

# The Business Analyst's Career Master Plan

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# The Business Analyst's Career Master Plan: Master the tools, techniques, and strategies for a thriving career in business analysis

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# Chapter 1: Unlocking Opportunities in Business Analysis

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A *business analyst* is more than a job title: it is a role, a skill, and, most importantly, a great career path you can take to bring about impactful value. If you search business analysis job descriptions, however, you will find such variation in scope, size, responsibilities, and requirements that it can be hard to understand what exactly business analysis is and what it looks like to be a business analyst. And that is exactly where we will start—by defining business analysis and why the practice is not only evolving but becoming more critical to businesses. The skills of a business analyst overlap with that of many other professions, and understanding the relationships and differences can be key to helping you in your career planning.

Business analysis brings real value to organizations through the defined functions and responsibilities performed by those doing analysis work. Understanding these activities and what differentiates junior analysis professionals from senior analysis professionals can help you seek out organizations and industries that are actively investing in business analysis talent. These skill sets will include competencies you probably already have

and more that you can develop based on where you want to go. On your business analysis career journey, you'll find that not only are the opportunities vast and exciting but there is also an entire global community dedicated to enabling changes that deliver long-lasting value.

In this chapter, we're going to cover the following main topics:

- Defining business analysis
- The role and importance of business analysis in organizations
- Exploring career opportunities in business analysis
- Defining the essential skills for business analysis professionals

## Defining business analysis

Business analysis is all about the delivery of value. As true as this definition is, it is quite vague and all-encompassing. However, if you not only define business analysis but, more importantly, clearly articulate the impact of great business analysis work on an organization, *you are truly adding value!* With this perspective of your business analysis work, the possibilities for your business analysis career are limitless—not only in terms of where you can take it but also in the success you can achieve by fully focusing on maximizing value in every endeavor.

So, what is business analysis?

Business analysis has been defined as follows:

*“The practice of enabling change in the context of an enterprise by defining needs and recommending solutions that deliver value to stakeholders.” International Institute of Business Analysis™ (IIBA®)*

This definition is great for many reasons.

First, it articulates *enabling change*. Business analysis is about change-based work. Whether you are enacting the change yourself or are responding to

changes around you, change is the only constant. This is exactly the environment for business analysis and why its value shines.

Now, the work of business analysis professionals is all about two key actions:

- Defining needs
- Recommending solutions

Many stakeholders will tell you what they want or even simply their frustrations. The power of business analysis is in taking all these inputs and understanding them to identify what is truly needed to bring about the desired business value. Business analysis professionals seek to understand how to accomplish goals and act as unbiased parties in a conversation.

With that understanding, you can recommend solution options. The keyword here is *recommend*; you do not make the decisions. Making decisions is the job of your stakeholders, particularly sponsors and owners. Your job is to define the options in detail and make such a compelling business case that the best choice becomes obvious to the decision-makers. We'll highlight how to make these compelling business cases throughout the book. For now, approach this journey from a perspective of not only understanding what is needed but also recommending smart solutions that make it easy for your stakeholders to decide and act on.

Now, the last portion of this definition we need to consider is the keyword *value*. Business analysis is all about delivering value. No matter what your position, department, organization, or even the industry your career grows into, always focus on adding value. How are you helping the project deliver, and therefore add, value? How are you helping your department get the most value out of their investments? And how are you helping to ensure products continue to be long-term solutions and never stop delivering value? That is the creed of a business analysis professional that will guide you in your career.

## Understanding who is a business analyst

Now, one of the important things about the term *business analyst* is that the job role and title are often confused. This means that you can find that the same job title has very different job descriptions from company to company. This shows even in how the IIBA describes a business analyst as “*anyone who performs business analysis work.*”

Again, this is a very vague definition that suggests the role is all-encompassing. But understand that this role has evolved from its roots as a technical position whose focus was often on simply supporting company technical projects. These projects’ customers were often internal staff. Take, for example, implementing a **customer relationship management (CRM)** system. The main installation work might be primarily done by the **information technology (IT)** team; however, the primary customer of the CRM system is the marketing department. The system is not meant for external customers. So then, IT staff have to try to understand marketing processes and requirements. This can be a challenge because you hired technical experts who are great at installing and maintaining software, but not necessarily knowledgeable in sales campaigns and customer relationships. There needs to be some translation of what the system does and can do for the marketing team, and how the software needs to perform to help accomplish the marketing goals. This is where the role of the business analyst comes in.

As the role of the *translator* melted away and business analysts found themselves working as key stakeholders on project teams, the business understanding became so valuable that technical **subject matter experts (SMEs)** were receiving training in various business areas to be able to do this translation work between technical and business areas. Thus, we began to see the rise of general business analysts who were not reporting to an IT department but rather to other areas of the organization. Analyst roles began to emerge in marketing, human resources, and security. And with even further growth, analysts were found in project office and even enterprise positions that looked across all departments.

**Here’s a question to stop and ask yourself right now**

Do I enjoy learning technology, understanding how it works, and defining scenarios for the other areas of the business, including where and how they can take advantage of these capabilities? Or would I rather work in an area of the business focused on the non-technical business work outside the IT department?

Your answer may not only sway your career but also help you decide what types of analysis roles you are looking for. Just because the original careers began in technical positions does not mean you have to take a technical position to be a great business analysis professional. The position descriptions, and even the names of the positions themselves, are evolving and will continue to evolve. The key point is to recognize the analysis activities that are performed and ask yourself what is most important to you, remembering there is both a practice and profession of business analysis work.

## The purpose of business analysis in organizations

With the focus on delivering value, business analysis has become a key component to those who recognize its value. In general, business analysis is focused on the needs of the organization. Business analysis professionals are the unbiased parties that look holistically at every situation to see how the organization can gain the most value.

Going back to that definition we began with, *business analysis professionals use their analysis skills to understand needs*. These needs are not obvious but must be elicited, leveraging various techniques from document analysis to interactive facilitated stakeholder sessions, for example. Many end users tell you what they want, not what they need. They might say they need a shiny new red corvette convertible vehicle when in fact all they need is a way to get to work two blocks down the street without getting wet in the rain. How do you define the needs correctly when stakeholder demands can be contradictory? The answer is that you need someone who can analyze the situation and make recommendations on the best way to proceed.

That is the second part to think about: *business analysis professionals make recommendations*. They have to leverage their powers of influence coupled with technical analysis skills to present solid business cases of why one might choose one option over another.

### **Remember**

A business analyst never actually makes a business decision. They *recommend* business decision options but ultimately must get stakeholders to make, and own, the business decision.

This is why interpersonal communication skills, and technical analysis to analyze options, alternatives, risks, and potential impacts are critical to your success in a business analysis role.

As you will see in the next section, there is a need for roles that are unbiased, removed from having any investment in the product, and focused on the organization as a whole.. Too many areas of organizations today are function-oriented, compete for resources, or are focused on a singular internal or external success metric. These all have to be balanced before, during, and after project-based work. This means asking the great questions:

- Are we getting all the value we planned for?
- Are we still getting value?
- What can we do to maximize the return on all our investments in terms of both time and resources?

### **How business analysis professionals differ from project managers and technical roles**

Business analysis skills have long overlapped with other position descriptions. In fact, you'll often come across many position descriptions that seem to describe a business analysis professional even though their titles may be of a program manager or a financial or risk analyst. These are all positions that use business analysis skills.

Take, for example, a project manager. This is a long-established position that has a very clear goal: the successful completion of a project. Their sole focus is on achieving the objectives set out by the project charter. They concentrate on scope, schedule, and budget. Their responsibility is not to do the work but to direct the creation, approval, and ongoing change work of executing the project plan (PMI®, 2024). Now, there is often a lot of work to define the specific tasks that must be completed to achieve the project outcomes. How do project managers know which tasks to complete? Well, the requirements for the project determine what has to be done. And where do those requirements come from? Good analysis work!

A lot of work goes into coordinating with stakeholders to elicit, define, verify, validate, and trace requirements through approvals and implementation. That is all business analysis work. Now, in a perfect world, a project has a project manager to ensure the work is carried out, as well as a business analyst who ensures the right work is done at the right time for the right reasons. It is a wonderful symbiotic relationship. The challenge is that not every project office is staffed this way. Actually, it can be quite hard to justify a second “coordinator” role on a project. So, the project manager is often responsible for not only managing the tasks to complete the work but also doing the analysis work.

The same goes for system analysts, solution architects, and other technical positions that have a general responsibility for day-to-day operations. While making sure the systems are up and running may seem like it needs more technical, application-specific skills, think about when things do not go as planned. The amount of analysis, research, testing, and exploration that goes into finding the root cause is a great example of the analysis skills required of every position that supports technical applications and equipment. Those analysis skills are then coupled with their subject area expertise to help deliver recommendations. No application owner wants to be told there is nothing they can do when an issue arises. They want options. Good analysis work, even in a specific subject matter area, is what helps define options for more informed decision-making.

Also, think about maximizing the investments of the technology you already own. Your process improvement and solution evaluation teams are filling the roles of business analysis professionals. Process improvement teams often seek to understand current situations to define potentially improved future processes. Auditors seek to understand what is and is not being captured in systems. Finance departments are always looking at budgets to see whether teams really need all the licensing or maintenance investments. Looking at what you already have and seeing whether there are better, more efficient, or more effective options, is a great analysis that often does not happen in project-based work. Yet, there needs to be dedicated analysis time for these kinds of efforts. So, if you do not have someone on your team who performs this function, then you, even as the SME, will need to equip your toolbox with analysis skills to help address all these situations. That is why it would be great if every technical team had a group of business analysis professionals who could easily help take a look at the current issue, situation, or opportunity with an unbiased eye focused on maximum value. So, as the title and the role of the business analysis professional continue to evolve in every industry, it is important to look at the value business analysis skills can bring to any organization. Think about both the work you have done and want to do in the future as we dive into defining the work of a business analysis professional.

## **Understanding the role and importance of business analysis in organizations**

Business analysts are defined as anyone who performs business analysis work. No matter the technique, task, or context, their focus is on maximizing value (IIBA, 2024). Even if you choose not to focus solely on business analysis later in your career, the skills you gain now will benefit both you and your organization for years to come, regardless of technological or even industry changes.

## **Core functions and responsibilities of a business analysis professional**

As you explore the various career paths for business analysis in the next sections, you'll see that while the work can sometimes feel vague or broad, there are core functions and responsibilities you can focus on, no matter what your position or the industry you work in.

The most common is being an SME on any **change-based work** (i.e., a project). Your responsibilities lie in defining the requirements of the solution and then validating that the solution does indeed meet your requirements. You might need to articulate to others how things do or do not work, producing some process models. Requirements will be traced to solution components and your test plans and results will need to be verified and validated.

Even if you are not the SME, you may need to elicit information from the stakeholders to define these requirements and detailed work. This is very common in project-based work. The business analyst will be responsible for ensuring requirements are verified and validated throughout the entire change work. These are not just the technical requirements but rather all the requirements to deliver the goals of the project. Having a person not assigned to a particular line of business brings a more holistic approach to the team. This role can then focus on those non-functional requirements, including quality elements; transition requirements, such as training, communication, and data migrations; and potential opportunities to leverage the work for far greater gain than perhaps originally identified in the project charter. This comes through conducting interactive and facilitated workshops with stakeholders, engaging them in their workplaces with observations and interviews, and reading through the available documentation.

But business analysis resides well beyond the confines of a project or program. IIBA (2015) defines six knowledge areas of business analysis work, which includes both *strategy analysis* and *solution evaluation* that look beyond the scope of project-based work. Strategy analysis is the realm where senior professionals tend to migrate. This is where larger questions are asked about what is best for the organization. SWOT analysis, balanced scorecards, benchmarking, and market analysis are the techniques analysts

use to look at what is happening both inside and outside the organization. Discussions range from reviewing and even defining the organizational mission and vision to exploring enterprise architecture and understanding what capability gaps the organization may possess.

But too often, the area of solution evaluation can quickly be overlooked with the day-to-day pressure to respond to current issues and market changes. Solution evaluation focuses on looking at what you already have and identifying whether it is still providing the maximum value for the organization. These are the operational improvement teams that plan for tomorrow by assessing what is and is not happening today. Those who love numbers will enjoy analyzing the statistics of metrics and **key performance indicators (KPIs)** of the organization and then crafting persuasive recommendations for business cases that will drive the greater value of the prior work. Regardless of whether this is an assigned position or simply rolled into the lessons-learned activities of the project, business analysis professionals will continuously identify areas of improvement and work to define the requirements that will enable the right changes to be quickly implemented.

## Contributing to project outcomes and organizational efficiency

When business analysis skill sets are added to a project, the chances of success go up exponentially. Why? Because every decision point, which is a common risk area for a project manager, has extra support in analyzing the options and recommending solutions. Remember, business analysis professionals worry about what is best for the organization, not just a project. While a project manager may be trying to control the budget with design options, the long-term support models, integration capabilities, and options for future enhancements might be benefits that are worth paying more for. Someone must think beyond the project scope.

Remember, business analysis professionals are great change agents. All their work involves making changes for greater value. This is especially true when making organizational changes that impact the way stakeholders

complete their work. Helping to articulate what is changing, what impact it has on the stakeholders, and how to make changes, as well as, most importantly, following up to help ensure the changes are firmly rooted in daily operations, is a big responsibility. You cannot simply throw a new application to the organization and just hope people use it. Defining the transition requirements that will turn your product into a solution is the key area where business analysis professionals justify their involvement in project-based work.

From start to finish, a commitment to understanding and natural curiosity drives continuous improvement in daily operations. For instance, a common activity might require you to understand a process to be able to identify the technical integration requirements. But in that same discussion with the stakeholder, you identify another process, related but out of the scope of the project, that needs improvement. You notice that a little training might be the answer to getting more users to use the system daily. You then use this insight to make a business case to justify some training time to help the organization get the most out of their investment. Despite it being outside the scope of the work of the project, you have identified an area where value can be added. That is because the business analysis professionals are always trying to understand the full context and see items more holistically.

So, with this understanding of what it takes for business analysis professionals to deliver value, let's explore the specific job titles and roles you can explore throughout your business analysis career.

## Exploring career opportunities in business analysis

It can be challenging to define business analysis roles and work. However, the great news is that this creates a huge spectrum of career opportunities. The trick is to understand yourself and what motivations, desires, and hopes you have for your career.

### Traditional business analysis career paths

When we think about the more traditional path of a business analysis career, we focus on starting in a **junior business analyst** position in a major corporation. Often, these roles are in technical teams, and they seem to take two types of starting points—either a role dedicated to business analysis or a system analyst position. Let's talk about the system analyst position first.

## Starting as a system analyst

**System analyst** positions normally have you dedicated to a single system or application. You are expected to become an SME in this system. This makes you the perfect person to both troubleshoot when things go wrong and define opportunities for improvement. With this knowledge, though, you might find yourself doing more operational activities, such as supporting end users and performing maintenance tasks. However, with all this central focus on a single area, you are the perfect person to define any requirements for changes or analyze impacts from other project work for this system. Every one of these activities requires business analysis skills even if the position is not called a business analyst. But all of these roles and job titles are great areas for you to start building your skills and practicing analysis techniques. And these jobs that require analysis work are great places to begin building your experience in working with requirements and verification and validation activities.

Starting in a role such as this, typically your career path will then see you start to get offered analyst positions that focus on more **enterprise applications**. These are applications that often have more business-side end users. You will have to spend time understanding business requirements as much as technical requirements. This is often a great point for you to determine how technical of a position you want. Stepping beyond these types of roles can often go in two directions. Business analysis professionals are found in both: the lines of business of an organization and multiple areas of IT teams. You can continue to look more broadly at where and how your analysis skills can be used to help run the business. These roles are less technical and more focused on the *what* and *why* of change work. But you can also go deeper and become more technically focused on

learning the *how* of the change work and help with detailed specifications and implementation and testing of changes.

For example, those who want to stay more technical often search for **solution architect** positions. These roles have more understanding of all the technical areas involved in an organization but are true analysts in that they analyze needs to determine the best solutions. There will be more design work and focus on the optimization of technical assets and planning the future technical architecture. These are also great positions to push you to learn and understand all the facets of technology that both support and drive the business.

Another area that is great for senior technical analysts is management roles, from a single program area focus to a technical manager of teams. **Program managers** are great positions because you begin to balance both the operational and project-based work that leverages and exploits the value of a single program area. This could be an application, or it could be a functional area of the IT teams. This is where your leadership and interpersonal skills will be brought to the forefront. You will not only balance technical and business requirements but also the skill sets of your teams and look at capabilities coupled with long-term visions.

## Starting as a junior business analyst

Now, the definition of the profession of business analysis by IIBA (2022) and the **Project Management Institute®(PMI®)** has led to the recognition of more and more business analysis-titled positions (Hass, 2005), so much so that there are many organizations that have junior and senior business analysts on a business analysis team in their companies today. These are often larger organizations with the business analysis teams found either in **project management offices (PMOs)**, within the IT department itself, or even in enterprise areas of business development. These larger, more invested areas of business analysis work mean there is more dedication to a business analysis career path within the same company, if not the same organizational department (IIBA, 2023).

Typically, with some university-level schooling, often in a technology area, junior business analyst can be an entry-level job. Entry-level roles will be quite focused on understanding requirements and modeling business process and documentation. This is great as it will give you the opportunity to start both practicing business analysis techniques and learning about the organization and what drives this business. As you get comfortable working in project teams, learning to troubleshoot problems, and articulating clear requirements that can be easily developed and delivered, you can then move to a more in-depth-business analysis role.

Typically, we see the evolution of a business analysis professional in both the techniques and tasks they do, and the scope of the project work they are assigned. As they advance in their career, mid-level business analysts start to get assigned to larger projects. These are often for efforts that span beyond one department and require more coordination of both stakeholders and requirements. There will be recommendations requiring greater in-depth analysis of options as the decisions will require the collaboration of stakeholders and are not confined to a single domain. In these roles, you will find yourself learning more about different areas of the organization and will also start to develop your skills in repeated areas of work as an SME.

Once your project experience has you transitioning to enterprise, large-scale projects, this is often when you can grow into a senior business analysis role. Here, you are looked at as a guiding expert, able to be assigned to any project or initiative the organization identifies. You will have the experience to tailor your analysis approaches and leverage a greater number of in-depth techniques. You will start spending more time outside project work and having discussions with leadership about the strategic direction of the portfolios and even the organization. These discussions will shift over time to analyzing the current capabilities of both the internal workings of the organization and the external threats and opportunities the markets, competition, and even industry are presenting. Senior business analysis professionals often find themselves starting to mentor junior professionals who are beginning their careers in the same organization to help prepare them to grow and succeed in more advanced analysis positions.

## Starting as a mid-to-senior-level business analyst

Individuals who have experience in business analysis, working on cross-functional projects, and collaborating with stakeholders on solutions are able to not only seek advanced business analysis positions that have a more strategic view in their change-based work but also shift to management roles.

In organizations where the profession and skill of business analysis are recognized, there is often a **business analysis manager** or team lead. Just like project managers have a PMO and a project management officer, organizations with a business analysis team will have a business analysis manager or lead. These roles shift the analysis work from focusing on being a project team lead to analyzing the business analysis skill sets and competencies employed at your organization. You will be doing a lot of resource allocations to ensure the right projects get the right business analysis support. This can be as simple as assigning senior business analysts to more complex projects while ensuring junior business analysts work on simpler tasks.

Now, at the same time, you will often take on typical management duties, but again, will be leveraging your team's skill sets. You might assign that same junior analyst to assist the senior business analyst on a high visibility and high-risk enterprise project to not only provide support but also help mentor and train the junior analyst. You will be coordinating lessons learned and retrospectives and be responsible for the continuous improvement of the business analysis competencies at the organization. As a senior member of the team, you will be invited to take part in more strategic discussions around the portfolio of work the organization has as a whole.

## Examples of the different levels of analysis work

Project-based business analysis work is one of the most common areas business analysis skills are applied to in organizations. But even within a project, there are different types of business analysis skillset demands and roles you can play. Consider the different options listed as follows and think

about what areas resonate with you. Where are you now? Where might you want to be?

- **Entry-level and junior business analysis roles** get assigned projects such as upgrading a server or building reports. These projects are technical in nature in that they require analysis support, but the roles are confined to either a single business unit or application in their scope of work. In these instances, analysts work directly with SMEs on project-based tasks that revolve around routine, day-to-day operations for the stakeholders involved. This routine nature makes the work easier to describe and understand. The tasks of the project are often known ahead of time or are easy to identify from prior experience.
- **Mid-level business analysis roles** involve tracing requirements on projects that are implementing new solutions for the organization. These are common digital transformations, such as implementing a CRM system or migrating to Microsoft Office Online. These projects will often introduce business analysts to change management topics and facilitate the delivery of systems such that the enterprise begins to leverage the solutions.
- **Senior-level business analysis roles** often get assigned before projects start, wherein business analysts are requested to help build out the potential business case. High-level goals of engaging in new markets or considering a merger or acquisition drive the change work that these professionals occupy themselves with.

All of these are project-based business analysis roles and activities. But just like the positions in an organization, the specific role you play on a project can vary. Even the role itself can evolve from a business analysis position to one that simply uses the business analysis skill set.

## Transitioning to and from business analysis work

As described so far, there are a number of other roles that involve business analysis work but may not be titled business analyst roles. Project managers are a great example. Their jobs require a lot of analysis work to be successful, just like other common positions that are working to effect

changes for greater value. Anyone doing business analysis work in these kinds of positions can easily pursue mid-level business analysis positions. They bring a great wealth of knowledge while having real-world experience. These transitions are relatively easy as mostly it is a shift in mindset to understanding the new area of work responsibilities. Often, these transitioning roles benefit from training in more specific analysis tasks and techniques.

Another popular role, especially with the rise of the agile methodology and approaches, is the **product owner** role. Many business analysts on teams working with more agile and adaptive approaches find that they become pseudo or proxy product owners. They may not have ultimate control of the final decisions and priorities, but in the absence of a vested product owner, they begin to weigh in on the trade-offs with each decision by leveraging their experience and contextual understanding of the customer and solution spaces. Having worked on an agile team and understanding the information they need to run their development in an adaptive manner, sliding into official product owner roles comes quite naturally. They often work well with product teams, but they need to simply focus their perspective on what is best for the customer while still supporting the organization. Here, more in-depth knowledge off the business value of the product area and the alignment with the overall mission and vision of the organization will help the transitioning business analyst succeed in a product owner role.

## Evolving business analysis career paths

While business analysis is not going away, keep in mind that these are just example career paths that are quite common with organizations that have established business analysis roles and capabilities. On the other hand, many business analysis professionals have never had a position titled *business analyst* and yet have performed business analysis work throughout their entire careers. This will continue to be the case for years to come. Business analysis is and will continue to be both a skill set and a profession. You can still dedicate yourself to business analysis roles as well as find success in pursuing positions, organizations, and even industries of interest to you where they need business analysis skill sets.

Take, for example, a **prompt engineer**. This is an exciting career path at the time of writing. The development of technology is exploding at an exponential rate. If you are enjoying learning about **artificial intelligence (AI)** and work on becoming an SME in the area, the position of a prompt engineer would leverage both skill sets. You would need the technical aptitude to understand the technology while leveraging your business analysis skill sets in the decision-making, design approaches and options, and value delivery propositions of solutions. This is a technical position that is only successful when it employs business analysis work. Many of the jobs of tomorrow have not even been created today, which is why having a transferable skill set such as business analysis will allow you to evolve your career path in sync with the industry. Again, as your career progresses, take note of what areas you enjoy working in and learn more about as this will be key to not only your success but also your career happiness!

## Industries favouring business analysis professionals

While business analysis roles are evolving well beyond a technical SME, technology teams remain common areas where business analysis professionals focus on requirements and understanding how their respective areas, or even the IT equipment in general, operate. While rooted in technology, this does not mean you need to be working in the technology industry. Our world is becoming more digitally connected than ever before, and so IT teams across all the different industries are seeking business analysis positions from entry-level system analysts to seasoned professionals who analyze entire IT investments and enterprise architectures.

Industries that are big into research are great areas to seek out business analysis roles. Areas such as healthcare and finance continue to hire analysts on staff. They need the analysis skill sets for quality control, regulations, and an evolving technical landscape of requirements and building business cases for investments. Sales and marketing teams are always looking for analysis professionals to help understand customer sentiment and buying patterns, predict industry trends, and re-evaluate portfolios.

In addition, the consulting industry continues to seek qualified business analysis professionals who can jump into any project or industry and quickly identify the requirements that will fast-track quality deliverables. With the variety of industries and breadth and depth that contract work can take, it is easy to see the power in knowing not only your strengths and areas of work you enjoy, but also why it is so important. It is also necessary to not just learn new things but also to learn concepts and new ideas quickly to adapt to dynamic team working environments. With the essential skills that we will describe next, you will see just how exciting a career in business analysis you can have!

## Essential skills for business analysis professionals

As challenging as defining business analysis work and role in the organizations of future can seem, the great news is that this means there is a huge spectrum of career opportunities for doing business analysis work. The trick is to understand yourself and what motivates and excites you in your career.

### Skills and competencies for success

At the core of business analysis work is identifying the needs of stakeholders and organizations. This means **requirements**. Even if you prefer higher-level business focus areas over detailed technical implementations, being able to articulate what is required for the business to achieve its goals in a way that solution teams can build, test, and deliver is crucial to being a successful analyst in any environment. No matter what kind of analysis work you do, hold the definition of a requirement close at hand. Be able to recite the following throughout your career to keep you focused as this is truly what is required!

#### **Requirement**

Usable representation of a need (IIBA, 2015).

Knowing and applying this definition is a crucial skill for any analyst no matter where or what they are working on. So, much of the value-adding work we do is focused on understanding what is needed and capturing the information in the form of words, such as requirements traceability matrices; images, with process models and diagrams; and even products, such as prototypes. You must focus on the delivery of this work in various formats for different time zones, languages, backgrounds, education, and even cultures. Business analysis professionals are successful in so many areas due to their dedication to practice and improving both the art and science of business analysis work, primarily in the definition and management of requirements.

## Technical business analysis skills

The science of business analysis is your analytical skills applied through business analysis tasks and techniques. Capturing, verifying, validating, and tracing requirements is a critical skillset to ensure that the solution delivers the intended value. You will find a number of roles responsible for planning and managing test plans and **user acceptance testing (UAT)** periods for this very reason—to ensure the requirements are not only delivered but delivered in a way that provides the intended value.

