# Business Case

## Business Analysis Practice Area Management:

## The Center of Excellence Model

Version 4.1 ● 13 FEB 2009

PROJECT DELIVERY FRAMEWORK

# BUSINESS CASE

## THE CENTER OF EXCELLENCE MODEL

# BUSINESS ANALYSIS PRACTICE AREA MANAGEMENT

VERSION: 4.1 REVISION DATE: February 13, 2009



| **President** | | |
|---|---|---|
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# Section 1 Executive Summary

## 1.1 Issue

*Consulting Perspective:* The E2 Consulting Account team assigned to the Client has been tasked with maturing the account from new business into a fully sponsored client partnership through the ongoing provision of client-ready qualified resources.

Several hindrances to this objective have been identified. These include: availability of qualified resources, lack of ongoing training & support at the client site to ensure quality of performance & deliverables, and hit & miss placement of the resources according to resource availability.

*Client Perspective:* The Client requires the contracted E2 Consulting to manage succession planning, training, performance and ensure professional conduct on the client site at all times. If the Client themselves does not have a center of excellence or practice community to ensure a standardized set of deliverables, the responsibility rests solely with E2 Consulting to provide this as part of their service. Cost and ongoing management are issues because E2 Consulting needs to build this into its resource pricing, and managing performance for resources that effectively report to the client, presents a unique loyalty situation.

## 1.2 Anticipated Outcomes

The anticipated outcomes for this project include creation of a new methodology for filtering & pipelining resources, an available billable industry-specific bench (billable to other accounts on loan for short term projects), providing ongoing resource training and client specific management of resources within the account.

Benefits for E2 Consulting will be increased client-centric presence, increased client satisfaction, enhanced reputation of E2 Consulting, increased number of qualified resources, maturation of the resources within the account, achievement of higher success rates in projects due to resource specialization & retention, ongoing measurable Resource ROI and increased sales revenue.

## 1.3 Recommendation

The E2 Consulting Account Team assigned to Client recommends initiation of a project that will effectively establish a framework for industry-specific filtering, pipelining, maturation and onsite management of Business Analyst resources in order to ensure that adequate staffing levels are in place to meet all of the resource demands placed on E2 Consulting by the client. Once this resource pipelining & management framework has been established and is operational at Client, it will be leveraged across other client account.

To this end, the Account Team will establish an ongoing process for identifying resources with aptitude for the health-care/insurance industry clients, ensuring development of those resources into client-ready resources, managing those resources at both project & client levels and working to mature the capacities & capabilities of the ongoing project-ready resource pool available to the client at any given time.

## 1.4 Justification

To date, E2 Consulting has multiple client accounts where demand for qualified resources exceeds the availability of the resources. There are outstanding RFR's (Request for Resources) which have been initiated by the client that E2 Consulting has been unable to fulfill. This disparity leaves the door open to E2 Consulting's competition to meet the demand.

# Section 2 Problem Definition

## 2.1 Problem Statement

Currently, the E2 Consulting Account Manager works with the client to manage resource needs for ongoing and impending projects within the client's environment. To this end, the Account Manager forecasts an ongoing need for resources and works with RMG to locate, qualify and place those resources through a filtering process.

From this filtering process, assigned Business Analyst resources are managed through a project delivery model where all resources report back up to the project manager, sponsor and stakeholders. As such, any account-level training that resources receive is specific to a given project and limited to specific business activities directly impacted by the assigned project.

When there is no longer a need for a given resource, they move on to new projects, new clients, or new companies.

The primary problems with this process are being able to locate qualified resources for a given project in a timely manner; availability of adequate training; inconsistent results for resource placement & training; inconsistent deliverables, tasks & activities between resources & projects; inability to measure & monitor ongoing performance of resources within the context of the account.

The specific issues identified from the business problems listed above, are as follows:

⇒ Lack on an ongoing resource pipeline (process is triggered by current need)

  - Business Analysts with specific industry background are more challenging to locate than general BA's, in order to fulfill client demand quickly
  - Health-care/insurance projects are more complex because of the systems & business processes, and as a result there are not enough qualified resources

⇒ Healthcare & Insurance client environments and processes are more organic in nature with more layers of (multi-tiered) complexity. These client environments are less linear (less flat) because there are larger numbers of decisions across differing functional layers that can affect the outcome of a given process. As a result, end to end processes involve more interactions with and external decisions from other systems.

