BA 20/20

Becoming a Benchmark Company for the Business Analyst Practice

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Ground Rules

- This session is for you, so please participate.

- Interrupt me for clarifications.

- The content in this presentation is the responsibility of Hans Eckman, and does not express the views or opinions of SunTrust Bank.

- No animals were harmed during the creation of this presentation. Please support your local pet rescue groups.

Steps to Setting a Strategic Vision

- Gather the critical change agents

- Define the desired outcome (destination postcard*)

- Script the critical steps*

- Create a mechanism for change

- Evaluate and update the vision and supporting processes as needed

*See Switch: How to Change Things When Change Is Hard by Chip Heath and Dan Heath

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The Road Less Travelled

- In 2007, SunTrust made a strategic investment to improve the business analyst capabilities within applications delivery
  - Move to a role-based Professional Development Manager model
  - Pooled BA resources were assigned to workstreams
  - Improved BA tasks and templates in the delivery SDLC
  - BAs took B2T Training courses to match capabilities to industry best practices and the IIBA BABOK
  - Implemented a requirements management tool

- Like Dorothy, we had our ruby slippers and travelling companions.

- What needed a Yellow Brick Road to find the Emerald City.

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What Would Success Look Like?

20/20 SunTrust BA Goals

➢ 80% BA certification within 2 years of employment

➢ BA recognition as a project team lead

➢ 90%+ Requirements coverage

➢ Less than 5% missed requirements at signoff

➢ Less than 2% valid static test defects

➢ Less than 2% UAT defects due to requirements

➢ Job aides, knowledge base and templates covering 75% of all BA expected activities

➢ Full lifecycle project metrics with reporting, baselines and target performance
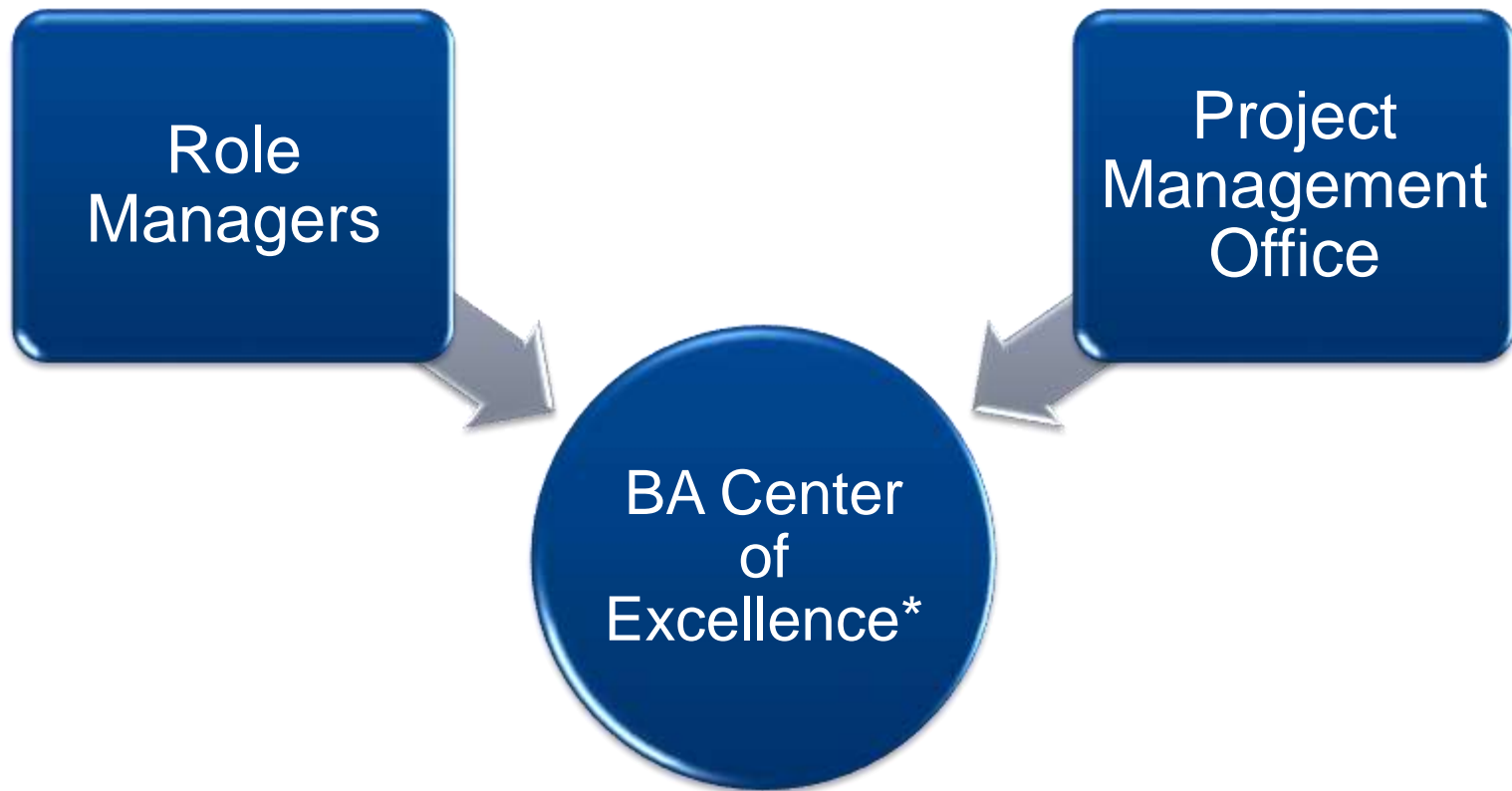
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Putting the BA in the Center of the Room