Defining these requirements requires an analytical eye and understanding of how work is carried out, where decisions are made, and what systems must integrate and share data to make the processes successful. To show their understanding and communicate their knowledge to others, business analysis professionals must be comfortable with visual models. Process modeling, data modeling, decision modeling, interface diagrams, and contextual visuals are key skills in a business analysis toolkit. But then you must also be able to layer on analysis skills. From building a business case, prioritization activities, and SWOT, PESTLE, and MoSCoW analysis techniques to lessons learned and retrospectives, the analytical focus on value is key to your success.

## Communication and collaboration

Simply having technical analysis skills isn't enough as most of your analysis work will require you to work with people—stakeholders such as end users, decision-makers and sponsors, product owners, and SMEs. This is where the source of much of your information will lie. While there are many analysis positions that might solely focus on data analysis and technical areas, you will always have to communicate your analysis work. *This is why successful business analysis professionals are ones who can both effectively communicate and collaborate with their stakeholders.*

The emphasis here is on collaborating *with* your stakeholders. Most of your stakeholders will never report directly to you, from a management position. That means you are asking for them to take precious time away from their current work to help you understand the situation you are analyzing. You have to be able to communicate not only the work you are doing but also why the work is critical, especially to your stakeholders. You need to articulate your role and then effectively communicate the requirements, often from business needs down to technical details. This is why the technical skills of being able to not only carry out but also visualize and even demonstrate the analysis work are key competencies of senior business analysis positions. You have to understand the work as well as be able to communicate it to others.

The way you elicit the information, decisions, and group buy-in is often through engagement. You not only have to facilitate workshops and focus groups, but you will also need to get participation from stakeholders coming from various time zones and cultures, speaking different languages, and, especially, having varied personalities. While the technical skills of running a hybrid meeting are critical, the soft skills of getting people to participate in an online meeting with cameras on, actively give feedback, and frequently ask questions are almost more important. Many times, these people will not even report to you, and in fact, they may be senior-level staff at your organization. You will be tasked with bringing them together in a collaborative approach to analyze an opportunity or challenge to select a solution they all agree on. These interpersonal skills, required of many customer service and end user positions, are also required of business analysis professionals. That is why the role is so valued by organizations

who understand business analysis work—they know the dual skill set that must be present in order to deliver value.

## Strategies for continuous learning and keeping up with industry trends

So, how do you stay relevant in industries that are changing faster than sometimes the job market can keep up with? The answer lies in one of the most critical skillsets a business analysis professional must possess: continuous learning. When asked, many professionals give the same answer about one of the most valuable traits of successful business analysts, and that is to be a quick learner. You must have the tenacity to learn new domains, technologies, and ways of working. But then you must be able to quickly translate this into your work and apply it to your challenges. Whether it is trying a demo version of a new technology tool or watching webinars and attending conferences, there must be a desire in you to learn more. Continuously ask what else is going on in your topic area, organization, and industry. Learning new techniques and approaches from other organizations and your business analysis communities can be the insight you need to help bring new ideas into your own company and analysis teams. The world is going to change, and business analysis professionals prepare for these changes by being abreast of trends and ideas so that they can apply their skills when the given situation calls for them.

Conferences, both in-person and online, are great places to learn about industry trends. Seek out support from your organization to not only cover the costs but to also communicate to your leadership the topics and areas of interest that you want to bring back to your organization. Spending company resources (money and time) on learning will also hold you accountable for the value you will need to return to your organization. The same is the case with online training programs. Seek advanced coursework that explores topics deeply and gives a greater understanding of what, why, and how technological components are working and how organizations are pulling value out of their digital innovations. Hands-on practice will be central to developing your skill sets so that you are comfortable with applying them everywhere your business analysis career takes you!

## Career development and networking tips

Central to your career in business analysis is working to develop your professional network. There is a whole worldwide community of business analysis professionals for you to connect, learn, and grow with. For business analysis, this network is the IIBA. This is *the* professional network of people dedicated to the practice and profession of business analysis. Joining this professional association will grow not only your network but also your career. Finding communities of practice with techniques and templates, examples and application scenarios, and especially other professionals you can reach out to for help as you build your experience will be incredibly valuable to your successful career growth.

This is also the place where you find out more about certifications and additional training that will elevate your experience to the next level. The international professional organizations are the source of the certifying bodies and identify the criteria that describe successful professionals. This is exactly the information you can then use to articulate to your employers your added value when you pursue and achieve certifications. Certifications and concentrated studying are second to work experience in propelling your career forward, and being part of a community that nurtures the professional recognition of your skill sets is a key asset to leverage in your toolbox. You will learn more about these options and their impacts in later chapters.

This is also where you begin to build your personal network. Your career will move in a positive direction when you collaborate with others. First, there are the stakeholders you work with. Demonstrating your analysis skills but, more importantly, your facilitation and engagement skills to help projects succeed builds your credibility as a valuable team member. Referrals from those who have seen your work and the value it can add to an organization are your tickets to progressing in your career. From promotion to more senior analysis positions to referrals for transition to project manager or other roles, those stakeholders you impress with your analysis skills are incredible resources for your career growth. Then, when you couple this with your professional associations and meeting others

doing similar work for other organizations and industries, you have a sounding board for articulating ideas and sharing challenges. You can get inspired and share ideas that improve your skill set and your drive to deliver more value.

Your career is a living thing that needs to be fed; it grows when treated well. Investing in your professional network, seeking mentors, and then ultimately mentoring future professionals is how you keep up the energy in your analysis work and continuously enjoy a long and prosperous business analysis career.

## Summary

In this chapter, you were introduced to the foundational business analysis concepts and the profession of business analysis work. The business analysis role is all about adding value no matter what changes occur around you. While business analysis originally focused on technology application, the role can be found in multiple positions in organizations, including those that are not titled business analysts but require the key skill sets of business analysis to be successful. You have learned about the key actions core business analysis professionals focus on, including requirements analysis and management and a heavy emphasis on engaging and collaborating with stakeholders. Remember that business analysis is a career path with exponential growth opportunity as skills and experience can be transferred to other positions, markets, and even industries.

As you think about your career and what areas of the analysis work motivate you to connect and grow your passion, you will need to identify and focus on the foundational skills you want to ensure are rooted in all your analysis work, which we will cover in the next chapter. There, we will not only jump into the entry-level and junior business analysis job descriptions but also start to define what business analysis looks like in greater detail so you can reflect on your own efforts to deliver value.

## Further Reading

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# Chapter 2: Foundational Skills for Business Analysis Professionals

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This chapter delves into the foundational skills and competencies essential for success as a business analysis professional. Here, we're going to walk through the most common tools and techniques used in business analysis work. Understanding the elements of these foundational concepts and the value they provide sets the basis to layer on more advanced business analysis topics.

Referring back to the definition of business analysis in *Chapter 1*, you'll first focus on defining needs. In business analysis terms, these are called *requirements*. But these statements of need must always have a *usable* element, and so knowing how to communicate requirements, both in written and visual models, is an indispensable skill that leads to long-term value. Since business analysis work is all about value, you'll then look at how to articulate the value of any change effort by exploring how to build a solid business case. This is the rationale behind any effort, but it is also an especially foundational analysis skill to define return on investments and justify the hard work we put into positive change efforts.

In this chapter, we're going to cover the following main topics:

- Essential skills and competencies
- Fundamental tools and techniques
- Building a solid foundation

## Essential skills and competencies

When considering what makes a successful business analysis professional, you'll need to look beyond analytical thinking and problem-solving and focus on communication and engagement skills. Business analysis work, first and foremost, is about analyzing the business for how to get the most value out of it. This is where understanding needs and recommending solutions come into play as the core of a business analysis professional. Achieving that value often requires extensive change work. This refers to not only the changes that have to be made to IT systems or processes but also the changes that must happen in the ways people work and interact with the solution. Being a leader with positive influence is critical to helping teams buy into the change work and collaborate to ensure the success of the solution. So, the most successful business analysis professionals are those that communicate well with their stakeholders.

### The value of understanding needs

Requirements are often the root of almost any business analysis work. While the knowledge of how to elicit, capture, and trace requirements is critical to almost any solution with digital elements, understanding requirements and how to communicate them is a skill set needed in every area of every business. So, no matter where your career takes you, building requirements knowledge, practice, and expertise into your career path will define long-term success.

The challenge is that many stakeholders are often going to tell you *what they want*. As we realized in *Chapter 1*, just because they say they want something, or even that they need it, it doesn't mean it is truly a business need. Consider the following discussion to understand what I mean by this:

*Stakeholder:* I need a shiny new sports car.

*Business analyst:* What do you need it for?

*Stakeholder:* I need to drive to work.

*Business analyst:* How far do you live from the office?

*Stakeholder:* Less than 1 kilometer away.

*Business analyst:* Is there parking at the office?

*Stakeholder:* I'm not sure yet. I'll have to ask.

Now, what are your thoughts? Does the stakeholder really need a shiny new sports car? That's what they said, right? But is it what they truly need?

Here, the stakeholder tried to give you a solution before you could understand the problem. In this case, it does not sound like a solution. It is one option, but you have to ask, is it the best option? And not only for this particular stakeholder, but is it the best option for their family and lifestyle? Does it fit with the workplace and organization? This is where we turn wants and desires into a description of what is *required* to make the solution a success. A requirement for this stakeholder may be “to get to work on time with ease and efficiency.” This is quite different from demanding a shiny new sports car, as stated. But this is exactly what a good requirement looks like. It does not have the solution stated. Our requirement gives us many options to define a solution—a bicycle, bus pass, scooter, and more. Our requirement is more valuable because it focuses on *what* needs to be achieved, not *how* it will be achieved. This is where innovation and new ideas can emerge in the design, if we focus back on the business value. While a simple example, this is exactly the work you need to do to understand the needs that drive good business value. Take the same approach in all your work—every conversation, workshop, and elicitation session—and seek out the underlying business need and ask what is best for the organization.

## Analyzing the business

As you work to uncover the needs of the stakeholders involved in your change work, you must next ask how each need ties back to what the organization wants to achieve. Doing this helps you practice and grow your analytical thinking and problem-solving skills daily. While enterprise views of the business and strategic thinking are core requirements of senior business analysis professionals, even when you begin your analysis work, always ask what value the organization gets from the effort.

Start simple and think about the goal of a meeting. What is it that you need to achieve from a meeting with stakeholders? It could be as simple as defining the needs for the new application. Then, during the meeting, keep the focus on this goal, such as this goal. When a stakeholder starts talking about having to modify the business process or asks questions about compliance, stay interested yet focused. Note these items down as areas to follow up on, but for each one, ask what ideas or thoughts the stakeholders have and how these are going to affect the new application. The current processes being modified because of a change in technology is quite common and so may end up being a requirement.

Complying with laws and regulations is often a requirement of most organizations in general, so these will also be requirements. Even though neither item is a feature or functionality of the new app, each of these additional topics is of value to the business because it turns the application (or any product for that matter) into a solution that the business can get value from. You will hear needs appear in the discussions that, if addressed properly, can deliver great value to the organization. That's what you want to do constantly in your business analysis work.

Always come in from the perspective of an inquisitive treasure hunter. You are searching for the valuable treasures buried in the day-to-day chaos that, when leveraged, bring increased revenue, decreased costs, increased efficiency, and long-term customer and employee satisfaction. Even if your first projects are simple upgrade or replacement projects where most of the work is known or has been done before, ask questions about why things work the way they do. Ask what issues occurred in the past and what the team did to address them. Ask what happened after the last similar project.

Were positive impacts recorded? How were those insights recorded? Great questions are the tools of choice in an analyst's toolbox for any effort as it helps you seek understanding. An analyst's favorite questions to ask are "Why?" and "Why not?" in this endeavor to understand. Then, you ask yourself "*What does this mean to the business?*"

Take, for example, an issue with an application not responding. It appears as a simple need to troubleshoot and fix a problem. Analysis work is required to diagnose the issue. What might be causing this problem? Even though the application is not working, it could be that the connectivity was interrupted or the server hosting the app is not responding. So, now you must work with different teams to find the source of the issue and then determine the best solution. The team uncovers that the issue is with the application and a simple reboot solves the problem; however, while the application fails to load, the team notices that the server is having trouble responding and a number of other jobs have failed. So, the real value comes in when you ask what the team can do to prevent this from happening again. Now you are putting the business back into focus and getting the most value out of the team's efforts.

Yes, some people do not want to hear that they need to replace an entire server; however, if you have done the analysis and started asking how many times the server had jobs that failed or, worse, impacted work by not supporting the business applications, your findings might be the insights the decision-makers need to seriously consider the business case for replacing the server. But the trick is to not just seek out an understanding of the current needs and issues. You need to also go further and ask what it means to the organization. Always relate the ideas to what is needed to achieve the business outcomes. That is how you build value into your solutions. That is exactly what you want to articulate as you work with your stakeholders.

## Working with stakeholders

Business analysis professionals will often find themselves having to work with all kinds of stakeholders. No matter how technical your area of expertise is, there are people who fill all kinds of roles to add value to the

organization. The role of a business analyst is one of support and empowerment. You do not own the end solution—a product manager or system administrator might be the *owner* in this case. You do not make product or business decisions—you analyze the options and recommend solution ideas. You might understand and help articulate the change work that must happen to get solutions implemented and working properly, but in a business analysis role, you are not necessarily doing the implementation work, nor are you using the end result daily—the users are. So, you not only need people to give you their valuable time to sit and define what needs to happen, but you also need to be able to influence them to buy into solutions and actually use them. Hence, in your role, you need to be seen as a team player and a true enabler of success.

You need to approach your stakeholders from the perspective that you are working with them, not for them (and certainly not against them); that is, you're enabling *them* to do the work. You want *them* to own the work. This is why you should be cautious about being an **SME** on a project where you are perceived to be someone who can perform the actual work. When facilitating discussions and problem-solving as a business analyst, try to avoid taking on the work yourself. The analysis work will always continue to remain your responsibility, but not the execution of the changes. Always ask the team who is best suited to complete the defined task. Your role is to help everyone think through the problem or opportunity.

Even with the requirements work itself, you may be responsible for the requirements, but those are business and stakeholder requirements. They are the needs of the business by fulfilling which it achieves the desired business value. So, while they may be your responsibility, you do not own them; your stakeholders do. Thus, your skills have to shine in not only helping them articulate their requirements but also helping them buy into, own, and work to deliver those requirements to achieve their objectives. Always ask why the team is looking at the work in the first place. What goal is the team trying to achieve? One of the greatest things you can do is offer an objective perspective. Sometimes the teams are too close to the product or revenue goals to step back and see the larger picture. Making smart investments today can yield even bigger profits later, but only if they see it and are not

focused solely on the short term. This is what business analysis work is great for!

That end-customer view is critical to the success of most change work. Even with your discussions with your project stakeholders, you may not have the customers or end users in the room. You need to either be able to talk with them or get someone to articulate their needs on their behalf. Many times, you will have to ask your stakeholders to describe and envision their end customers. You seek understanding from their perspective. This is why you are not simply an “order taker” of requirements. You seek understanding so you can help your stakeholders uncover their own needs. You ask the good questions that get them thinking.

Remember that some stakeholders may never have had the privilege to work with a business analysis professional before. The first time you deliver them value—improving processes, helping to define great solutions, and solving problems—they’ll want you back repeatedly. You help make their work easy. You help them be successful. Who wouldn’t want someone like that on their team? This is because you are not working *for* them but *with* them. You take their input to help define the needs, then step back and think about the value to the organization. With a focus on value, you then work to enable your stakeholders to be successful because you know that the needs of the business and the stakeholders combine for ultimate value delivery. But to do this, you need some good tools in your toolbox. So now, let’s look at some of the tools and techniques you want to ensure are part of your daily analysis work.

## Fundamental tools and techniques

No matter where your business analysis adventures take you, you will find common business analysis tools and techniques valuable to any industry and almost any type of change work. With this in mind, foundational knowledge of how to elicit, track, and communicate what is required to make the change work a success is what you want to immediately focus on in your analysis work. Communication is going to be key to achieving your goals by going beyond simply articulating needs and being able to get

everyone on the same page. Are your stakeholders picturing the same thing as you and your documented requirements? This is key to your working relationship with your stakeholders and supporting their buy-in for the change work and the end solution. Learn to elicit information and then successfully use, leverage, and communicate your findings. You will need various forms of communication that help paint a picture of how that success will become a reality. Creating visual models of both the business context and the solution space will not only help you describe the work but also help you get your stakeholders collaborating with each other to deliver value.

## Elicitation and seeking understanding

Elicitation is the art of understanding. Elicit means to *draw out*. While doing analysis and change work, you will quickly find out that you will have to elicit a huge amount of information from your customers on what they both want and need. Learning how to pull out information from stakeholders who are unsure of what they need, have ideas all over the place of what they want, or may even have no idea what is best for them, or the organization is going to be one of your superpowers as a business analysis professional. You want to practice asking good questions and mine for connections and patterns in the information and data. Always ask for more insights to understand the bigger picture, as well as verify and validate the assumptions identified. Business analysis professionals seek out greater levels of information and ideas to maximize the value of all the change work they do. So, you want to ensure that up front in your analysis work are the skills to draw out information, ask great questions, and seek an understanding of the true business needs that can be addressed to deliver long-term value.

## Analyzing available information

To focus on understanding what is going on, it can be best and often simplest to start with a technique called **document analysis**. By definition, document analysis is just a fancy way of saying that you're going to read

and analyze all the available materials related to the change effort. This is something you want to do right from the beginning of any engagement. Read as much about the subject matter, the company, the technology, and even the project team, as possible. Most document analysis is as simple as reviewing what already exists. Just asking what information the company has on the challenge or opportunity can give you a quick insight into how much work you will have to do. For instance, if there is little to no documentation out there, then you know this is a more novel concept or idea and will require greater work on your part to help the team articulate their needs. Opposite to this, well-documented business processes and known industry technologies will (usually) make the work more straightforward with detailed specifications being easier to articulate. But that also means you will need to read a lot before getting started so you are up to speed with the rest of the team. Again, do not worry about having to do the work, but focus on being informed enough to understand the context and general discussion space. Just like reading a book, read documentation to understand the story of what is or is not happening.

Now, the best way to analyze information is to simply ask great questions. As you read, explore, and learn, what questions do you think of? What questions are not answered in your material? Do you know where or who can help you find answers? What sources are there to help you learn more? What you are doing is not only learning about the current state and past issues, ideas, and decisions but also preparing yourself for your conversations. Stakeholders do not like repeating content that is already documented in sources readily available to you. You want to value their time and prepare for interviews and meetings by coming up with a list of questions that you did not see answered in the available literature.

An easy approach to document analysis is to simply take notes of what you do and do not find as you review materials. Make notes of what points are important and details to remember. Now, this may seem hard at the beginning because everything may seem important. That is okay when getting started. Make enough notes or highlights to make it easy to come back to the information to read more. What key takeaways did you get from reading company documentation? What insights did you get by looking

through the user guides and **standard operating procedures (SOPs)**? Where did you get confused or lost trying to navigate the corporate website and investor information? Any confusion can be a signal that there are gaps in the information. So, make note of this and simply keep going. With business analysis work, there are always verification and validation activities you will do to confirm the information, so simply capture information at this point. You are simply seeking contextual understanding to better understand the solution space.

Now, with the impact of technology today, this may mean more than just reviewing company documents. You will definitely want to do your due diligence; research using web searches and have AI tools summarize and find patterns. **Data mining** and **data analysis** are additional techniques often used during your review of materials specifically related to the data. These techniques can be used to further refine your skillset every time you work with data. Here, your questions are about what patterns and trends the data shows. You will have to work to get the datasets and characteristics that give you meaningful insights. Learn how to use data analysis tools to understand the data or even find out which stakeholders are data experts to help guide you through the data. So, just like document analysis, identifying potential sources of information and then reviewing those sources are great activities to begin to warm up your analysis skills. Once you start to get comfortable with concepts and begin to form an understanding of the context and environment of proposed changes, then you are ready to go directly to the biggest sources of requirements and understanding: your stakeholders.

### Eliciting information directly from stakeholders

The art of conversation is what will help you elicit the understanding you need from your stakeholders. **Interviews** are one of the most used techniques in business analysis work as they are all about asking good questions to seek understanding.

When doing any kind of elicitation work, you always start with a goal. What information or answers are you seeking? Have you clearly stated and

worked to communicate this goal? You need that to keep both you and your stakeholders focused during the conversation. Get in the good habit of always coming back to the goal to avoid talking too much about unrelated topics. What information do you need from the stakeholders? What are you going to do with the information? How will the information help your change effort? Be clear in your introduction rather than just barging in and demanding answers.

While images of a news reporter might come to mind, remember that elicitation is not a process of running through a checklist for data points. It is about seeking understanding. So, before every meeting, phone call, workshop, or other planned event, plan out a list of core questions. With your goal as your focal point, think about what questions can help you get to that goal. It is hard to just ask someone what is required. You will probably get answers about what they want, not necessarily what they need (if they answer at all). It is often easier for stakeholders to describe what is or is not currently happening. They can articulate the challenges and pain points they are having with current systems and processes. They will even find it easier to talk about their own business work and what they are trying to achieve daily. These are great items to ask about to seek understanding. Within the notes you collect will be the buried treasure of requirements to be defined and confirmed. But first, focus on the good questions that lead your stakeholders along a journey to your goals.

Now, as you go through the planned questions, go back to your goal to use the unplanned questions. These are thoughts such as “*That’s interesting—tell me more please!*” or “*Why do you feel that way?*” or “*Why do you think that is so?*” Show genuine interest in your stakeholders and what is happening in their world. This will both foster trust in you and your skills and help the stakeholders buy into the work. Explore the topics together *with* your stakeholders. Often, they are learning just as much as you about what work has to be completed to make the proposed changes a success. So, encourage greater conversation and exploration with your questions. Open-ended questions are preferred at the initial elicitation stage to give you the space to explore. As long as you focus on your goal, you are not going off-topic. These types of questions help you better understand where your

stakeholders are coming from. The more you can understand and connect with them on the change effort, the more they will build trust in you and help you be successful in your analysis work.

Now, these don't all have to be face-to-face conversations. Some of the best information can be as easy as an email or as simple as a chat or text conversation. If you need to get to know the stakeholders better or it is your first time meeting them, then an in-person or virtual meeting can be preferred. Again, this should at least be the case for the first time. Once you have built rapport with your stakeholders and they understand not only what you're doing but also why, then it is much easier to communicate with them via email or text messages and voicemails. Now they have become valuable sources of information to analyze. You will find having an alternative source for data and information will make your verification and validation work even easier since you can compare what you found in your document analysis work with what your stakeholders are saying. Just know that the more you understand the answer or the reason for an answer, the more insight you will have. The more informed you are, the easier it is to make confident, data-driven recommendations for how to best deliver value.

## Capturing the business case

As you seek to understand not only what the change work entails but also why the change is valued, you will want to collect the information in a **business case**.

Business cases “*provide a justification for a course of action based on the benefits to be realized by using the proposed solution, as compared to the cost, effort, and other considerations to acquire and live with that solution*” (IIBA®, 2015). Business cases, which often take the form of formal proposals or presentations in many organizations, provide you with a great template to think through the change effort to ensure decision-makers are picking a long-lasting solution. Initially, always use a template. Use the following template in *Figure 2.1* or a modified version from your organization on every initiative, even if the project or work has already been defined. You want to practice answering these questions for every

effort you are spending valuable time on. These questions answer not only the *what* but also the *why*. They also articulate why now, why this option, why not others, and more to give the decision-makers greater confidence that, given the current environment and business context, they have the best recommendation to address their needs.

So, what exactly is in a business case? Well first, always start with the goal —*what value is to be achieved?* This is something every technique, task, meeting, workshop, and even daily activities you do should answer. This answers the why—it is the reason the team has dedicated time or resources to this effort in the first place. To go along with this, you then want to know what is or is not happening right now that is prompting this discussion. That is, why are we talking about this now? Why not before? Why not later? What has happened? What is happening? What we often call this is the *current state*. Do we know what we are or are not doing?

You then want be clear about what the *future state* looks like. Remember, your analysis work helps changes to be implemented successfully. What does “done” look like to this team? How do we know we’ve achieved the goal? The more clearly you can define the desired future state, the easier it will be to focus not only on the team but also on the output. *Scope creep*—where the size, space, and complexity increase well beyond the initial and often approved ideas—is something to be avoided at all costs, and being focused on a specific goal and outcomes helps!

With this known, the next step is to brainstorm ideas. In a perfect world, any idea might be possible. Every idea should be analyzed; avoid limiting solution options when first discussing how to realize the desired future state. The challenge is often that the business has already chosen an option, and that’s okay. Asking you to still build out a business case is valuable because you are answering all the questions that need to be asked. Make a habit of asking these questions every time no matter what effort or stage of the change work is presented as the answers will guide your business analysis work.

Once there is a high-level understanding of why we're doing what we're doing, we can start defining the recommended approach. Many stakeholders want to list the product or technology they want to buy, but remember, it's about achieving value. A new calendar app will not bring value by itself. But an app that you have had properly installed and configured by a vendor who then provided you with end user training will give you a lot more value in keeping track of your calendar. See the difference? We want to clearly define the approach to achieving the solution, not just the product.

Every approach needs to then define the costs involved. Think not just in hard dollar costs but in time and resources. Even *opportunity costs* of what other work is not being done while doing this effort need to be considered. You want to lay out as clear a picture as possible of the effort required to bring about this change. It is then, as you think through these investments, that you start identifying the *risks*. What risks are involved with this approach? A risk can be both positive and negative. Try to lay out as many as possible. When you are first starting out, state what you know and simply add in the risks of what you do not know. For example, a great risk for a mobile application could be that the company has never custom-developed a mobile app internally before. Having never done it before, you simply do not know what unknowns there are with this work. But that's exactly what you're articulating. Remember, the content of your business case is there to not only clarify options but also help your decision-makers truly understand the context in which they are making their decisions.

Then, you shift to the potential impacts. Here is where the analysis work is critical and something you should work on whenever decisions come up in discussions. Think about what positive impacts this approach could have on the organization. Help the stakeholders see beyond a single line of business. For example, a mobile app for the marketing team could bring in new customers, but it also lets the security team leverage newer technology to secure account access. But marketing may never think about that! Of course, any action has an equal and opposite reaction—so what are the potential negative impacts of the approach? Could it take more time to train staff to support the application than planned? Issues with integration could delay launch dates or selecting a vendor the organization has never worked

with before could be challenging. There can be a lot of risks with changes being made, but there are also risks of not achieving the goals if no changes are made. You are not trying to scare anyone. Simply focus on giving all your stakeholders as clear an understanding as possible of what opportunities and challenges they could face in their approach.