  - Larger volume of decision management transactions per system, component & process than non-healthcare/insurance systems
  - Larger volume of automated transactions per system, component and process than non-healthcare/insurance systems
  - Resources require greater ongoing support to advance knowledge & skills within client environment for health-care/insurance clients

⇒ Healthcare & Insurance clients tend to be highly risk averse

⇒ Need to retain resources for longer terms within given accounts in order to mature the resource and achieve greater ROI per resource

⇒ Lack of ongoing end to end resource career management to cultivate the resource

- Online training tends to be linear and changes to it are slow to respond to evolving need. It is also impeded by the fact that it is self-directed and participants can skip critical steps, and will focus only as much as they can find time to devote to training
- Individual projects may or may not provide adequate training to shift resources between roles within the industry or the client
- Resources require greater attention to ongoing training & management needs to evolve with client

## 2.2 Alternatives Analysis

There are eight (8) options to address the problems:

- Do Nothing
- Implement periodic one-off training for batches of resources with no ongoing resource & career management
- Implement online training using Internal training tools with no ongoing resource & career management
- Manage the resources with no additional training
- Manage the resources and use Internal training tools to provide ongoing industry-specific training
- Manage resources and use periodic one-off training
- Implement some combination of the resource & career management tools
- Implement the resource & career management tools with full ongoing training plan

Further exploration of these options reveals that the majority of these options are reactionary fixes that do not address the full scope of the problem. Each solution inherently introduces risks that may or may not be tolerable by E2 Consulting.

⇒ *Do Nothing:* If left it as it is (do nothing), the existing problem will compound to the point that E2 Consulting is not able to keep up with client demand for resources and Client will go elsewhere to fulfill this demand. This approach aligns with Phase 1 (Chaotic) of Gartner's Networking Maturity Model (see below).

⇒ *Implement periodic one-off training with no ongoing resource & career management:* In implementing one-off training (training that runs periodically for up to a week), only targeted skills could be addressed and E2 Consulting will be forced to choose between basic Business Analysis skills and Client-specific skills training. This approach aligns with Phase 2 (Reactive) of Gartner's Networking Maturity Model (see below).

⇒ *Implement online training using Internal training tools with no ongoing resource & career management:* By adding items to Internal training tools and not implementing a management program, E2 Consulting will limit the maturation rate of its resources, services and accounts.

This is primarily because the Internal training tools is a self-directed linear program that resources will only access if they are motivated to. Many resources will not access the online training and their professional growth will be based on exposure. This approach aligns with Phase 2 (Reactive) of Gartner's Networking Maturity Model (see below).

⇒ *Manage the resources with no additional training:* If the E2 Consulting Account Team were to manage the resources without a full training plan, the team would be unable to cultivate a consistent and predictable number of resources for long-term engagements within the client/industry. Resources will continue to cycle through the account at a self-directed pace, and may ultimately move out to fulfill their career aspirations. This approach aligns with Phase 2 (Reactive) of Gartner's Networking Maturity Model (see below).

⇒ *Manage the resources and use internal training tools to provide ongoing industry-specific training:* It is possible to manage the resources and use internal training tools provided that the university is used as a management-directed tool with timelines and interactive components to ensure that resources are in fact accessing the available training modules in a timely manner. The Practice Area Manager would need to ensure that this was one of the tools used to cultivate the growth of resources in a proactive manner. This approach aligns with Phase 3 (Proactive) of Gartner's Networking Maturity Model (see below).