The person performing business analysis is our customer

- What does a BA need to be successful?

- How will a BA recognize success?

- How will others properly engage a BA ?

SKILLS TOOLS AUTHORITY

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Support and Authority for Change

- Provide authority, coordinate collaborative initiatives, identify bright spots, recommend membership, provide prioritization
- *or a Community of Practice when lacking stakeholder group support

Task Evaluation Criteria

1. Allows BA to complete task FASTER, EASIER and MORE ACCURATELY

2. Can be implemented in under 3 MONTHS and 160 HOURS

3. Decision based on DATA not ANECDOTES.

4. When executed, delivers MEASURABLE VALUE.

5. Enforces GOVERNANCE, COMPLIANCE and STANDARDS
   (note: changes to governance, compliance and standards meet this criteria)

BA 20/20 – Executing the Vision

- Support and approval from PDM and PMO
- Adoption of criteria and approach by change agents
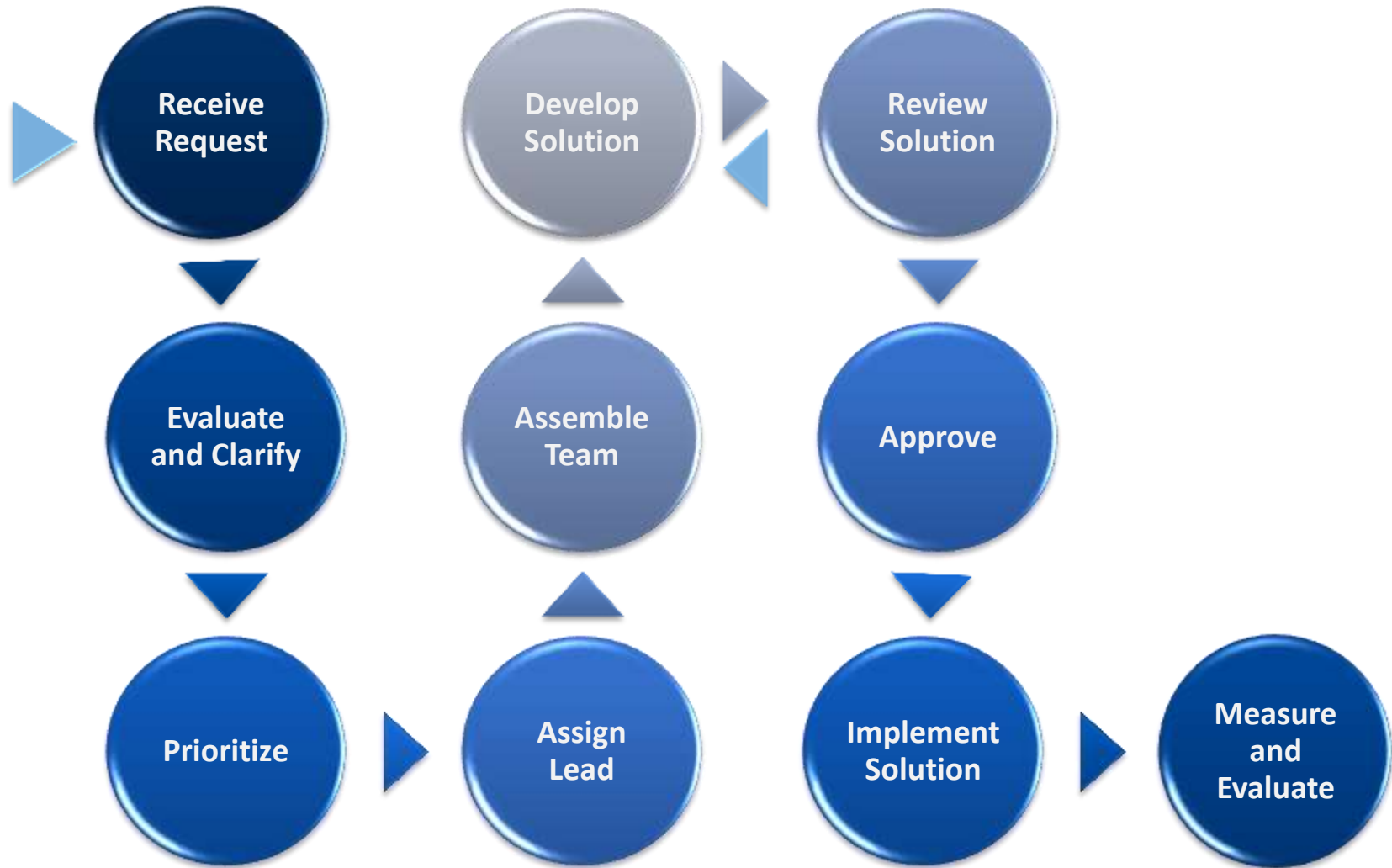- Execute at all contact points

People

- BA Center of Excellence
- BA development managers
- PMO
- Business Analysts
- Cross-Role Impacts
  (Delivery Managers, Business Sponsors, PM, Dev, QA, Architecture etc.)

Process/Tools

- SDLC/Methodology
- Templates
- Training
- Guidance, Job Aides
- Reporting

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Change Request Flow

Receive Request → Evaluate and Clarify → Prioritize → Assign Lead → Assemble Team → Develop Solution → Review Solution → Approve → Implement Solution → Measure and Evaluate

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Leveraging Commander's Intent

Focus change on actionable goals not detailed steps.

Define: Goal, Constraints, and Time

Lead

Communicate: Goal, Constraints, and Time
Define: Intermediate Goals and Constraints