Now, the real value of your analysis skills is in the ability to define options. You want to define as many alternative products, approaches, vendors, and solutions as possible to show that the team truly has selected the best fit for their desired goals given the current and future contexts. This is why brainstorming at the beginning is helpful. The team might select one option as the preferred approach, but all the other options should be explored to help the team include or eliminate the options from their decision-making. Just like the preferred approach, you will need to do a cost, risks, and impact analysis of *each* alternative approach. Every option needs its own analysis. It is not busy work but rather answering your stakeholders' questions before they are even asked. You're building confidence in the decision-making because the stakeholders understand the ramifications of their choices with your laid-out analysis. This is where you can even bring up the idea of *not* making the change. There is always the option to do nothing. Put this in your options so that people think through the rationale for their change effort. Organizations can devote a significant amount of resources to something that becomes obsolete a few months later. You want to prevent that by having the conversation now.

Then, finally, always restate the recommendation with an initial plan and evaluation criteria. Decision-makers need to know what the next steps are once they have made the decision. How do they get started? What's needed immediately to move toward the future state? These are just the initial steps. Do not worry about building a full project plan. But then what is often more valuable is articulating how to measure the actual progress of the change effort. How and when would you measure success? Even initial metrics and ideas are helpful. Again, you are showing not only the opportunity but also the full landscape of the change work so that your stakeholders can make as informed a decision as possible.

These business cases can be as simple as an email or more formal in the form of a presentation. *Figure 2.1* lays out the questions that you want to walk through in any format to help ensure you have provided a solid business case.

**Business Case Template**  
*Recommendation Structure*

- **GOAL:** *What business strategy does this support?*
- **Current Situation:** *What is happening to make this need required at this point in time?*
- **Desired Situation or Outcome:** *What does the business hope to achieve?*
- **Recommended Approach:** *How can we solve this need?*
  - **Costs:** *What potential costs would it take to deliver on this approach?*
  - **Risks:** *What things are unknown that are associated with this approach?*
  - **Impacts:** *What possible positive/negative impacts are there to this approach?*
- **Alternative Approaches:** *What other options could be considered?*
  - *For EACH option include the:*
    - **Costs:**
    - **Risks:**
    - **Impacts:**
  - *Ensure to also include an option of DO NOTHING and its information*

Option	Costs	Risks	Impacts
Do Nothing			

- **Restate and Define Recommendation Approach:** *Be clear on what you are recommending.*
  - **Recommended plan:** *What is needed to get this started?*
  - **Evaluation plan:** *If selected, how would you measure success?*

*Figure 2.1 – Business case template*

So, if your organization does not use a template or other business case format as in *Figure 2.1* already, start to use this template daily. No matter

the size or scope, these are the questions you need to ask. Whether you write it in a formal document that is reviewed and approved, or you simply state the elements in an email or even a verbal conversation, get comfortable with looking holistically at challenges and opportunities by building out business cases. Even a simple email request to your manager can be structured using a business case format. In the email, you can present a brief analysis of the options considered, outline the potential impact, and recommend a specific course of action. This demonstrates that you've thought through the decision and are suggesting a well-considered solution. Seeing the alternatives and impacts of potential decisions will not only help you build fluidity in your work and expand the number of solutions you can recommend, but you will also demonstrate the value you provide for an organization by ensuring they truly have an understanding of what the change work means to the organization.

Whether from reading documents or working with stakeholders directly to understand their situation, consider all this work as input and insight into what the organization needs to deliver value. What you have found is simply information. Business analysis professionals are treasure hunters seeking the paths and opportunities to organizational success. The more you get to practice and experience these within different organizations and environments, the more comfortable you will be with sifting through the information to find those focal elements of needs. As you get more comfortable, you'll also more easily be able to use other analysis techniques as they will build on these foundational skills. You will commonly use these techniques to prepare for more interactivity and facilitate workshops as your analysis work grows in both size and complexity. But while you might have elicited understanding using these techniques, the true value comes now in how you analyze the information to clearly articulate the business needs. Being able to capture, trace, and manage those needs as you analyze them and turn them into working requirements is where the value of your analysis skills will truly begin to emerge.

## Capturing needs

As you dive into the vast amount of information available in your analysis work, you will discover the need to properly capture, track, and categorize the information you are receiving. In business analysis work, you will often get more information than is required for the current effort. The upside is that it might be great input for future work. Learning and understanding never waste time when you think about always tracing back to what the business can do with the insight gathered. Being able to not only keep track of the requirements identified and their status but also keep yourself focused and on task are key skill sets of successful business analysis professionals that you want to start learning right from the beginning. **Item tracking** is the official technique defined by IIBA (2015), and you want to do it daily for not just requirements work but all your work. The focus is simply on taking information and its related data pieces to support the change work throughout its lifecycle.

As you identify requirements, and even potential requirements or ideas, the first thing you want to do is simply capture them. This is as simple as starting a list of items to track. First, you articulate the need—what is required? These are the statements of functionality, which might be “*the system should be able to compute the tax rate on goods purchased*” or “*a user must be logged in prior to accessing the timesheet*.” The documents you read or the stakeholder interviews never state it directly this way. But you come across a need and then you translate it to what is required. That’s it. Don’t overthink this step as there’s plenty of opportunity ahead to verify and validate what you have captured. For now, simply articulate the requirement and write it down.

Also, start simple. You don’t need any fancy technology to begin with, though it is good to always ask whether there is a format, software, or template that you can use. If not, however, one of the best tools to use right from the beginning is a spreadsheet application. Now, the reason why starting with a spreadsheet and not a word-processing document is advised is that you are going to want to track information about each requirement. This is metadata on the requirements. What do I need to know about each requirement? What questions will I be asked about the requirements? What actions will I need stakeholders to take on the requirements? All these

questions can be answered with some smart item tracking. And that tracking needs to trace all the details back to the requirement and down to the solution. So, I might put things such as the following:

- Description
- Source
- Verified?
  - By whom?
  - When?
- Validated?
  - By whom?
  - When?
- Acceptance criteria
- Dependency

Again, use a simple spreadsheet to start, such as the one in *Figure 2.2*.

Item #	Requirement	Description	Source	Verified By	Verified Date	Validated By	Validated Date	Acceptance Criteria	Dependency
1	Available 24/7	Application must be available 24/7	Marketing	Marketing	2-May			Can use after business hours	
2	Able to log in	Users need to be able to authenticate to see their own items	Technology	Technology	7-May	Security manager	12-May	Authenticated users enter correct user name and password and then can see their accounts Non-authenticated users see no account data	Accounts setup

*Figure 2.2 – Example requirements traceability matrix*

What you are doing is creating a **requirements traceability matrix (RTM)**. This is a common way to track requirements as it allows you to trace all the metadata for every requirement or item you find.

Here are two habits that you want to build right away:

- Capture the requirements
- Add more fields (metadata types) for every question or process using the requirements

Use an RTM instead of notes or a note-taking app as it will save you a ton of time moving forward. Remember the requirements are not about producing a presentable document to be read and then discarded. Picture

this more as an active, living, breathing entity that grows as you continue to elicit, understand, learn, and evolve the change work. Things will be added and then changed, updated, and modified. Perhaps a good column to add is *Status* to know whether it was just an idea versus something approved to build and deliver.. Simply start by putting everything on here as you learn but then continually update and add more information as you go. You want everything you are doing with your analysis work in one place. Think of this as all the information you might need to track as the change effort moves forward. Again, this is why spreadsheets or some sort of relational database are helpful so that you can track, relate, and report on the status of all the requirements.

Now, there are a number of requirements software out there too. Find out what your organization is using. If they don't have something, start an RTM for your current work. Turn your lessons learned at the end of the project into a template for your next change effort. Each time you use your RTM template, evolve it to help you trace those requirements all the way to their delivery. Think about reusability here as much as possible. Sometimes requirements on one project are similar or even the same as the ones you need on the next project (if they are a business need, then remember they exist and must be present even after a project has concluded). Think again about how great it is to have requirements already documented and analyzed for you! All you have to do is maybe make some small modifications or add some new test cases. That is definitely business value!

Companies with robust requirement management systems are great at reusability as the requirements are stored into a system for continued reuse. While these solutions are not as common due to their high costs right now, even saving spreadsheets to a project space or collaboration area can help future business analysts review the work you did for a prior project. Always think about reuse with the requirements: Reuse the list constantly throughout the project to stay focused. Then, reuse the requirements, the template, and any of the metadata for future changes.

## **Tracking requirements in agile environments**

The spreadsheet and tracking list approach described so far is generally geared toward planning-based project work, that is, where all the requirements are defined upfront and the team works to deliver the requirements as confirmed (verified and validated) in the solution. However, while teams using agile approaches to requirements and development work might use software tools such as Jira™ and want requirements to be written in the format of a user story, they still require the same traceability. User stories are broken down into tasks to build, test, and deliver the requirements. User stories are traced back up to their themes, features, and epics or other categorizations where they add the most value collectively. You still need to track metadata such as status, priority, and level of effort. Simply find out what format or tool your organization uses and try that while you get comfortable with the process. The format is not as important as getting the data together in a consistent and usable format that helps you validate that the change work is delivering the intended business value.

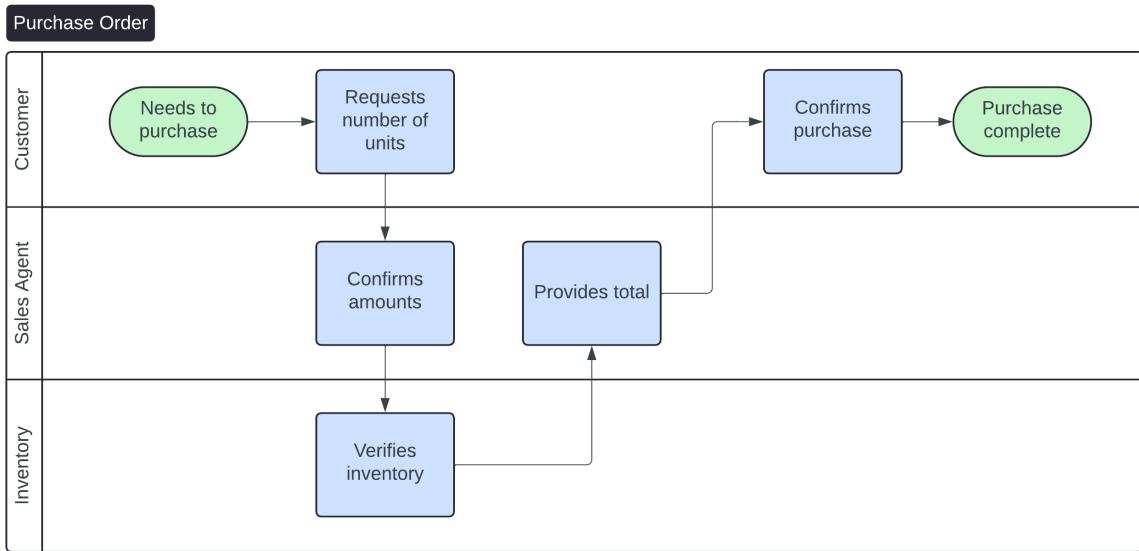
Back to the definition of requirements that we saw in the previous chapter —“*a usable representation of a need.*” Remember that what you produce in your analysis work still needs to be usable (IIBA, 2015). That is why a simple spreadsheet can be quite effective. If the team members can all pick it up and use it to find out the status or answer a question about the work, then that is the best format. It is usable. And if people are picturing the same thing when they do read the work, then it is a usable representation. The requirements tracking, while your responsibility, is not your product. You are creating artifacts that *enable* the team to be successful. The requirements need to facilitate the successful implementation of a solution that addresses the business need. So, ensure you share and communicate your requirements tracking lists frequently. Placing your spreadsheet in a collaboration space so that others can review and update it can save you valuable time while quickly giving other team members valuable information. Knowledge management is an area you can explore further that helps you consider information from this larger perspective of reuse and leveraging for future efforts. That is the whole goal of capturing and tracking what is needed to deliver business value. The value in capturing the needs is in helping your stakeholders understand the full view of the

change effort, often using multiple communication vehicles, as you will see next.

## Visualizing requirements

Requirements, as stated, have to be usable. You need to be able to communicate the requirement to different audiences and have everyone understand and picture the same end goal. This can be very hard for many people. Remember, especially with project teams, that people of different backgrounds will have different experiences and biases that they naturally bring to information and discussions. Every single stakeholder, including yourself, needs to be able to articulate, translate, and comprehend the requirement in the same way. This is why your visual skills are key tactical components of your analysis work.

One of the best ways to visualize requirements that arise is **process modeling**. Process modeling simply shows how work is carried out in a graphical form (IIBA, 2015). It defines a process and the steps it takes to complete that process using visual cues to articulate the actions happening. *Figure 2.3* is an example process model for a purchase order process. The oval shapes show the start and end points while the boxes define the actions or steps taken to complete the process.



*Figure 2.3 – Example process model*

Process models are indispensable visuals that speak up to the business level and strategically look at how functions and capabilities are organized from the broader perspective. They can speak all the way down into the technical mappings of components and architectures at the tactical level. You will want to start getting comfortable with process modeling as part of your foundational skills. In your elicitation sessions, listen to what your stakeholders say are the steps that happen in a process. As soon as steps and actions are mentioned, start capturing them in a visual model. Stakeholders will appreciate the visual depiction of information as many stakeholders never see this kind of visual supporting their work. Business analysis is all about value, and that is exactly what process models do. Simply creating a process model during a discussion adds value in several key ways, including the following:

- Defining the current process
- Visualizing the future process
- Documenting elicitation results
- Drafting requirements
- Creating an artifact to verify and validate information
- Providing SOPs and user guides for staff

Wow! With just one visual, you can do all that! But you want to build these habits now. Get comfortable with creating visuals live during meetings. Then, walk through your visuals with your stakeholders before your meeting ends. This will help you quickly verify and validate any assumptions and ensure you heard them correctly. You can always clean up the diagram later (for example, align swim lanes, connect arrows, or explain acronyms), but capturing the ideas and information from your stakeholders while they are engaged and present is key.

## Process modeling technologies and methodologies

To create some great process models, even if you feel you are not a technical analyst, you want to get comfortable with using some of the more powerful technologies early on. Microsoft Visio (2024) is one of the most popular modeling software, especially if your organization uses Microsoft products. For Mac users, the tool of choice is Lucidchart (Lucid Software Inc, 2024). Either is a great option, so see whether your organization is already using them or you can get yourself a subscription. Remember, you are helping the business maximize the value you provide, so the better the tools you have, the easier you will find your analysis work.

As you learn more about how to use these powerful tools (check out my course on LinkedIn Learning here:

<https://www.linkedin.com/learning/lucidchart-for-business-analysis/>), you will also learn that there are a lot of methodologies and nomenclatures out there. Learning what **Business Process Modeling Notation (BPMN)** is can be helpful, but do not feel pressured to push it on your stakeholders. Remember, the best technique is the one that works. Most stakeholders will never know what format your process model is in. They only care that their work is accurately captured. In the beginning, simply learn good process modeling standards, such as swim lanes and process steps. Ask your organization what formats they use and prefer. It is easiest to follow their standard or model. Then, focus on getting comfortable with drawing these live in your sessions. Start creating process models with applications you are comfortable with but know that an application whose purpose is process

modeling will give you many more features and functionality that will streamline your work, especially with web-based applications such as Lucidchart that are adding more AI features to the application that greatly speed up and enhance your analysis work (Lucid Software Inc, 2024). While there are many free apps out there that can help you show visual steps, getting comfortable with these more advanced tools is what paves the way for more advanced diagramming in the future.

Building your foundational skillsets starts with seeking an understanding of the change effort, tracking the insights and results of analysis work, and then communicating them to your stakeholders. This will put you on the path to success no matter where your analysis work takes you. A business case or, more importantly, the questions that are asked when building a business case should constantly be considered by any organization to add value. Use these daily. Then, really take stock of where and how you track information. Getting comfortable with using and reusing templates and even sharing those templates with other analysts builds even greater value in your investment. But never lose sight of the fact that you are enabling others to succeed with their change work. You are providing the analysis to help them achieve the greatest value. That work is what builds the value of business analysis in an organization, but also in your career, as you will see next.

## Building a solid foundation

As much as business analysis is flexible and thrives in agile environments, building a solid foundation of analysis skills is critical to ensuring growth in your career. The activities, techniques, and even the tools mentioned so far in this chapter are what you should be using daily wherever your analysis work takes you. Get comfortable with listening carefully to identify the needs, communicating ideas through documentation and visuals, and justifying decisions in your business activities so that they become healthy habits on your analysis journey. Build as much analysis work into your daily routines as possible. Seek a greater understanding of news stories. Ask family and friends for more details on their travels and their career paths.

Be naturally inquisitive about why and how things work the way they do when going to the supermarket, store, or even medical appointments. You want to fire up those analysis synapses in your brain, so they are always firing while working.

As you gather information and greater understanding, you drive home the value of your analysis work with a focus on getting better business outcomes for your business cases. And the value becomes exponential when you enable teams to proactively make data-driven decisions with well-informed recommendations, especially when you integrate these skills and approaches into your daily habits.

## Building the business analysis business case

When you work hard to deliver quality analysis work, you are helping to build the business case for more analysis positions and capabilities in your organization. The business case template in this chapter and the questions that it addresses is the approach to take with every single decision you and your teams face in your work. Business cases are more than just a project artifact—they’re the alignment for the organization. They help decision makers make informed decisions. And a good business case can save an organization a lot of time and money.

But the analysis work is more than just the business case for the change work. The value comes in the complete package you provide. From building the business case and identifying options to defining and tracing the requirements all the way to the chosen end solution, the entire time you are keeping an eye out on the business. You ask constantly throughout the effort whether the work being done or decisions that are being made are best for the business. Now, starting out, the scope is small. So, all you have to do is continuously ask teams whether the work is still supporting the goal. Bring up for discussion anything that does not appear to support the original goal. This will help the team, or even yourself, to align the work back to the reason you are all doing it in the first place. This keeps teams focused and on track. Any organization would be thrilled to know that their employees are working on the right things at the right time for the right

reasons. But you have to ask the right questions to get the information that helps teams make those informed decisions.

When you keep this perspective, you are building the business case for business analysis. You are doing more than justifying your position; you are justifying the skillset that you bring to the table. Even with something as simple as creating a process model of the current process and the future process—sure, you need it to help get the changes in place. But then if you turn over the final validated process model to the help desk or applications team, you have just given them an artifact they can use long into the solution's life cycle.

Think about when you started your current position. Would you have appreciated it if every activity you needed to do for your work had been written down with step-by-step instructions? Or if you had a picture of the work or the process steps? That probably would have saved you a lot of time on even the smallest activities. Well, that is exactly what you do for the business when you do quality analysis work. You ask not just what is needed for the change, but also if the analysis work can be leveraged beyond the current project. It might be for cases such as this of supporting the operational teams. You can also help the team get ideas for future projects and changes through your research and analysis work. You have just saved the next team time and effort. This value only increases the more you look at what is best for the team, the organization, the community, and the business overall. Wear your business analysis “hat” for any work you do. Consider that you are justifying your position and the value you provide by always looking to deliver more than simply the tasks assigned to you. Think about how you can leverage the work you do for greater value in the future. When you shift your mindset to incorporating the tools and techniques of business analysis into daily work, you are truly building a business case for business analysis.

## Recommending solutions

At a foundational level, a lot of your work is going to be very task-oriented, especially if the role is focused on requirements and project-related tasks

such as specifying items, tracking and delivering documentation, and ensuring testing is completed successfully. But while you may be in a junior position when starting out, you are still the one to help analyze the situation to provide recommendations. You do this by seeking out understanding and uncovering needs. But the value truly comes when you offer a direction, grounded in facts and data, that offers the opportunity to achieve business goals. Getting comfortable with your analysis work is what will make you confident in approaching stakeholders with recommendations. That is what they are looking for from you—not the answer to every question but insights based on the information that you have acquired. They will see this value when you are focused on the business and not just a project or an application or technology.

#### An example change effort delivering business value

Let's look at an example that articulates how to immediately use the foundational skills while adding value. The IT department identifies that it is time to upgrade one of their servers. This is common and not unexpected as they do it often; however, they ask for a business analyst to help the team this time because it is a server that processes financial transactions, and they don't want any mishap. While this is not an official project on the overall company roadmap, you are assigned to the project team to help successfully complete it.

Now, you immediately dive into what information is available. What documentation do they have on the existing server? What documentation does the vendor have that explains the nature of the upgrade? Is there a project charter or work order that documents the expectations, timing, and any corporate requirements? Before the team meeting has even been set up to walk through the actual work, you are creating a clear picture of what needs to happen and why.

The next day is the team meeting, and you meet your primary stakeholders and SMEs to help you understand the change effort. While the team has been assigned the task with no deadline, one of the application managers informs everyone that they want to upgrade the application before the end

of the month and do not want to have to switch servers mid-project. Now you have insight into the deadlines and dependencies. However, you ask a question during the meeting about what functions and processes the application runs on the server your team needs to upgrade. The application manager explains that this server is where their internal reporting happens. The main processing for their application is on a cloud-based server managed by an external vendor. This is a great insight as you helped the team see that there is a dependency, but the risk is low if there are any issues with the schedule as customer data and functions for the application are not being run via this server.

The team lead starts running through a checklist of tasks that they used when upgrading a different server last month. While there is some feedback from the team about differences and things they won't do every time, in general, it is a comprehensive list of tasks, making the meeting efficient. After the meeting, you ask the team lead where the checklist is located for you to review. They state that right now it is only on their desktop, but they'll email it to you. You ask whether it's okay if you review it and make it into a template for the next server upgrade, so other teams have something to follow as well. They love the idea and appreciate that you thought of it. They advise that you share the template with the server team manager and ask where it would be best to post it on the SharePoint site so the team can easily find it.

While setting up the test environment, you ask whether there is a checklist the server team follows. The main server administrator says no and that they just create it from scratch. They further explain that it was the same last time because they are never sure what exactly the applications teams want to test, so they just start with basic actions and adjust if there are any requests during the testing. You help to facilitate questions from the server administrator and project team in a short meeting later that day after you are CC'd into multiple emails going back and forth with test environment questions. The answers help build a more robust listing than what the server administrator started with.

While the team is feeling confident about the test environment, you ask how they will test in production. They say that in general, they don't. They just hope no one complains about anything being broken because they are scared to touch production data. You take the test environment checklist of test cases and validation checks to one of the IT managers and ask how the same functions can be validated in production. You explain that there is a risk to some other applications using the server for financial transactions. The IT manager shares that they actually have a set of "test accounts" that get zeroed out so as not to impact any reporting or compliance requests. The team just needs to request the data and can get some help with production validation when the server goes live. You share the good news with the project team. Many teammates mention that they have been working at the company for years and had no idea that that was possible. The team is fully prepared, and the migration goes well.

While the team wants to quickly move on to bigger projects, you request running a lessons-learned session to review the effort. While your personal reasons for this are to be a more helpful analyst on the next project, you find that giving the team members space to share their thoughts and feedback is welcomed and appreciated. They point out some of the great work each team member did, share some frustrations about deadlines and demands of internal users, and confirm some of the process improvements you had noted.

You request, as part of the final task, to sit with the server administrator and walk through their setup process and what requirements they needed to know to ensure the test environment supported the risk-averse- approach. You want to capture these requirements with both the idea to help create a template for future testing as well as to simply create a survey for future testing needs. This way, the server administrator can easily delegate the creation of new test environments by having a team member use the template structure. Then, any of the technical teams that are requesting the test environment can answer questions upfront regarding how, where, and when the test environment is configured to best support their testing requirements.

You leave this small project feeling more confident. While you almost created more work in making templates and checklists and communicating the outcomes of the lessons learned session than you did on the actual project, you were a continuously value-adding member. This example is quite common and a great way to think about how you can add value to future efforts, which in turn adds pure value to the organization. These recommendations and insights seen during the change effort do not have a huge scope; however, they can have a huge impact. While you may never be the person upgrading the server yourself, the insight you have on the process and the team that turns into actionable investments for future technical work is exponentially valuable to the company. You need to recognize not only the opportunities in your assigned work to make valuable recommendations but also the broader impact you can create by always asking: What delivers the greatest value to the organization?

## Analyzing yourself

Carrying out analysis on yourself can be how you boost and continue a successful analysis career. What this means is to think about your goals and what you hope to achieve. Then, really take a hard look at where you are and where you need to be to achieve those goals. After that, start thinking of all the ways to go from your current state to your ideal future state. For each of these, analyze the pros and cons of the options. What kind of personal investment (time and money) do you have to make for each? What are the potential rewards and risks with each option? What if you make no changes and simply continue with your work as you do today (the “do nothing” option)? See? You’re already doing a business case on your own career. This is a great activity to practice your analysis skills as it is on a topic you know best—you!

Treat your career the same way you treat your analysis work. Analyzing your career is the perfect practice for the conversations and analysis work you will be doing with stakeholders. When a new job opportunity presents itself, again, do a business case and consider your goals and what you can do to achieve the most value. Seek vested stakeholders who know the business analysis career paths in your organization and even in other

companies to give you insight into possible options. But you will be the one who takes the elicited information and analyzes it for its value to your career. What recommendations do you have for yourself and for your career? Have you really considered all the options and what they could mean for achieving your career goals and putting you on a path to success?

Practice daily in your work, asking, “*Why am I doing this?*” First, you want to ensure you are doing the right work to help the business achieve their desired change. You should not be wasting time on any work that does not deliver business value. This is a great habit to develop. Simply ask stakeholders for more information to seek understanding and insight whenever you are not sure why you were tasked with a specific activity. Again, do the same with your career. If you ever find yourself in a position that is not adding value to your future career goals, then stop and analyze the situation. For example, say you find yourself spending more time on just authenticating users and managing permissions on an application than actually troubleshooting existing issues or designing improvements and integrating new features. If this is what you like doing, then this is fine. Now, if you want to practice and apply those analysis skills of working with stakeholders, capturing their requirements, and presenting ideas, then you might want to inquire about getting some more project-based work. Actively ask and inquire how you can be on teams that need someone to analyze documents and define requirements that can be implemented. Now, you are not only putting your career at the forefront, but you are also showing the value you can add to the organization by growing your business analysis skills while helping change work be successfully implemented. Recommending that the organization (and you!) can get more value by including you in key change efforts can be one of the best recommendations you make in your business analysis work.

