



Great Expectations: Expectations of BA delivery and communicating BA services

Report from the BA Manager Forum on 9th June 2017

Introduction

This workshop was facilitated by Christina Lovelock, of Leeds University, and James Cadle, of AssistKD. Its objectives were to:

- analyse the stakeholders for a BA practice
- understand why expectations matter
- discuss how to discover expectations
- use a framework to chart expectations and approaches to managing them.

The workshop consisted of two breakout sessions where, in groups of about 6-10, the participants considered these issues and then fed back their conclusions.

This report is structured around the two breakout sessions.

Stakeholders for a BA practice

Here, we consolidate and summarise the typical stakeholders with whom a BA practice is involved. In this context, participants considered stakeholders who were both internal and external to the organisation. Obviously, not all stakeholder groups are relevant to all organisations.

Top-level ('C-suite') management (internal)

- Chief Executive / Chief Executive Officer (CEO)
- Managing Director
- Chief Financial Officer (CFO)
- Chief Operating Officer (COO)
- Chief Marketing Office (CMO)
- Board Members
- Business owner.

Senior/middle management (internal)

- Senior Managers
- Project Sponsor
- Portfolio Management
- Product Owners (Visionary)
- Product Managers
- Business Change Manager
- 'Customer' (money payer)
- Account Managers
- IT executives.

'User' community (internal)

- Operations ('doers')
- Marketing
- Sales
- Human Resources
- Business process owners
- Data owners
- End users
- Subject matter experts (SMEs)
- Data protection officers
- Legal/compliance
- Risk management
- Procurement
- Finance
- Communications.

Management services / IT (internal)

- BA practice managers / practice leads
- Business analysts
- Project manager
- Test management
- Testers/test teams
- Infrastructure owners
- Enterprise architects
- Solution architects
- User experience designers
- Developers/development team
- Project Management Office (PMO)
- Service transition/support
- Information security
- Service management
- Quality Assurance (QA)
- Accessibility experts
- Maintenance.

Owners (external)

- Shareholders
- Government funders.

Customers (external)

- External end-users (customers)
- Consumers.

Suppliers (external)

- External [product/service] providers

Other stakeholders (external)

- Trades unions
- Regulators
- Auditors
- Accreditors
- Professional bodies

Challenges of working with stakeholders

In this second part of the workshop, participants were invited to consider the challenges of working with selected stakeholders. Here we present the conclusions of the groups for certain stakeholders.

Senior management

Their attributes were described as:

- High level
- Strategic
- Political with own agendas
- Lack of accountability
- Silo thinking
- Dictatorial
- Influencing ally or champion.

The challenges of working with these stakeholders were:

- Lousy or no prioritisation
- Changes of mind or of structure
- Conflicts
- Hidden agendas.

Project Sponsor

Their attributes were described as:

- Leadership / ownership
- Vision
- Decision-making
- Inspires trust
- Considers the 'why' (benefits).

The challenges of working with these stakeholders were:

- Can't or won't make a decision
- Management by committee
- Poor communication
- Lack of time
- Too involved in detail.

Visionary / Product Owner

Their attributes were described as:

- Representative of their area
- Authority and decision-making
- Passionate (heavily invested)
- 'Can do'
- Negotiator/influencer/conflict resolver
- Problem solver
- Able to prioritise
- Understanding of business value and business benefit.

The challenges of working with these stakeholders were:

- Being open to change and compromise
- Focusing on the broad overall view rather than just on the user community
- Understanding the benefit of BA crossover roles and responsibilities
- Spreading themselves too thinly; [lack of] availability to make decisions
- Being receptive to challenge from BA
- Within scope / aligned to benefits
- What is a minimum viable product?
- Over-complicating – gold-plating versus fit for purpose.

