

Building an Analyst Community at State Auto

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Introduction

Kate Gwynne is a certified business analyst, and has more than 20 years of experience helping organizations successfully align and implement their business and IT initiatives. From 1990 – 2010, Kate successfully completed projects and initiatives in the Insurance, Web Development, Retail, Utilities, Government, Financial, Telecommunications, Engineering, and Software Manufacturing industries. In her current role as Business Analysis Practice Lead for State Auto Insurance Companies, Kate provides leadership and guidance to more than 100 BA's and BSA's and is working towards the growth and development of the State Auto Analyst Community.

PROFESSIONAL ACCREDITATION AND AFFILIATIONS

- International Institute of Business Analysis (IIBA): Certified Business Analysis Professional and Member
- IIBA Columbus Ohio Chapter: Active Member
- Society for Marketing Professional Services: Former Board Member
- Society for Technical Communications: Former Committee Member



The information contained herein includes historical information about the State Auto BA program.
Nothing contained herein is intended to be relied upon as advice for other BA programs.

Agenda

- **The Analyst Summit**
- **Guiding Principles to Analyst Community Initiatives**
- **The State Auto Analyst Community**
 - Defining** the Business Analysis Practice:
 - Setting Expectations . . . The BA Competency Profile
 - Competency vs. Seniority . . . Role Level Descriptions • Candidate Pre-screening
 - Guiding** the Business Analysis Practice:
 - Knowledge Sharing . . . Newsletters • Website • Coaching • Lunch-n-Learn Sessions
 - Building** the Business Analysis Practice:
 - Techniques Before Tools. . . Requirements Management Life Cycle
- **Q & A**



The Analyst Summit

The Summit

Team Building Event - an opportunity for all BA's and BSA's to meet, share, and learn, and will ultimately lay the foundation for unity and structure, as we work towards building a cohesive Analyst Community within State Auto.

Responding to issues today...

- Misperception of roles and core skills of various types of analysts
- Coaching and training gaps
- Limited understanding of the essential role of the analyst plays within the project lifecycle and State Auto
- Perception that change is a threat to stability and quality

...in an effort to change tomorrow.

The Summit will provide value by building a sense of community and trust. The goal is to improve the confidence, effectiveness, and motivation of analysts, and give them essential tools they can use every day by:

- Improving the understanding of the varying roles analysts can play within an organization
- Enhancing core competencies and skills of analysts at all levels through interactive workshops
- Uniting analysts from all areas of State Auto, allowing them to network, share ideas, and brainstorm on solutions to unique challenges each analyst faces
- Identifying strategies to help them successfully meet deadlines and produce outstanding deliverables



The Analyst Summit

2008 ANALYST SUMMIT

BRAINSTORMING ACTIVITY

What are your project-related pain points?	What training would you like to see offered?	What do you expect / or what would you like to expect from the PMO?
	writing for example.	
➤ Deadlines unrealistic	➤ Better communication on what training is currently offered.	➤ Better direction from Project Management
➤ Poor training	➤ Microsoft project training	➤ Participation matrix
➤ Unprepared	➤ A&D requirements documentation	➤ Training - standardization
➤ Funding	➤ More realistic workshop for requirements elicitation	➤ Consistent requirements document using tools / template
➤ Tools inadequate	➤ Communication about requirements	➤ Various templates for various departments (adaptable)
➤ Software	➤ MS Project	➤ Make sure everyone follows the procedures
➤ Unequal workload	➤ Introduction of staff and how they fit together	➤ PMO guidelines / suggestions for consistency / flexibility
➤ Constant interruptions	➤ Document training	➤ Roles about PMO (what they can and cannot do) - clear definition of PMO's capability/goals
➤ Duplicate work	➤ Education of different documents and	Time management about project



Guiding Principles to Analyst Community Initiatives

- *Perspective*

- Representatives from different role types and various departments participate in Advisory Groups.

- *Transparency*

- Communication and idea exchange throughout the process.