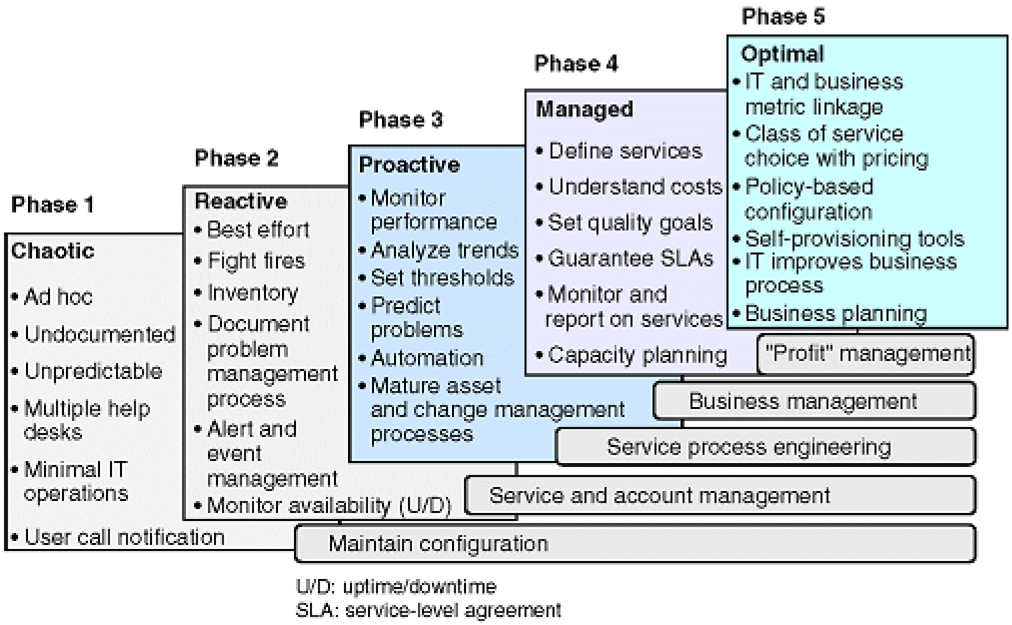
⇒ *Manage resources and use periodic one-off training:* Applying a management approach coupled with periodic one-off training will address some of the problems identified in this business case in that it will provide some of the training needed and will provide the requisite ongoing management. However, the training provided will be limited by cost, scheduling and availability of instructors, and will place the onus for ongoing training and mentorship on the manager. Presumably the training here would be provided as a reactionary measure and will only target basic skills in either business analysis or client-centric topics, but not both. Maturity of the resources and the account are limited by the extent to which the volume of resources can be trained consistently to achieve predictable results. This approach aligns with Phase 3 (Proactive) of Gartner's Networking Maturity Model (see below).

⇒ *Implement some combination of the resource & career management tools:* Implementing any combination of the management tools & techniques described in this business case will yield positive results; however, management alone will not resolve the problems at a rate which will significantly mature the resources, services or account. This approach aligns with Phase 4 (Managed) of Gartner's Networking Maturity Model (see below).

⇒ *Implement the resource & career management tools with full ongoing training plan:* If the E2 Consulting Account Team were to implement the tools and training needed to identify potential candidates, and cultivate these resources throughout their career, it will develop industry specific talent and foster the resource's skills to a high degree of proficiency. The critical success factor will be ramping up the project, transitioning into ongoing management, decreasing the time to market for resources and building robust programs that will enable rapid turn-around on changes to ongoing usage of tools, techniques and resourcing.

Full implementation of the management and training sets up a proactive approach to anticipating & meeting the demand of the client, and would expedite maturation of resources, services & the account. To the degree to which all resources are trained and managed, E2 Consulting will see more consistent results between resources and across projects. This approach aligns with Phase 5 (Optimal) of Gartner's Networking Maturity Model.

**The Gartner Networking Maturity Model**




Source: Gartner "The Gartner Networking Maturity Model", J. Pultz, 5 January 2005.

## 2.3 Outstanding Issues

The following section outlines the questions that will need to be answered in order for successful completion of the practice management project to be realized.

a) *Available Billable Bench:* Who will pay for the bench? How do we increase the profit margin to cover it? E2 Consulting has a few options to address these questions and will need to respond based on its own tolerances. The Options are:

- Support a longer term bench with revolving resources
  - Benefit: qualified & available resources
  - Limitation: Cost to support non-billable resources

- Make these resources available to other accounts for short-term billable engagements that will only occupy a resource for a maximum of 2 months
    - Benefit: qualified resources available in relatively short time frame
    - Limitation: Engaged accounts may want to keep resources & will lose confidence in E2 Consulting for pulling them
- Cultivate offshore resources to a point where they can be brought onshore. E2 Consulting could capitalize on the salary differences as a means of increasing the profit margin on resources to pay for the bench
    - Benefit: qualified & available resources with a built-in profit margin
    - Limitation: Cost to support non-billable resources, demand for higher onshore salaries
- Contract an outside firm to provide these resources and keep them available on contract
    - Benefit: qualified & available resources, reduced cost liability to E2 Consulting for supporting non-billable bench
    - Limitation: In the case where resources accept engagements with other firms/clients, E2 Consulting does not benefit from training it has paid for – no ROI

# Section 3 Project Overview

## 3.1 Project Description

| Description of Project |
|---|
| The E2 Consulting Account team has determined that it will develop an industry focused Business Analysis practice management framework to address the problems of resource availability & quality, deliverable & work product consistency, and meeting client demands in a timely manner.<br><br>To this end, the recommended resolutions have been categorized under pre-filtering activities, resource pipelining processes, training and client-specific management tools to measure & monitor performance and manage ongoing resource placement.<br><br>The framework for these categories will be achieved through establishment of industry-focused, client-specific competencies, KPI's & training, and development of tools & mechanisms to pipeline & measure performance against. Once these tools & techniques have been established, E2 Consulting will move forward into ongoing management of the resources, strategic resource placement and training within the context of the account and client's environment. |