## Summary

Business analysis work can start at any time, but building a foundation of essential skills and competencies will be valuable throughout your entire career. The emphasis throughout your work is to elicit and understand the

business needs. These are the requirements for how the business creates, delivers, and receives value. But requirements are not just scattered on the floor waiting for you to pick them up. Your interpersonal skills to engage with stakeholders are going to be key in eliciting an understanding of context, challenges, and organizational needs. From there, you layer on the analysis skills to seek and mine the data not only for the requirements but to identify insights that help you make informed recommendations. When you can see business opportunities beyond the scope of the current change effort, you are demonstrating the power of business analysis skills.

Immediately, you can start practicing your document analysis skills and learning more about your team, processes, and what the value streams are for your organization. Then, practice asking questions to team members about what you discovered. Reshape your emails into mini business cases that clearly articulate the needs and goals daily but give options and think through all the ways to achieve your objectives. Start building task lists to think about what you are tracking and why. A spreadsheet of thoughts, ideas, and more is a great way to start visualizing traceability and helps you prepare for larger-scale requirements management. If you are not already doing so, start trying some visual models of the work you do. In meetings, try to draw out what is or is not happening. Even if at first you don't share it with others, start getting comfortable in both eliciting process steps as well as using technology to model out structures and more. The more you capture information that others can use for future work, the more valuable your analysis becomes to the organization.

Get comfortable with these core skills, practicing daily. You will see in the next chapter how powerful the ability to visualize the change work can be in working with your stakeholders and getting their buy-in. You also need to have that mindset shift of eliciting insights with the goal of recommending greater-value business solutions. This is the foundation for being more strategic and handling increasingly complex business scenarios with advanced techniques that you will learn more about in the next chapter.

## Further reading

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# Chapter 3: Advancing Your Business Analysis Techniques

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As your business analysis skills grow and mature, you will find an ever-expanding offering of value that you can provide your teams, organizations, and environments. Now is the time to think beyond single change efforts and consider the bigger picture. What is happening before and after the change effort? What downstream effects might there be? What is or is not happening that created this situation in the first place? The way to start building this perspective in your analysis work is to use more advanced techniques that build on your foundational analysis skills.

The challenge begins with being comfortable with your foundational skills. Never lose sight of the true business need. What you are then doing is expanding the context of the change effort. With a larger context comes an ever-increasing number of stakeholders. This means that your communication and collaboration skills with your stakeholders are going to be even more important to your success. You are expanding in your scope and complexity and so should your business analysis techniques. Advanced techniques are what you need to consider now as you find success in your analysis career.

In this chapter, we're going to cover the following main topics:

- Exploring advanced analysis techniques
- Applying advanced techniques in real-world scenarios
- Best practices for implementation

## Exploring advanced analysis techniques

The foundational elements of learning how to elicit requirements and then track and manage the requirements' details are only the starting point of what you will need as your career advances. Most analysts begin their careers in operations, maintaining and improving current systems, and then what is most common is project-based work. The challenge is that operations and project-based jobs have a very tunnel-focused view of the change effort, which in turn limits the analyst's value proposition. You need to start expanding your scope. And yes, with expanded scope comes expanded complexities. But these more advanced techniques are how you can deftly handle the analysis of larger and more complex change work, all while keeping you focused on delivering value.

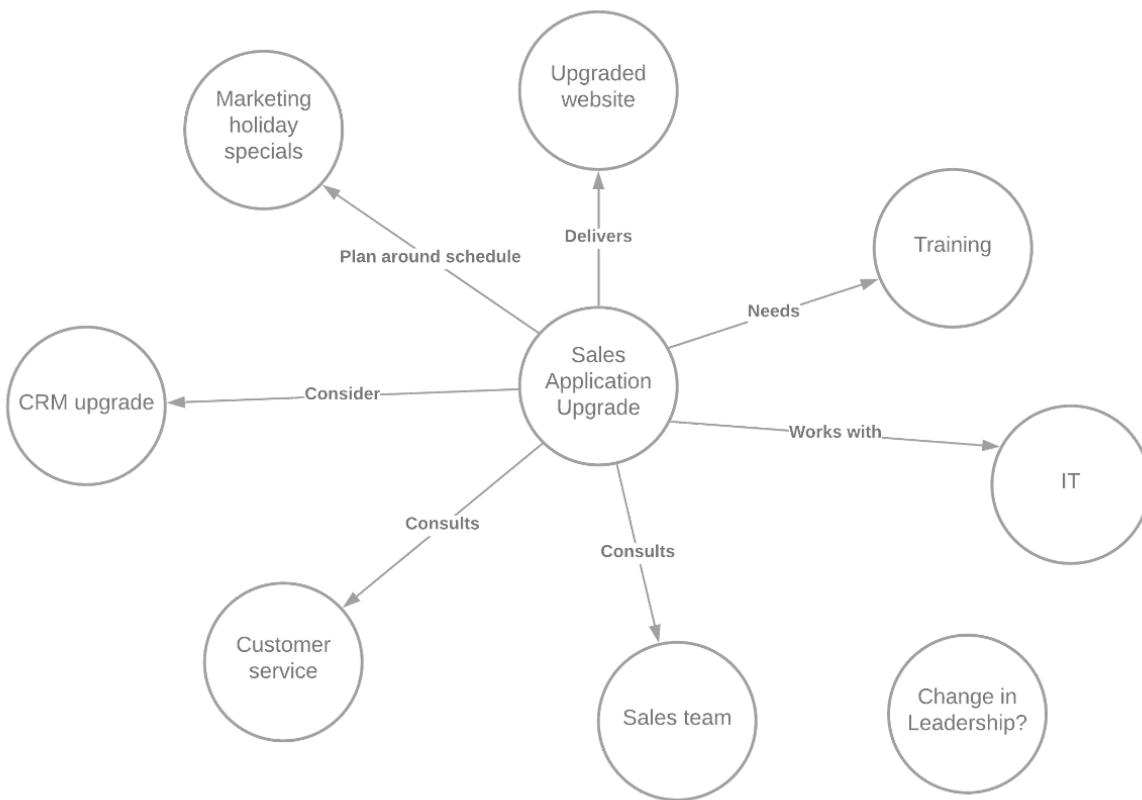
Let's begin with the more technical skills, which will help expand the ways in which you can collaborate with stakeholders to identify business needs in a larger context.

### Advanced modeling techniques

Pictures are worth more than a thousand words in your analysis work. Getting stakeholders to all picture the same end goal, solution, and design ideas is both an art and a science. While your initial models are always going to center around basic process models, having the following models as part of your elicitation and analysis activities will not only help you build more robust and long-lasting solutions but also build strength and dexterity in your analysis work.

#### Context diagrams

Context is king for all your solutions. What I mean by this is that understanding the context in which changes are happening is what turns a product into a solution. One of the easiest ways to understand the context is with a diagram of what is happening. *Figure 3.1* is an example of a simple context diagram for a sales application upgrade effort. The context diagram allows you to centralize your work and articulate all the other elements of the project, environment, and organization that may or may not impact the resulting solutions in a visual format.



*Figure 3.1 – Example context diagram for a sales application upgrade*

Start with whatever is being discussed in the middle of your diagram. In *Figure 3.2*, as you can see, our work in this scenario is the upgrade of a sales application.



*Figure 3.2 – Enter the focus of the change work in a circle in the center of the page*

With this focus of our project, then, as you can see in *Figure 3.3*, we start listing out, around the focal concept, all the thoughts, activities, stakeholders, systems, and more that are being discussed through our elicitation work.

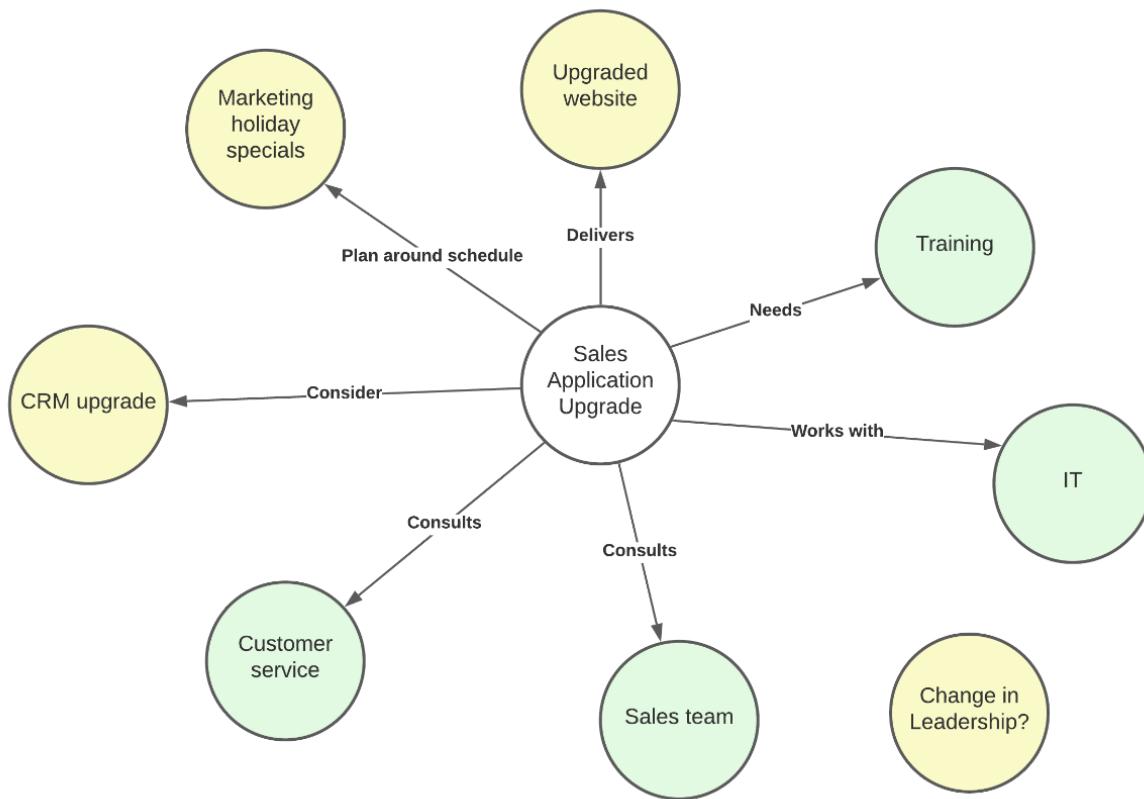


*Figure 3.3 – Brainstorm related items around the central concept*

This is a great brainstorming exercise at the start of any initiative to help people share what they are thinking and visualizing for the end result. Add anything that the group is unsure about as well. You want to create a space for and encourage your stakeholders to explore. Once you have identified the items in context (the circles in *Figure 3.3*), then add lines that go from your topic in the middle to each concept around it. On each line you draw, articulate the relationship. How is each concept related to your effort in the center? Why is each concept important? Why does the team want to keep that concept in mind? If a concept is added but the team is not sure how or even whether that concept is related to the effort, then simply do not draw a line at this point.

What you have just produced is a workable model to leverage throughout your effort. The items without a connecting line are ones where you want to confirm whether they are related and therefore within scope. But what the

team identifies at the beginning of any effort may not hold as the team learns more with the change work. Keep referring to this diagram, and as you discover and learn throughout the change effort, add, update, and delete items to help the team visualize the effort. An easy technique is to color-code the elements. In the example in *Figure 3.4*, the items the team know are in scope have been colored in green. The elements the team think might be impacted but are unknown are in yellow.



*Figure 3.4 – Context diagram with coloring to identify scope or verified context items*

As the project progresses, items are either turned green, or the relationship is removed and turned white so that there is always a clear picture of the context. This proves incredibly valuable to the team and helps them realize the complexity of the effort from the sheer size and scope of the work that is being generated.

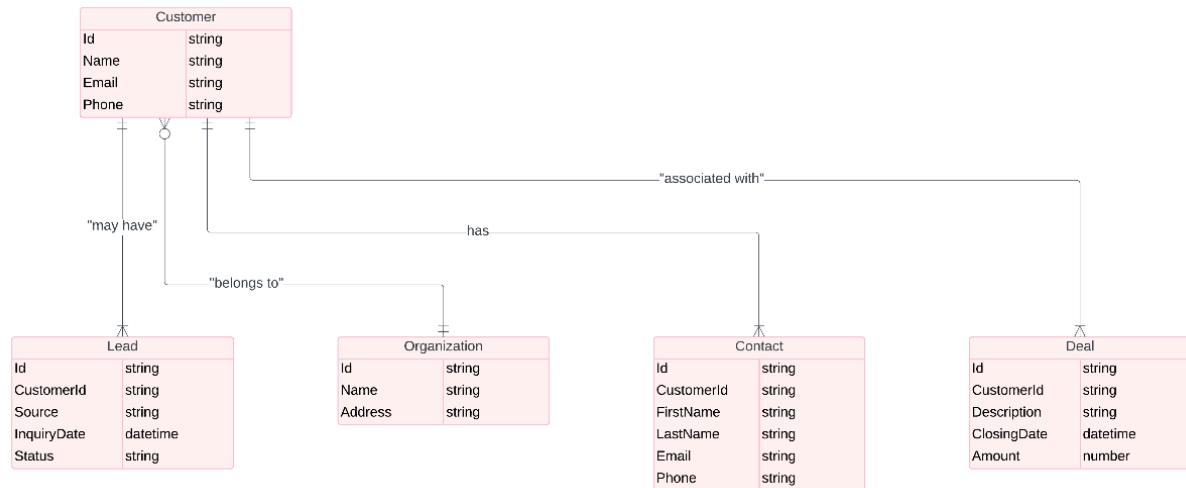
These diagrams are simple to create, and it is a good habit to start one with every effort. Simply remember that the goal is not the diagram itself. The goal is to use tools and techniques that enable your team to be successful and drive the results. You use the technique that works for your team and enables them to achieve their goals. The hard work of getting stakeholders on the same page will always have a high **return on investment (ROI)**, empowering them to be successful in their change work.

## Data modeling

Helping information flow between systems is critical to enable the success of a solution. Understanding not just what but how the information is able to transition throughout the business processes is critical to designing solutions that enable data-informed and driven decision-making, which is key to business success. There are two general data diagrams you might find valuable in your analysis work, especially if you work on technical solutions.

### Entity Relationship Diagram (ERD)

First, there is the **Entity Relationship Diagram (ERD)**, as seen in *Figure 3.5*. This is a type of data model that lists entities and their related attributes along with their relationship to other entities (IIBA, 2015). People who design relational databases or work with people managing related data will find these diagrams common to help organize and structure data. They list the data points, or *entities*, that are used and their related attributes, such as **Customer** in *Figure 3.5*. The models also help articulate the relationships of entities to other entities.



*Figure 3.5 – Example ERD for a Customer Relationship Management (CRM) system*

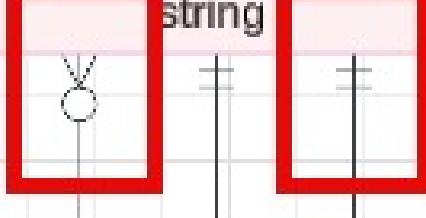
Many diagramming tools have ERDs or similar formats as base templates and shapes to leverage. There are also a number of import options and even **artificial intelligence (AI)** tools that can take the data requirements or information you already have and help you generate the models, such as Lucidchart (<https://www.lucidchart.com/pages/landing/er-diagram-software>). For each data point, you simply need the name and then a unique identifier. From there, the attributes are everything about that data point or entity. In our example in *Figure 3.6*, **Customer** is an entity that has a unique identifier, or **Id**. Then, for each customer is a **Name**, **Email**, and **Phone** value.

Customer	
<b>Id</b>	string
<b>Name</b>	string
<b>Email</b>	string
<b>Phone</b>	string

*Figure 3.6 – Example entity and the attributes for the entity*

After you have identified each element used by the solution or required in the end result, you will want to draw the relationships. ERDs use cardinality nomenclature to identify the type of relationship, such as one to one, one to many, zero to many, and zero to one (IIBA, 2015). In *Figure 3.7*, the cardinality is indicated by the connector on each entity. The example shows that a customer may have one or more leads.

Customer	
Id	string
Name	string
Email	string
Phone	string



"may have"

"belongs to"

Lead	
Id	string
CustomerId	string
Source	string
InquiryDate	datetime
Status	string

Figure 3.7 – The cardinality points indicating the type or relationships between entities

They are simple in concept, but the sheer volume of data elements can quickly expand the scope of your effort as you think about how many types of data or entities may be in your end solution. Always remember to ask stakeholders what is defined. Reuse prior projects' work and build upon existing diagrams to facilitate your work. Many solutions leverage existing or prior work. You could also check whether the organization has a repository of visuals and what standards they use. Even if you have to start from scratch with defining ERDs, the visuals can quickly help with articulating requirements and the solution scope for the entire team.

### Data Flow Diagram (DFD)

Another helpful diagram to use in your analysis work, especially when working with multiple technical systems, is the **Data Flow Diagram (DFD)**. *Figure 3.8* shows the concept of focusing on a central topic or component and laying out the external entities and data stores.

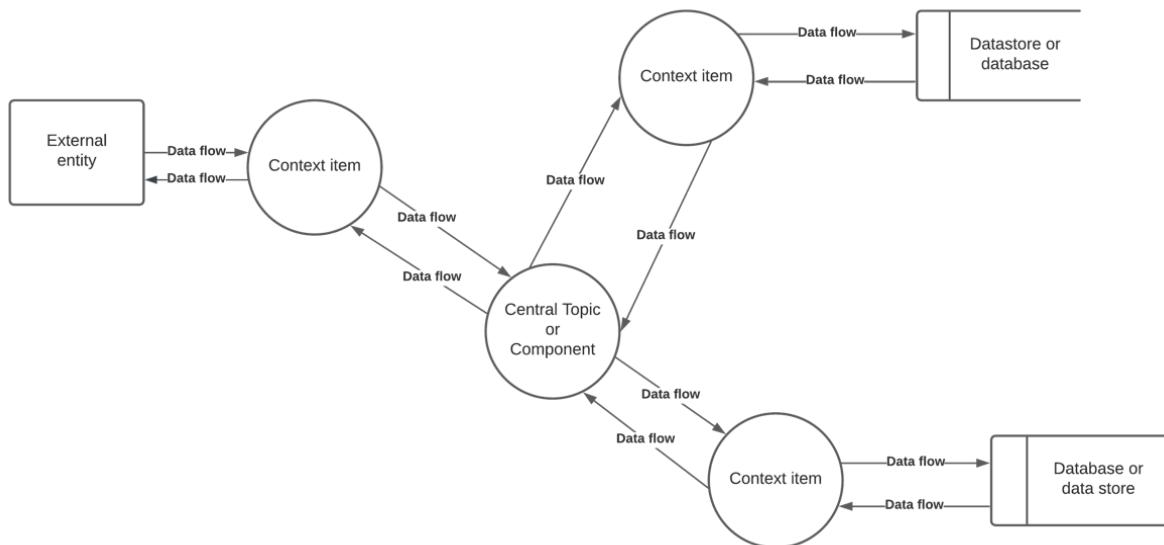
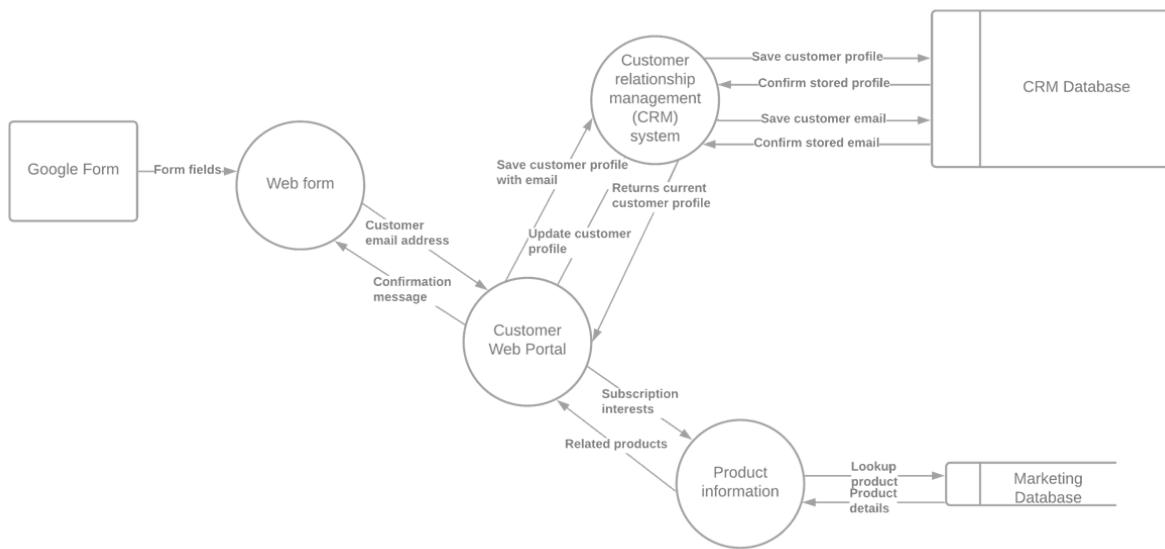


Figure 3.8 – The format of a DFD

DFDs help show the movement of data through a system or other technical component. There is normally data input and output from one part of a technical solution to another. For example, if you were going to work on the customer web portal feature your organization has, you would analyze where information comes from and where it goes. *Figure 3.9* shows an example DFD. In this example, your analysis reveals that there is a Google form that is used to collect customer information. That information is then sent to both the marketing team and the CRM system. You ask what types of data are collected from the external Google web form to the different solutions. Each type or piece of data can be labeled as a new arrow in the system to show the inputs and outputs. This helps articulate that while there is a CRM application, the actual data elements are stored in the CRM's database.



*Figure 3.9 – An example DFD to show the data coming from a Google form into various databases of internal solutions*

Each of the steps (the circles in *Figure 3.9*) in your DFD would be a great place to get data requirements from. Asking technical SMEs how the data is transformed and integrated to be saved in the various databases will be key to solutions that may not be realized without understanding how and where data flows between solution components. That question of transformation

and locations might introduce you to even more data models, such as an interface model or diagram to better show the information flow across and between different elements (IIBA, 2015). These are very helpful when you have multiple technical components working together to build a single solution.

There are a number of modeling methodologies and formats available to design visuals for your data, and it is worth understanding how powerful these data models can be to the organization. Data models, while helpful to project teams, are also great artifacts for operations and supporting the end solution. The exact format to use will depend on the owner of the final diagram. For instance, the database team may have a format for ERDs, and so it is best to start with their template even if you are simply exploring the possible requirements when you start. I always ask for the template the team uses or prefers and start there. But if none exists, you can create a template from the format you use and communicate both how you created the diagram and how you leveraged it. All the work you do should add value to both the change effort and the end solution.

## Value stream mapping

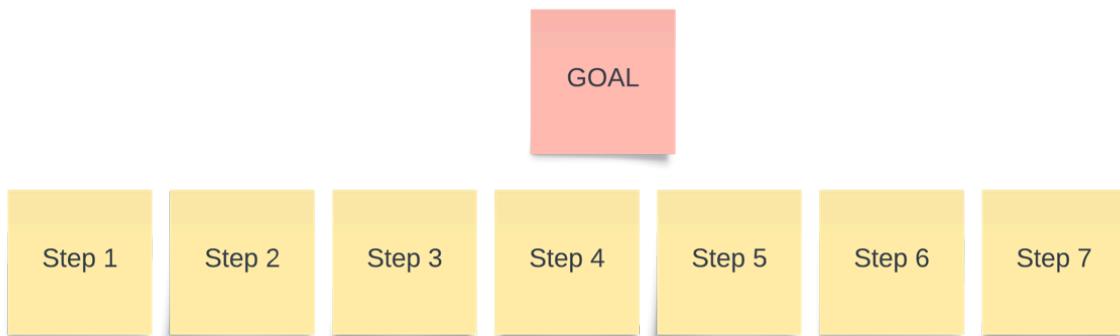
An additional technique you want to include, particularly in any effort that aims to improve processes and how work is performed, is called value stream mapping. By definition, value stream mapping is “*A complete, fact-based, time-series representation of the stream of activities required to deliver a product or service*” (IIBA, 2015). This simply means listing out the steps in order as done today to achieve a result, then reviewing the process steps to ensure every step performed adds value to the overall goal. The best approach is to see this as a collaborative technique with your stakeholders. This is why you want to start doing this once you feel comfortable talking the process through with stakeholders. Once you are comfortable with the process steps and have elicited full details from your stakeholders, you can show your value by applying the value stream.

To build out a value stream mapping, you will first want clarity on the goal of the process or function in question. This is not the goal of the project or

change effort but the business goal this process helps deliver. By doing this, you are getting your stakeholders to focus on value.

Then, name the process in question. Make it a good verb-noun description to show the action. “Customer service complaint” does not describe the process. You need a description of the action. Ensure your stakeholders state the process in action terms, such as “Receive customer service complaint” or “Track and record actions taken on customer service complaint.” The more detail on the goals and the names of the specific process, the more successful the next steps will be.

Start with steps. Articulate the steps of the process as they currently are. This is the *as-is* process, not what stakeholders want the process to be. It is also what generally happens, not the one-off instances or random times when supplies were out, somebody was out sick, or there was a power outage. What happens 80-90 percent of the time? Just carry out simple steps with a focus on what action is taken. An easy way of doing this is to use sticky notes (which could be virtual) to articulate what is happening. *Figure 3.10* shows the layout where the goal is clearly displayed at the top. Then, each step is on its own sticky note laid out horizontally to denote the process actions.



*Figure 3.10 – Sticky notes laid out to start defining the value stream of a process*

Now, for each step, you want to get the *cost* of that step. The easiest approach to quantify a step is often time. Simply ask how long (again, on

average, the “what usually happens” definition) each step takes to complete. Go through and then add up the value of time at the end. In *Figure 3.11*, the blue sticky notes are the “time costs” for each step with a total at the end.



*Figure 3.11 – Example process for submitting an application*

Then, for each step, ask whether the step helps to accomplish the defined goal. If it does, then you want to keep that value-adding step and so move the process step below the time amount. If it does not help accomplish the goal, then leave it as non-value-adding. “Waiting” is a common example where you find non-value-adding steps. You then add up the cost of the value-adding steps. *Figure 3.12* shows the value-adding tasks moved to the bottom, where the new total time would be just 16 minutes if the team removed the waiting time process steps.



*Figure 3.12 – Example process for submitting an application with only the value-adding steps measured*

With this, the team gets a great visual to ask about what can be done to remove the “waiting” steps from the process. There is a clear measurement of 130 minutes of potential savings for each time the process is repeated. But until the process is broken down in a way where only the steps that help to accomplish the goal are analyzed, the team can find it challenging to see the opportunity. This is why having visuals to accomplish your analysis work can deliver not only faster results but also more effective, value-adding results for all your analysis goals.

