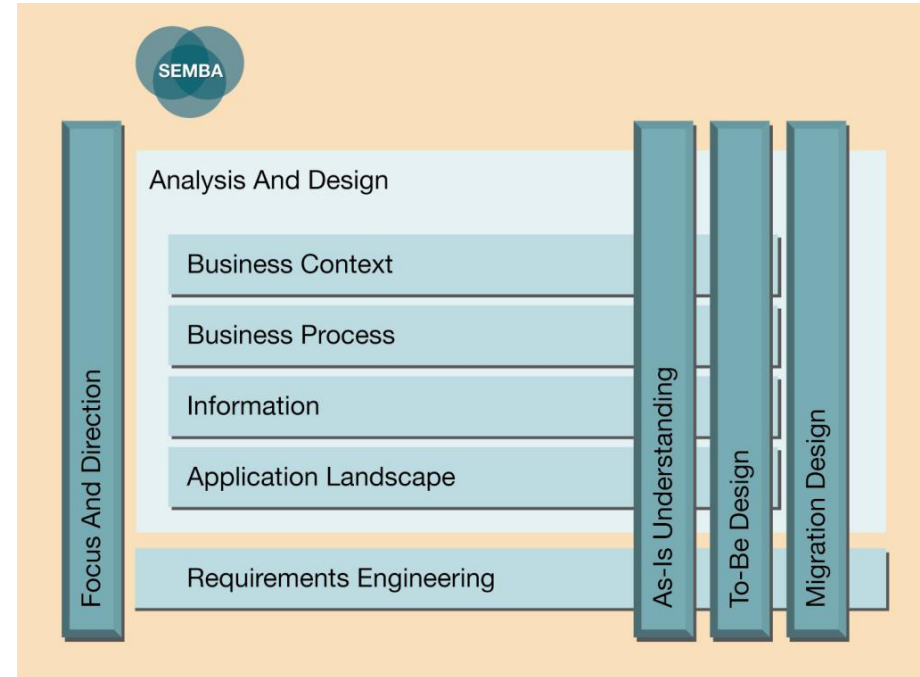
Phase: As-Is Understanding

Draft Requirements Management Approach. Top-down understanding (Business Context to Application Landscape) or Bottom-up (vice versa). Seek and archive improvement opportunities. Sanity check through Change Driver analysis.



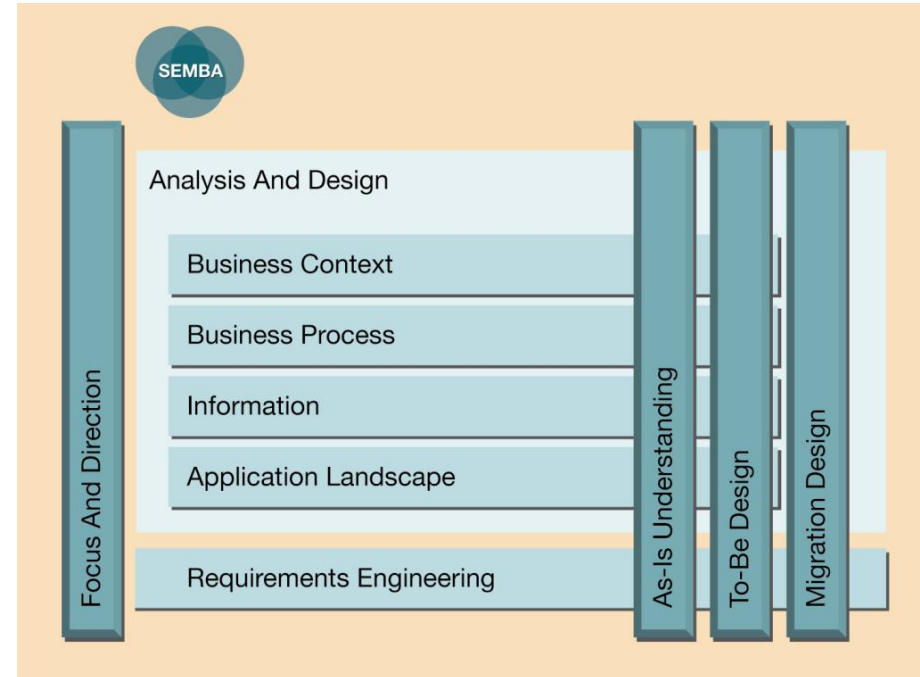
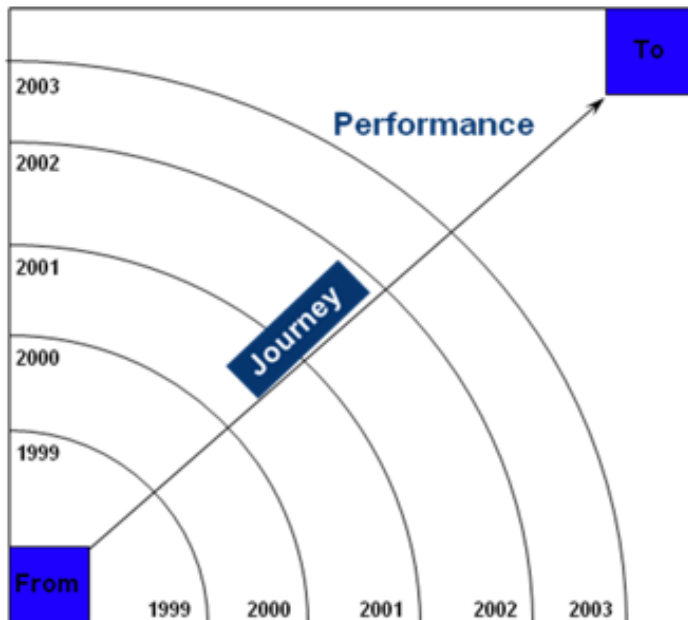
Phase: To-Be Design

Final definition, prioritization and confirmation of the inventoried requirements. Map all streams on the desired outcome.



