10 Steps to Becoming a Bad Ass Business Analyst

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This article was originally published as a three-part series in BA Times, http://www.batimes.com, June – August 2009.

Do you want to take your professional capabilities to the next level? Do you want to add more than just techniques to your tool kit? Wanna become a bad ass Business Analyst? Here are ten opportunities to apply "*intelligent disobedience*" and *judicious audacity* to your environment to earn those bad ass stripes.

The term *intelligent disobedience* comes from guide dog training. Blind people who live in cities listen for the auditory queues from a traffic light turning green to tell them it is safe to step off the curb into an intersection and walk across the road. Their guide dog is trained to watch for cars that aren't showing signs of stopping. When the dog sees danger to their human, the dog is intelligently disobedient, and stays in a "sit" position, letting the human know that they shouldn't step into the path of danger.

Judicious audacity is the intelligent application of aggressive boldness; that is, taking control of the situation in a fearless fashion because it is the effective and efficient thing to do.

Caveat emptor: there is a significant amount of risk inherent in many of these actions, though the payoff is high. Buckle up tight, fellow BAs, here we go.

Step 1. Exploit the hidden power in "menial" tasks

Step 2. Delegate!

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Step 1. Exploit the Hidden Power in "Menial" Tasks

We think that as we advance in our role, we shouldn't have to do menial work. Tasks like taking notes or writing the first draft of a document or process may feel like they should be beneath us. Wrong perspective. Menial tasks aren't always low brain power tasks; below are two examples of hidden power for the BA who can leave their ego at the door.

#1: Note taking and the power behind it

When you are the person recording the meeting minutes, you are in control of the official record of the decisions, action items, and open issues. Is the speaker making pronouncements in sentence fragments? You can stop the meeting and request that the speaker give you a statement that can be recorded. Does it appear that a decision has been made but you aren't sure exactly what was decided? You can stop the meeting and request that someone give you a summary so that you can record it properly. Has an action item been agreed to? You have the power to suggest who should own that action item and what the due date should be. Is note taking a menial task? Hardly. You're actually running the meeting and finalizing the decision making.

And, of course you are taking these notes directly in electronic form. Pen and paper is a luxury reserved for CEOs and poets, the rest of us have to be more efficient.

Before sending out the meeting notes, you should summarize the key points and decisions. Was there some fuzziness around a particular topic? Clarify it based on your business understanding or by contacting the Subject Matter Expert (SME). This is like stealth direction setting. And think of the visibility you have when you send around the meeting notes for comments and correction. Just be sure to have "recorded by <your name>" in the meeting notes.

#2: Seize the moment: Draft the initial process/doc yourself

Do you ever get impatient with the lack of progress, or the inability of some people to get past a blank template? Start the document yourself and send it out to the team as a "suggestion". The trick is to *influence the process* by presenting your ideas to kick-start everyone else's thinking. Your natural BA instinct will be to try to get *everything* right before you show the document to anyone. In this case, though, you don't need to get everything right because you are influencing, as opposed to analyzing; you're pointing people in the general direction that you think is best, and encouraging them to build on top of your suggestions.

Step 2. Delegate!

Delegate? How am I supposed to delegate? I'm a single contributor, I can't delegate; I get tasks delegated to me!

True. We BAs are single contributors, we don't have the authority to delegate, but we have earned the right to suggest that a particular person or group should perform a task. In Step 1, above, there are two methods of "stealth delegation":

You can delegate by recommending a person to own an action item from a meeting. If a person has special knowledge or interest in a particular area, it is appropriate to suggest they bring their expertise to bear on a task in that area. Minimally, you could ask them to draft a few slides or a couple of paragraphs outlining their ideas or concerns, which you can incorporate in the deliverable. They are likely to come up with some points you wouldn't have thought of as well as being more invested in the success of the effort.

Delegate by putting a comment in a draft *implicitly assigning* a section by asking a question of a specific stakeholder, e.g., "Stakeholder A, do you have anything to add here?" Then follow up with that stakeholder both privately and publicly.

There's also delegating by trading tasks – what can you do for the individual that you want to do something for you? This sort of "horse-trading" is a great way to leverage your own skills to obtain something you need, but can't accomplish on your own.

In all these cases, be very clear about what you need from the person and when you need it. Follow up with them approximately half way through the time you have allowed for the deliverable to make sure it's still on their radar. Be sure to emphasize that their special knowledge and input is vital to the success of the project and thank them for taking the time to contribute.