- *Clarity*

- Content review and evaluation for fairness, accuracy, and relevancy.



Defining the Business Analysis Practice

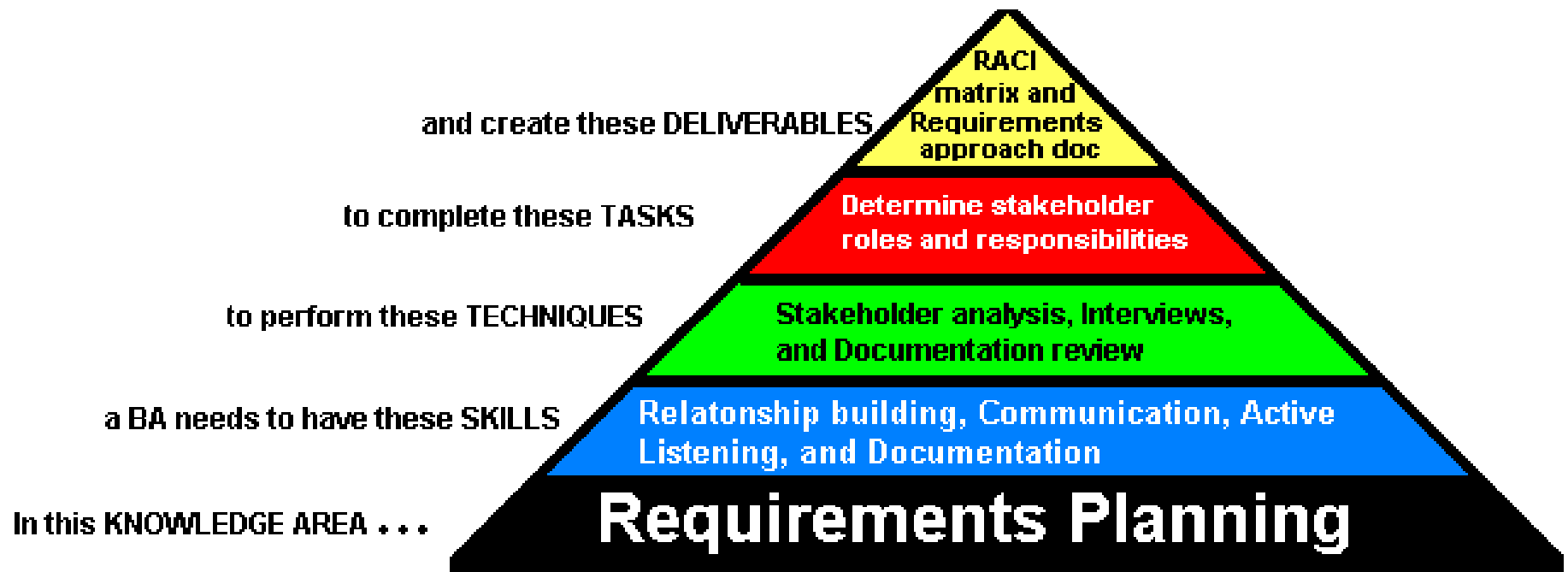


Setting Expectations: The BA Competency Profile

- *What knowledge areas* are associated with business analysis?
- *What tasks* are associated with a particular knowledge area?
- *What techniques* could the Analyst utilize to complete the task?
- *What deliverables* are associated with the task?
- *What skills* should the Analyst possess to successfully complete the task?



Setting Expectations: The BA Competency Profile





Setting Expectations: The BA Competency Profile

Complete these

↓ TASKS ...

- Identify project stakeholders
- Define roles and responsibilities of stakeholders
- Plan how requirements will be elicited, traced, prioritized, reviewed, and approved
- Develop a requirements communication plan
- Determine deliverables that the Analyst will produce
- Develop estimates for business analysis tasks

... using these

↓ TECHNIQUES ...