Subject matter experts (SMEs) (synthesis of two groups)

Their attributes were described as:

- Focused on detail
- Set in their ways
- Inability to change
- Small view
- Want everything quickly
- Unrealistic
- Expertise and experience
- Pool of future BAs
- Know lessons learned
- Have the other 'day job'
- Busy
- Knowledgeable
- Business versus technical language
- Champions for change
- Trusted adviser for user community
- Provides a 'customer lens'.

The challenges of working with these stakeholders were:

- Availability
- Previous failures
- No understanding of cost/benefit
- SPOF (single point of failure)
- Cannot make decisions.

'Tom the tester'

His attributes were described as:

- High expectations of the BA
- Demanding for information.

The challenges of working with this stakeholder were:

- Detail and clarity
- Binary thinking
- Following the script versus interpreting and understanding
- Documentation
- Use of tools
- Good dialogue required with constant access
- High maintenance (apart from Tom).

Architects

Their attributes and challenges were described as:

- Ivory tower
- Academic
- Not delivery focused
- Very technical
- Technical overview
- Independent

Scrum master

Their attributes were described as:

- Delivery focused on software
- Servant leader – removes blockages
- Short-term focus
- Different from project managers (inward rather than outward looking)
- Prioritising
- Strong soft skills.

The challenges of working with these stakeholders were:

- [Getting them to] understand all the accountabilities of the BA such as maintaining documentation
- [Getting them to] understand the value a BA brings
- Time pressure to hit dates.

Developers

Their attributes were described as:

- Big picture
- Flexible/Agile
- Requirements focused
- Competent
- Willing.

The challenges of working with these stakeholders were:

- Bigger picture
- Understanding of objective
- Technical focus
- Technical limitations.

Compliance

Their attributes were described as:

- Cautious
- Risk-averse
- Interpreters.

The challenges of working with these stakeholders were:

- Second-hand interpretation of relevant legislation
- [Create a] bottleneck
- Approval instead of guidance, support and advice
- Consistency across geography (Europe etc)Hidden costs.

External (outsourced) partners

Their attributes were described as:

- Over promise
- Under deliver
- Geographical split
- Specialist knowledge
- Apolitical

The challenges of working with these stakeholders were:

- Own agenda (getting more business)
- Need to get them engaged early enough
- Focused on contract terms – less flexible
- Over-promise and under-deliver
- Expectations of output
- Consistency of resources and knowledge
- Learning curve for them and their people
- Geography and time zones
- Scalability versus quality.
- Hidden costs.

Regulators

These were described as rigid and inflexible, passionate and tending to follow protocol. The main challenges were clarity and timescales.

Stakeholder management strategies

In the second breakout session, each group focused on one or two of the stakeholders identified and used a framework presented by Christina Lovelock to analyse these stakeholders and define strategies for their management. In some cases, groups chose not to use the complete framework.

Stakeholder 1: Senior management

Expectation	Never-ending pool of high quality BAs; to understand and translate business needs quickly and to high quality; to discover and fix problems quickly; to come with the solution, not just the requirements.
Experience	Often, no resources available; low levels of experience; have to compromise with what they really want; never deliver on time; good in a crisis and at fire-fighting; ask too many questions; obstructive.
Key performance indicators	Feedback questionnaires; monitoring against plans; scope changes project plan; outstanding defects; assessment of business criticality.
Objectives	Provide high quality resources for high priority projects; clearly document the business needs and objectives; high quality delivery against agreed plan; work on problems within our remit and influence/facilitate in other areas; identify the business needs.
Critical success factors	Provide resource for highest priority projects on roadmap; performance measurement; clearly defined scope; traceability; minimal disruption to business; documented business case and requirements.
Importance	High.