## 3.2 Goals and Objectives

| Business Goal/Objective | Description |
|---|---|
| Maintain resource capabilities & capacities to meet ongoing client resource demands | • To establish ongoing client & project ready resource pipeline in order to meet client project needs |
| Manage & grow resource capacities & capabilities | • Knowledge retention & growth among the E2 Consulting BA resources within the client's environment |
| Retain resources long enough to achieve ROI | • To achieve resource ROI through resource maturation within an industry and account |
| Maturation of the resources, services & account | • To enable the processes of resource planning, management & retention to mature to the degree that they can effectively increase the ROI associated with individual resources and to support the client and enhance the existing relationship |
| Timely access to qualified resources | • To meet client demand, E2 Consulting must have access to qualified and available resources in a timely manner |

## 3.3 Performance Measures

| Key Process/Services | Performance Measure |
|---|---|
| Pipelining Activities | • Resource Aptitude Screening<br>• Placement & Resource Statistics<br>• Demographics |
| Training | • Training Efficacy Surveys<br>• Resource Statistics<br>• BA Testing |
| Management | • Client Satisfaction Surveys<br>• Resource Surveys<br>• ROI Measurements<br>• KPI Statistics |

## 3.4 Major Project Milestones

| Milestones/Deliverables | Target Date |
|---|---|
| Establishment of Industry-specific Business Analysis competencies | TBD |
| Establishment of Client & Industry-specific Business Analysis competencies | TBD |
| Establishment of industry-specific tools for practical application throughout pipelining, training & management processes | TBD |
| Establishment of metrics to measure readiness, progress and performance | TBD |
| Establishment of Individual KPI's for ongoing performance management against project-specific deliverables | TBD |
| Establishment of ongoing training program to mature existing resource capacity & capability | TBD |
| Establishment of specific ROI criteria, metrics & tools for measuring ROI at both an individual and practice level | TBD |
| Establishment of ongoing training program to develop client-ready resources | TBD |
| Establishment of a client-specific, ready BA resource bench exceeding the number of existing and open resource requests by a factor of 25% of the forecasted resources for the next 2 year period | TBD |

## 3.5 E2 Consulting and Client Environment

| Stakeholders/Customers | Description |
|---|---|
| Client | • Owner of the environment wherein the systems & business processes operate |
| E2 Consulting | • Owner of the tools & methodologies used to integrate & develop solutions within the context of the client's environment<br>• Manager of the resources using the tools & methodologies within the context of the client's environment |
| Strategic Consultant / Practice Area Manager | • Creator of the workflow, tools & methodologies, competencies, resource filtering & pipelining activities and originator of the training curriculum<br>• Manager of the workflow, tools & methodologies competencies, resource filtering criteria & pipelining activities and owner/manager of the training curriculum |
| Business Analyst | • User of the ongoing workflow, tools & methodologies for application within the context of the client's environment to define the end to end integration & development of the multi-tiered, decision management business solution |
| LCD – Learning & Competency Division | • Manager of the ongoing training tools used in all training sessions |
| Trainer | • Delivery of the specified training curriculum |
| RMG – Resource Management Group | • Manager of the ongoing resource filtering & pipelining processes |

| Processes/Services | Description of Modifications/Automation |
|---|---|
| BA Resource Pipeline | • Longer resource forecasting periods (2 year minimum)<br>• Upstream filters to identify resources for pipelining<br>• Pre-training to generate ongoing client-ready resource pipeline |
| BA Resource Training | • Ongoing going resource training to evolve resource pool capabilities, increase resource effectiveness & ROI<br>• Shared knowledge sessions to manage, retain & grow resource capacities & capabilities |
| BA Resource Management | • Establish & maintain responsive resource pool<br>• Manage resource needs within the context of the client, client's environment and industry<br>• Ongoing retention of resource talent, client knowledge<br>• Maturation of the resource management processes & client relationship |

## 3.6 Project Assumptions

⇒ *Existing Processes will be impacted:* RMG processes for pre-selection to the account will be modified

⇒ *Resources on the project will be billable:* All resources, including resources to manage the BA Practice Area will be at least 80% billable to the client. Cost for non-billable management activities (20%) will be burdened on E2 Consulting