Step 3. Compose in Real Time

Whether you are doing a structured walkthrough of your BRD, or realtime process development, when you have a live audience for work that is happening in realtime under your fingertips, the pressure is on. This is one of the stages on which you earn your Bad Ass BA performance award if you are truly a master of your craft.

Let's say you are using one of the many application sharing tools that allow people to see what is on your computer screen, no matter where in the world they are physically located and that you are revising the phrasing of a requirement that is giving people heartburn. Three people are talking at once. While you retype the offending requirement before everyone's eyes, you get to say,

> "Folks, let's agree on who is the actor, here. Do we agree on that it's the system? Good. Now, what was the exception condition that someone identified? Wait, repeat that again, you said it too fast. Okay, good. Does anyone disagree? Now, what has to happen to trigger this requirement to come into play. One at a time folks, one at a time. Any conditions? No? Okay. Let me read this out loud to see if makes sense…. I think we want a different word, here, how about "configuration"? Any disagreement? Good. Now give me a moment to tune up the action … okay, please read this to yourselves. <count from one to five silently> Does anyone feel this does not express what we are trying to capture? Great. What's the next one we need to work on?"

You own the stage, you clearly own the material, you are in the driver's seat and you are getting the job done. Furthermore, you are putting pressure on the people who disagree to get their issues out in the open and resolve them by asking if anyone disagrees and explicitly making silence equal consent. The key is to determine when you've captured the meat of the idea and not let people wordsmith themselves to death.

How did you develop this skill? You've been taking notes in meetings (see Step 1, Point #1, regarding CEOs and poets) for years and doing the same thing; now you're just doing it before everyone's eyes and making it look easy.

Step 4. Define gonzo success criteria

Slang: "gonzo" means conspicuously or grossly unconventional or unusual

As an exceptional BA, you should already have gotten all your project team members and stakeholders to focus on the success criteria for the project and the on-going process. Now take a dramatic step and get them to focus on the *end customers'* success criteria for the on-going process. When you start doing this, the team members and stakeholders are likely to tell you that you are crazy and what you're suggesting is impossible to do/measure/implement. Don't worry, that's a natural reaction to out-of-the-box thinking, and you are way out of the box.

The point of focusing on the customers' success criteria is that we usually measure what is important to us, and what we feel is reasonable to measure. Too often, what we think is important is not what the customers consider important. Here are two examples to illustrate different aspects of this.

Scenario 1

Airlines have determined that customers' satisfaction is impacted by how long it takes to check in for a flight, so it makes sense to have a requirement that the flight check-in process be as efficient as possible and to measure the time it takes to check in. It would be sensible and relatively easy to measure the time it takes for the counter personnel to key in the customer's information and provide the customer with a boarding pass. If you are the customer, however, when do you start measuring the time to check in? Probably when you get in line at the counter.

So, if there's a 20 minute wait in line because the airline hasn't staffed the counter properly, it may not matter to you that the time it takes the counter personnel to key in your information has been cut from 10 minutes to 5 minutes. Nor would you be impressed if they were able to cut it further to 2 minutes – you are still irritated by the long wait in line. The gonzo success criterion comes from looking at something that the airline doesn't nominally control and may find difficult to measure: the amount of time spent waiting in line. Once you change your point of view to the customer's, however, further improvement in the pieces of the process that you control may be wasted investment, compared to extending your control to other, more difficult to manage and measure portions of the process.

Scenario 2

Software companies don't want to give away support for their products so they generally require customer companies to pay for a maintenance license. When someone from the customer company calls in for support, the first thing the software company does is determine if that contact and company is entitled to support by checking that company's "entitlement data". It makes sense to the software company to make it as easy as possible for the customer companies to keep their entitlement data up to date, so the software company could have developed success criteria about how much time it takes the customer to update entitlement data. From the customer company's point of view, however, there may be no reason to value entitlement data; the customer company just wants support, now. The customer's success criterion is for the software company to "automagically" know that they are calling about a legal copy of the software for which maintenance has been paid.

Manual maintenance of entitlement data is just one possible way to meet that need. If the software company came up with another solution that led to the software itself automatically maintaining the entitlement data when it is deployed or updated, the customer would probably be delighted. But as long as the success criteria assumes that entitlement data must be maintained manually, the customers' real needs are being overlooked. In this case, the gonzo success criteria requires ignoring the solution already in place and getting back to the customers' underlying need.