- Interviews
- Brainstorming sessions
- Survey/questionnaire
- Documentation review
- Stakeholder analysis
- Initial impact assessment
- Communication analysis
- RACI matrix
- Initial risk assessment
- Data collection methods
- Estimating
- Change control

... to create or contribute to

these ↓ DELIVERABLES.

- Participation Matrix
- Requirements Communication Plan
- Requirements Approach
- Traceability Matrix
- Requirements aspects of the Project Plan
- Forms or templates needed as part of requirements management
- Requirements Approval Process
- Change Management Process

Analysts performing Requirements Planning - determine standard requirements activities and tools, coordinate work effort, and identify project stakeholders.

The goal is to ensure the success of the requirements management process and associated deliverables.



Competency vs. Seniority BA Role Level Descriptions

Business Analyst Associate (Intern)	BA Level 1 (Junior)	BA Level 2 (Mid Level)	BA Level 3 (Senior)
Requirements Analysis & Documentation			
<ul style="list-style-type: none"> ➤ Document and analyze requirements, based on agreed upon format. 	<ul style="list-style-type: none"> ➤ Document and analyze requirements, based on agreed upon format. ➤ Diagram flow charts. 	<ul style="list-style-type: none"> ➤ Document and analyze requirements, based on agreed upon format. ➤ Diagram flow charts, and assist with gap analysis and impact analysis. ➤ Contribute to risk assessment, including identification and impacts. 	<ul style="list-style-type: none"> ➤ Diagram current and to-be states; perform gap analysis; perform impact analysis to identify stakeholders of potentially impacted departments and applications; and, conduct initial risk assessments including risk identification and risk impacts. ➤ Define and describe the characteristics of an acceptable solution to a business problem, so the project team has a clear understanding of how to design and implement the solution.



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<ul style="list-style-type: none"> ➤ Active Listening ➤ Analytical Thinking ➤ Change Management ➤ Coaching / Mentoring ➤ Collaboration ➤ Communication <ul style="list-style-type: none"> ○ Verbal ○ Non-Verbal ○ Written ➤ Conflict Resolution ➤ Consensus Building ➤ Creativity ➤ Decision Making ➤ Deductive Reasoning ➤ Documentation ➤ Estimating ➤ Facilitation ➤ Flexibility ➤ Goal Setting ➤ Leadership / Supervising ➤ Mediation ➤ Multi-Tasking ➤ Negotiation 	<ul style="list-style-type: none"> ➤ Active Listening ➤ Analytical Thinking ➤ Change Management ➤ Coaching / Mentoring ➤ Collaboration ➤ Communication <ul style="list-style-type: none"> ○ Verbal ○ Non-Verbal ○ Written ➤ Conflict Resolution ➤ Consensus Building ➤ Creativity ➤ Decision Making ➤ Deductive Reasoning ➤ Documentation ➤ Estimating ➤ Facilitation ➤ Flexibility ➤ Goal Setting ➤ Leadership / Supervising ➤ Mediation ➤ Multi-Tasking ➤ Negotiation 	<ul style="list-style-type: none"> ➤ Active Listening ➤ Analytical Thinking ➤ Change Management ➤ Coaching / Mentoring ➤ Collaboration ➤ Communication <ul style="list-style-type: none"> ○ Verbal ○ Non-Verbal ○ Written ➤ Conflict Resolution ➤ Consensus Building ➤ Creativity ➤ Decision Making ➤ Deductive Reasoning ➤ Documentation ➤ Estimating ➤ Facilitation ➤ Flexibility ➤ Goal Setting ➤ Leadership / Supervising ➤ Mediation ➤ Multi-Tasking ➤ Negotiation 	<ul style="list-style-type: none"> ➤ Active Listening ➤ Analytical Thinking ➤ Change Management ➤ Coaching / Mentoring ➤ Collaboration ➤ Communication <ul style="list-style-type: none"> ○ Verbal ○ Non-Verbal ○ Written ➤ Conflict Resolution ➤ Consensus Building ➤ Creativity ➤ Decision Making ➤ Deductive Reasoning ➤ Documentation ➤ Estimating ➤ Facilitation ➤ Flexibility ➤ Goal Setting ➤ Leadership / Supervising ➤ Mediation ➤ Multi-Tasking ➤ Negotiation



Guiding the Business Analysis Practice



Knowledge Sharing Newsletters

Analyst Community

Sponsored by the PMO and YOU

What's new for you?

