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THE BUSINESS OF IT

Mary Gorman, vice president of quality and delivery at EBG Consulting, and expert in business analysis, discusses the value of business analysis in enterprises and especially it's place the software development life-cycle as companies continue to embrace agile methodologies. Gorman explains the continuing importance of modeling to support collaboration between business and IT. Facilitating iterative feedback with the use of rough models between departments is an effective way to open up collaboration, where it wasn't happening previously.

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Tony Higgins: On "The Business of IT" today, I'm privileged to have with me Mary Gorman of EBG Consulting. Mary's well known in the industry for having a long career in directly helping business improve delivery of high value products. She's also a prolific author and blogger and notable contributor to the IIBA. Mary, welcome.

Mary Gorman: Thanks, Tony. It's great to be with you again.

Tony Higgins: You've had significant involvement with the IIBA over the years with development of the BABOK and the certification exam and committee work. The IIBA from my perspective has almost had a free run for nearly ten years with almost no other professional body paying attention to formulizing and supporting the business analysis profession. Now that the much larger PMI organization has turned their spotlight onto business analysis with the

announcement of their certification program, how do you see the future of BA certifications and these two organizations playing out?

Mary Gorman: Well, Tony, it is exciting, I think, to have more awareness of the value of business analysis. So anyone that can help amplify that to the marketplace, I think, is very important. For years – and some of us remember before the IIBA – it was really difficult to explain what business analysis work was and often it wasn't as valued as certain work like project management. So as I said, it's wonderful that we now have a broader way to communicate that value. That said, I would just really want to emphasize that in both of those organizations the word is not – the phrase is not business analyst; it's analysis. So the PMI has a professional in business analysis and this IIBA is certified business analyst professional. Those are designations to indicate your ability to do the work. So we want to be careful that we don't revert to the role aspect because truly if we understand the broadness of business analysis, it's the responsibility of everyone on the team and so it really goes to what skills do you have and what work do you do.

Tony Higgins: That's interesting. That's a subtlety that I don't think any – you know, most people know.

Mary Gorman: And it was challenging in helping with both the IIBA body of knowledge as well as the new PMI, PBA work not to write business analyst as you were talking about the work. And yet when we look at the commonality of these and you look at both of them and as analysts we'd look for, you know, those patterns, we have to do needs assessment to do our business analysis work. We have to do planning. We have to do analysis. And most importantly, we have to do validation, right?

Tony Higgins: Right.

Mary Gorman: And then – so both organizations recognize that. We're speaking the same things. And I would ask that – when I'm talking to folks is to really – if you want to do an assessment of your skills what are the skills you need to participate in business analysis work and it's not just modelling. It's not just doing process or data models. It's really to bring, I think, a broader understanding of say systems thinking. You know, that sometimes gets lost in

the shuffle of, okay, we're writing requirements. Well, the first thing is we have to elicit, we have to collaborate. So those types of skills, if we can focus on that and the work that has to be done, I'm all for anybody that wants to recognize the value in that work.

Tony Higgins: I think the industry would be well served by that as well. I mean the many companies that I go around and see, if it's one thing – and I have a few questions on modelling coming up and I just love modelling but it's for the same reasons. It kind of pulls people up, gets them into an analysis or an analytical mindset really and focus on what is it we're really trying to do here rather than often in many cases taking dictation when it comes to requirements.

Mary Gorman: Exactly. Exactly. So trying to help us be – have that shared understanding of looking for the value of the product, that's – to me that's the heart of business analysis work.

Tony Higgins: That's excellent. So on that note, in my role I encounter BAs in very, you know, large enterprises and quite a number of them and I have to tell you they're pretty confused in general and apprehensive about their role if we look toward an agile process because for many of them it's very new. So it of course has become a topic for them because in almost every case their organization has some sort of transition to agile initiative going on and they're somewhere along the road in that journey. From your perspective how do they fit into that picture, the business analyst and are there a few things they should do to prepare themselves for this transition which is inevitable it seems?

Mary Gorman: I agree with you, Tony. There's no question. We can't afford in today's world to delay delivering high valued products as you mentioned earlier. So whatever we have to do to be agile to do that. And what I see – and again, I'll just continue this aspect of the business analysis work that has to be done. On agile teams that we work with – you know, at EBG Consulting we do a lot of specific help for clients to be able to take their backlogs and be able to manage those backlogs in a very agile way and a lean way, I might add. So when we think about what work has to be done and the skills again that would be needed to do that, the ability to have a – I think a constant focus on collaboratively learning what those particular needs are. So as a person – let's say

I'm a person charged with that. I have to reach out to the business community, the customer base and technology and it really – and Tony, you and I have had these conversations before. I started out as a programmer a few years ago and we had some-

Tony Higgins: Not that long ago.