Now that you can begin to visualize the larger scope of impact your change work can and should have, you want to layer on the skillsets that complement your learning of advanced techniques such that you are truly delivering value. The major difference between junior and senior business analysis professionals is their perspectives. Advanced business analysis work involves thinking more strategically about the upstream and downstream effects of changes. So, adding strategic techniques to your analysis work will help you advance your solutions and your career into more advanced value-adding spaces.

## Thinking more strategically

Looking at your change work with a more strategic perspective will help you elevate your career path from tactical executioner to strategic partner. The way you do this is to start considering the bigger picture of every change effort. Consider each project or change initiative as a single building block helping to construct a larger structure for your organization. Where and how each block fits is determined by the overall picture and desired outcomes. Asking what these are is the best way to start moving in a strategic direction.

Since project-based work is often a very central point of business analysis work, understanding what a project is and the value of coordinating multiple projects together will help you expand your analysis perspective. You can simply start by asking what other projects are being worked on or planned. Just like your context diagrams; by considering these change efforts within the larger scope of the enterprise, you can start to look for the connections and relations to the overall value streams of the organization.

## Programs and portfolios

Just like project managers who go from managing a single project to coordinating multiple projects, business analysis professionals will see their scope of work expand from single change efforts to larger integrated transformational efforts as they find success in their analysis work. When a group of projects is managed in a coordinated effort for greater results than individually managed ones, this is considered program and portfolio management (Gareis, 2000). The sum of the individual parts adds up to greater value than each individual item, project, and even program in this case. You want to start taking the same approach with your analysis work. How does the work you are doing for one change effort benefit many change efforts?

Take, for example, your diagrams or a **requirements traceability matrix (RTM)**. There are the obvious lessons learned and creating templates for reuse for future analysis work. But then what about the data and

requirements within each of those products? Can they be used to support and enable other projects? To understand this better, let's see an example: consider a discussion to learn how refunds are processed. There is quite a bit of talk about how the original request for a refund comes to the company. While your project is not focused on the customer service center or the store cashiers, you capture much of the discussion to understand the upstream processes and assist you with scenario questions relating to refunds. But even prior to this discussion, you know that there have been other questions and desires from the customer service center to review the metrics of how many calls they address each hour, separated by call type. The customer service manager has been considering this as a separate project, not related to the work you are doing. But knowing this desire, you encourage the team to walk through what they know about the customer service process, though still focused on the refund scenarios. Knowing more about how work is happening in the organization, you give the process information to the customer service manager to ask more questions about their concerns about the current metrics. The insight you get from the current refund process turns out to be just the information the customer service manager needs to start building a more thorough business case to review and hopefully improve many of their customer service processes. So, you were able to use the analysis work of one change effort to support and facilitate other work! But this value only comes when you are thinking more strategically by looking beyond the confines of a single project.

Even the simple activity of building a test plan traces back to requirements. The more you can set up the test plan and all the test cases in a well-documented and organized way, the easier you make the regression testing for all future work (Katalon, 2024). Do not limit the scope of the value you can provide with single initiatives. Always look to see where the work you are doing can benefit beyond the current change effort. The more you broaden your view and see the bigger picture, the more you can see how many business needs are connected.

## Systems thinking

When you start stepping back and taking a holistic view of the scope of your work, you should begin to notice how interconnected and related your work is with other efforts. The value stream in organizations often extends well beyond where the work actually takes place. Looking at how people, processes, and technology are interrelated and connected is the foundation of **systems thinking**.

Systems thinking is about the relationships and how they come together to make whole concepts, not the individual pieces (Anderson & Johnson, 1997). Take, for example, the customer service department. Most organizations have a team whose focus is on supporting the customer. How they do that is through customer follow-up, responding to inquiries, complaints, and concerns, and possibly even outreach to see whether there are more products the organization can add to the customer portfolio. Now, a traditional approach would be to dissect the departments by each of the functions they perform. Handling a customer complaint is a business process. Following up on a recent purchase is another business process. Outbound sales to see whether the customer would like to buy more products are unique business processes that you could define with clear start and end points. Now, a more strategic approach is to consider customer service as a whole. What does customer service mean? Most organizations do not want it to be labeled as just troubleshooting. Customer service should be a positive value addition to any relationship. So, how does the organization add value to its relationship with customers via its customer service team and department?

Now you're thinking strategically. A customer complaint is an opportunity to sell more of a product. A customer inquiry is an opportunity to survey for questions and ideas for future products. Turning the customer service department into a customer relationship organization could have much longer-lasting business value than a simple product purchase.

But what systems are in place now to enable this relationship? Is the CRM system set up so that the customer service representative has a clear picture of the customer they are talking to? How do they quickly find as well as log information about every interaction the customer has with the company? Is

social media and website or mobile app usage integrated into this customer portfolio view? Where and how are the customer service representatives empowered and enabled to make judgment calls as to how to best service the customer? Are the SOPs too rigid to enable the customer service rep to handle the call themselves? Or are there metrics on how many calls have to be escalated? Is the organization culturally averse to transferring phone calls and making the customer wait? How are customer service representatives compensated or encouraged to provide the highest quality service possible? And what is that metric and how is it recorded?

Just asking some great questions about the environment, context, and larger picture begins to uncover a hidden spider web of interrelated elements that can all impact, both positively and negatively, the environment in which customer service is provided. You cannot change one element without considering all the pieces of the web that are interrelated. That is both the power and challenge of taking a systems approach to your work. You understand the interrelated elements a business needs to include in solutions. This makes it easier to define the scope of work, even if you are now focused on an infinitely greater complexity of the work itself. You see all the touchpoints that are required for success. Think of all the related elements and what requirements would enable your change work to be a success. This broader view is how you change from delivering a product to rolling out and enabling a long-term solution. So, now that you have explored advanced techniques to help you tackle these more complex issues, let's move on to the applications beyond just a project scope to more strategic and solution-focused efforts.

## Applying advanced techniques in real-world scenarios

The knowledge of techniques and their purpose and design is the first thing to focus on to build your analysis skills. The practice and application are the experience that boosts your career from entry-level to senior analyst. Additionally, transitioning from project-based work, focused primarily on requirements and delivering a specific, measured change, to strategically

defining the projects in the first place is a different skill, founded in good business analysis work. Being able to look beyond just the project or iteration and analyzing processes and existing products for continuous improvements is where your business analysis skills are applied in your quest for career growth.

The two areas where you want to seek opportunities are the frontend, or the precursor to your current work, and the backend, the post-change efforts. These are where you strategize and help organizations pick the right directions for the right reasons, whether it is a specific project or product or even a change in service and branding. But also, do not be too quick to leave project-based work and time-bounded initiatives. Taking the time to measure the impact and asking what else can be done is the value-adding iteration many organizations do not take the time to analyze. So, when you do walk through the solutions and implementations to explore where more value can be added, you are truly adding analysis value to the organization with the right application of your analysis skillset to the right value-adding efforts.

## Getting strategic with advanced techniques

Just like a project requires a lot of process analysis to understand how things work, strategic analysis looks at understanding how the organization works. While knowing that the processes, systems, and even people are often interrelated and layered with dependencies, taking a structured approach to analyzing the business can give you both the insights and the confidence to have value-adding conversations with leadership and decision-makers.

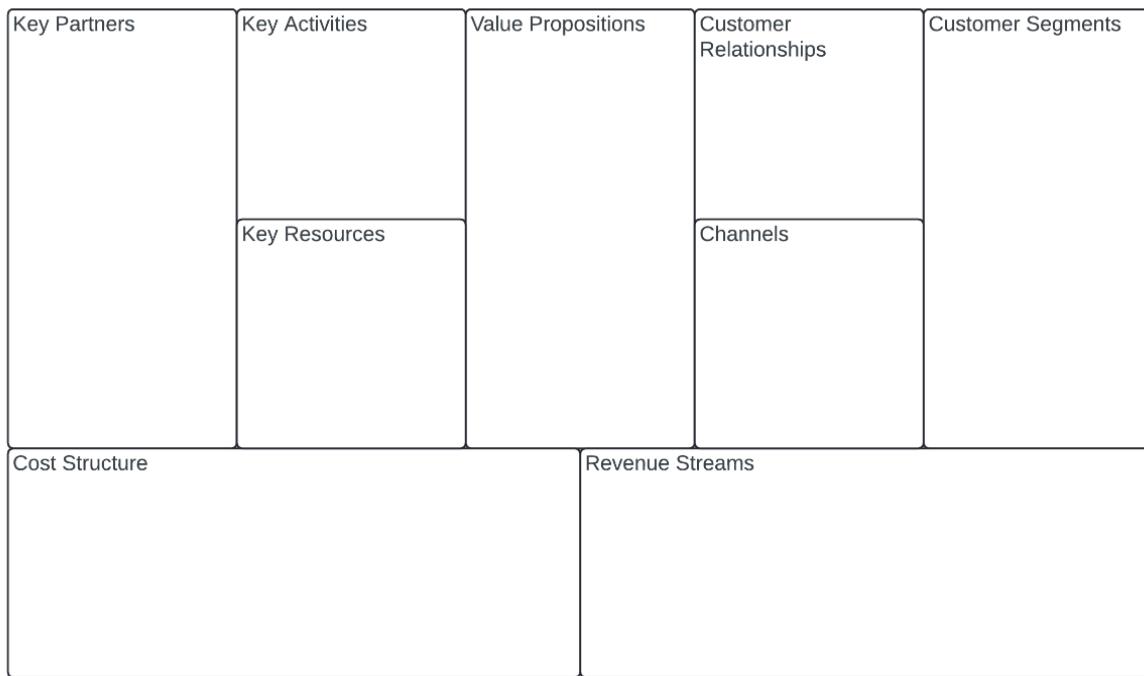
## Using the business model canvas

The business model canvas is a way to articulate the business. It breaks down the business into nine key areas:

- Key partners

- Key activities
- Key resources
- Value propositions
- Customer relationships
- Customer segments
- Channels
- Cost structure
- Revenue streams

But rather than treat this as a simple checklist of items, laying out the elements in a visual model, such as in *Figure 3.13*, helps you facilitate discussions that explore opportunities and understand interrelationships and dependencies (Osterwalder, A., & Pigneur, Y. (2010)).



*Figure 3.13 – The business model canvas visual layout*

A good example of the use of *Figure 3.13* is thinking through the key partners for a company's annual employee engagement event. There are a number of activities the marketing team is focused on. They are doing a

great job at leveraging existing customers to help support and be part of the exciting event. But when thinking about the partners, we start asking about who the suppliers are. The organization feels they are the suppliers. But then we might ask, who is making the T-shirts? Who is making the customized packaged desserts? We might also ask about the supplies for the activities that are planned. That is when marketing starts identifying who their preferred suppliers are. We ask whether these suppliers are customers (the organization is a financial institution). Most are. But that leads to a great discussion about the value of customer relationships where the organization could support their customers and the customers support the organization. The marketing team had never articulated this as one of the value propositions relating to a customer of the organization. Then, the customer segments which are missing is brought up. Why are these missing? Is it because there are limited channels the company is using to reach new customers? And what could that mean for the revenue streams?

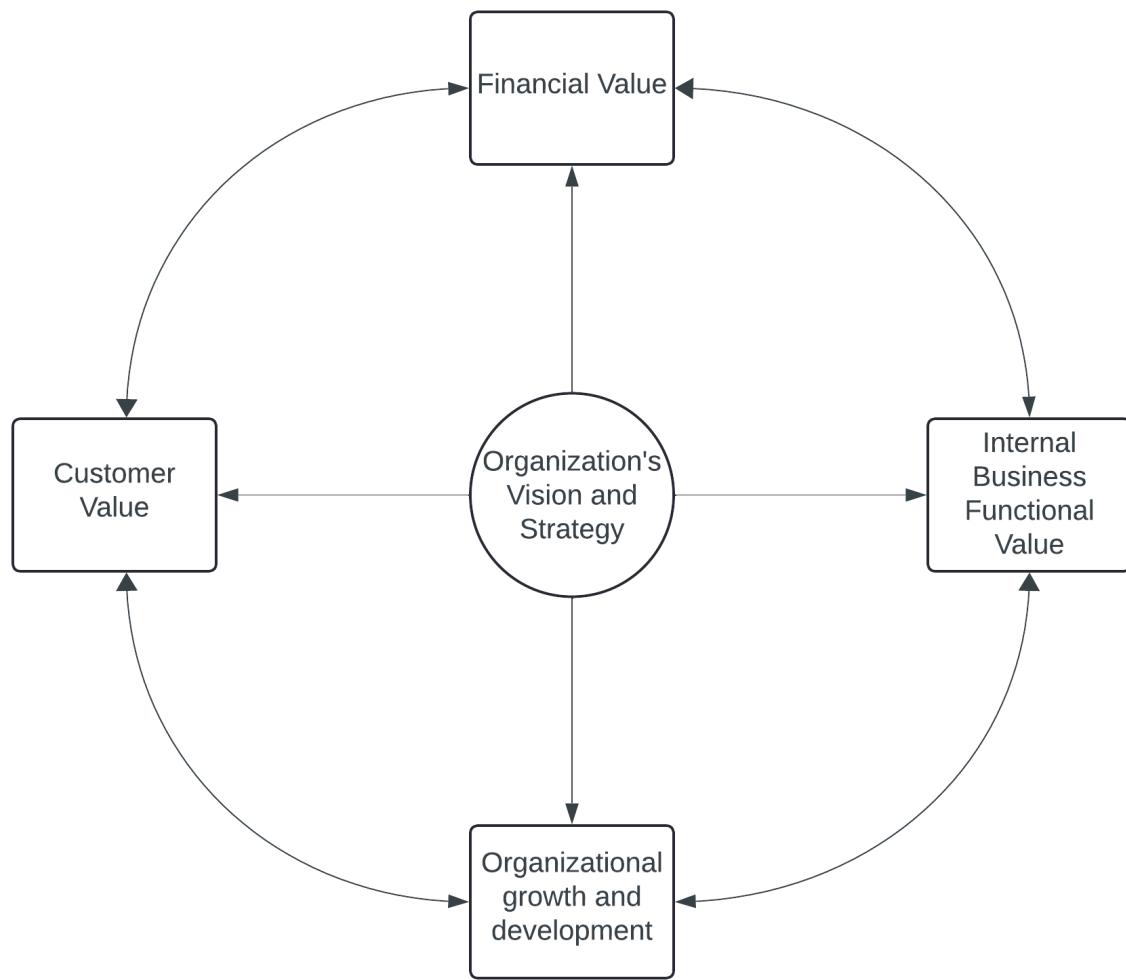
This circular discussion is exactly the power of the **business model canvas**. The interrelated elements are simply a reflection of how businesses operate. One area of the business cannot be analyzed in isolation. Yet, the power of using this as a facilitated discussion tool is what elevates your analysis skills. The visual can be a guide for your stakeholders, and it helps you ask those good questions that get your stakeholders thinking. Senior analysts are not worried about finding the best solution. They are focused on enabling the stakeholders and organization to find the best solution that works for them. By combining your ability to see the organization through a holistic, interconnected lens with thoughtful questioning, you can help teams make more strategic, informed decisions.

### Seeing the balanced scorecard in action

The analysis work at the strategic level often includes quite a bit of balancing both current needs with future desires, as well as past performance with industry trends and cutting-edge technology. Organizations want to invest in the future but balance that with the risks of today. Seeing when the organization is positioned to be unbalanced can be

the strategic conversation that elevates your role from analyst to strategic advisor.

The balanced scorecard is a helpful technique for this. *Figure 3.14* lays out the concepts of the balanced scorecard to help you consider the strategic organizational value change efforts can have for an organization, especially when looking across multiple efforts (IIBA, 2015).



*Figure 3.14 – The balanced scorecard elements*

Let's take a look at this technique from the lens of an example IT project that is quite common in many organizations. Leadership decides to implement some new technology. The stated project charter defines great

business applications and articulates the value the software itself should deliver. In the initial analysis of the effort, you, as the assigned business analyst, along with the assigned project manager are reviewing the information that was used to justify the project itself. Discussions with the technical team define the technical capabilities that they see value in and why they are excited about the solution.

So, in our analysis, we are seeing the internal business functional value – the benefits the IT team could get from advanced features and capabilities to manage the system. There is absolute value in investing in the capabilities of the organization to better manage data, services, and long-term future management. The challenge is that the technical benefits don't seem to benefit the end customer in any manner. It is not providing faster service to the end customer, even though the IT teams have more capabilities than ever before. Even when asked directly what changes the end customer would see with the solution in place, the technical team does not really have a good answer. The solution appears to be fully valued in the IT department only. And without the end customer being impacted, it is difficult to assess the financial value. The original business case stated that there would be greater access for the customers, which would be a benefit over the competition, leading to greater revenue. We are trying to look at this effort from the enterprise value stated in the business case, but the result appears unbalanced.

Referring *Figure 3.14* to analyze our situation, the internal business functional value is very clear for the IT teams, and it also enables them to be ready for greater growth and development. But those elements of development are more in supporting capabilities, so we feel the line is very light (if at all even existent) in terms of the customer value this is providing. While we have acknowledged the organization's vision of wanting to be a technology leader in the community, there is no correlation with financial value as even the support costs increase due to adding more technology.

We use the balanced scorecard model to have a discussion with senior leadership about the project's definition. Again, not devaluing the technical capabilities the project would deliver, we question the enterprise level of

scope the business case originally pitched. Leadership agrees and scopes the project down to an IT investment project within the portfolio. This does not have a big impact on the project work itself as IT SMEs still get the support and schedule to implement the change. The bigger impact is on the overall portfolio and the discussions that follow to now rebalance the portfolio to consider where they are positively impacting both customer value and the financial bottom line. Having the view of the balanced scorecard in the selection of approved projects helps the organization to stay focused on both internal and external efforts that yield value to the organization's goals.

We just applied this model to a singular project here. But you could use the same thought process in any discussion, particularly if you find yourself as part of program and portfolio analysis. Using this technique can help the team see whether they truly have a balanced mix of change efforts that will drive the overall vision and strategy of the organization. Too often, organizations will learn the hard way that they need to focus on the change efforts' impact and delivered value rather than simply the type of changes being proposed.

## Lessons learned

**Lessons learned** is a technique you will want to, have to, and without even knowing sometimes, leverage in every effort you put your analysis skills to work. Lessons learned is all about learning from your experience. This refers to both good and bad experiences. Most often, you will remember those “not so successful” sessions or the meetings that “did not go as planned” in your journey and be determined to never repeat them again. The trick here is to move them from “lessons identified,” where you realized what happened, to “lessons learned.” The way to do this is to identify the action that will prevent that mistake in future efforts, or the actions you need to take to ensure that every future effort is just as successful as what you experienced in this past effort. Once you shift your mindset to the action-focused learning perspective, then you just need to look at the work you do with your stakeholders and what that learning means for your career.

## Lessons learned from your stakeholders

First, your stakeholders are going to give you the most lessons learned. Think about the fact that as an analyst, you will often work with people whom you are not in charge of. Yet, you will have the responsibility of helping those stakeholders successfully implement valued changes. Just reading this situation can feel like a lesson learned in itself! As long as you act on the learning elements, you will be wildly successful! Let's take a look at an opportunity to consider how best to run a successful lessons-learned session, or retrospective as they can be called in agile teams, that elicits learning and input for the next iteration.

Too often, stakeholders will use the “after action” time, the post-launch meeting, or some other **post-implementation review (PIR)** to complain about all the things that went wrong on a project. This is common in organizations where many project managers often struggle to get support to have even a wrap-up meeting (too many are already burdened with more projects that are demanding their attention). You can be a facilitator to help ensure that while there were many learning points throughout the most recent effort, these pains do not need to be repeated or endured by others. Remember, like most of your analysis work, your job is to seek out value in both current and future efforts. So, when people start sharing how many changes and issues happened on the most recent project, first acknowledge it. Remember, feedback is a gift. In your role, you are always seeking input, ideas, and more. Feedback becomes that gift of information and more. Apathy will always be the obstacle to overcome because you will get little to no input. But feedback, even negative, is still feedback. So, your stakeholders should first be appreciated for simply taking the time to give feedback. Then, layer on your analysis superpowers and encourage them to share what would be useful or could have helped to avoid one of the issues in the first place. Not having a user guide can be very frustrating for any team, as a great example. So, now that you know the root of the issue, ask one more (most critical!) question – what can be done to prevent this issue from happening again? In this case, it can be as simple as creating a user guide. The team actually documented quite a bit of what they learned, so an action item to have the learning and development SME finalize a user guide

for the new system can be assigned with a due date that is 30 days from now. *Remember that due dates always drive results!* Now we are getting proactive with the work on this application.

In a facilitated workshop session, the stakeholders will quickly get used to this idea of sharing feedback and then searching for ideas on how to solve issues, followed by an assigned action item. Once the stakeholders get rolling with ideas, layer in the positive outcomes as well. For example, in one project I was assigned, which was a simple server upgrade, as the analyst, I coordinated the testing and troubleshooted all the issues to help be ready for production according to the schedule. It went so smoothly, and I documented things so well that the next year, when the server needed to be upgraded, the organization did not assign a business analyst. After the server upgrade was eventually completed, one of the engineers told me that they did not realize how much work I did in the testing phase to help keep things on schedule. The team really struggled without an analyst assigned and the schedule was severely impacted.

Together, the SME and I went to the technology leadership team and shared this information. We asked whether we could implement some scoping questions when projects are being resourced to identify testing requirements, or even the possibility of testing requirements earlier to help ensure the alignment of resources. In this case, we were hoping to set it as a policy to have more analysts, or those with analysis skills, added to projects where testing was a major component of implementation. In sharing the experience and leveraging some data, our work resulted in a policy that helped get more analysts assigned to critical projects. But this only came about by defining and following through an action to ensure the lessons identified became actual lessons learned.

### Lessons learned from your experience

The second part is now to apply these same skills back to your business analysis career. With every effort you make in your business analysis work, always plan time to analyze your experience. Set a “retrospective” meeting

with yourself on your calendar after you wrap up each effort, no matter how small. In this self-session, ask yourself the following questions:

- What did you like doing in the effort? Why?
- What elements of the work did you *not* enjoy? Why?
- What portions of the work challenged you? Do you know why it felt challenging?
- What portions of the work were too easy? Were there parts of your work that felt like they were a waste of your talent?
- Was there any area where there was more opportunity for greater business analysis work?

You can see these are very similar to the questions you would ask of any project or work effort retrospective. But now the tricky part is in actioning your career.

For each element you enjoyed, create an action item that addresses how you can get more initiatives that include these topics and techniques. For example, did you enjoy learning about other areas of the business and how they operate? If so, ensure you are assigned to projects that are cross-departmental or require cross-functional teams to be successful.

For each element then that was not enjoyable, take a hard look at why. Was it because of a lack of skill or experience? These are easily addressed sometimes with more training or by shadowing other analysts on larger projects. Was the content itself not of interest to you? Again, seeking out more diverse work or even shifting from project-focused to strategic analysis or process improvement efforts can switch up the change focus enough to reignite excitement in your analysis work. The trick is, just like with your stakeholders, asking yourself what you are going to do with these insights. Assign tasks with clear due dates and hold yourself accountable. In fact, share these with your management and put them into your development plans so that there is a logical connection to your own growth. When you do so, you are doing true business analysis work on the business value of your past actions for future success. This approach then benefits both your organization and your career for many years to come.

With the knowledge of advanced techniques and greater scope and insight into where business analysis work can be performed, let's now talk about how you can apply business analysis skills throughout your analysis work.

## Best practices for implementation

The biggest differentiator in junior and senior business analysis professionals will often be not in what they do or even when and where, but in how they perform their analysis work. Business analysts empower teams to be wildly successful. They seek maximum business value and help organizations achieve greater good. No one person benefits. There is always a greater value delivery impact that even applies to the team's own learning and growth. An analysis professional who can positively impact individuals, teams, and organizational culture in addition to financial impacts and customer service is a person any organization would compete to hire.

As you work to implement successful changes in your organization, it helps to remember that the analysis professional does not own the end product. The analysis professional owns the *process* to enable the team to achieve their outcomes. The team owns the end solution and product. Your role is to facilitate success, both now and in the future. Facilitation is all about making things easy.

### Facilitating workshops

To begin adding a higher level of service to your analysis work, you need to focus on facilitating the change efforts. You are no longer simply a task completer or order taker. You are the motivation and focus the team needs to achieve results. You do this through your facilitation skills.

#### **Facilitation**

Facilitation's root word is *facil* which means "to make easy."

Your job is to make it easy for others to be wildly successful. This can be hard to swallow for new analysts, and this is why it is an advanced concept.

Senior analysts know that when the team is successful, it means they were successful. But you need to build confidence in that. The easiest way to experience this sensation of value delivery beyond just an assigned project is to facilitate collaborative experiences. Stakeholders may not understand what facilitation means to them until they experience the ease of accomplishing goals through a helpful guide.

A facilitated workshop simply means you will host a session to achieve some outcome. The outcome is normally business driven and you will have to have input from a wide variety of stakeholders with diverse backgrounds and experience. Being a facilitator means you bring everyone together and focus them on this singular goal. You set up the structure that you then walk everyone through to reach their intended end goal. Rather than worrying about an agenda, you focus on participation and outcomes. While you have your own goals in wanting to get everyone participating and contributing equally toward the desired outcome, helping the team achieve their desired business need is how you end a successful facilitated session.

### Prioritization in action

A common practice is to bring teams together to brainstorm ideas. Building a mobile application is often very exciting for integrating technological advancements into the business model. With an enthusiastic group, it takes little effort to get them to throw in all kinds of ideas. Through some good questions and encouraging elaboration, your team will come up with a large number of ideas.

However, almost as immediately as these ideas are voiced, feelings of doubt will creep into team members' minds. Comments of "too expensive," "that'd never happen here," or "not in our organization" will begin to fill the sidebar conversations of your previously enthusiastic participants. You will need to quickly step in and reflect on how great the number of ideas is as that is exactly what you wanted – a large swathe of ideas, regardless of their status, possibility, or popularity. Now, it is time to prioritize features that have the most value to pursue first. Again, to emphasize, it is far easier to prioritize from a longer list than to be stuck with only two or three ideas.