Implementer

Implementer

Execute

Practitioner

Practitioner

Practitioner

Practitioner

Foundation: Tools, Process, and Training

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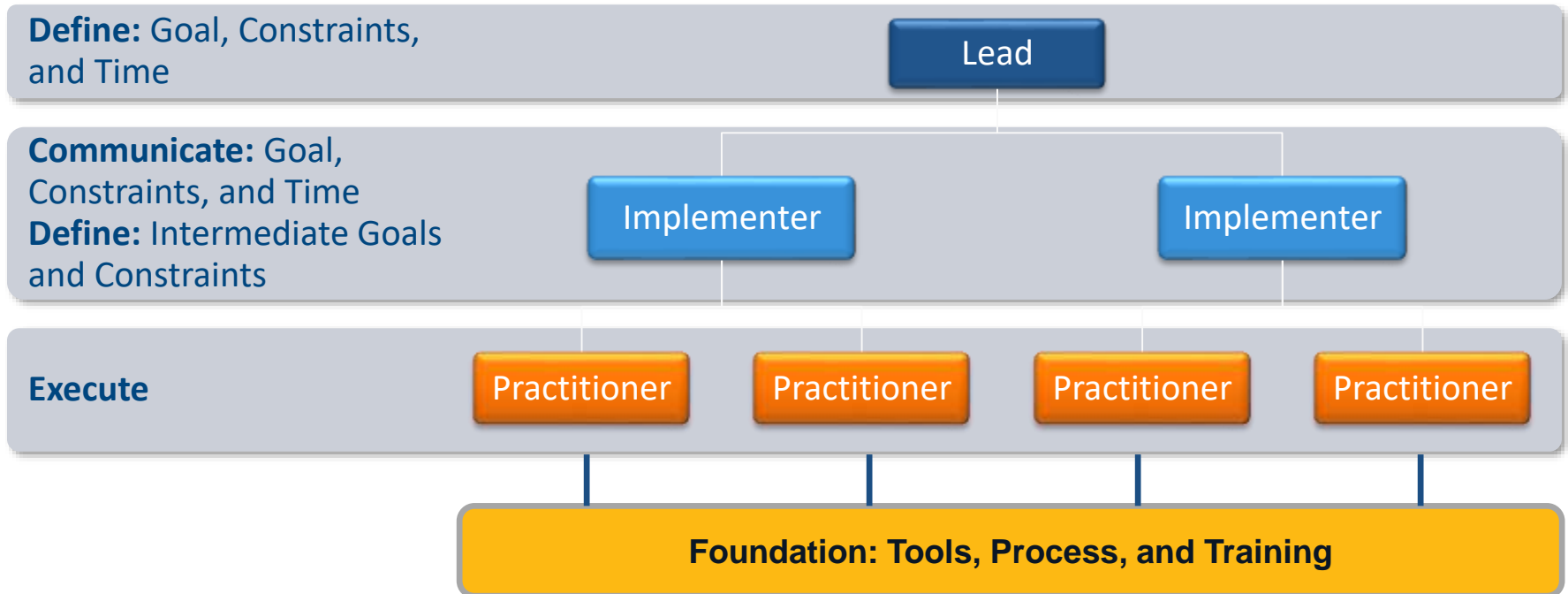
Recommended Reading

- Switch: How to Change Things When Change Is Hard by Chip Heath and Dan Heath

- Good to Great: Why Some Companies Make the Leap...And Others Don't by Jim Collins

- Small Giants: Companies That Choose to Be Great Instead of Big by Bo Burlingham