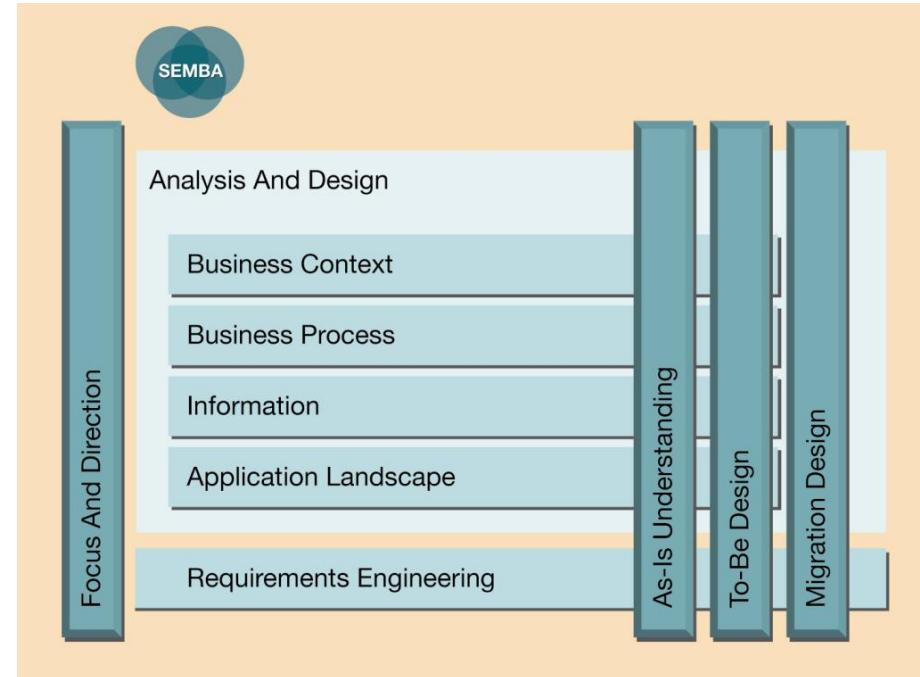
Phase: Migration Design

Fit-gap analysis. Migration design is a logical follow-up of the To-Be Design, not an autonomous phase. Choose deliverable formats, e.g. RUP roadmaps, UML, BPMN



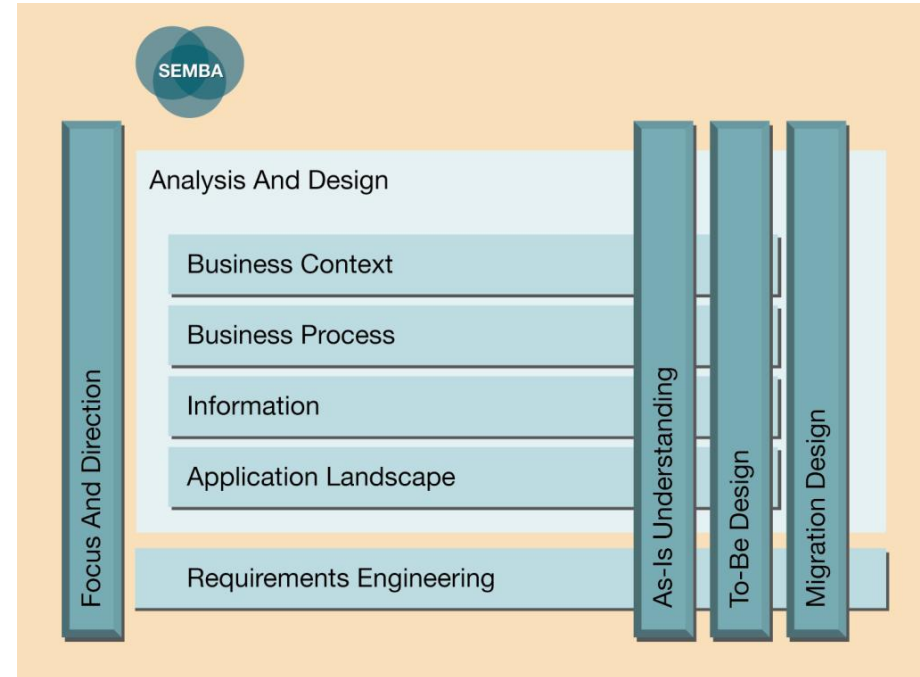
Stream: Business Context

A collage of the organisation itself, put in the context of the organisation's ecosystem. It provides the rationale for the organisational business model and all that flows from this rationale.