Mary Gorman: No, just a few. And so it's not that I need programming skills but I need to do – in doing business analysis work need to know how to effectively engage the technology experts. We want in agile to have both an understanding of the non-functional and functional. And many times in the past it was – as we know, it was very siloed. You do the analysis up front, then you get to design. So I would suggest that being able to have – you don't necessarily have to know the answers but to help lead the conversation to bring those technology dimensions into bear earlier, much earlier than we have in the past because in agile we need to see both the functional and non-functional together early on. That's different, I think, than in the past. So that's one way. I think the other aspect about taking more of an agile business analysis mindset is to bring testing in much earlier than we have in the past. And I'm actually doing a session this afternoon here at Agile 2014 and it's called "Test Analysis". So bringing both the idea that if I write a certain story, I also am responsible for making sure we have acceptance criteria for that story at that time. I want to confirm that story as soon as possible, well before development or testing.

Tony Higgins: So is that a little along the lines of begin with the end in mind?

Mary Gorman: Absolutely.

Tony Higgins: One of the wonderful ten habits – sorry, seven habits.

Mary Gorman: And what we're seeing is, you know, some agile groups are taking an approach of using tests whether it's given one then or BDD type things. And those can very effective for elicitation to a point, but when it comes to writing the business role that has to be actually coded and tested and the detailed data that would be used for the testing, again calibrating the timing of when we do that work, that's all part of being nimble if you will and being open

that when we write a story taking it to the next level with example scenarios and tests as early as possible because what happens – and I hope I can make the case this afternoon – is that by taking tests we improve the requirements and then requirements – say if we look at a model, a state diagram, that state diagram is going to feed test planning. So the analysis work as well as the testing are really just feeding very nicely off one another.

Tony Higgins: Very interesting. That's excellent advice actually. So I hadn't thought of the non-functional one but the testing one I expected to come. But that's very enlightening. Are we doing enough modeling since you just brought it up? I mean models are incredibly powerful analysis tools, heavily relied on. When we look to other industries of course, I mean, they're absolutely essentially. People wouldn't dream of doing their work in these other industries without them. Are we leveraging them enough in business application development?

Mary Gorman: Well, I'm really glad you brought that up because, you know, there are great tools like Blueprint that allow us to do models. And I think especially when our teams are not collocated that we need to have some way of sharing those models. So we would have to have that medium. That said, I think that in the past sometimes we got overly focused on a few models and they became the focus. I actually used focus twice. But they became-

Tony Higgins: I know what you mean.

Mary Gorman: -the work.

Tony Higgins: Almost the end goal.

Mary Gorman: Thank you.

Tony Higgins: De facto end goal in people's minds.

Mary Gorman: Exactly. That's not our deliverable.

Tony Higgins: Right.

Mary Gorman: So we don't need to gold plate models if we can use models and particularly to your point about transitioning to agile in a lightweight way and an organic way. And by that I mean we might sketch a data model and it's just a simple sketch. We may not take it to a very detailed level. We may not get to all of the data structure aspects right up front, but we use that as a form of communication and ask is that what you're thinking? And then one idea – Chris [Matts] has this great expression of break the model. And for most analysts in the past, oh my gosh, don't break my model. But the power is putting a simple sketch up and finding out very quickly are we communicating the same thing or is there something that I'm missing. So in essence adjust the model and learn from it. That to me, being able to have the business and the technology folks together sharing something like a data model or a process model or a [swim lane], it's the point is to have that equal way of collaborating instead of people having their own special diagrams with special notation that only certain people can understand. So taking those lightweight approaches and by organic – and this is – this a real challenge. I'm sure you've seen this, Tony. I was working with a client last week and we were doing a workshop and the data in particular, right?

Tony Higgins: Right.

Mary Gorman: They want – on this agile team they feel very hesitant to not do all the data modelling up front before the first sprint because it would be very difficult. They might incur technical debt if they have to adjust the data model as they move along.

Tony Higgins: So they're just terrified of doing it.

Mary Gorman: Right. Right. They want to get all the data up front. Well, that's not an agile approach. It was going to slow the process down and they may actually be caught up with low value data that may never actually be necessary or may not be necessary for a long period of time. So thinking about as a – I'm doing the analysis working knowing that there's a toolbox of all these different models, I should be conversant with the models and some I should be fluent in using those models, but making sure that as I collaborate with the entire team that we're sharing this, we're co-creating this.

Tony Higgins: Right. So it's almost – if I could paraphrase, the purpose of them as you just said was more like a catalyst for collaboration.

Mary Gorman: Yes.

Tony Higgins: A means to an end. The end being we need to collaborate a whole lot better and he's an awesome way to do it.

Mary Gorman: Right.

Tony Higgins: And using them more in a tactical sense; you know, just when needed, just enough, not exhaustive end to end to the greatest depths of detail, etcetera, etcetera.

Mary Gorman: Exactly. Now, there are certain industries where a model might have value after delivery of the product. But that needs to be a decision based on what would it cost to maintain that.