The PMO is building a Business Analysis Center of Excellence to support the State Auto Analyst Community! This includes exciting initiatives for both PMOs and BSA's, and is focused on providing education resources for daily work activities and career path training and guidance.

Look for these in 2009 and 2010:
Business Analysis College thru State Auto U (article →)

State Auto University

Business Analysis College

The PMO is working with the folks in the State Auto University to create a career path and skills tracking program for the State Auto Analyst Community!

Opportunity Zone currently provides training courses for skills such as

Who's who

in the

Analyst Advisory Group

The Analyst Advisory Group is a diverse group of State Auto BSA's and BSA's, dedicated to building

The PMO Voice

Putting the Pieces Together

Estimating Your Time

By Kate Gwynne

Although an estimate is often referred to as a forecast or a prediction, it's ultimately a guess based on your experience, historical information, behavioral patterns, and any magical formulas you can devise.

In this issue...

- Estimating Your Time
- Upcoming Events
- Who's Who in the PMO?
- What's In a Name? Need a Facilitator?
- Knowledge Sharing News on the Street
- Check This Out!

Upcoming Events

- The State Auto 2008 Analyst Summit: October 15-16, 2008

The PMO Voice

Putting the Pieces Together

ISSUE 12/08



Vendor Management and the RFI Process

By Kate Gwynne

The requirements are done, and it's becoming apparent that no in-house solution exists to meet the needs of the project. So you need to take a look at some external solutions, which will also mean engaging a few vendors. Now what?

Whether you're talking about products or services, engaging vendors can be time consuming and sometimes a bit frustrating. But there are things you can do to help organize the chaos and streamline your efforts. Below are a few options that may help you do just that...

Step 1 - Organize Your Requirements

- Create a spreadsheet that includes requirement details such as the category, a unique ID, a sub-category where necessary, and a brief description.

In this issue...

- Vendor Management
- Upcoming Events
- Who's Who in the PMO?
- How to Engage Gartner Group
- What's In a Name? Check This Out!
- The PMO Spotlight

Upcoming Events

IIBA Columbus Chapter
<http://www.iibacolumbus.org/nextevent.php>

IIBA Central Indiana



Knowledge Sharing Website

SA Analyst Community

View All Site Content

Good to Know . . .

- Announcements
- Coming Soon
- Check This Out

New Initiatives . . .

- Requirements Mgmt Life Cycle

Training . . .

- Calendar of Events
- Lunch-n-Learn Presentations
- 2008 Analyst Summit
- Webinars

Our Library . . .

- PMO Newsletters
- The Book Nook
- Role Descriptions



Book / Article Title

and Year Published

Your Review

THE BOOK NOOK

An informal review of books and articles on professional topics.

The Business Analyst's Handbook

Howard Podeswa / 2009

This book is an excellent resource tool for any Business Analyst or Business Systems Analyst. This book covers everything from common BA terminology, how to set up various types of meetings including suggested questions to be asked, and examples of diagrams, check lists and templates.

This is not a book that you would sit down and read. You would use it as a resource.

The only negative was the page numbering. It was off by one in Chapter 4 on. If you

Boston University

Check out this site for Analyst-related webinar topics.

Chartered Property Casualty Underwriters (CPCU)

Insurance related courses - not necessarily Analyst-specific - but helpful nonetheless. Webinar courses are often less than \$100.