- Inside the Magic Kingdom: Seven Keys to Disney's Success by Tom Connellan

- Linchpin: Are You Indispensable? by Seth Godin

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Company Profile

SunTrust Banks, Inc. is a purpose-driven company dedicated to Lighting the Way to Financial Well-Being for the people, businesses, and communities it serves. Headquartered in Atlanta, the Company has three business segments: Consumer Banking and Private Wealth Management, Wholesale Banking, and Mortgage Banking. Its flagship subsidiary, SunTrust Bank, operates an extensive branch and ATM network throughout the high-growth Southeast and Mid-Atlantic states, along with 24-hour digital access. Certain business lines serve consumer, commercial, corporate, and institutional clients nationally. As of December 31, 2016, SunTrust had total assets of $205 billion and total deposits of $160 billion. The Company provides deposit, credit, trust, investment, mortgage, asset management, securities brokerage, and capital market services. SunTrust leads onUp, a national movement inspiring Americans to build financial confidence. Join the movement at onUp.com
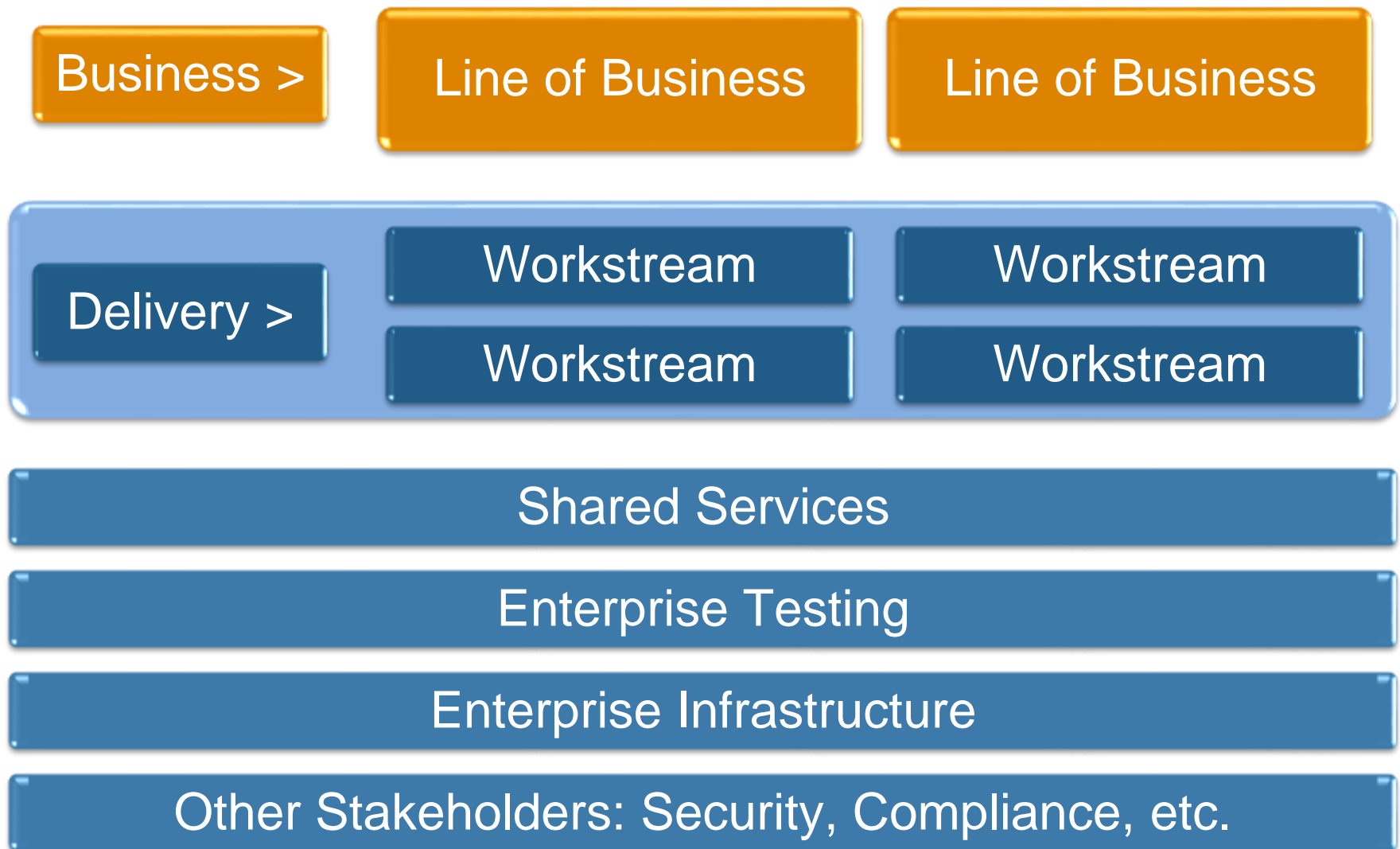
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Additional Questions?

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Additional Materials

Overview of Organizational Structure

Business >

Line of Business

Line of Business

Delivery >

Workstream

Workstream

Workstream

Workstream

Shared Services

Enterprise Testing

Enterprise Infrastructure

Other Stakeholders: Security, Compliance, etc.

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Background

- COE was only focused within IT Delivery Services
- Enterprise Delivery Services was a matrixed organization
  - Professional Development Managers: Role management
  - Project Management Office: Project delivery standards, processes, support and governance
  - Workstreams: Dedicated teams supporting LOB software needs.
- Two models for Center of Excellence (COE) or Community of Practice (COP)
  - COE: Advocacy group of leaders promoting best practices
  - COP: Overall framework for excellence for all team members

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Creating a COE Charter

- Co-sponsorship from PDM and PMO
  - 80% of process changes are PMO controlled, 20% PDM
  - 60% of training is PDM controlled, 40% PMO

- Timing (and patience) can be everything
  - Several reorganizations, especially impacting the PMO
  - Staffing changes in PMO and PDMs
  - Additional resources joining the PAT

- Secret of Success: Removed each obstacle
  - Single sponsorship: PDM
  - Sponsor authority
  - COE leadership

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Lessons Learned

- Responsibility tipping point: People gravitate to the team that solves their problems

- Sponsorship: Validation of COE control and authority

- Must have thought leaders who are willing to work

- Identify and remove barriers (like rerouting with GPS)

- Must fill an organizational void or need

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