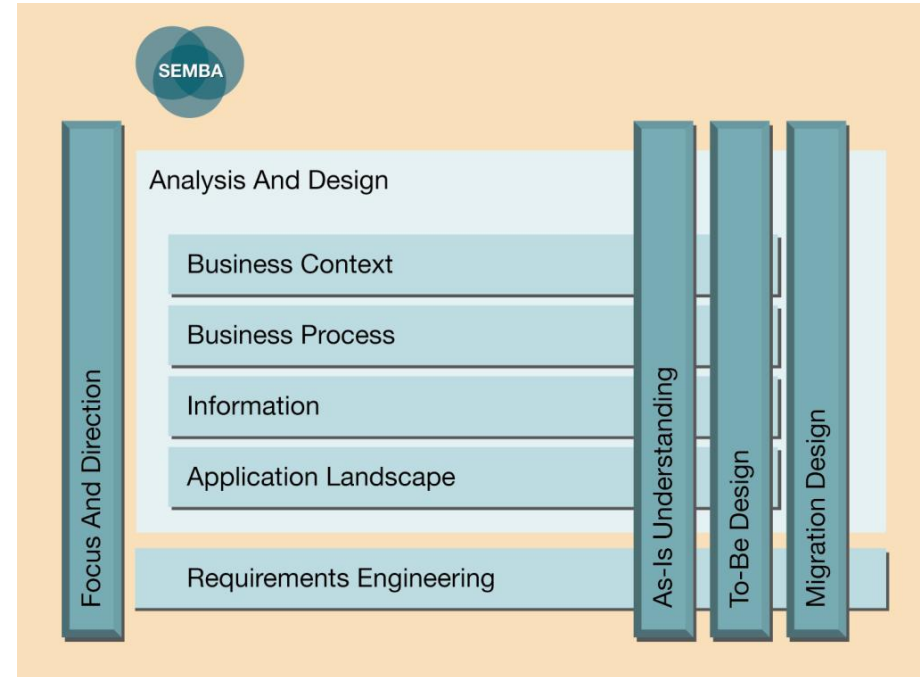
Stream: Business Process

The collection of the business processes that make up the organisation, possibly limited to the solution scope. The application landscape and the channels of information all serve to support these business processes.



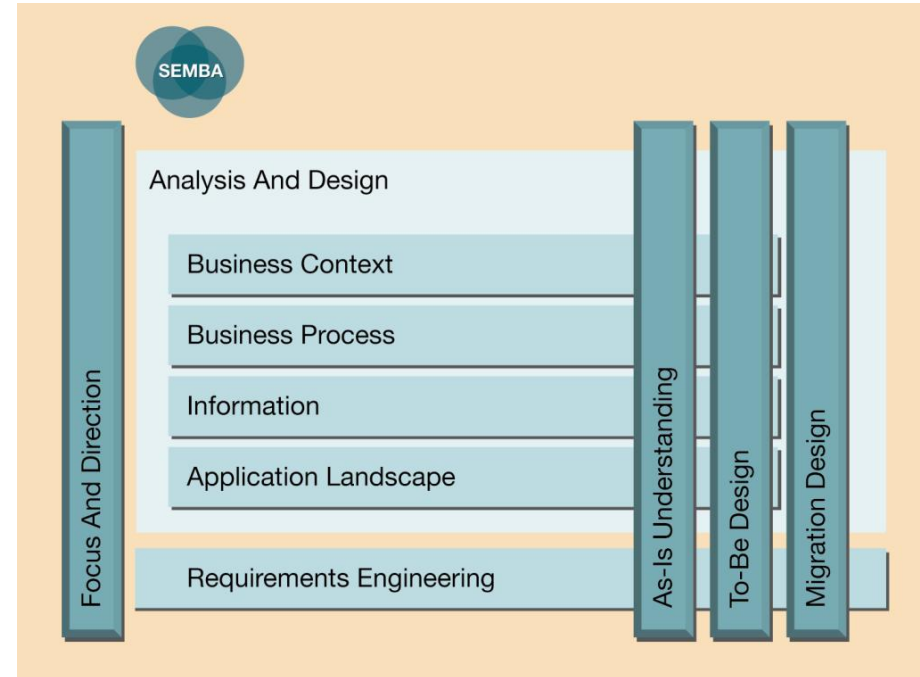
Stream: Information

‘IT’ information that flows through the organisation, but also informal and formal channels that are not part of the IT infrastructure or Application Landscape.



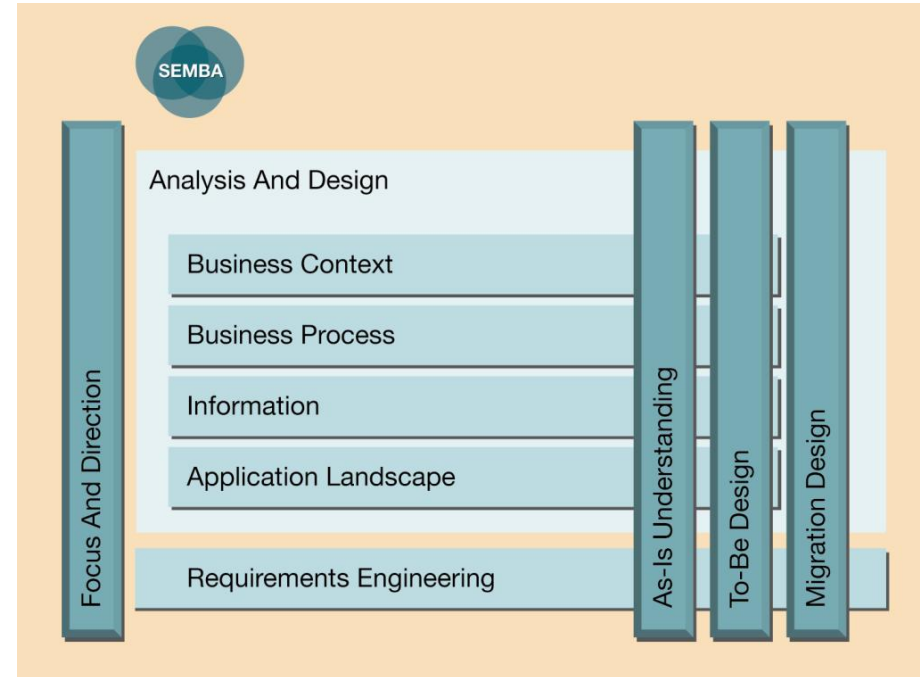
Stream: Application Landscape

Most-addressed layer in current BA methodologies. All the IT within the organisation as well as the expressions of IT to the user through applications.