As a Business Analyst, you are used to putting yourself in other people's shoes to figure out what they want. Use that skill to add the end customer point of view to your requirements and metrics and you will increase your value enormously.

Step 5. Ask the crazy-as-a-fox stupid questions

Slang: "crazy as a fox" – the fox is considered a cunning creature who may choose to act in a manner that appears to be foolish or stupid, but actually advances its underlying plans, or, in the case of fox hunting, outwits its pursuers and saves its life.

All Business Analyst job descriptions should have these four expected duties:

- Asks the questions that no one else dares to ask, and that everyone wishes that somebody would ask.

"I'm not sure I'm following, it sounds like we have made an assumption that magic happens at this point in the process, and all the customer record duplications are cleaned up and removed. Could you tell me again how this is going to happen?"

- Asks the questions that, once answered, will bring everyone to the same level of understanding.

It may be the case that some people in a meeting know what a particular TLA (three letter acronym) means, but others have no clue, and are having a hard time following the conversation. The "stupid" question, "sorry to interrupt, but could you tell me again, what SRM stands for?" isn't stupid, it is a kindness.

- Crystallizes the issue for people to understand what the sticking points are.

You may need to go out on a limb and take the risk of oversimplifying, but it is a risk worth taking. For example, it is not unusual for two team members to be arguing vociferously when they are actually in violent agreement. It's your job to remove their blinders and show them how their opinions can actually dovetail. Try paraphrasing their positions, and then suggest how they can be combined.

"Let me tell you what I'm hearing. Lakshmi, you feel that A is the most important issue. Jorge, you've been saying that B has to be addressed first. I don't think this is a win-lose situation. Your recommendations are not mutually exclusive if we do C, which essentially combines A and B. As for D, can we forgo it? Doing so would remove the risks we are concerned about. What would the ramifications of that approach be?"

- Ask the questions that lead to out-of-the-box thinking.

One interesting "stupid' question involves asking for the anti-solution and using the resulting suggestions to generate discussion on how to resolve those problems.

"Let's spend a few minutes thinking out-of-the-box with the anti-solution. If we really wanted to mess this situation up, what would we do? [much laughter and crazy suggestions which you capture as discussion points] And how can we avoid point A? What about point B – aren't we actually making that worse with this requirement we just defined? Does this raise an the possibility of an entirely new solution/policy/process?"

Step 6. Get Their Attention

Slang: A "clue-by-four" is a broad hint, firmly delivered. Also a metaphor for enlightenment. This term derives from a western American folk saying about training a mule: "*First, you got to hit him with a two-by-four. That's to get his attention.*" A two-by-four is a standardized size for boards used when building – roughly 2 inches thick by 4 inches wide by multiple feet long.

People, unfortunately, don't always pay attention to potential risk. Risk as seen through our BA eyes frequently has to do with the consequences of missing information. This kind of risk can be overlooked or underestimated by people who usually focus on delivery risks. The clever BA needs to not only identify the risk, the BA needs to also assess the severity of the risk, and frame and communicate the risk in a way that makes the consequences clear and unappetizing.

The fact that Risk Management is usually considered a project management activity does not preclude a BA from putting this methodology into her own toolkit:

1. Identify, characterize, and assess threats
2. Assess the vulnerability of critical assets to specific threats
3. Determine and quantify the risk severity and likelihood of occurrence
4. Identify ways to reduce or avoid those risks
5. Prioritize risk reduction measures based on a strategy

Capturing this information in a tool like the Failure Mode and Effects Analysis (FMEA) permits you to share it with the stakeholders and get their agreement on the existence of the risk and buy-in to the risk avoidance and diminution methods. Then, when the stakeholder isn't paying attention to a promise or deliverable, you get the joy of saying, "Madam Stakeholder? I just wanted to gently remind you that three weeks ago you promised to provide me with headcount of your developer teams so that we can estimate the number of licenses that will need to be negotiated for this third party application. According to the agreed upon risk management plan, if we don't have the information by tomorrow 5pm your local time, we will have to defer all the requirements from your organization until the next phase of the project."

Risk Management is traditionally the responsibility of the Project Manager, however, identifying risk is an activity that falls squarly in the lap of the savvy business analyst. take some time to become familiar with it and the tools to support it.