IIBA Webinars

These webinars are sponsored by the International Institute of Business Analysis (IIBA). The webinars are free, though you do have to be a member of IIBA to view them. Check out their membership page at <http://www.theiiba.org/AM/Template.cfm?Section=Membership> for more details on how to become a member.

If you are currently a Certified Business Analysis Professional (CBAP), these 1-hour webinars count towards the Continuing Development Units needed for your re-certification process.

Ravenflow

Check out this site for Analyst-related webinar topics.



Knowledge Sharing Lunch-n-Learn Sessions

Process Patents

Technology Strategy and Market Positioning

**Use Case Development
and
Use Case Packages**

How to be a Successful
JAD Session Facilitator

What is "Business Analysis"?

Meetings vs. JAD Session

Creating a
Communication Plan

Effective Meeting Management
Tips to Run an Effective Meeting

Business Analysis
&

**What makes an
effective
requirement?**

Requirements Planning

Project Management
Collaboration

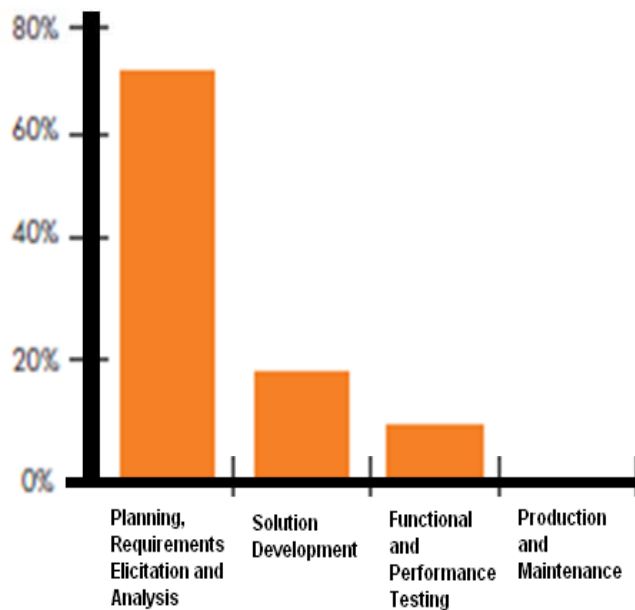


Building the Business Analysis Practice

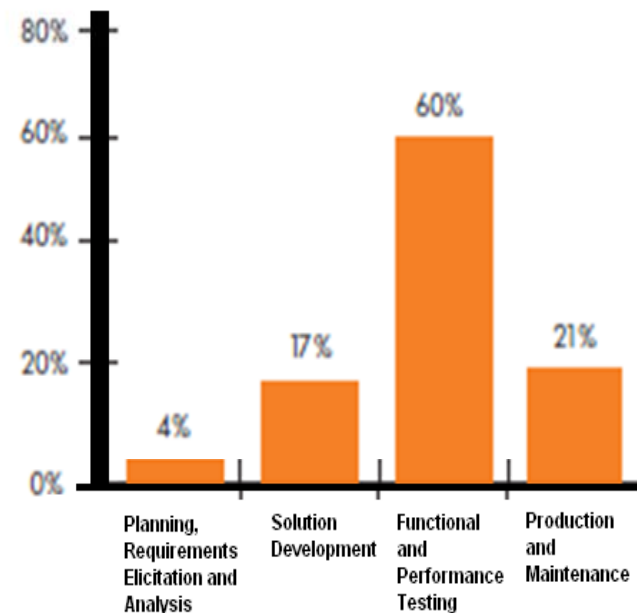


Industry Statistics on Requirements Management

While defects are usually introduced in the early stages of a project, most defects are not discovered until development, testing, or production rollout has begun.