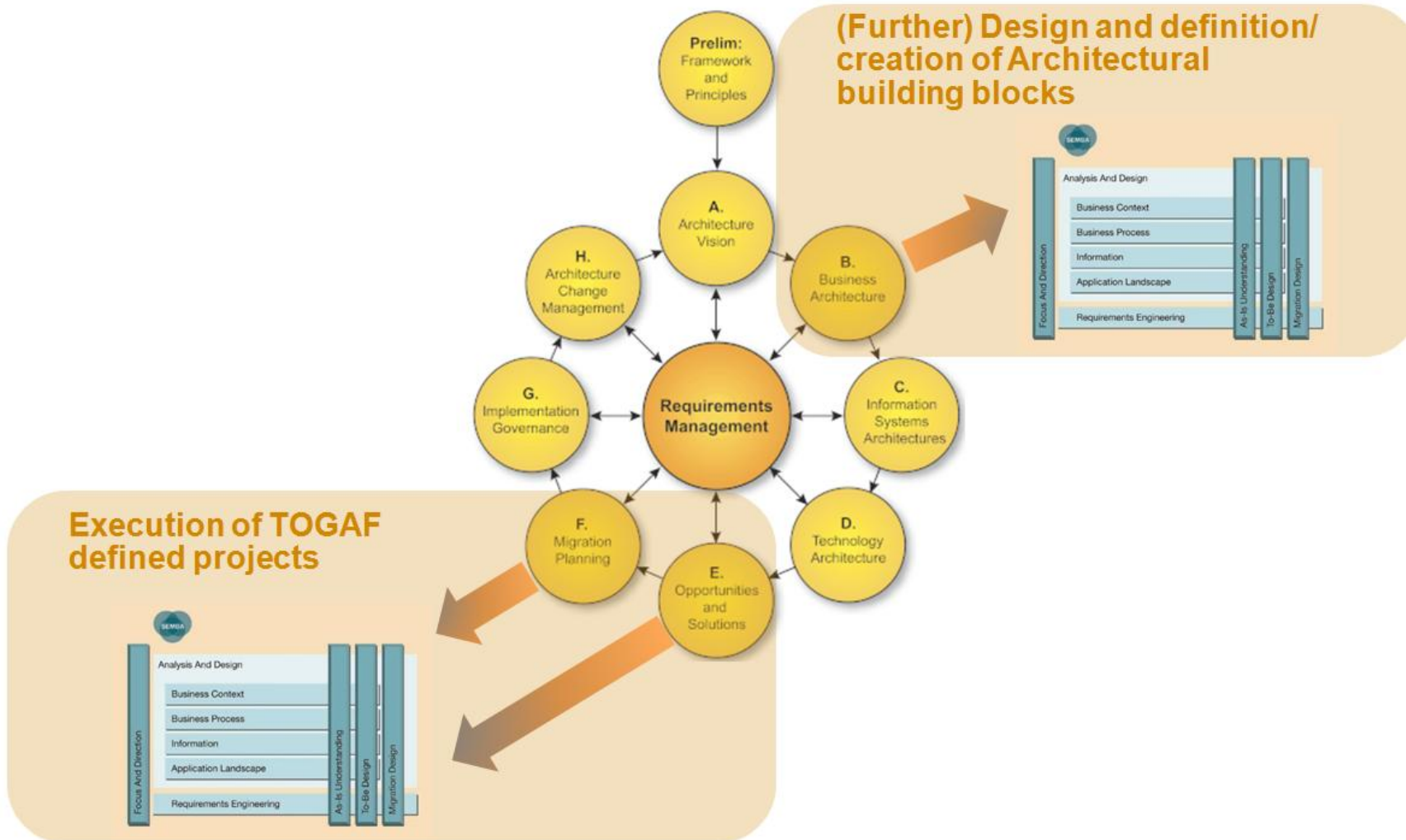


Stream: Requirements Management

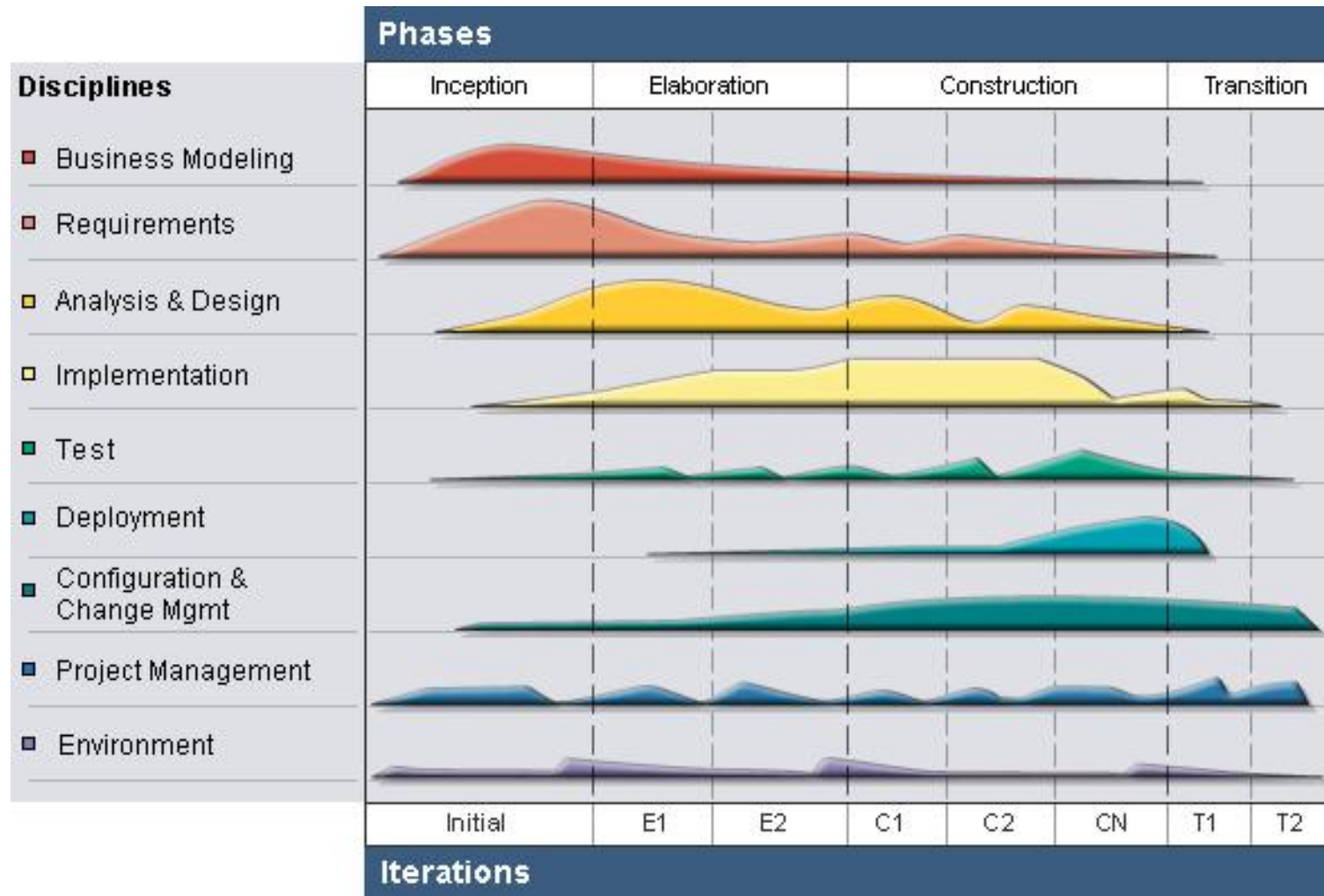
Not a separate activity before Analysis & Design, but