Step 7. Schmooze those stakeholders

Slang: "schmooze" means to chat in a friendly and persuasive manner, especially so as to gain favor, business, or connections. Derivation: "schmooze" came into the English language from the Yiddish language shmues, meaning talk.

Stakeholders have the power to help you or hurt you, and if you surprise them with something, they will almost always hurt you. Make sure that they know when something is happening in your project that will touch their sphere of influence and that they buy into the change.

When you identify your stakeholders, those with the most power to help or hurt your project are the High Priority stakeholders, and should be regularly schmoozed by you and/or one of your key team members. At a minimum, meet with them regularly to keep them apprised of the project's progress and potential impacts on their area of influence. Make sure they know who is supposed to be representing their interests, and make sure you understand what those interests are. Ask them what their success criteria are for the project, and if their idea of success is not in line with the project's goal, perform proactive change management. Build bridges and help them understand that you are looking out for them. You will undoubtedly have to deal with them again in the future.

Step 8. Rat out those underachievers

Slang: to "rat out" is to inform on, or tattle.

You've presented your requirements gathering plan; you believe that there is a shared understanding of the strategic direction and everybody has signed up to do their share of the work. A couple of weeks go by and everyone has completed their commitments but one team, Team Slowpoke. You did everything to ensure that all the work would come in on time. You called them a couple of days before the deliverable was due and asked how they were doing. You got a non-committal answer and they said they didn't need help. The day of deliverable came and went. You called the next day and said that you must have missed their email with the deliverable and would they resend it. By noon. Today, Thursday. Noon came and went. It's Friday 10 am. The entire team meets at 8 o'clock Monday morning. What's a bad ass BA to do?

You can talk to the laggards' peers, expressing your concern, and encouraging them to put pressure on the laggards. In parallel, you can talk to your manager and express your concern. No whining, just concern.

> "Mr. Manager, I just wanted to let you know that all the teams have provided the information that they agreed to provide, except for the Slowpoke team. They have said they don't need help. They aren't responding to email, or voicemail, and no one is in their office. I'm concerned about what we can accomplish in our Monday meeting given their lack of participation."

Finally, in the 8 a.m. Monday meeting, you can review all the deliverables and their status, thanking all the other teams for delivering on time, and calling attention to Team Slowpoke's failure to deliver. You can ask Team Slowpoke's leader, in the nicest possible way, to explain why this failure occurred so the rest of the group can help resolve the problem. You remain silent, maintain eye contact, and listen. Then you can ask how they intend to resolve the problem and what the new due date will be. In fact, you might even offer to talk with their manager, in case this is a resourcing problem and the team needs to have something taken off of their plate. Use your sense of judicious audacity here, to determine how far this needs to be pushed.

The worst thing you can do is do nothing.

Step 9. Speak truth to power

Here are three ways that Business Analysts can use their verbal acumen to demonstrate leadership.

#1. Someone has to say what needs to be said

Rarely is it worthwhile to embarrass a person in public, but sometimes it needs to be done.

> For example, in a group workshop, staff members are engaged in a productive discussion. Ground rules banning in-room cell phone conversations were agreed to. A manager who is there to lend credence to the proceedings and answer any management type questions that may come up receives a call on his cell phone. Instead of excusing himself, he proceeds to take the call, hunching his back and focusing his gaze on the floor as if averting his eyes from the people around him also makes his voice inaudible to everyone but the person who called him.
>
> Our BA-Meeting Facilitator turns to the manager and politely requests that he turn off the &#@$ing phone. As the manager leaves the room with phone glued to his ear applause erupts in the room.

#2. Children whine. Bad ass BAs do not whine.

If a BA wants to be taken seriously, whining is the kiss of death. Bad ass BAs present the facts, just the facts, and nothing but the facts, followed by a constructive suggestion for moving forward.

#3. Ask for "Guidance" instead of blaming

When asked by a senior manager what the cause of the delay is, a junior team member gets defensive and starts to whine that the team can't be held accountable for delays caused by other groups.

> "Madam Manager, you are right. Our draft of the BRD is late because all sections should be ready for preliminary review today, and section 4 is not done right now. We are collaborating with the infrastructure team, and they needed to get information from the data center operations team, and that team is in a time zone 12 hours ahead of us. We are having difficulty conveying the importance of their cooperation. We would appreciate your guidance in how to handle this situation."

