

ENVIRO365

JUNIOR BUSINESS ANALYST ASSESSMENT



Instructions

Complete All the questions on the assessment for the below scenarios.

Please submit your assessment response within 5 working days of receiving the assessment.

Scenario 1: DBS Investment

You are a Business Analyst who is meeting up with various Salesperson to understand their current processes, assess and propose improvements.

Below are snippets of the conversation you had with a Sales Manager, John.

John is a Sales Manager selling variety of equity and products to a segment of clients.

"Sometimes, I get referrals from colleagues from other parts of the business. But sometimes, the clients will approach me directly too."

"It depends on the clients. Some knows what they want and will confirm an order quickly. Others might be new to the market and will call me a few times on the products and prices. It's quite troublesome because prices for simple products are available in the system but for the more complex ones, I have to contact the Pricing Manager.

Sometimes I can't get him because he's talking to other sales manager and when the client gets impatient waiting for the price, I might lose the deal."

"Concurrently, I have to reply to clients' pricing enquiries on our chat messaging system and emails so it's quite tedious."

"Once the client has confirmed an order, we will need to send them a term sheet document on the same day. The document will contain important details about the deal. Some clients may acknowledge but it's not mandatory. We need to archive these documents for audit purposes."

"For confirmed orders, our operations department will compare the document order details against the order details captured in the company's system. If there is any discrepancy, the operations department will speak to Sales to determine if the document or the order in the system is incorrect. If the document is incorrect, I will need to re-generate the document to the client and operations department. If the order in the system is incorrect, I will need to cancel and re-input a new order for Operations department to verify again."

The Operations department tends to inform me late about such errors, so I can have to rush these at night as they need to be done on the same day as the order confirmation.”

“Currently, I manually prepare the term sheet document via Microsoft word. Some of my colleagues uses excel instead. Although our Legal and Compliance department provides copies of the term sheet documents in the group shared folder, it’s more convenient to maintain the copies on my own computer so I can make changes quickly.”

“Some of my clients do complain that the term sheets they received from my colleagues are different from mine and it is confusing to them. I guess it’s something we must live with because it’s hard to ask the Sales team to always refer to the shared folder.”

“When the client enquires about products or prices, I will reply via email. Sometimes, I may provide them with an indicative term sheet document to provide more information. However, the document must be clearly marked as indicative.”

“I want to focus more on Sales activities instead of these administrative tasks. The company should provide more support to us on expanding our client base. For example, I do not have readily available data on the volume of orders that my existing clients are placing daily, monthly, yearly.

I do not know how many clients have made enquiries but did not confirm an order ultimately. Also, I do not know the reason why they did not proceed with an order. It could be because our pricings are not competitive enough or because we do not respond fast enough.

I will manually collate some transactional data in excel for my analysis, but this is time-consuming and not sustainable in the long run.”

Using a process modelling tool of your choice

1. Draw a business process flow diagram to illustrate John’s existing processes.

Scenario 2: Enviro 365 Bank

You are asked to conduct a stakeholder analysis for a new online banking system at your bank.

1. Describe the steps you would take to identify and analyze the stakeholders involved.

Scenario 3: Enviro 365 Bank

Enviro365 Investments Bank is seeking to automate the withdrawal process for its investors. The process currently makes use of manual forms which investors must download, complete, sign and send to the service area via e-mail. This is a time-consuming exercise which requires the service team to re-capture the withdrawal details on the line of business system and creates room for service team to make mistakes. When volumes are high, this also results in a bad experience for the investors where some of the withdrawals are processed late. With the new online process, investor experience will be improved, and time saved for the service area to focus on other important areas of the business.

Investors should be presented with a web interface that allows them to select a product they are withdrawing from; capture the withdrawal amount and banking details the money must be paid into. Once the withdrawal is completed, investors should receive a notification that shows them the balance before the withdrawal was made, the amount withdrawn and the closing balance. A copy of bank statement must be requested from investors when a withdrawal is submitted.

1. Create user experience requirement list for the above functionality.
2. Create a prototype (one screen of your choice) which forms part of the withdrawal process.

Scenario 4: Enviro 365 Bank data definitions

For the below tables for Customer and Order for Enviro Bank, complete the table for the given attributes.

Entity name:	CUSTOMER		
Attribute	Key (PK / FK)	Data type	Data size
Customer ID			
Create date (when the 'Customer' record was created)			
Status (e.g. Good, Blacklisted)			
First name			

Last name			
Email			
Cell phone			
Date of birth			
Address line 1			
Zip code			
Gender (e.g. Female, Unknown)			

Entity name:	ORDER		
Attribute	Key (PK / FK)	Data type	Data size
Order ID			
Create date (when the cart record was created)			
Status (e.g. Paid, Abandoned, Dispatched)			
Order date (when the cart was checked out and paid)			
Customer ID			
Total pre-tax value			
Total tax value			
Total order value			
Total quantity of products			

Scenario 5: Website Services Inc.

Website Services Inc.



1 Flamingo Way
Table View
ph 021 555 0000
www.wesinc.co.za

To Marius Kruger
Kabeljou (Pty) Ltd

Quotation for e-commerce website:

As discussed:

Item	Time est.	Fee
Requirements analysis	3 weeks	40,690
Design	1 week	18,100
Building	2 weeks	36,700
Testing	1 week	22,775
Hardware installation	1 week	9,010
Server H/W and OS		59,800
Installation onto server	2 days	5,490
Catalogue data and image upload	4 weeks	14,300
Training and handover	2 days	10,988
Post-implementation support	4 weeks	33,385
Total		R247,238

1 year's licence fee for WebSiteShopify (e-commerce platform) @ USD150 PM

R19,800

Billing plug-in for 1st year, USD65 PM

R8,580

is this
enough?

?
cost after
1st year

Terms:

- 50% payment up front
- 25% on installation
- 25% after support phase complete
- Your web site will be quality assured to run on Chrome, Explorer, Firefox and Mozilla
- We can commence within 2 weeks of acceptance of this quote.
- System can be implemented within 2 months of starting work, assuming client is available as needed e.g. for requirements analysis, training etc.
- Client to provide DSL and server space before installation.
- 2.5% discount if total invoice settled in advance.

Kind regards,
Joe Wren, MD

E&OE

John
083 212 1175
urgent 11/11/15

OK OK OK

1. Explain your understanding of the business analyst's role in each stage of the Software development life cycle using the Website Services Inc quotation.
2. Prepare a high-level project plan by referencing the Website Services Inc quotation.