as a sub-process *during* Analysis & Design. Crossing all streams.



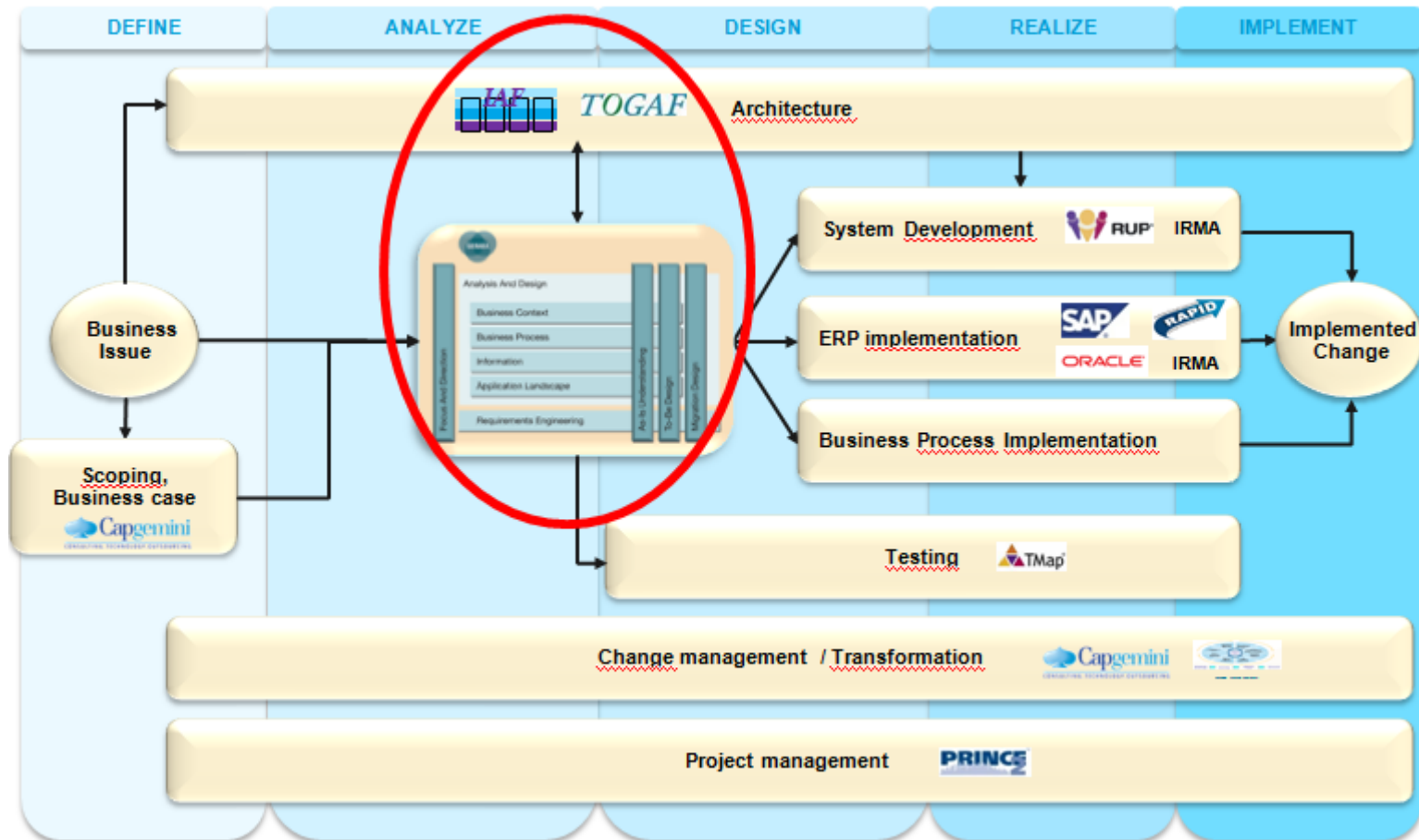
Positioning relative to architecture becoming more clear...