Tony Higgins: And it becomes now your deliverable or one of your deliverables.
Mary Gorman: Right. Right. We have some folks that find certain models may be helpful for training. So that may be helpful to invest in that model. But many times, I'm sure people can remember they put their heart and soul into a particular model and a year later, you know, it was out of date. So I think being intentional and understand who is being served by the model, who needs to participate in creating that model, and then what's your future plan for it so that you don't overinvest or in some cases under invest.

Tony Higgins: So stop and basically outline what's the purpose of this model on the planet, in my project and don't go out of scope.

Mary Gorman: Exactly. Well, I mean it's all about the modelling, right, because we use them to help identify the scope but many times we don't step back and think of the model, the life of that model, right?

Tony Higgins: The life cycle of a model.

Mary Gorman: Yeah.

Tony Higgins: Wow. Excellent. So I just have a few closing questions for you if I may. What's one piece of advice you'd have for somebody who's about to undertake a new, large enterprise project? And I'm not picking on any specific role, just anyone entering into that because, you know, we have a nice – not nice but we have a long history of what we used to call death marches. Some of them are still out there. I still see them. And for people coming into some of these the situation is improving, just my subjective experience, but just someone venturing into that say for the first time in their career.

Mary Gorman: Oh, wow. That's a tough one, Tony. I would suggest that being very clear on what are the goals and objectives and having the ability to look down the road keeping at a very – you're thinking about horizontally down the road but a very thin slice. And part of what my colleague Ellen Gottesdiener and I have focused on is we have something called the seven product dimensions and we've written about this quite a bit and it's in our book, "Discover to Deliver: Agile Product Planning and Analysis", and at the enterprise level being able to clearly understand those seven product dimensions. And I mentioned earlier there are functional and there are non-functional. And so from an enterprise perspective, being very clear of what are the technical aspects, what are the quality attributes at a very narrow slice, right? Thin slice, I should say. Because many times when we create roadmaps which again is an important aspect for that big effort, the roadmap needs to include both the functional aspects as well as the non-functional. So again, having the discipline to understand there'll be trade-offs and what would be high value from a technology perspective, is that value from a business perspective. So having that ability to look at those across, look at it – and look at the product holistically and be able to explain what that value proposition is before you move much farther along.

Tony Higgins: What shifts or trends do you see in, I guess, the business of IT, the topic of this conversation, over the next couple of years? I mean there's many out there but if there were some that bubble to the surfaces you're most interested in or most excited about or you think may be most influential.

Mary Gorman: There's one trend I know that you've seen. It's this very clear focus on the customer experience. It's not just the user experience anymore. It's the complete customer experience from ideation to delivery and further on. So I noticed here at the Agile 2014 conference the number of sessions around user experience, journey maps and making sure that we look at the product in that regard from the customer's perspective. Another aspect that the last three client engagements I've had that's been very, very important is the ability to support mobile use. So how do you take your existing products and reach out and – actually, many times it's not reaching out. It's people are reaching in to you saying I need to use this on my phone, on my tablet. That brings up a lot of questions and they're not just technology based questions, they're not technical. It's if I have this particular report and this financial planner needs to look at this report on their cellphone what is the most important data? What aspects of the report can we give them? How do we communicate with them? And so that – people are struggling with that now and I think that having ways to help people analyze – go back to business analysis work – analyze what is the need and how do we address that and those go hand in glove; the customer experience with the mobile delivery. So I think that's a really important aspect that we need to be able to address in a better way.

Tony Higgins: That's very interesting. Yeah, because the use cases on the mobile device may be quite different and often is than…

Mary Gorman: Oh, yes. And then of course testing. Oh, my goodness, that takes a whole other – a shift to that one.

Tony Higgins: Where do you go to get your information? What are your favourite websites, blogs for?

Mary Gorman: Oh, my goodness. Well, this will show my interest in life right now. Of course I have to mention our EBG. We have a blog and whatever. But I am very interested in this whole concept of user experience and how we communicate with people and the ability to – I love the Nielsen Norman Group. They have this – you know, they are to me the bible for UX research; excellent, excellent reports, studies that are done. And then related to it tangentially is Garr

Reynolds' "Presentation Zen". And again, it's how we can present and share information with people in a very powerful, creative way. That another thing – just one of the skills, I think, is in addition to collaborating we have to have a creative way of collaborating and use of colour, symbols, engaging people across cultures. So I'm always looking for that. And then I enjoy following a number of LinkedIn groups. I love the very democratic way that happens instead of just reading one person's blog but to stay tuned to someone who's just starting this and they are in some remote area and to hear the voice of the people in our community. Very telling what they're looking for. So I use that to keep myself in touch.

Tony Higgins: Wonderful. Mary, thank you very much for spending the time with us. Appreciate it.

Mary Gorman: Oh, it's great to be with you again, Tony. Thank you.