So, to prioritize where to start, before the first negative comment can even be shared, explain that you will do three rounds of voting. Each person will vote once each round. But what you do next is the special part. This is what makes it easy for the team to be unbiased in their personal opinions and focus on business outcomes. You tell everyone they are to vote first on the idea that is the most feasible. What would be the easiest to implement? You then give them only 15 seconds to choose before going on to the second vote. Now you ask everyone to vote for the idea that would be the most innovative. What would set the organization apart from your competition? Again, after a quick review, within 15 seconds the second vote is cast. Now that your team is warmed up, you ask them to vote for the idea that is the best. It is okay that each person has their own idea of what *best* means. After two rounds of voting, everyone will be quick to vote, and you will not even need the timer. Stepping back, everyone will be surprised that there are three ideas that have gotten more votes than anything else. In less than a couple of minutes, you have helped the team objectively and even strategically identify the first-priority ideas to start analyzing for implementation. The team finds it fun and is very optimistic and eager to start. The negative comments have disappeared, and the team is excited as the meeting now ends earlier than planned, leaving them to get back to their duties.

A shift in focus, coupled with some tight timelines, and you are left with a prioritized list of features. You had no input into what a “good” or “bad” idea was. In fact, the outcome is purely stakeholder-driven. You enabled *them* to look at *their* ideas from an actionable perspective to move efforts forward. Those skills, the ones that help elicit the work that needs detailed analysis support, are the valued ones that turn good teams into highly successful partners.

## Collaboration tools

As workplaces and the world in general continue to evolve and are pushed to deliver results at an incessant speed due to innovation in technology, getting people to collaborate on outcomes is as much a technical skill as it

is a people skill. Your analysis work needs space – space to brainstorm and prioritize. These spaces are often created with the help of technology as teams are more spread out and remote than ever before. Your facilitation skills help with handling stakeholders and their ideas. Using collaboration tools to create the work environment, capture the inputs, and visualize data for tracking changes into solutions is how you enable your own success.

Collaboration tools are becoming more common in the workplace, so learning the skills to navigate these technologies is going to be critical for your career. These are tools such as Microsoft SharePoint (<https://www.microsoft.com/en-us/microsoft-365/sharepoint/collaboration>), Google's Workspace (<https://workspace.google.com/essentials/>), and collaborative spaces such as Mural (<https://mural.co/>) and Miro (<https://miro.com/>), as just some examples of the more popular tools. These go beyond online meeting tools (although do get comfortable with having meetings in-person, online, and a mixture of both!). These tools are where the work happens. Get out of the habit of keeping your own notes and even emails and start ensuring anything worth knowing about a change effort is in a shared location. You should never be the sole source of information. Remember, it's not your information. It's the business's information. It's their ideas, decisions, and priorities. Even if you wrote the test cases, are they in a shared space for assignment, troubleshooting, and reporting status? This is the mentality you need for the work you do.

Setting up spaces for the stakeholders to work *with each other* is what creates that buy-in and focus back to business goals. Collaboration tools give you space to articulate team standards and expectations. Many use anonymous features so that people can share ideas freely without analysis. And more importantly, it shows what the group thinks and wants overall without the heavy weight of strong personalities. Everyone can participate equally.

If you have not used many of these tools yet, give them a go now. Start small and run simple meetings from the collaboration space. Try not to write down any notes outside that space. If someone emails you something, put it in the collaboration space and share the link until that person is

available for some training (so they can post in the shared space and share next time!). Build in the behavior that to help changes get implemented, collective input is required. The more you can create a space for people to come together, the more buy-in you will see from the team, leading to more successful outcomes.

## Measures of success

Now, with the work to help others to succeed, measures of success are critical. Knowing where you are at and what other measures there are helps you define the actions that take your analysis work from basic to deeper breadths and depths of work. Any good analyst will seek acceptance criteria for all efforts. Know what the acceptance criteria are for the success of the change work you are doing. How does the team know they are doing well? What value would be produced? Practice articulating this with your stakeholders to help them stay focused on goals and drive the discussions and decision-making toward clear outcomes.

You want to do the same with your own analysis work. When facilitating meetings, success metrics are derived from thinking about how the session went. Was everyone there who needed to be there (and *only who you needed...*)? Were effective collaboration spaces set up and enabled for participants? Did everyone contribute equally? Was there buy-in and acceptance for what the team produced during the session? Facilitation goals are almost more important than the meeting goals because the impact of good facilitation is felt long after the meeting concludes. Do this regularly on all your analysis work. Assess your results. Then, action each item just like a lesson learned.

As you begin to build metrics of your analysis work, be strategic in thinking about your career. What does success look like to you? What measures would be indicative of career progression at your organization? What is needed to grow your career beyond project-based work? Work to define these measures of success as then it becomes much easier to analyze the options to get you there. When on a path, if you have no destination, then any direction is correct. When you have well-measured success criteria,

then the necessary action steps for your career are simply placed in front of you to own.

## Summary

Your analysis work will grow with complexity and size as your skills progress. In the same manner, so should your techniques and perspectives. Helping teams articulate their needs and then visualize them as they work through change efforts are the technical skills you never want to stop growing.

Modeling software is one of the best technical tools in your toolbox that, regardless of the option, can help you get comfortable with articulating change work and value in visual ways. The more you can step back and see the bigger picture, the more you can guide teams to think more strategically. That shift in focus from a task-based effort to a strategic view of how the organization gets value from any efforts is how you grow your skills and your analysis career. When coupled with key measures of what success means for you, it can become easier to plan your value-adding actions.

Often, you will have to face your own decisions about where and how to take your career. By focusing on and articulating what valuable business analysis means to you, you'll be able to find success in a sea of change – whether in the industry or technology. Just as you want to enable stakeholders to own the change work and integrate the end solution, you need to own your career and work to overcome adversity to reap the rewards of satisfying value delivery. To establish that path to success, next, you will look at how to build a career roadmap so that you can continue to advance your analysis career and overcome hurdles in your goal to deliver value.

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# Chapter 4: Navigating Career Progression in Business Analysis

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This chapter focuses on strategies for advancing your career in business analysis. From setting career goals to overcoming common challenges, you will learn how to navigate your career progression effectively. Many of the most valuable tools and techniques to do so are already in your analysis toolbox. Performing business analysis and learning more about the techniques and advancements in technology are core to a forward-moving career. However, the techniques to analyze your the successes and challenges of your career are the same ones you use with stakeholders in your analysis work. When you start analyzing your own progress with the same passion and fever you bring to your professional assignments, you can overcome any career plateau and continue to seek greater value in both your career and yourself.

In this chapter, we're going to cover the following main topics:

- Strategies for career advancement
- Developing a career roadmap
- Overcoming common career challenges

# Strategies for career advancement

The foundational elements of learning how to elicit requirements and then track and manage the details of the requirements are only the starting point of what you will need as your career advances. Just like tasks in a project that move a change from the current state to a future state, you will need to take action to advance your career from entry-level to seasoned professional. This action can be based on your assignments and what you do as a business analysis professional. You should also take your career into your own hands by considering certifications and seeking communities and resources of other business analysis professionals to engage and learn from. Let's begin with the more technical skills now to start expanding your offerings.

## Experience

When starting out, much of your analysis work may be delegated or assigned to you. This can be great as it allows you to dive into the assignments and focus on tactical outputs that are more discrete and build a strong foundation of experience. The more assignments you complete successfully with high standards, the more your skill set will be recognized. Once this happens, it is time to shift from simply completing the work to seeking out the work. Identify the needs of your own business analysis work experience and seek out solutions that deliver value for your career.

## Getting more strategic

Business analysis professionals who have started to prove themselves through a positive track record of great analysis deliverables coupled with positive interactions with stakeholders start to place themselves in a position of demand. As demand for your skills grows, it is time to start asking yourself what kind of work you both want and need. Yes, when employed by a company, you still need to do the assigned work and deliver the highest quality possible. However, as you start to notice the type of work you are often assigned, you need to ask yourself whether there are

other kinds of analysis work you should be doing (or, more importantly, should be learning about) that are beneficial to where you want to take your analysis career.

As you do with your stakeholders, get in the habit of asking good questions, but start doing it on your business analysis work. Try some of these questions to expand your horizons:

- If you work on the same types of projects (for instance,, IT or HR), then ask “*Are there projects in other areas or lines of business that I could be assigned?*”
- If most of your projects are short in duration, then ask “*Are there larger projects or efforts that might take 6 months or longer that I could be a part of?*”
- If you are often brought in after the project starts, then ask “*Is it possible to be included in the initial project kickoff, to understand more of the business needs and desired outcomes?*”
- If you deliver analysis work and leave a project before it is completed, then ask “*Is it possible to follow up with end users after the changes or solutions have been in place for a little while to get their feedback and insight?*”

Try asking these questions to expand your business analysis horizons. Then, take note of what you enjoy with each different type of work and where you feel challenged. While those more challenging efforts might be made easier with more experience or professional development, enjoyable work can be key to designing your career roadmap. Focus on analysis work that aligns with the tasks you enjoy and challenges you to develop new skills. This approach is a valuable investment in your career growth.

## Getting a non-technical position

Business analysis work is rooted in IT. The need to tie business goals to technical solutions is what created the business analyst role in the first place [1]. With this foundation, many business analysis professionals start their careers working on IT teams or in IT departments. The challenge is that

business analysis is not only an IT skill set, it is also good for business, drives better decision-making, and improves overall business performance.

So, how do you move out of the IT space or get assigned a more non-technical role? First, do your own analysis work on your organization. Are there *analyst* positions in other departments? They might be labeled as *marketing analyst* or *risk analyst* positions. If you begin to notice these, then you know there are opportunities for business analysis work in those areas. Many times, you can easily transition to another area of the business in an analyst role because you are bringing the analysis skill set. You may need to learn the terminology and processes of a different area of the business but, as a business analysis professional, your passion for learning will make this an exciting opportunity. Many analysts thrive on exploring new environments and contexts. This is why your foundational skills are so important – because they can transition to any environment and still provide value very quickly.

Another avenue to consider that is quite natural for many analysts is a *project manager* position. This is often a relatively easy transition for some analysts who have been assigned to projects, and it's even easier to quickly dive in if you have been doing requirements work. The reason is that requirements are what define the necessary work to deliver a change. This work is called *tasks* and a project is simply all the tasks required to go from the current state to the future state. All these project elements and more require analysis work to deliver that requested change.

What is great about project management roles is that they are often not tied to a single department, especially larger ones. This means you will get to learn more about other areas of your organization by working in different spaces. The skills you develop as a project manager are also just as transferable as your business analysis skills. So, even if your future positions are not titled “project manager,” getting experience in managing projects gives you valuable skills to take and apply to any job, just like your business analysis skills. Getting experience in both these competencies will then enable you to seek out a wide array of positions throughout your career, especially as you get professional recognition for this experience.

## Getting a technical analysis position

While many analysis professionals may start in technical positions, the opposite can also be true. You may be thinking that you are doing analysis work but find yourself in non-technical positions or roles outside the IT department. This is great as it shows the value of business analysis work and its application beyond just requirements work. For you, a shift to a more technical position can be a great career move to give you a different perspective on where you can add value with your analysis skills. Technical work can feel more detailed and specific, tracing discrete requirements through testing and into implementation. Often, roles can involve lots of troubleshooting that will require you to flex your problem-solving skills.

Just like our non-IT roles, look for *analyst* positions inside your technical teams. If you feel like you do not have a lot of technology experience, junior positions are great ways to learn both the technology and analysis skills focused on a specific program or technology type. Start simple and use the junior position to focus on learning the technology. Leverage your analysis skills and constantly ask good questions so you start to identify relationships between components and technical areas.

And a note here – you can leverage your analysis skills and relationships to get technical understanding without having to take a fully technical position. If you are worried about not having enough technical experience, gain some technological knowledge. A great way to do this is to ask technical team members if you can shadow them while they demonstrate the features of an application, or ask to go with an IT team member when they are troubleshooting a problem. This is a great way to both learn about technical topics as well as share your analysis skills and bring a unique, unbiased perspective to the work they are doing.

## Certification

One of the best steps you can take for your career right now, whether you plan to stay in your current role or pursue a career in business analysis, is to explore relevant certifications. Certifications are becoming the biggest

factor in hiring and promoting professionals today [2]. Professional certifications mean a third-party entity will validate that you understand the activities and have demonstrated the skill set of that professional organization. They present a standard that organizations can use to assess your level of expertise. In your search for senior positions, you will notice that certifications are quickly becoming a requirement to even be considered for the position. However, the choice of certification should be made using strong business analysis skills and should align strategically with your career goals.

## Certified Business Analysis Professional®

When searching for business analysis certifications, **Certified Business Analysis Professional® (CBAP®)** from the **International Institute of Business Analysis® (IIBA®)** is *the* certification to demonstrate and display your professionalism in this field. This certification requires an application documenting 7,500 hours of business analysis work experience, along with letters of recommendation, and then you must pass a test that is over 3 hours long. While this can sound daunting, this is exactly why the certification will quickly set you apart from others. And, actually, if you have been doing business analysis work (you do not need to be called a business analyst or have that job title!) for at least 5 years, you probably already have the qualifications. You have to be a good business analyst and do thorough document analysis and interview yourself to ensure your work experience addresses all the requirements. Anyone who understands what is required to earn your CBAP® certification knows that if you hold this, you are committed to analysis work, both in your career and in your activities.

## Specialized business analysis certifications

In your career, you can go from a generalist to a specialist. Similarly, with business analysis certifications, there are also specialist certifications that you might consider. IIBA has certifications for analysis work in Agile analysis, business data analytics, cybersecurity, and product ownership (<https://www.iiba.org/business-analysis-certifications/iiba-certifications/>).

Each of these focuses on an area where you can do business analysis. Now, if you are enjoying project-based work, then looking into the **Project Management Institute's (PMI®) Professional Business Analysis (PMI-PBA)®** certification might be worthwhile (<https://www.pmi.org/certifications/business-analysis-pba>). This certification emphasizes requirements' traceability and change management work (PMI, 2024). There are also Agile and Scrum certifications including facilitation and more from the Scrum Alliance (<https://www.scrumalliance.org/get-certified>).

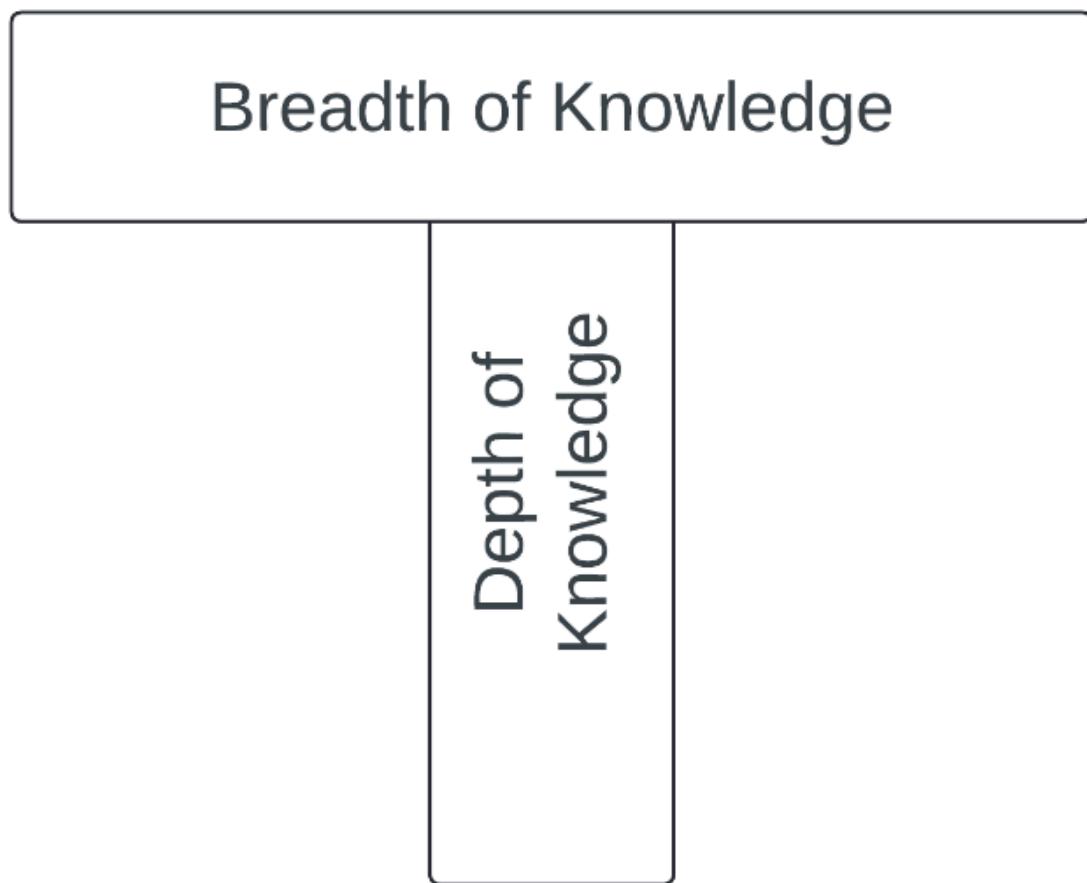
### Note

After finishing this chapter, consider developing a career roadmap to guide your decisions about certifications. The key is to choose certifications that directly support your career goals. This is what it means to be strategic in your career; just because you can pursue a certification doesn't mean you should. Focus on the choices that will move your career in the direction you want, ensuring your certifications align with your long-term objectives.

## Continuous learning and professional development

Now, as powerful as certifications can be on a resume, continuous learning and professional development are key indicators of advancing professionals. Demonstrating your dedication to learning and mastering new concepts and techniques through training and growth opportunities shows others your commitment to delivering the highest value in your work. Training can involve online courses or in-person workshops, but even listening to podcasts and webinars are great ways to learn new approaches and hear from industry experts who actively apply analysis skills. These are also areas you want to make healthy habits out of because when you get professional certifications, you often have to maintain them with a certain amount of professional development activity. Training then becomes a huge ROI when it is on both topics to support certification as well as immediately applicable to the work you are doing daily.

Know that your business analysis work will take you to many areas in your own organization and even to different organizations across a wide variety of industries. Each opportunity is a place for you to learn. Good business analysis professionals do not simply study business analysis, though. Instead, they often complement their depth of knowledge in analysis tools and techniques with a breadth of knowledge of business topics. The most successful business analysis professionals are the ones we see as “T-shaped,” as identified in *Figure 4.1*. This is from going wide and knowing something about a lot of topics (breadth of knowledge) and then concentrating on a particular topic and going deep into learning the specifics of a subject matter (depth of knowledge).



*Figure 4.1: T-shaped perspective of knowledge areas*

For example, as you learn more about the profession of business analysis work, you can take courses on the following:

- Process modeling and analysis
- Requirements traceability and analysis work
- People skills, such as facilitation and scoping
- Change management practices

These will boost your analysis skills and capabilities to deliver value. Imagine you are an analyst at a financial organization. Perhaps your organization does general training on financial practices, or compliance has a vendor on site to share updates to federal compliance regulations. These may not seem to have many ties to business analysis work; however, they can help you understand the context in which your analysis work will take place. Understanding your client's world will only enhance the value delivery of your analysis since you will not be hindered by unfamiliar acronyms or unaware of core functions and concepts your stakeholders are more intimately aware of. Business concepts are always worth learning about as they will become valuable in the future work you do to analyze the business.

### Networking, mentorship, and coaching

Hand in hand with seeking professional development opportunities is the ability to network with fellow business analysis professionals. The largest and most valuable business analysis organization is the IIBA. Although they are a global organization, they have local chapters and events all around the world. Finding out about the events and groups where you live can be a valuable resource for your continued development. Many offer support and study groups for various certifications, and you can meet business analysis professionals doing both similar and different work from yourself. You can get new ideas on techniques and approaches to be successful in your analysis work. You can also get inspired and learn about other ways analysis work is getting valued. When you need to search for your next business analysis position, your local IIBA chapter is often a great resource. Not to mention, your membership can keep you engaged with a fun and

exciting community that enjoys their work and can simply be the motivation on tough days when your work may not seem like the most glorious job.

But just like with training, do not limit yourself to just business analysis organizations. Finding other professionals working in your local area or even remotely around the world can give you access to experts and insights, resources for facilitation and stakeholder engagement, and new and emerging technologies. Groups such as the **Association for Talent Development (ATD®)** (<https://www.td.org/>) and the **Society for Human Resource Management (SHRM®)** (<https://www.shrm.org/home>) can be great places to learn ways to engage with teams and define capabilities. Their topics and values might be the skills you need to add to your own toolbox that will help you grow your analysis career.

Seeking out multiple organizations to join can help you discover more resources for your growth. Finding a mentor as you build your professional network can be the guiding compass to help you as you encounter obstacles. Mentoring can take different shapes, from formal agreements and structures to more informal professional friendships. Either way, the role of a mentor to a mentee is to provide ideas and insights. Having someone you can reach out to to ask questions or share experiences can be the sounding board to help you stay focused and successful. We'll dive deeper into mentorship in *Chapter 9*.

Besides mentors, you may even find a great coach! Mentors are often people you have a relationship with who you can seek out and confide in throughout your career journey. A coach, on the other hand, can be targeted for more specific, direct business outcomes. They ask you the hard questions that help you navigate where you want to go and what you want to achieve. Now, don't think that coaching is limited to only when you might be struggling. Coaching can be an excellent way to help you move from good to great. Getting a business coach who is focused on business analysis work and the delivery of value can help you problem solve, ideate, and consider approaches that you had never thought of before, as they bring in their own experience. They can be great when defining or redefining

your career approach to what you want to do and where you want to go. Just like a mentor, though, coaches do not do the work for you nor tell you what to do. Great coaches ask you good questions. Yes, they're often great business analysts themselves! They seek to understand your needs and then help you find your own path that works for you. But a guiding light on an unknown journey can be invaluable.

As you gain experience, strategically thinking about the work you do continues to shape your thoughts for the work that you *want* to do.

Obtaining certifications and taking professional development courses helps you explore topics and broaden and deepen your knowledge so that you can explore more career opportunities. When coupled with a mentor or coach, these can help you define the direction you want your career to go in. Now is the time to develop a career roadmap where you can use some great business analysis techniques on your own career for the path to long-term success.

## Developing a career roadmap

As you begin to think about what you want in your business analysis career, you will want to codify it with more structure to help you build accountability while keeping a larger, long-term vision. Creating and maintaining a comprehensive career roadmap can give you that focus. In this section, we'll explore how you can use SWOT analysis to understand your strengths and weaknesses and use that to build your career roadmap.

### Using SWOT analysis to understand yourself

The last thing you may want to do at the end of your day is to do more business analysis work; however, performing business analysis on both you and your career is the trick to making a value-adding roadmap that drives long-term success. This is why business analysis is a skill set that is valued no matter where your career ventures. It seeks value from every effort, both in the workplace and beyond. Those same techniques you use to analyze a business opportunity or need are the ones you use to analyze your career.

A great strategic tool to keep in your business analysis toolbox is SWOT analysis. **SWOT** stands for **strengths, weaknesses, opportunities, and threats**. While very valuable in helping with strategic decision-making, this can be just as vital to consider your own analysis work from a strategic perspective. Just like the technique, though, you need to ensure you do the analysis portion, and not merely record the SWOT part. Here's what you need to consider.

Like all good strategic discussions, a brainstorming session on what your strengths and weaknesses are can be helpful to paint a current situation picture. You can do this by answering the following questions.

For strengths, ask the following:

- What do I do well?
- What do I enjoy doing?
- What do my stakeholders compliment me on when I do business analysis work?

For weaknesses, ask the following:

- What do I feel uncomfortable doing?
- What things have I never done before?
- What items (tasks, techniques, etc.) am I uncomfortable doing without assistance?

The answers to these questions should span a wide range of topics. Think about techniques, approaches, methodologies, and even different technologies. But then go beyond technical and think about the number of stakeholders, their positions, and experience; your types of business analysis work; and the *where, when, and how* of the project assignments. This is a very internal reflection with no right or wrong answer, but worth spending time analyzing.

Then, you have to look at the external forces. These are the opportunities and threats. In the same manner as your strengths and weaknesses, brainstorm the opportunities you know of or that might exist as well as

things that could derail your success as a business analyst. Write down answers to the following questions.

For opportunities, consider the following:

- What new projects or initiatives are happening at your workplaces?
- What training is available?
- What events are bringing together people who are passionate about business value?

For threats, consider these questions:

- What are the job requirements or defined metrics that must be met?
- What organizational changes are happening?
- What industry trends are evolving?

This is by no means an exhaustive list, but it is enough to have you thinking and brainstorming ideas.

- And that's all you have done so far – brainstormed ideas. Now, you have to do the SWOT analysis portion and consider these elements together. SWOT analysis takes this list of 4 items and considers the  $2 \times 2$  matrix approach to analyze the options, as laid out in *Table 4.1*:

	<b>OPPORTUNITIES</b>	<b>THREATS</b>
<b>STRENGTHS</b>	<i>What strengths do you have to take advantage of the opportunities presented?</i>	<i>What strengths do you have that can minimize the risks and impacts of the possible threats?</i>
<b>WEAKNESSES</b>	<i>What opportunities are out there that can help you turn your weakness into a strength?</i>	<i>What threats are out there that would exploit your weakness, and so should be avoided at all costs?</i>

Table 4.1: SWOT analysis structure

Some examples of where the awareness of your strengths and weaknesses could be used to leverage opportunities or mitigate threats might include the following:

- There is a new project that has yet to define the solution option (i.e., nothing has been chosen yet). Getting assigned as the business analyst would allow you to practice and improve your business case skills, which you have currently identified as a weakness for not having had to create many business cases in your work to date.
- The marketing team wants to improve the efficiency and effectiveness of the growing team, and your experience facilitating process improvement workshops with diverse groups would be a strength to help them be successful in their endeavors.
- While you do not have a technical background, which is a weakness you are concerned about, you know several of the software developers who might be on the custom app project as you networked with them at local project management association events, which is a great opportunity to leverage.
- The larger projects require advanced PMP® certifications that you do not have, so you request not to be assigned as a senior project manager at this time.

A detailed analysis of your experiences, both past and present, alongside what is and is not happening in your professional environment, is key to generating the insights needed to chart a course for success. You will need these ideas and elements to build a roadmap of explicit steps that can move your career from the current state to your desired future state.

## Building a career roadmap

A roadmap is a path to success. Without a direction, even simply a next step, you could be wasting time or missing opportunities that would excite and delight you in your analysis work, not to mention see you well compensated for your efforts. A career roadmap that lays out steps that go in the direction you want your professional work to go can be an essential tool in any business analysis professional's toolbox.