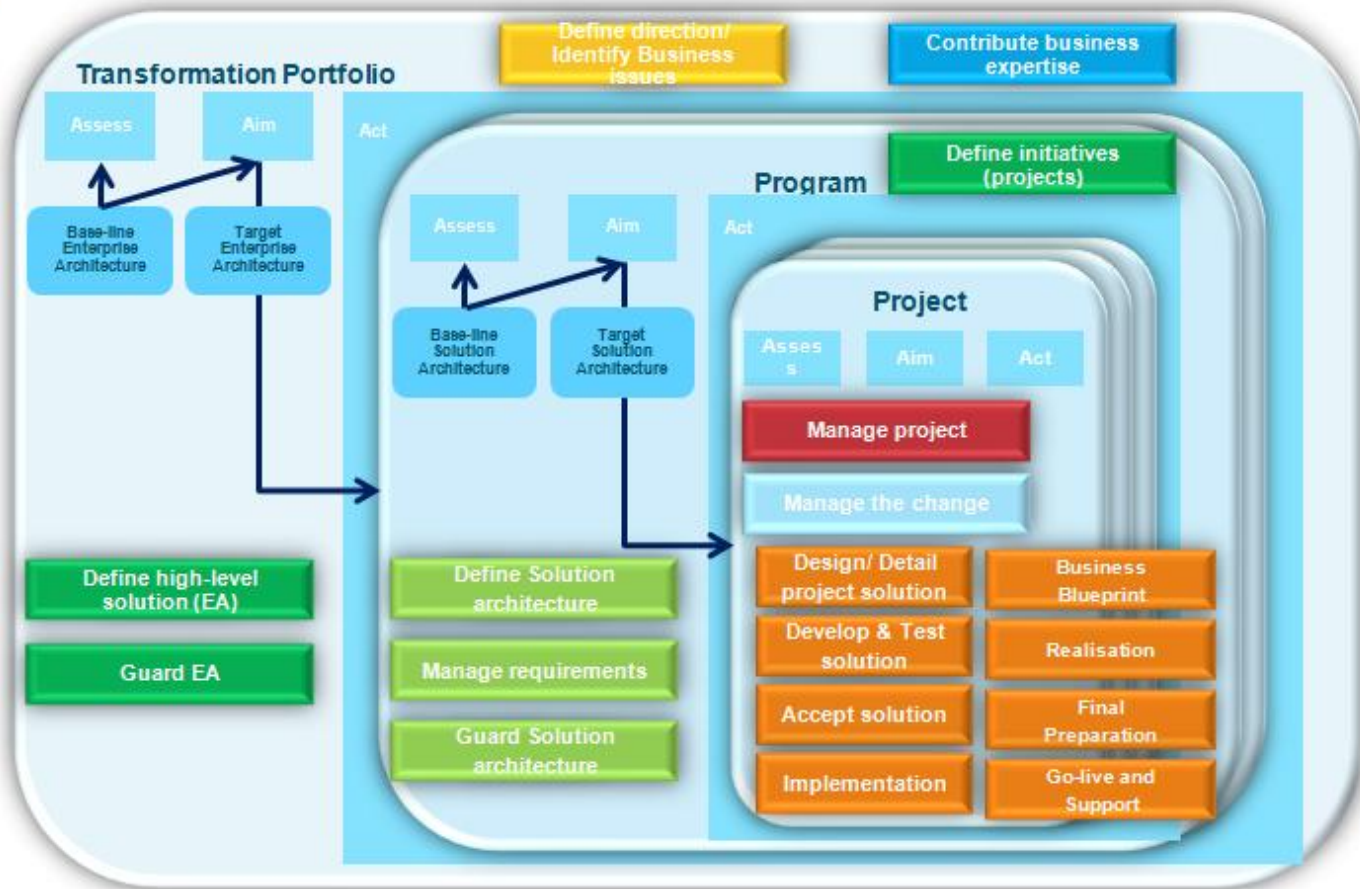
... also to systems development and ERP implementation ...



... we need to understand the entire life cycle ...