In this context, a request for guidance is encoded request escalation, e.g., that strong motivation be provided to provide the information. Of course you could say, "Would you please arrange for a fire to be lit under that laggard's butt?" but that might not reflect well on your powers of self-control.

Step 10. Put on Your "Facilitator Flak Jacket"

Slang: a flak jacket is form of protective clothing designed to provide protection from shrapnel and other indirect low velocity projectiles.

The BA role is a communications hub as we said before. We spend a lot of time helping people discuss their needs and concerns while trying to move the effort forward towards a goal. Facilitating a meeting with a group of contentious stakeholders is no fun, but it can be interesting. Ideally your company would provide training on facilitation, negotiation, and conflict management. If that is not available to you, think about a high school coach or a teacher who, while you may not have liked that person, you respected because they were able to keep control of an obnoxious group of teenagers. Channel that person. Remember that you are wearing an invisible flak jacket – take criticism in a constructive manner and adjust your conduct if doing so will yield a better result. The flak jacket will protect you from bleeding out when a particularly unkind criticism is hurled at you.

#1: Set the Agenda

> Normally the facilitator sets the meeting agenda. If you realize that the meeting agenda isn't going to meet your needs, offer the list of items you would like to see on the agenda.
>
> "For our meeting on Thursday, I'd like to see us address the following topics…. We have been talking about these issues in several other meetings this week and I think we are ready to make some decisions. Could we have these three topics on the agenda? I think if we put them in this order we'll be able to make the decisions quickly."

#2: Good Housekeeping

Start with getting people to agree on how the group meeting will be run.

- Verify the "rules of the road"

  For example, if you are running a brain storming session, you will remind people that all input is good, and comments like "that's a ridiculous idea" are out of bounds.

- Identify and agree upon the decision making method
- Decision making methods range from unanimity, through consensus, to authoritarian. Should the team choose consensus, make sure there is a common understanding of what this means (usually, "it's not my first choice, but I'll support it" or "disagree but commit") and how ties or stalemates will be broken (possibly by delegating the final decision in this situation to a project or team leader, with the "disagree but commit" agreement in that case).
- Explicitly call out the expected results/deliverables/goals of the meeting

- At the beginning of the meeting, review the deliverables for that meeting, get agreement that they are complete, and then drive to the agenda to complete those deliverables. At the end of the meeting, review the deliverables to make sure they have been met.

#3: Keep people to the schedule

> "Mr. Senior Architect, I'm sorry to interrupt your story, which I must say is quite interesting. To keep us on schedule, could I ask you to wrap it up in the next two minutes? Thank you."

There can be a fine line between managing the schedule and permitting the attendees to dig down to unrecognized underlying information. Spread this power around by identifying a rule in the "rules of the road" permitting anyone to call a "rat hole" or "rabbit hole" when attendees are either pontificating on something that has already been agreed upon, or are going off topic. Provide a culturally appropriate phrase to use when doing this. Sometimes this can be a nonsense phrase – for example, in a steering committee, one attendee brought a little cut-out human figure his child had made and explained it was named Flat Stanley. Flat Stanley was adopted as the team mascot, and "given" the power to make recommendations to keep the team on schedule. From that point on, the phrase "calling Flat Stanley" meant the speaker should wrap it up and move on.

#4: Manage the Conflict

Some of us would rather sink into the floor rather than be a room when two people are speaking to each other in a challenging, contentious manner. There's a certain amount of conflict that is constructive, and even necessary. Shutting constructive conflict down too early is like the game whack-a-mole, it merely means that the conflict will erupt elsewhere. Sometimes we have to bite our tongue and be patient, giving time for the individuals to work it out in a professional manner.

Conflict is not constructive when the argument has been repeated more than twice or when the comments have become personal insults, or people are yelling in anger. At this point the facilitator must shut down the conflict.

> "Gentlemen… Gentlemen! Please. Sam, would you record in the minutes that this topic needs to be addressed in a different meeting. Gentlemen, why don't you two take a five minute break. We'll move on to item #5 on the agenda."

For more information on the art and power of facilitation, take a look at "The Art and Power of Facilitation" by Alice Zavala and Kathleen Haas. This book is one of a series in the Business Analysis Essential Library published in 2008 by Management Concepts.

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