The agility tools that are used to manage user stories and product roadmaps are the very same tools you can use to manage your career goals and keep you focused yet flexible. The one constant you will notice in all your work (besides the value that business analysis can bring to any change effort) is that things will always continue to change. And so a successful career roadmap in today's world requires that agility be built into the design. What this means to you is using a structure that allows changes to happen yet prioritizes the highest-value activities. Lay out a structure as in *Table 4.2* for your initial roadmap.

Start simple, and ask: *what are the most important things to your career right now?* Put these items in the **Now** column, as shown in *Table 4.2*. Perhaps you want to focus on the current job assignments and get an official business analysis certification. You notice how you want to do more of the testing plans and validation of solutions on a future project to expand your skills in traceability. You can add that to the **Next** column. You would like to work on a non-IT project at some point and think that while ECBA™ certification at this point is good, in the future, you should consider the CBAP® certification as well. Add these to the **Later** column. The **Not Now** column is a great parking lot to put items that come up but you're not sure are applicable. We do not want to delete any good ideas just in case we need them in the future, so we can use the **Not Now** column. The idea of PMP® certification could go there for now.

<b>Now</b>	<b>Next</b>	<b>Later</b>	<b>Not Now</b>
Define requirements for IT project	Create test plans and coordinate <b>user acceptance testing (UAT)</b> on a project	Analysis position on a non-IT project	
ECBA™ certification		CBAP® certification	PMP® certification

Table 4.2: Example roadmap structure

Now, agility demands a flexible structure. Notice there are no concrete deadlines or timelines for these items. The **Now** column should have

whatever is of most value to your career at this point in time. Prioritize the ideas based on their value to you and your current context, environment, and whatever else is going on in your work and even personal life. The trick is to think of your career roadmap as a living, breathing thing. While it looks to the future, it should be constantly reviewed and updated based on what is (or is not) happening today. As you learn, experience, and connect with others, take your insights and reflect them in your roadmap. That means moving things around and reconsidering priorities. Do not overload the **Now** and **Next** columns but fill up the ideas in the **Later** columns. Then, come back and reprioritize the options as you complete something in the **Now** column.

Roadmaps are a great space to practice rolling wave planning. Very common in Agile projects, rolling wave planning focuses on planning those items that are closest to today with the greatest amount of detail. Farther-out items and goals have less planning because things are likely to change between now and then. As the future gets closer and items are more likely to occur, then more detail is put into them. So, plan the specific actions or tasks required to complete those goals in the **Now** column. Build out mini-project plans to complete them. Do not worry about the details of items in the **Next**, **Later**, and **Not Now** columns. You will plan the details for those when they become of the highest priority to delivering value to your career. Until then, they are simply ideas on the roadmap. And know that there is always value in completing activities along your development roadmap – the ROI is that you will get more work opportunities, more pay and benefits, and will often enjoy your work so that it turns from a paid activity to a sought-after passion. After analyzing your career and working to identify how to capitalize on opportunities and minimize threats, a solid career roadmap equips you with the tools necessary to overcome any obstacles that may hinder your continued success.

## Overcoming common career challenges

While a plan is a great way to move you forward, not everything will always go as planned. Even those who plan out a great journey in their

business analysis careers can get complacent or restricted without knowing it. You have to constantly review your current state and desired future state. As you do that, you want to make course corrections to keep you on track to a valued career. Failing to identify these common challenges with business analysis careers is often the reason people stop enjoying the analysis work and seek other employment opportunities. Business analysis work can be very fun and rewarding, but only if you stay aware of your own work and constantly reflect on an active and evolving career roadmap.

## Getting a different type of analysis work

The downside of getting known for your requirements work is that you can get known for *only* doing requirements work. Business analysis skills, techniques, and approaches are valued in so many areas of business that it actually can hurt the organization by only assigning you to elicit and trace requirements.

When you do requirements work, think of all the tasks and techniques you must use to leverage the value of great requirements work. You do interviews and hold focus groups to elicit information. You verify with document analysis and track and manage the requirements with item tracking. You conduct interactive and collaborative workshops to validate requirements for solution designs. These skills are not the easiest things to teach junior professionals and often have to be learned. As you get good at identifying needs, you do not want to wait for the project to be defined and the initial solution to be approved.

Eliciting information and getting stakeholders on the same view of a project are key change activities that business analysis professionals are great at. The launch of a new project needs clarity and focus on articulating what business value the project aims to deliver. Just like requirements, the business need or opportunity needs to be defined. Then, it has to be traced through the implementation of the solution. You are doing similar tasks and techniques to your requirements, but you are expanding to the larger project effort and focused on business value. If you only take project work where you are responsible for the requirements, you may have a hard time seeing

the solution in your work. Getting experience with stakeholders throughout a project can help you learn the communication skills you need to ensure the requirements are not just defined and implemented but also understood and supported even beyond the implementation of the solution. Just like business analysis professionals can analyze more than requirements, they can analyze well beyond the scope of a single project.

## Switching from project-based work

In project-based work, it is easy to see the analysis skill set. Business analysis professionals analyze the requirements that can define the task required to drive a change to implementation. But who asked why we were doing this project in the first place? Why now? Why not later? Or why not another solution or approach? Some of the most valued business analysis work is in deciding not only which projects to do but also whether the organization should even do the project in the first place. This switches your analysis work to a more strategic focus. In doing so, you get the opportunity to not only do more strategic tasks but also practice more strategic techniques.

Strategy analysis work involves looking at the current and future states of the business, not just the processes of a project. You analyze risks and recommend approaches that are input to the actual project work. You then apply more advanced techniques in this analysis work that utilize the balanced scorecard and business model canvases.

Then there is the operational perspective: analyzing how things are operating in the organization today. While you might do basic techniques of interviews and process models to understand what is happening, using some metrics and **key performance indicators (KPIs)** may expose opportunities for improvement. Measuring out revised processes with techniques such as value stream mapping and discussing evaluation criteria helps you ensure the organization is getting the most value out of their already invested people, processes, and technologies. This can be well after the project has been completed and the solution has been in use for many months or even years. But like strategic analysis work, this kind of analysis perspective

helps to determine the next most valuable project work to do to keep the organization moving forward. However, similar to how you can get trapped solely working on projects, you can get stuck with only being associated with technology work, which, again, does not leverage the maximum value of your incredible analysis skills.

## Progressing beyond tech-based analysis

Many business analysis professionals begin their careers in the technology department, though this is happening less and less as the role evolves to be more of a strategic partner than simply a requirements role. However, those who begin jobs in the IT department or are responsible for technical implementations and management efforts may find challenges in expanding their scope. It is easy to seek IT-related work but even on IT projects, several business needs emerge and opportunities are defined well outside the confines of both the project and the technology.

### A case study on business value

Take, for example, a Microsoft SharePoint program manager. While the server upgrades, command-line coding, and JavaScript activities were supported by a developer, the young SharePoint program manager was ultimately responsible for the valuable use of the SharePoint system. Basic operational job responsibilities included ensuring the program stayed available for end users and troubleshooting any service interruption. But even in these activities, the program manager often would connect with end users to understand what they were trying to do when the issue was reported. The program manager would meet users who were only using the system for a single process as well as power users who were trying to do complex business applications in the program. This also revealed several employees who did not even use the system at all. However, the young SharePoint program manager was building some valuable relationships with these employees as they got to learn more about the processes the other departments were responsible for and how they completed their work. A lot of the troubleshooting would see the program manager sit with the

developer to help walk through the issues to resolve the problems. The developer would often point out ideas on how to improve the system's performance and show off some of the cool features that could really help users.

With this background, as the program manager learned more about the business processes, they saw opportunities to do some educational training. They did basic training that was more informational and shared the capabilities of the program, but they also did more hands-on training for end users on how to walk through and use the program. The more time the program manager spent with the end users, the more opportunities and ideas for process improvement emerged. They worked to coordinate with the developer to determine which suggestions warranted custom development versus those that could be addressed through business process reengineering. This program manager was providing valuable business analysis work for years to come.

This example is a great way to see where and how business analysis activities can grow and add value to an organization. Review this case study and note the following business analysis tasks and techniques and the potential value they all offer:

- Troubleshooting issues with root cause analysis
- Interviews and focus groups with end users to define business needs and processes
- Process mapping and analysis of current and future statement processes
- Solution and business capabilities analysis and evaluation
- Acceptance and evaluation criteria
- Design options and solution approaches
- Stakeholder communication and collaboration

All these value-adding analysis activities were done not because they were assigned, but because those are the activities of someone with a business analysis perspective and goal to deliver the most value to an organization. These activities would not be possible if you only worked on projects.

Project-based work can limit your perspective and reduce your chance for strategic analysis and solution evaluation experience. With a business focus comes the realization that your career can easily go well beyond the IT department, but only after you identify these potential roadblocks can you move your career forward on the path to success.

## Summary

Just like you analyze business problems in your work, analyzing your career is how you can continuously deliver value in a prosperous business analysis profession. As you build your analysis experience and expand it to more areas of application, consider supplementing your growth with certifications, networking opportunities, and mentorship programs. These can be valuable resources to expand your toolkit for greater career success.

That path to success often comes from a defined map that lists the steps to help you go from the current state to a future state. You have to remember to be a good business analyst on yourself and leverage techniques such as SWOT analysis as your professional context continues to evolve. When you see the opportunities and your strengths, then building a career plan that is founded on agility and value-adding activities can give you the focus to take your career to the next level, while also exploring opportunities. Just like the variation in the types of work you take, consider our model of a “T-shaped” approach to analysis work. The examples in this chapter help you take a *breadth* approach to exploring analysis work. In the next chapter, let us explore the specializations you can dive deep into your career and deliver even more value.

## Further reading

- [1] Hermes, M. (2014, May 4). *The World's Theory – The History of Business Analysis & Evolution of the Business Analyst*. BA Times. Retrieved from <https://www.batimes.com/articles/the-world-s-theory-the-history-of-business-analysis-evolution-of-the-business-analyst/>

- [2] Weissman, S. (2024, April 11). *Degrees Earned Fall Again, Certificates Rise*. Inside Higher Ed. Retrieved from <https://www.insidehighered.com/news/students/academics/2024/04/11/degrees-earned-fall-again-certificates-rise>

# Chapter 5: Specializations within Business Analysis

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While business analysis professionals are encouraged to have a very broad knowledge of business processes and value delivery streams, specializing in a particular area can lead to a successful long-term analysis career. Here, you will explore the various areas and approaches in which you can specialize in your business analysis. Throughout the exploration of these areas and what the tasks and techniques might look like in day-to-day analysis work, you will need to go back and analyze your career in more depth using valuable analysis techniques. When you have analyzed the advantages and challenges of specialization, you can make a strategic, informed, and data-driven decision about where you want to take your analysis career.

In this chapter, we're going to cover the following main topics:

- Different areas of specialization
- How to choose the right specialization
- Benefits and challenges of specialization

# Different areas of specialization

Business analysis is both a role and a skill set. With this in mind, you can then choose to focus your analysis work within a specific specialization or area of work. Specialization simply means concentrating within an area or industry to the point you are both a subject matter expert on the topic and a business analysis professional. The need for deep expertise in specific areas is becoming increasingly important as businesses seek more support to navigate evolving trends. Technology is a driving factor in the need to specialize and understand how work is evolving. But just like your career, you do not need to pursue purely technical positions or job titles.

## Analysing data

With the explosion of not just data, but the amount of data that is now available to end users, the ability to extract insights from an overwhelming amount of data is critical for supporting effective decision-making. Data analysis, data analytics, and business data analytics are growing areas of need for organizations to maintain a competitive advantage in the market. And working with data can actually vary from the business cases created based on the data to creating diagrams that model where, how, and even why the data is being created and consumed in the organization to deep, intricate programming of algorithms to draw out insights from vast amounts of data. These areas are like treasure hunts; you have to sift through all the information to find out what secrets it might have to help businesses make smart decisions. If you like these treasure hunts but at a very tactical level, this can be a great specialization area to explore. If you are naturally curious about what data insights mean to your organization's direction, then an analysis position centered around data might be just what your analysis career needs.

The power of business analysis when it comes to data is that the value is beyond just understanding what data is out there. The business analysis perspective starts thinking about what data is needed, where to get it from, how to organize it, and especially how to use the data to drive data-driven

decision-making. Smartly organized data means that the insights and causative factors are more apt to be grounded in truth and, therefore, forecasts and simulations will hold true. What will set your career apart, though, from, say, the career of a data scientist, is your ability to focus on asking what the results of data analysis have on the organization's decision-making. For example, some data analysis scenarios might include things such as the following:

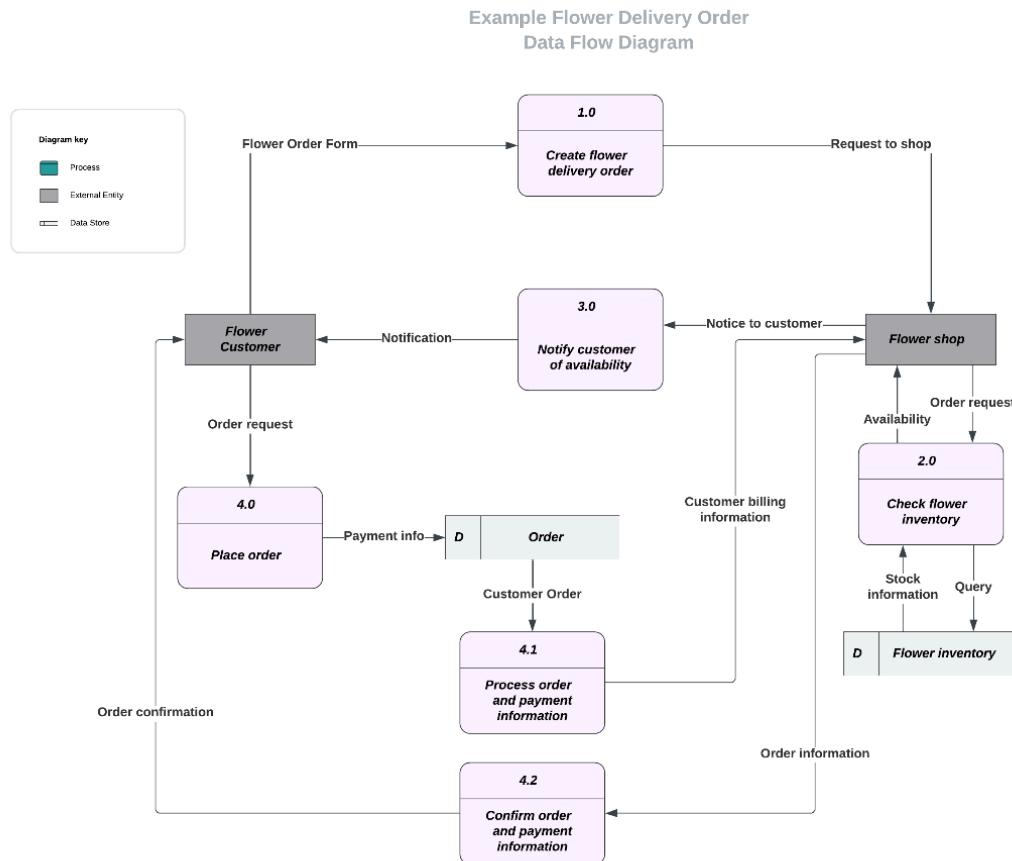
- Given the influential factors of the market's geography, where and when should the organization open another store?
- Given the causation found in the efforts to promote mobile technology and connect to new customers on social media, what does the product catalog look like when tailored to a younger generation of customers?
- Given the seasonal trends in credit card fraud and cybersecurity incidents, how should our organization assess and evaluate our current and future IT infrastructure?

Taking data, uncovering insights, and then driving decision-making within the context of the enterprise while seeking strategic alignment is the bigger picture and value description of a business analysis professional who specializes in business data analytics. But before you start researching what kind of technical language you need to know for data analysis work, remember that business analysis activities are about delivering business value, not how to analyze datasets. Let's now consider some aspects of specializing in data in your business analysis work (in a BA position) as opposed to taking a data position that requires you to do technical data analysis work (such as in a data scientist position).

## Data flow diagrams

If you enjoy making visual models of how work is carried out but love data, then consider exploring data flow diagrams in more detail. Similar to process models that show how work is carried out, data flow diagrams show the flows of data: where they come from, what actions or activities happen with the data, and where the data gets stored or even utilized by other activities (IIBA®, 2015). This is a great example of the need to understand

general business analysis topics and how to think about processes and systems. But there is also a deeper focus on the details. *Figure 5.1* is an example data flow diagram that was created for the process of ordering flowers.



*Figure 5.1 – Data flow diagram*

## Creating visual models

This model was created with Lucidchart (<https://www.lucidchart.com/>), a great visual modeling tool for Mac users. Microsoft users will find the same features and value in Microsoft Visio (<https://www.microsoft.com/en-us/microsoft-365/visio/>). Getting comfortable creating visual models with any software, even collaboration software such as Mural (<https://mural.co/>)

and Miro (<https://miro.com/>) will be a key skill set to add to your business analysis career. Models such as these will be found throughout this book to help give you an idea of the variations even your analysis products can take.

Data models are often created with the same approach you might use with process models – asking what is happening, when, where, and even why. And then these models are often complementary because you can use the process model to ask about what data is stored where and what happens with it. This is what creates data models. While you will need to do the same elicitation work as you do for any process analysis to understand what is happening, as a data specialist, you will then analyze the data elements uncovered during your analysis work. You do not need to worry about building data stores, but you might uncover data management and technical infrastructure requirements when you dive into the data details and ask about things such as the following:

- How are the data stores set up to accept this data and quickly mine it for insights?
- Are the data stores able to handle changes to the data flows?
- Is duplicate data going to separate systems and data stores?
- What other processes need this data?
- Is this data being used by other people/areas/departments?
- How is the data getting into the systems?
- How does the data get out of the system?
- What is being tracked on each piece of data?

These questions might require you to dive into your analysis training and do more work, such as interface analysis (what happens that allows systems to communicate and share data), advanced modeling (visuals of the enterprise architecture that makes things work), and business rules work (the policies that govern what is and is not supposed to happen); but you come from a data perspective. You bring the business value goals into a sharper focus on the data, and specializing in your analysis career can be a great way to demonstrate the value you provide an organization with. Exploring the where, how, and what of the data an organization uses is often a great area

for business analysis professionals to move to in their careers, and if you like this area of data, where you not only want to uncover data insights but also visualize results and drive the business decisions at an organization, then specialization in **business intelligence (BI)** might be a consideration.

## BI analysis

A specialty area that focuses on both data and business analysis skills is BI. Just like business analysis professionals, BI analysts use data to help with organizational decision-making. However, BI positions often require deep technical knowledge with a focus on understanding the data the organization already has and how to integrate it further for even more validated decision-making. BI analysts can often spend a lot of time focusing on building models for the decision-making process rather than asking why the insight would be helpful in the first place. If you like getting distracted by exploring what data is available and seeking more data sources to integrate for greater insights, BI roles are great ways to go beyond simple data analysis positions and leverage your strong business analysis skills because the insights are gathered to drive the organization's decision-making.

This is another place where you need to ask yourself what you like to do in your work. If you like using Excel to make PivotTables and pull in multiple sources of data to analyze them together, then pursuing BI training and getting more proficient in BI tools might prove more valuable to both your interest and your career. The technical demands of these positions often require knowledge of tools such as Tableau and Power BI, and even programming languages such as Python and R (Coursera, 2024). General business analysis work does not need programming experience. It can definitely help to have some knowledge of technical processes on technical projects; however, it is normally not required. For BI analysis positions, though, you will need deeper technical skills. The work shifts to you owning the responsibility for getting the data to display the insights rather than simply asking what the data means to the organization. This can be a great area to transition into if you have started your analysis career in a

technical role or within technical departments. It was said many years ago that data is the currency of our world, and so those who learn to harness data and wield it to the benefit of their business goals are the ones who will be able to out-compete and withstand market trends and competition (Vavra, 2016). However, the management of data can easily feel overwhelming. So, let's look at an example to demonstrate the value of being able to go deep into the data of an organization with a powerful business analysis technique – a data dictionary.

### Data dictionary

If you are wondering about how to differentiate between those who dive into data as their life's work rather than those who use data as part of their business analysis work, let's take a look at a great business analysis technique: the **data dictionary**. While it sounds simple at first or may even get confused with a glossary, it is about standardization and getting everyone on the same page with what a particular piece of data is and what it means in context (IIBA, 2015). I love the example you can use to demonstrate its power. At any organization, ask your stakeholders to define who a customer is. Who a customer is to the marketing team is not the same as to a teller in the bank, nor is it the same to a help-desk technician. It is the same word, and everyone thinks they know who you are referring to, but in each context, it represents a completely different person. The real confusion arises when you dig into the details of how and where the term "customer" is used. At the data level, a customer is made up of multiple components and is a composite term. It also can have different names depending on the context. When you start asking questions about where the term "customer" is used in different data stores and what elements of data are flowing between systems, the data concern starts to arise. Look at *Table 5.1* and see that a customer has multiple data elements – some are required, some are optional – and depending on which system you are in, they have completely different names.

### Primitive Data Element

#### **Data Element 1**

## **Data Element 2**

## **Data Element 3**

First Name

Middle Name

Last Name

## **Alternatives**

Given Name

Second Name

Surname

## **Options**

Title

Middle Initial

Designation

Nickname

## **Business Rules**

At least one required

Optional

At least one required

## **Composite**

Customer = Data Element 1 + Data Element 2 + Data Element 3

## Table 5.1 – Data dictionary table

Uncovering this kind of insight before decisions are made about customer data is crucial because you know that the data insights could be more accurate if the data is better reconciled and managed regarding the data points that are truly being analyzed.

Business analysis professionals facilitate understanding and work to get everyone on the same page. A data dictionary is how you define important terms in multiple formats and use them in the right context at the right time for the right reasons. While *Table 5.1* is simple in concept, think about doing this kind of work daily. Someone who gets excited defining the structure, alternatives, business rules, and more relating to a single piece of data is someone who should specialize in areas of the organization that focus on data. The energy you get from working with data terms lets you know that having a data analysis specialization might be the best thing for you and will help you enjoy your analysis career.

If you are looking for positions that might be data-centric in their daily activities, some common job titles might be as follows:

- Data analyst
- BI analyst
- Data scientist
- Data engineer

But even if you do not specialize with a “data” job title, you can get this kind of work experience and enjoyment in positions that might include the following responsibilities:

- **Data collection and cleaning:** Gathering, cleaning, and organizing data from various sources
- **Analysis and interpretation:** Identifying trends and insights through statistical analysis
- **Visualization:** Creating reports and visualizations to present findings to stakeholders

- **Collaboration:** Working closely with business leaders to understand their data needs and provide actionable insights
- **Advanced analytics:** Utilizing statistical methods, machine learning, and predictive modeling to analyze complex datasets
- **Data engineering:** Building systems for collecting, storing, and analyzing large volumes of data

All these positions and responsibilities require analysis work. And this is just one area of specialization your career can take. Let's now look at another very common specialization with technological roles and activities.

## IT systems analysis

If you have the same natural curiosity with technology as a data analyst has with data, then in a similar fashion, focusing on analyzing technology solutions might be the best direction for your career. A fact of our businesses now and for years to come is that technology is going to play a crucial role in how businesses deliver customer value, even if their products and services have nothing to do with technology. Technology is ingrained in our daily work and lives and is not going away anytime soon.

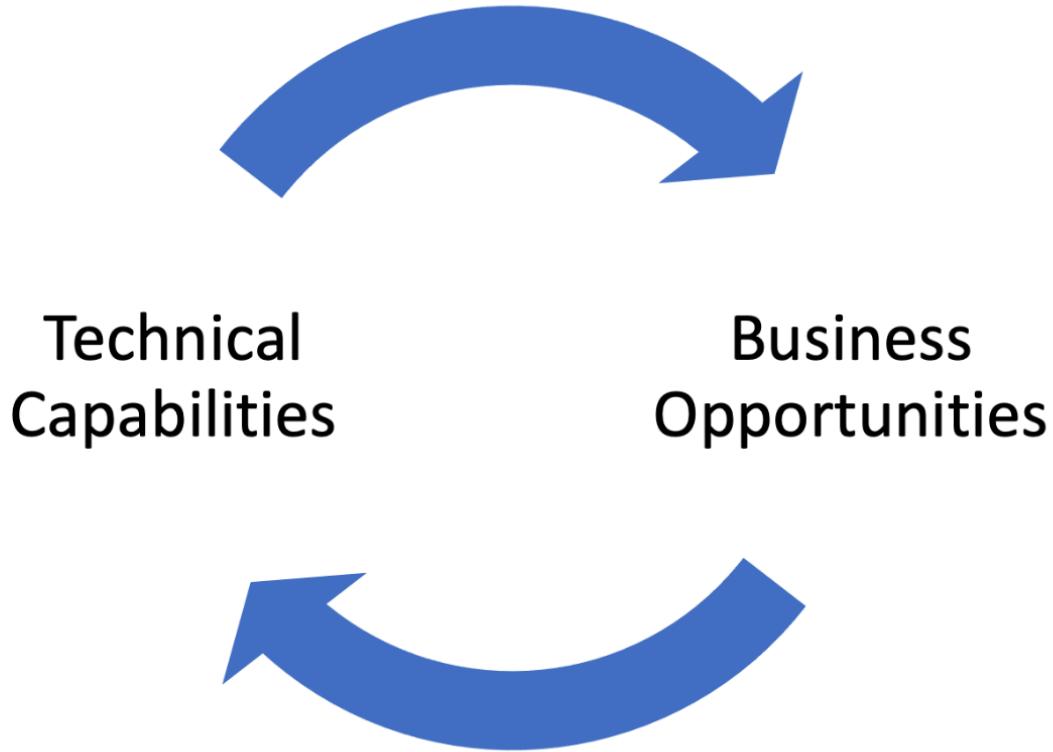
Specializing in technology could mean two different focuses. You could be a generalist and seek a position such as a technical solutions architect, who designs solutions that consider an organization's entire infrastructure stack. This is a great position because you learn about each area in a technology department and get experience in the specialized areas of technology. Often, senior technical business analysts will transition into these roles quite nicely, taking advantage of both their technical and analysis backgrounds.