Stakeholder 2: Project sponsor

Expectation	Wants 'the right thing' done; on time or early; under budget; wants 'easy' good news; no hassle – get it done; minimum amount of time; think they know what they want.
Experience	Gaps in what they want; takes longer than they thought; more reporting; complexity is a surprise; unexpected consequences/ impacts on their time and teams.
Key performance indicators	Realistic and measurable; on time; to budget; [within] scope; focus on clearly agreed benefits required; clearly agreed requirements; value-based milestone reporting; find a way.
Objectives	Agree problem solving approach; educate; benefits focus; requirements focus; organisational focus; partnership.
Critical success factors	Management of resource/time/money; experience of previous projects – lessons learned; [be] positive – what you can do; partnership; benchmarking elsewhere in market.
Importance	High.

Stakeholder 3: Visionary / Product owner

Expectation	Delivered on time; delivered within budget; realising benefits; collaborate working environment; no nasty surprises; good user experience.
Experience	Delivery on time, to budget and realising benefits highly unlikely; collaborative working environment generally met but individuals could divert – depends upon strength of management; sometimes there are nasty surprises.
Key performance indicators	Requirements delivered to planned date; requirements traced back to relevant benefit; risks communicated to product owner and mitigating action put in place; number of defects; good/bad user feedback.
Objectives	Communicate scope, plans and cost, explaining ‘art of the possible; support prioritisation – high importance requirements, shifting dates, resource allocation; proactive and regular updates – identifying and communicating risks and issues; show and tell retrospectives – up-to-date, accurate and precise with no repetition; provide traceability of requirements back to business benefits.
Critical success factors	Correct budget allocation; other projects/changes; clear definition of scope and its managed change; access to right people at the right time.
Importance	Dependent on perspective based on time, cost, quality and scope.

Stakeholder 4: Business change lead

Expectation	Clear plan; clear delivery; successful; on time; good communications and progress; good risk management.
Experience	Not explored.
Key performance indicators	Not explored.
Objectives	Be proactive; regular updates; minimal chasing required; minimal noise from other channels; ‘delivery in control; answer questions appropriately and succinctly.
Critical success factors	No explored.
Importance	Not explored.

Stakeholder 5: Compliance manager (internal)

Expectation	Wants an easy life from [the] regulator; doesn't want to defend their proposals; doesn't want to be challenged; 'project will adhere to my view'; compliance will be fully supported by finance ('just pay for it'); [wants to be] part of project from the beginning; [team] wants advice on their interpretation.
Experience	Will be challenged or ignored; project will probably follow [their] view; nor part of project from the beginning; [team] receives approval or rejection, not advice.
Key performance indicators	Regular feedback during project; did the regulator take any action?; demonstrate meeting internal/ISO standards (traceability matrix); number of changes and iterations; volume of approval; trace requirements to compliance specification.
Objectives	Early and regular collaboration; develop relationships with the regulator; include them in every key step of project governance; make compliance manager feel good; support them; engage and include them; identify alternative solutions that may still meet the requirements even if not a perfect solution; develop relationship with compliance manager and other key people, for example project sponsor, to break barriers.
Critical success factors	Resources; cost; time; age of technology; legal implications, for example licence to trade being taken away; internal politics.
Importance	Reputation – high; financial implications – high.

Stakeholder 6: Subject matter expert

Expectation	Fix my problem; I can access my documents; improve things – process improvements; solution to resolve problem [and that] meets needs; solution rolled out on time-frame.
Experience	Been engaged and [provide] input; give advice.
Key performance indicators	Same number of documents and level of access the same; customer satisfaction.
Objectives	Training programme; business champions; good migration planning; ease of use; user groups.
Critical success factors	In use and comfortable using it; decommission old system,
Importance	High.

Stakeholder 7: Project manager (synthesised from two groups)

Expectation	Delivery on time, to budget and to quality; plan for analysis; no surprises; good enough, accurate forecasting; KPIs being met.
Experience	Delivery does not necessarily meet these criteria and tends to be fluid; limited control; focus on quality involved in day-to-day work; inclined towards problem resolution; lack of communication.
Key performance indicators	Milestones; actual spend; defects linked to requirements; benefits realisation; burn down against estimates.
Objectives	Communications plan and monitoring; management of tolerances; meet estimates; be more involved in planning realistic estimates; define/redefine scope; proactive approach of realistic delivery.
Critical success factors	Stakeholder availability; accurate estimates of scope; matching personalities; clear communications from the start; agreed deadlines.
Importance	High or Medium.