Orange = The Phase in which Defects are Typically Introduced



Orange = The Phase in which Defects are Typically Discovered

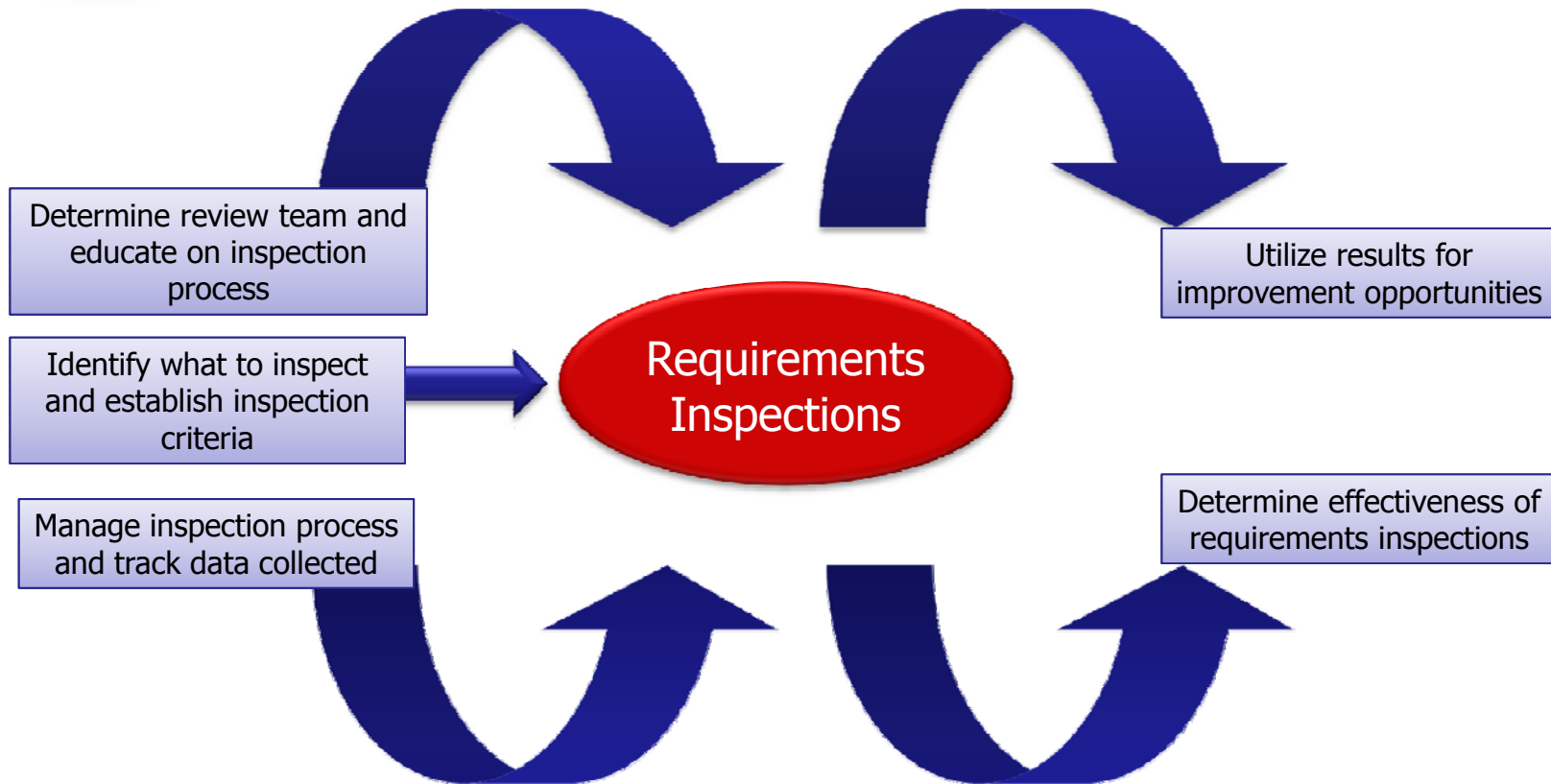


Techniques Before Tools: Requirements Mgmt Life Cycle