On the other hand, if you are just starting your career journey, almost any technical analyst position can be a great way to start specializing and building up your analysis skills. A position such as a technical analyst assigned to any program, system, or component of technology is a great way to define your specialization and analysis processes. Positions such as this could have the following job titles:

- Technical analyst
- Program analyst
- Application analyst
- Systems analyst
- Business systems analyst

If you venture into one of these roles without much experience, this just means you want to first learn as much about that piece of technology as possible. Learn how it is set up and configured in the organization. Learn where and how it is used and how it is connected to other technologies. Then, learn online what else the tool or technology can do. Learn from the communities what others are doing with the tool and aim to get training and hands-on experience in test and development sandboxes as much as possible. This is what makes you a **subject matter expert**, or **SME**, in the technology. While you are doing all this, practice your analysis skills, ask good questions, interview users, and document system processes and data flows because when you know the technology, you can focus on your analysis skills. Your analysis skills will keep you sharp when you find gaps or opportunities in what is and is not being used in your technology.

When you start with this approach, you become an invaluable resource because there is a constant challenge with technology: its constant and rapid evolution. Technology is changing so quickly that there needs to be people who can dedicate their attention to learning what new capabilities are emerging that could be valuable to the business. Of course, the business needs to be able to articulate what strategic goals it has and where it wants to take the organization. But they may not know what they need until they see it. But you can't show an organization ideas until you know what the technology can do. This kind of “chicken and egg” question is exactly where you sit. In *Figure 5.2*, you can see how you can start on either business opportunities or technology capabilities. You learn technology capabilities and seek business opportunities to leverage those. And you seek understanding on the business processes to define needs that you can then seek out technology that can possibly address those opportunities. And so, you feel like a constant circle, as shown in *Figure 5.2* below.



*Figure 5.2 – Relationship between business opportunities and technical capabilities*

When looking for positions that help you specialize in technological areas, look for roles that include the following responsibilities:

- Analyze and optimize business processes through technology
- Elicit requirements from stakeholders and translate them into technical specifications
- Facilitate user acceptance testing to validate that systems deliver necessary business value
- Troubleshooting and problem-solving to identify and resolve the root causes of issues
- Evaluate existing systems for optimization and increased value delivery
- Collaborate with technical teams to deliver technical system designs and solutions

When you specialize in a certain technology, you can provide organizations with the insight they need to take advantage of that technology in a way that drives them forward. But only when you take the time to dive into understanding the features, functionalities, and applications of the technology does this value truly emerge. But even in the technology space, there is even greater specialization in areas that are key to the business.

## Cybersecurity

Cybersecurity is a trend in technology that will only continue to grow and be of value as long as customers and organizations continue to use technology. This is not just a technological concern but also a business concern, given the reliance organizations have on technology. Business analysis professionals will find themselves having to learn basic cybersecurity considerations for defining requirements and successful solutions on any technical project (IIBA, 2024). Since failing to properly address cybersecurity requirements in any initiative can make or break an entire organization, prioritization of cybersecurity skills continues to grow in almost every organization in every industry in every part of our digitally connected work. Specializing in cybersecurity is an excellent focus if you enjoy being part of technical solution design teams. Solution architects often have strong cybersecurity backgrounds to combine with their infrastructure knowledge, and when you can layer on your business skills, enabling you to understand the strategic value delivery processes of your organization, you become critical to any project that harnesses technology.

A cybersecurity specialization will have you spending significant time asking about the following:

- Access control – *who has access to what and from where?*
- Authentication methods – *how will we prove that the person is who they say they are?*
- User management – *who needs access to what, and how can we give them only that access?*
- Disaster recovery and backup plans – *how long is the business comfortable with not being able to operate? How much data is the*

*business comfortable with losing or not being able to restore?*

- Audits and testing – *how do we know our systems are secure? Do we know how much they can handle before a breach is possible? What do we need to report on to prove our security stance?*

These questions are excellent areas of cybersecurity for a business analysis professional who focuses on the business portion of their business analysis career. This kind of specialization is often a great place to be pulled into a more technical SME role on any change efforts. Yet the technical security analyst role is truly valued by business sponsors when you show that you can relate your technical knowledge to what the business is trying to achieve. That desire to focus on value can lead you into even more areas of specialization where you focus on a single line of business, a process, or even a single product or program.

## Product management

Product management is an area that has grown in popularity with the rise of agile methodologies and approaches. The value of this role is not just managing a product from day to day. The business value of these roles is around acting on behalf of the customer to define the most valuable features and ideas that are viable to the business (Atlassian, 2024). Again, you are combining the expertise of knowing your customer and your product intimately with their needs, wants, and desires. You then couple this with your knowledge of the organization's capabilities, what the markets are doing, and what effects competition and the industry as a whole are putting on your product decisions.

You might first get experience of working in agile teams and defining needs in terms of value to your customer. As you get to know your target customers and audiences better, you may feel a strong desire to represent them directly and influence the business decisions being made. Agile skills of thinking like your customer, prioritizing delivery (and willingness to accept constant re-prioritization), and keeping focused on value implementation are critical in these roles. They are great if you enjoy the agile mindset and have a passion for representing your customer (IIBA,

2017). Concentrating on agile practices can be a natural place to move your analysis career, especially when you are starting out and looking for more hands-on experience.

## Agile

Agile is more than a simple methodology; it brings flexibility and adaptability into your change efforts. Agile is a mindset and a skill set that can be a powerful addition to any analyst's toolbox. Many organizations have found success by using agile approaches and often prefer that their teams and product delivery cycles run in an agile manner. The first step to specialize in this area is to get on an agile team. This can be a great first move if you are newer in your analysis role.

In an agile environment, a business analysis professional will often still get assigned the requirements capture for a project or initiative. The trick with agile teams is they often like requirements to be captured in user story format. A **user story** is a short, concise statement of value in terms of the customer (IIBA, 2017). While many teams will want particular formats, the goal again is to express statements of value. This is a good idea wherever you work with requirements. A user story, though, puts the user directly in focus.

### **An example format of a user story**

As a WHO I need WHAT so that WHY.

The WHO portion describes the customer with enough detail and specificity so that you can picture the customer of the requirement or desired functionality. The WHAT is the desired functionality or capability. The WHY becomes the business value. Even if you do not write requirements in this format, simply thinking about every requirement, every piece of work on any initiative in this format – customer, need, and value – is a great way to ensure your work is always valued. This is often the first skill explored and achieved in agile teams.

Agile environments can introduce you to a host of other skill sets and techniques that are valued in both agile work and that are great business analysis skills. Estimation is done and redone constantly, so you will get good at ensuring there are clear specifications and often improving your communication skills to help items to be estimated correctly the first time. Prioritization is an activity you will have to facilitate over and over again. Agile environments always want to deliver the highest-value activities. What provides the most value for the customer? That is the feature that you prioritize. You handle the changing work around you this way. Agile emphasizes collaboration so that there is constant feedback on what is or is not working well to help everyone stay focused on how much value is being delivered. These are all skills you will both explore and expand when working in agile environments. Getting comfortable with these areas as well as learning different agile techniques, as described in the Agile Extensions to the BABOK Guide (IIBA, 2017), are ways you can hone your agile skills. This will be exactly what you need to find greater career paths in agile environments – demonstrate your agile mindset through the application of these approaches. Building your agile experience by working on agile teams that welcome change and in fact even expect things to change will help hone your mindset so that you have the expertise needed when efforts call for the agile mindset. Not everyone gets this perspective. Having experience and expertise in agile environments is a specialty that is not only desired right now in many organizations but, due to the dynamic nature of the world around us, will be desired for years to come. If you get excited about change, if you like exploring ideas to see what works and enjoy facilitated discussions around user experience and expectations, then working in agile areas may be just the specialization to leverage your interest and your analysis skills.

## Financial analysis

Not everything in business is based purely on customer wants. Good attention to detail, particularly numbers, is important for any organization that wants to make informed financial decisions and follow suitable strategies. Analysts who enjoy numbers and exploring the financial aspects of an effort might seek specialization in finance. This has a two-way focus,

like much of your business analysis work. You could seek analysis positions in the finance department, where your primary duties are financial data analysis, with secondary work focused on driving positive business change based on those insights. Alternatively, you could do business analysis work within organizations whose mission is financial services and products. Both perspectives are quickly becoming popular and in need of more people with technical data and financial skills coupled with the business acumen to make informed business decisions.

If you take a financial analyst position, you will be expected to know about financial equations and formulas. You are looking to mine and analyze data to compare solution options and inform decision-making processes. Financial analysis skills that are important for helping with strategic business decisions include the ability to analyze the following:

- Metrics and **key performance indicators (KPIs)**
- Initial and ongoing costs
- **Return on investment (ROI)**
- **Net present value (NPV)**
- **Internal rate of return (IRR)**
- Risks and potential impacts
- Payback period
- **Total cost of ownership (TOC)**
- Value realization
- Cost-benefit analysis

These may not be everyday activities for some positions, but you could also find yourself doing even more in-depth financial calculations in certain financial analysis positions. If you get excited about calculating these results and consulting them for financial decisions being considered, then this world of financial data analysis may be perfect for you.

Consider a second option to specialize in financial analysis. You could do business analysis work as an assigned BA in a financial institution or industry. This kind of position means you will have to at least know what these terms and other financial lingo mean. You may not be doing the

calculations, but you will have to spend time seeking the data that helps drive the business decisions you are working on or supporting. Understanding the financial processes and what data is being used and flowing to build the reporting and ledgers will be critical to your success. Just like any other business analysis position, the more you dive into the industry in which your analysis work is taking place, the more valuable you become as a resource to any team. The question becomes how much you want to be hands-on with the financial data and defining insights instead of focused on leveraging the outcomes of the financial analysis work to drive the business decisions.

## Risk analysis

The financial sector, with the volatility of the world, markets, supply chains, and more, is continuing to seek and grow its financial analysis skills. Key in these positions is often risk analyst positions. These are analysts who analyze the risks of certain actions and explore what potential impacts those risks may or may not have on the business outcomes. What is really great about these positions is that they are not just found in financial teams. They are found in marketing and technology teams and even at the enterprise level in organizations that often take a more risk-adverse approach to their investment strategies. This is a great way to explore a business, coupled with technical skill sets. Risk analysts have to be very comfortable with probability and estimating impacts. Benchmarking, market analysis, metrics, KPIs, risk analysis, and management are key techniques that are employed daily by risk analysts (IIBA, 2015). These roles help decision-makers understand the ramifications of their decisions. Most of this work is just estimation; things are not certain. But there is a lot of work put into simulating possibilities and what impacts those options have on the organization. This can be exciting work, and it can be thrilling to present the possibilities and the impact each option may have to decision-makers. And with the constant changing of the technology, policies, politics, and more of our environments, risk analysis positions will deliver value for many years to come. But even in these processes there can be room for improvement.

## Process improvement

One of the areas that provides the most value and where business analysis professionals often let their skills shine is process improvement. Some organizations may have robust Six Sigma and Lean teams that focus on process optimization and reducing waste in operations. In this position, the focus is on understanding and analyzing current business processes to find opportunities for improvement. Defining current processes, measuring output, suggesting and implementing changes, and then remeasuring the processes will keep you focused on the details of the work within an organizational context in this type of work. You get to focus on the specifics while considering the impact on the bigger picture. These roles can often require certifications in methodologies and process improvement approaches that you might need to consider if you are interested in this career path. While it requires additional work, there can be clearer promotional paths as your experience (and certifications) grow. Accepting a position in process improvement will often require you to use techniques such as value stream mapping, **suppliers, inputs, process, outputs, customer (SIPOC)**, and root cause analysis, along with metrics and KPIs to help quantify the value of the improvement efforts.

But even if there is not a specific process improvement position at your organization, many analysis positions can focus on process improvement. Take, for example, a service desk analyst. While many service desk positions are about answering questions, most service desk positions are about solving problems. Using techniques such as functional decomposition daily to break down issues into smaller components so that the service is focused on the particular element in question is key to daily work. When you understand the process occurring at a more detailed level, you are in a great position to optimize the process to not only solve the immediate issue but then help prevent the issue from occurring again.

You might be a person who loves to take things apart to simply know how they work and then put them back together again. If this sounds like you, asking your employer or prospective employer about the amount of time your job would focus on process improvement activities is imperative. You

will get to build on your process modeling and analysis techniques to get more insightful analysis of value delivery and help organizations to maximize their existing investments.

Each of these areas of specialization is simply an option. They are not your only options by any means. Rather, consider how each area of specialization introduces new tasks and techniques to your daily analysis work that you may not use as frequently if you choose to be more generalist in your business analysis career path. Business analysis is not a one-size-fits-all role, but rather a field with diverse specializations that cater to different aspects of organizational needs. So, next, let's talk about the things to ask yourself to help you decide whether specialization is right for you and, if so, how to choose the right specialization.

## How to choose the right specialization

So, how do you choose the right specialization? Well, in good business analysis fashion, the answer is simple: it depends. First, ask yourself whether you even want to specialize in your analysis work. If you are just starting out, staying general can be a great way to learn about your analysis tasks and techniques. This means taking entry-level business analysis positions to get accustomed with the analysis work. But the question is then whether you like a particular topic more than others. You are going to use most of your analysis skills and techniques wherever you go. That is the great thing about business analysis. The question to ask yourself is whether there is a subject area, an industry, or even a job market area that interests you more than others. This is not just a question about whether you like it or not. This is a question about whether you are passionate about it. Would you be willing to spend your time outside your regular work hours attending user groups and professional association events at your own expense to learn more and connect with others doing the same kind of work? Does it excite you to enroll in a class to learn more on the topic, in addition to the daily work at your organization?

You want to always make informed decisions, especially with your career choices. This is what business analysis is all about – making data-driven

and data-informed decisions that strategically align with goals. You need to take this same approach with your career. Ask yourself questions about what you feel excited about and identify areas you have a natural curiosity, and whether it would be easy to sustain that curiosity for a period of time. If you didn't do your **SWOT analysis (strengths, weaknesses, opportunities, and threats)** in the previous chapter, now is a good time to go back and explore not just what you may want to do but in what the industry is doing as well as your interest. What potential opportunities do you see in your areas of interest? What threats might exist to limit your opportunities and advancement conditions? Each career move should entail all the analysis of a good business case. You are driving your own informed decisions.

While you are deciding what works best for your passion and interest in the business analysis domain, it can be beneficial, especially financially, to analyze market trends and demands for the business analysis profession. Having a career path that is not only exciting but in demand in a way that can pay you the salary you want and support your personal lifestyle is how you get the best of both worlds.

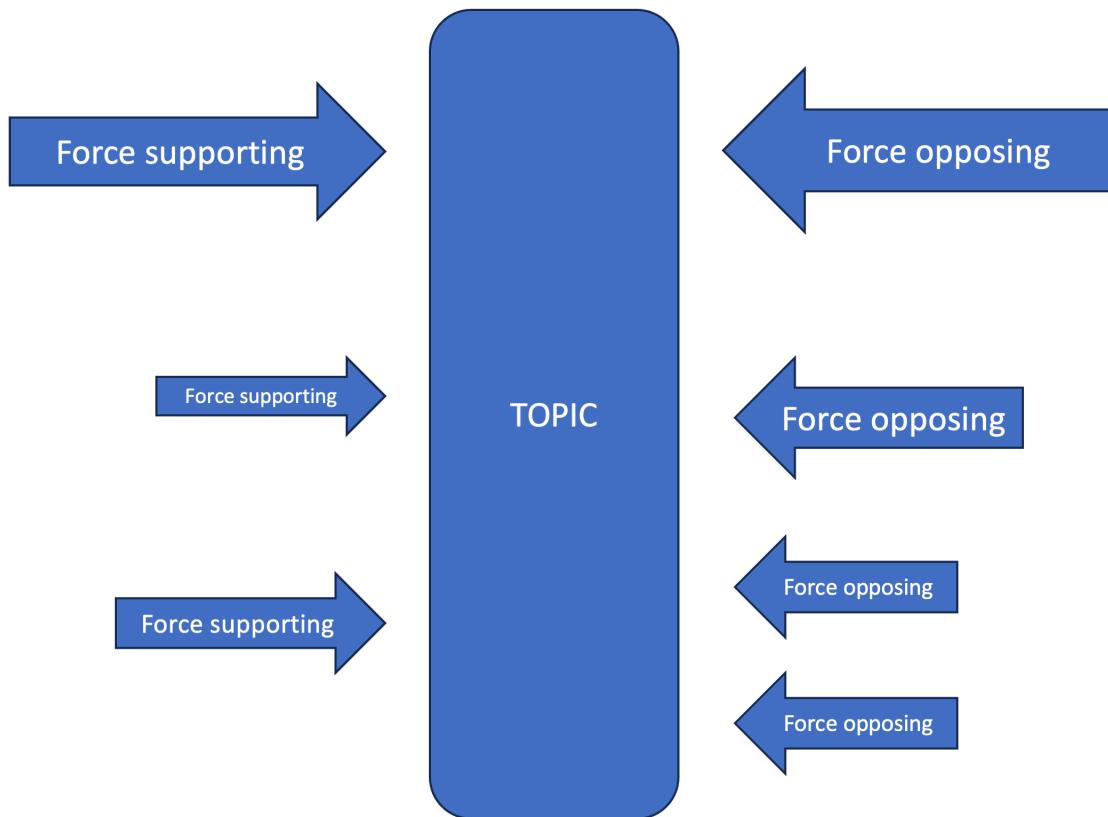
## Analysing market trends and demands

In the world of analysis professionals, you will encounter various market trends and demands. You may see the value in your business analysis, but the organizations and industries in which you work may have shifts and even radical swings in how and when the demand for business analysis professionals grows or shrinks. Specializing in technology, particularly a form of development or coding, might be extremely profitable as technology capabilities advance and organizations are exploring how best to integrate technology. But consider the no-code or low-code solutions that are coming onto the market, putting advanced programming capabilities into the hands of the general user. Your specialized skills become less valuable because the technology has changed. It was nothing you did or did not do. The environment and context around you has simply changed. So, whether through formal or informal techniques, stay abreast of current trends in business analysis in general and in the different areas of specialization. Positions and titles will come and go. New techniques will

emerge. But constantly growing your skills and adding to your toolbox will never go out of style. You simply want to be mindful of all the forces at play when it comes to your analysis career.

## Applying force field analysis

Balancing your interests and passions against the effect the economy and industries may have on your career can be a way to constantly adjust and align your career path. Like many of your analysis techniques, let's use one of your great analysis approaches on your career. **Force field analysis** is a technique that looks at the forces acting upon a situation or topic (IIBA, 2015). These are the forces that push you forward and push against your progress towards your goals. In general, the topic is in the middle and then you simply list the items to the left and right that are pushing against the topic, as shown in *Figure 5.3*. The size of the arrows indicate the strength of each force.



*Figure 5.3 – Force field analysis structure*

For your career, lay out the forces that are supporting your success. Consider things such as the following:

- Experience
- Certifications
- Subject area knowledge
- Training
- Industry trends
- Current job market

These factors can also push against your career progress:

- Lack of experience
- Lack of certifications
- Broad knowledge, no depth

- Lack of formal training
- Industry trends shifting demands
- Oversaturated job market

The more you can brainstorm, the better the understanding you will have of those forces that are affecting your decision to specialize or not.

The challenge is to remember to continually analyze your career. Lessons learned are powerful motivators and insights into what not only worked well but also what you enjoyed in your analysis work. Remember to review your past work and define actions that can support your SWOT analysis work. As shown in some of our examples, even when you do not change anything, the world in which you perform analysis work is constantly evolving. But just like the agile mindset, you can go into a successful analysis career having changed specializations many times or even having switched between specialization and generalization in your analysis work. There is no right or wrong answer to whether to specialize. The trick is that you want to have made a well-informed decision and with a solid business case that supports a long-term, successful career rather than a job for the next few months. So, to help you in your decision, let's take a look at some of the pros and cons of specialization in your career.

## Benefits and challenges of specialization

The reason why there is not a single answer as to what you should or should not do with your career is that it truly does depend. It depends on you and your work experience, the organization you work in, the industry, and the market, as well as your own drive and personal aptitude. Again, we want to make informed, data-driven decisions to get the maximum value from all our investments of time and energy. So, like any good business case, there are advantages and challenges with specializing in your analysis career that you should address when you make career choices.

### Advantages of specializing

Specializing is sticking to a single niche area and working your way forward within that niche. The advantage of this approach is being able to see clear career paths or at least professional growth. Tasks get bigger and more complex the longer you stay in a certain specialization. More advanced applications of tools and learning task-specific techniques come into play the longer you stay in a single area of work or business. Your general business acumen for the topic will make it easy to be seen as an SME in that area of the business. It can also narrow your scope and focus when you want to address your career goals. Certain training and certifications are more specific and tied directly to your area of work. Conferences and professional associations have a clearer relationship with the work you are doing because you focus on a specific topic. Consider how many financial associations or professional organizations there are out there. Then consider how many professional business analysis organizations have open membership. In specialization, business analysis is a valued skill set like communication and team building. It is not the only work you do, but it is valuable for getting the work done.

It can also be quite easy to start a new job search. You know the area of business or the general departments of an organization in which you would find your work. Only mature organizations have business analysis teams. Some do not even have “business analyst” as a titled position! Yet most organizations have IT departments and finance and marketing teams that actively recruit good team members who can have a positive impact on delivered value.

Consider that just in your area of specialization, you will often then repeat tasks and techniques. The more you do the same things, the better your skills are in future activities. Specialization allows you to hone a set of skills to be an expert on that topic area. In contrast, if you worked in a more general business analysis position, every assignment may be different and require different techniques to complete different tasks. You might get a greater breadth of technical knowledge with these analysis skills, but there may never be the opportunity to repeat the same tasks and so you will lack the depth of work that is more systematized. However, this can also be a hindrance as specialization does introduce some challenges.

## Challenges with specialization

There are challenges when you start to specialize in your business analysis career. One of the things you might notice even in your own assignments is that specialization can lead to you assuming that your specialty area is the *only* type of analysis work you do. As you become an SME, stakeholders may not see you as a business analyst. They see you as an SME. So, people will seek out your skills in your area of specialization, not for analysis. When this happens, you don't want your analysis skills to be overlooked, or worse, wasted. Those analysts who become really good at getting agile teams running smoothly might then only be sought after as a scrum master or even product owner. Sure, both of these roles get to do analysis work, but this perspective limits the amount and types of work you might be assigned. The same applies to task work. As good as the nature of certain tasks and techniques can be to increase your confidence and success, only doing a select few tasks or techniques will greatly limit and hamper your analysis skills progression. In fact, you could get so focused on your area of specialization that you lose some of those more holistic business perspectives of a business analysis professional. You can slowly slip into a permanent SME position rather than continuously growing and expanding your analysis knowledge and experience.

You could also face challenges in that your area of specialty is also an area of the market that is saturated with analysis professionals. Job markets can act like a pendulum and go from needing lots of positions filled to there being no demand. This is why analysis of your career, in particular SWOT analysis and force field analysis, needs to be periodically redone to look at what is happening in your context. Know that even if you get into an area of work that you love, the environment around you is constantly changing and evolving. You want to keep track of this because things could change.

Take, for example, AI. This is an area that is in high demand right now to help companies upskill and take advantage of this technology. Not many people have this deep specialization and so it is in high demand (and is well paid). As more and more people get skills in working with and designing AI solutions, the demand is more easily met, and the job market will become

more competitive. What used to be a specialization will almost have become a generalization, an expectation even, that everyone knows how to do. If this is your only specialization, how will you stand out from the rest of the community? What if this technology advances so far that many of the positions no longer exist because of the processing power the technology has evolved? If your only skill set is automated, your position and even your value, can become obsolete. This is why it is so important to always build and revise the business case for your career decisions. Your own analysis work will always be the key to your next great career move, but it requires active analysis on your part. Reflecting on your experience with the motivation and long-term vision you have for future analysis work, coupled with your insight into your environment, is where you define those elements for making informed career decisions and avoiding challenges with specialization.

## Overcoming challenges with being specialized

Like most of your analysis work, there will always be opportunities and threats in how you deliver value. You can easily address these challenges using your great analysis skills. First, keep an eye out for industry and market trends. Find out how they relate to your specialty area. What effect or influence might they have on the kind of analysis work you perform? What are they doing to the job market? How is your own organization responding? Look broadly at what your current organization is doing and what the industry is doing. This doesn't only mean seeing what analyst positions they are hiring. Rather, is your organization hiring more and more IT staff after having outsourced most of the department for years? Is the human resources department shrinking while more consultants are being hired for project-based contracts? Just by noticing these trends, you can have an earlier insight to course-correct and pivot your career in a proactive manner rather than having to react to a negative change in the market.

You should be on the offensive in your career. Continuing to always professionally develop your skills will help put you in more demand. Look for topics that are considered fringe topics for your work. These are topics

that have a small relation to your work but might not be completely related. A great example is in IT: definitely take some cybersecurity classes to understand the foundational concepts. But if there is a cloud architecture or virtual hosting course or event, attend it to learn more about what technologies are out there and how organizations are using them. Most of the learning you will do will be an investment in the future. It is okay to learn something interesting that you might need later in the future. The same goes for certifications. First, certifications will give you an advantage whenever you are seeking more benefits in your current position or transitioning to another position. Second, certifications make you dive into concepts and industry knowledge to understand the foundational concepts and core standards for that area of specialization. Again, looking for topics that are related but also expand your current horizon is a great way to continuously build your value. For example, consider ITIL certification if you work at all with IT. This is not a programming certification but rather helps you understand the development life cycles, even if you only ever get projects that work in one area (Bharadwaj, 2024). Now you are building both your specialization skills and your analysis skills, which help to insulate you from market shifts.

No matter how niche your work or industry may get, do not be afraid to go back to those business analysis foundations. Those core analysis skill sets and competencies are the most transferable skills, no matter how the world changes. Seeking business analysis training, pursuing another BA-related certification, or seeking a new business analysis position can help you root yourself in those foundational skills and explore what started your career. The greatest thing about being a business analysis professional is that you have the power to shift from generalist to specialist and back again. This power comes when you rely on the core skill sets and value delivery models that make business analysis the sought-after competency that it is today. The decision of when, how, and where is up to you, and you should apply that very skill set for informed decision-making of a long and successful analysis career.

## Summary

This chapter's goal was to introduce you to some areas of business analysis specialization to help you explore the many faces a business analysis career can take. Each area of specialization will have unique tasks and techniques that are tailored to the specific area of work, yet they will all rely on foundational business analysis skills. Having to learn to be a good business analyst in your own career is a challenge. Using your SWOT analysis, coupled with a broader scope of analysis of markets and trends, you should identify the forces acting upon your career. Then, you should continuously review and revise your career analysis work so that you are constantly adjusting to avoid any roadblocks that could come from focusing on a particular area of analysis work. One of the greatest strengths in your toolkit to be a relevant and sought-after analysis professional is those powerful certifications. In the next chapter, you will explore certifications in the context of how to focus and approach certifications with a plan for success.

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