Stakeholder 8: Programme manager

Expectation	Requirements [expressed] at a strategic level
Experience	Not explored.
Key performance indicators	Not explored.
Objectives	Not explored.
Critical success factors	Not explored.
Importance	High – as for project manager.

Stakeholder 9: Project management office (synthesised from two groups)

Expectation	Accurate and timely time recording; accurate projections; [good] utilisation; production of artefacts on time with customer approval; provision of information for governance and assurance; adherence to the [defined] process; quality is good and 'fit for purpose'.
Experience	Is the information accurate? ; sometimes information late; often need to be chased; not always good quality and leads to re-work.
Key performance indicators	Accuracy against timeline; actuals versus projection; %age delivered on time or communicated in advance.
Objectives	Early communication of issues; management by exception; to proactively communicate work/product status in time and accurately.
Critical success factors	Team understanding of fallout; under/over spend on projects; availability; prioritisation; consistent way of forecasting.
Importance	Medium to High.

Stakeholder 10: Other business analysts

Expectation	Collaboration/support; practice support; approachability; clear deliverables; standardisation/consistency of approach; recognised for quality.
Experience	Not explored.
Key performance indicators	Feedback; %age of re-work; culture surveys; competency levels; skills matrix; attrition/sickness rates.
Objectives	Mentoring; knowledge sharing; have standards and templates in place; peer reviews; recognition.
Critical success factors	Workload; an effective BA manager; time.
Importance	Day for early wins' the rest follows later.

Stakeholder 11: Architect

Expectation	Clear requirements; BAs understand architecture; business has a clear view of the division [between business analysis and architecture].
Experience	No solutionising; systems in place.
Key performance indicators	Not explored.
Objectives	Not explored.
Critical success factors	Not explored.
Importance	Not explored.

Stakeholder 12: Developers

Expectation	Clarity of specification; realistic timeframes; prioritisation for delivery; level of autonomy/freedom of action; involvement in design; tools and techniques to do it.
Experience	Specification not clear enough; timeframes never realistic; too many 'musts' in priorities; priorities change too much; micro-management of development; solution implicit in requirements; developers rarely involved in design and then too late; tools and techniques often not in place in time and freeware used.
Key performance indicators	Number of change requests; number of defects in testing; previous project experience; count the 'musts' and use the change log; level of creativity; number of escalations.
Objectives	More communication; specification walkthroughs; prototyping; consider how to present the specification; plan the timescales in consultation with developers and reduce scope if necessary; define minimum viable product; bring customers closer; use change freeze and come back later; validation of changes; use developers to influence design gateways; provide development budgets.
Critical success factors	Time; organisational willingness; experience of BA competence; solution capability – what is 'good enough'?
Importance	Not explored.

Stakeholder 13: User experience designer

Expectation	Business requirements fit to user requirements.
Experience	Collaborative experience; involved in whole process; need to help to understand business priorities.
Key performance indicators	Customer queries and feedback; errors/defects in user experience.
Objectives	Engage early; help to understand changing business priorities.
Critical success factors	Not explored.
Importance	Not explored.

Stakeholder Type	Expectation	Experience	KPIs	Objective	CSFs	Importance
Same of group of individuals (e.g. Customers, business sponsor)	<i>What do they want? (WHAT and HOW)</i>	<i>Are we meeting the expectation?</i>	<i>How can we measure/monitor</i>	<i>What can we do to EITHER meet the expectation or change it!</i>	<i>Factors which influence achieving the objective</i>	<i>Prioritise the stakeholders/ actions (H/M/L, rank... etc)</i>