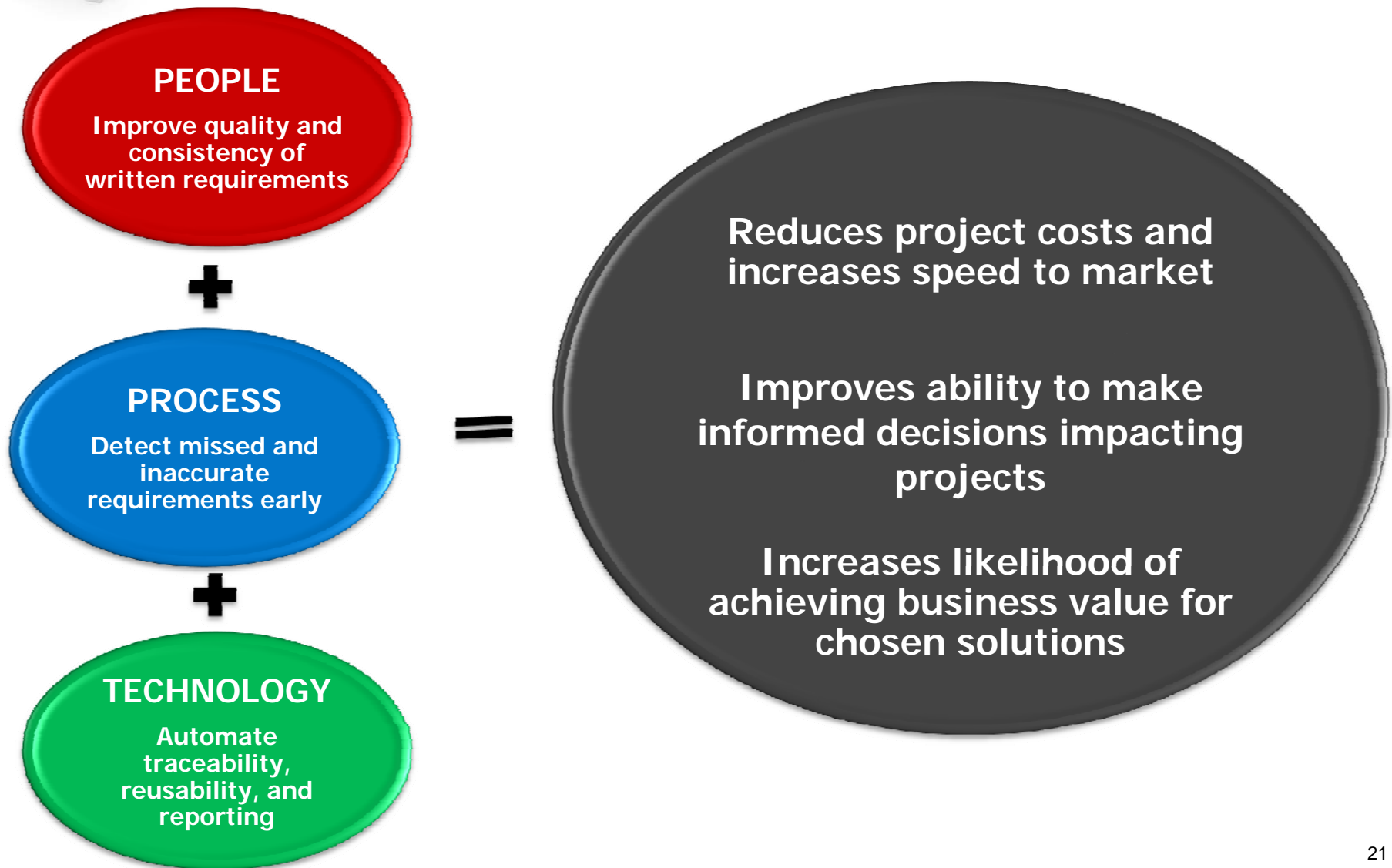
Requirements Inspection Process



As described in "Formal Inspections Gold Practice"



Techniques Before Tools: Requirements Mgmt Life Cycle





Q & A