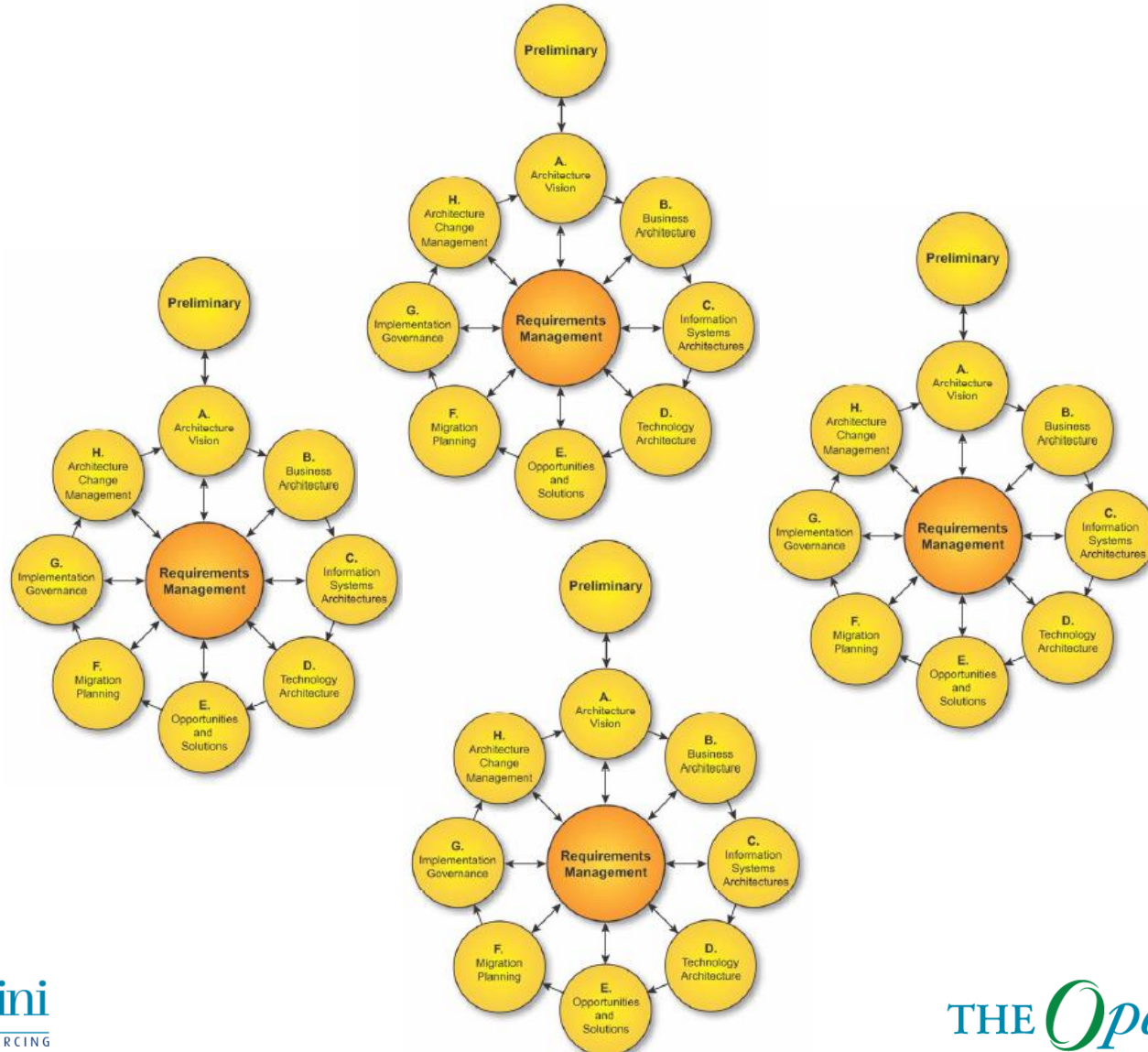
... and results are on their way ...



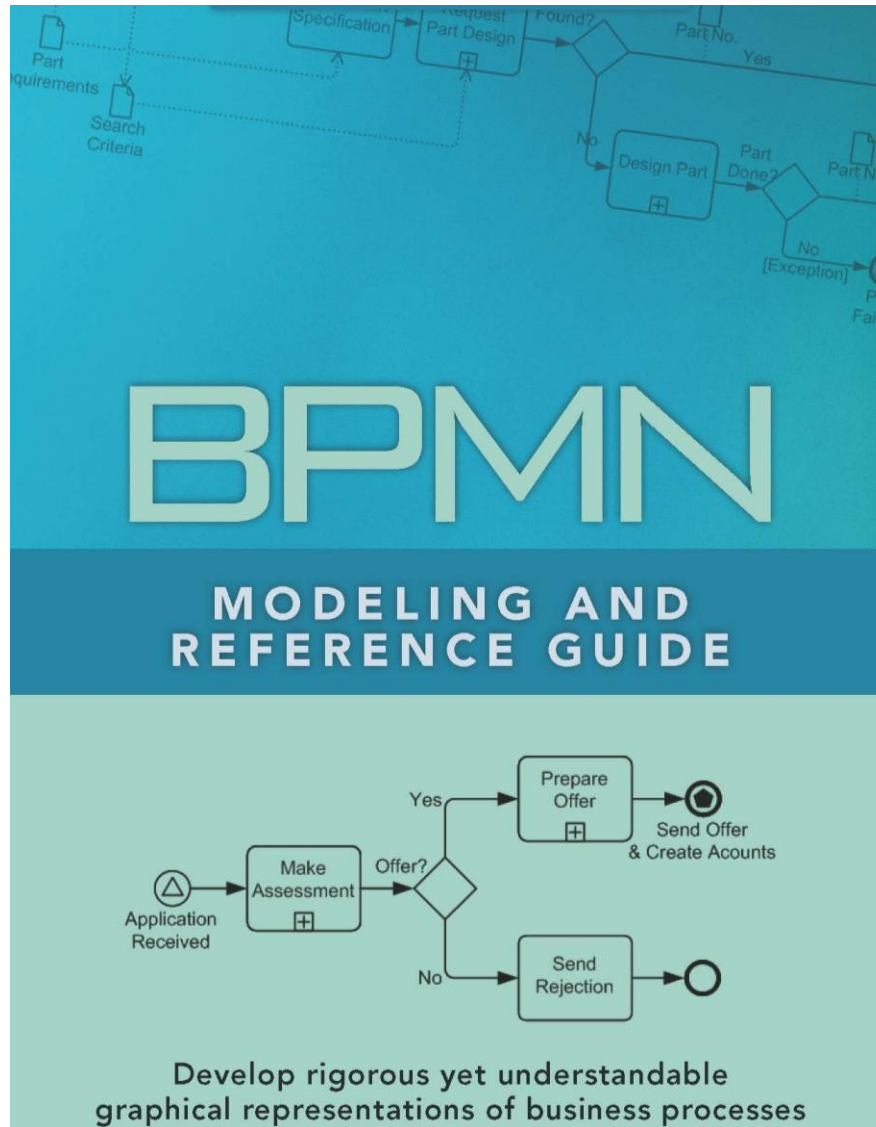
Legend: Colour identifies role:



We might need multiple crop circles...



.... and also need to align to industry modelling standards ...



The image shows the cover of the 'BPMN Modeling and Reference Guide'. The top half features a blue background with a complex BPMN diagram showing tasks like 'Specification', 'Request Part Design', and 'Design Part', along with decision diamonds and data objects. The middle section has a dark blue band with the text 'MODELING AND REFERENCE GUIDE' in white. The bottom section has a light green background with a simpler BPMN diagram showing 'Application Received', 'Make Assessment', 'Offer?', 'Prepare Offer', and 'Send Rejection'.

BPMN

MODELING AND REFERENCE GUIDE

Develop rigorous yet understandable graphical representations of business processes

... and to industry bodies ...

Search

 **Join NOW**

 **Renew NOW**

IIBA™ is the independent non-profit professional association serving the growing field of Business Analysis. Whatever your role—requirements management, systems analysis, business analysis, requirements analysis, project management, or consulting—IIBA can help you do your job better.



Visit the IIBA Blog

Learn about current projects and initiatives. Share your insights and comments.

Education

Certification

Join

Looking for a new career opportunity?

News

IIBA celebrates [5th Anniversary](#) October 29, 2008.

Your opinion counts! Participate in the [BABOK® Version 2 Survey](#). Deadline October 31, 2008

As seen on CIO.com! ["Business Analysts: A Key to Companies' Success"](#)



Discover the [Business Analysis Body of Knowledge® \(BABOK®\)](#), the accepted standard for the BA profession.

Offer business analysis courses? Become an IIBA [Endorsed Education Provider \(EEP™\)](#).

Looking for IIBA approved business analysis courses? See a complete list offered by our EEPs



Take your career to the next level! Earn the [Certified Business Analysis Professional™ \(CBAP®\)](#) designation required by many top employers.

CBAP® Exam Check for [computer-based testing \(CBT\)](#) locations near you and apply today!



Become a [member](#) of IIBA, the leading international association for business analysis professionals.

Become an [IIBA Sponsor](#) and gain access to this large and growing professional community.

Join an [IIBA Chapter](#) Find the local chapter nearest you.



Visit the IIBA™ job board, featuring current postings from IIBA Sponsors and other leading companies. Exclusively for IIBA Members.

[CLICK HERE](#)

LOST IN TRANSLATION

A handbook for information systems in the 21st century

[WELCOME](#)[AUTHORS](#)[EXCERPTS](#)[PURCHASE](#)[BLOG](#)[CONTACT](#)

Welcome

amazon.co.uk customer reviews:

Putting People First, by Stephen Jenner.

"The fact that failures in major IT projects and programmes come as little surprise indicates that something is amiss in the way we approach and manage such initiatives. The usual solutions offered focus on improved implementation but Carl Bate and Nigel Green don't offer more of the same – rather they provide insights, honed from practical experience in major IT enabled business change projects, that suggest a new way and one that focuses on the human dimensions of change. VPEC-T is more a way of thinking than a methodology, but it is no worse for that. Thought provoking and recommended to all those looking to move beyond the 'technology, process, people' paradigm (where people come last)".

How IT people can talk in a way that everyone understands, By P. Divers

"A simple and elegant approach to allow people who happen to be building IT architectures, to talk meaningfully with the the business people who are paying for it. It's a new way to (begin to) fix an old problem. An IT architecture that ignores people will be both complex and unworkable. VPECT encourages people type discussions around trust and values in a way that architecture frameworks ignore. An excellent tool, whose application is underestimated by it's authors in areas way outside of IT architectures".

Links

[Capgemini](#)[Capgemini CTO blog](#)[Roger Session's Objectwatch](#)[Services Fabric blog](#)[The Requirements Network Group \(RQNG\)](#)[VPEC-T Google Group](#)

Categories

[Adoption Engineering \(3\)](#)[Externalization \(3\)](#)[FAQ \(2\)](#)[General Feedback \(3\)](#)[VPEC-T Framework \(9\)](#)

X O P E N

PORTABILITY GUIDE

The case for an open methodology for Business Analysis ('open BA')

Ron Tolido

The Open Group 22th Enterprise
Architecture Practitioners Conference
London, April 28 2009