⇒ *Client Approval:* Client Stakeholders will approve any resources selected for their environment

⇒ *Capacity & Capability:* E2 Consulting needs to maintain adequate resourcing capacities to service client accounts

⇒ *Strategic Consultant/Practice Area Manager:* It is assumed that E2 Consulting will make the determination for placement of the resource outside of the scope of this Business Case, however, for financial analysis of options, it is assumed that E2 Consulting will hire one resource to establish the framework through this project and then carry forward the ongoing management activities

## 3.7 Project Constraints

⇒ *Billable placement in the account will impact the project:* BA Practice Area managers will be billable to the client and this will significantly impact the focus & timeline for effective progress on the practice management project

⇒ *Billable requirement:* The selected Practice Area Manager is required to be billable to the account. This will impede their progress by impacting both the time commitment and the degree to which they are able to focus on the deliverables for this project

⇒ *Project requirement:* The selected Practice Area Manager will be accountable to the client for contributions to projects to which they are assigned. The requirement to attend to the client's projects will impact the degree to which they are able to focus their attention to E2 CONSULTING 's practice management project

⇒ *Available Billable Bench:* Timely access to qualified billable bench resources on loan to other accounts

# Section 4 Project Evaluation

## 4.1 Statutory Fulfillment

| Mandates Related to Project | Statutory Citations | Penalties/Funding Losses |
|---|---|---|
| Mature client accounts from new business to global relationships | TBD | N/A |
| Manage resources through the client-based Center of Excellence model as a means of enabling resource maturation | TBD | N/A |
| Manage ongoing training through LCD | TBD | N/A |
| Manage billable bench through RMG | TBD | N/A |

## 4.2 Strategic Alignment

| Plan | Goals/Objectives | Relationship to Project |
|---|---|---|
| Ongoing | Maturation of the services provided to clients | Allows E2 Consulting to provide industry specific, client focused resources at all skill levels & enables higher degree of client capability & ROI |
| Ongoing | Maturation of the account | Account supports the project through placement and use of the resources provided through the project |
| Ongoing | Maturation of the individual resources from within | Resource pool from which to draw talent for given projects within the client accounts and industry |
| Ongoing | Increase Service Volumes (Sales) | Increase the volume of sales of services provided to each client |

## 4.3 Financial Analysis

| Methods: Project Cost Estimates | Estimate Factors/Underlying Assumptions |
|---|---|
| • Est. Loaded Cost of Practice Manager salary<br>○ $124,800 / yr<br>• Est. Cost of ongoing training<br>○ $70,000 / yr<br>• Est. Cost of filtering & pipelining activities<br>○ $1,200 / yr<br>• Est. Loaded Cost of Resources<br>○ $1,456,000 / yr | • None of this is billable activity for the client<br>• Est. Loaded Cost for Manager is approx. $60/hour<br>• Estimated cost of training will be reduced by volume of students, & ability to use SkillPort<br>• Cost of filtering & pipelining based on 20 resources / yr @ $60 / resource<br>• Est. Loaded Cost for resources is $35 / hr for 20 resources |

| Methods: Agency and Constituent Quantitative Project Benefits | Estimate Factors/Underlying Assumptions |
|---|---|
| • Increased resource ROI & the ability to measure against resources<br>• Increased (On Demand) responsiveness to ongoing & future client needs/resource demands<br>• Increased resource longevity within the industry & client<br>• Increased resource specialization<br>• Reduced time to specialization | • Maturation of the ability to measure resource efficacy & ROI at macro & micro levels<br>• Maturation of the relationship between E2 Consulting & the client<br>• Supported resources will remain with the client for longer periods & develop SME<br>• Reduced time to realized ROI |

## 4.4 Initial Risk Consideration

| Risk | Rating |
|---|---|
| • Cost for maintenance of a non-billable client-ready resource bench | 5 |
| • Placing a senior Business Analyst in a full-time billable engagement within the account will limit the time available to advance the internal agenda of this resource and it will take years to fully implement the recommendations | 3.5 |
| • Placing a senior Business Analyst in a full-time billable engagement within the account will detract from the focus of the internal agenda of this resource and it will take years to fully implement the recommendations, which mean potential resource changes will impact the progress of the project | 2 |
| • Cost of filtering & pipelining | 5 |
| • Cost of Strategic Consultant / BA Practice Manager | 5 |
| • Cost of customized training | 5 |
| • Time to market for individual resources | 4.5 |
| • Time to define industry-specific, client-focused competencies | 4.5 |

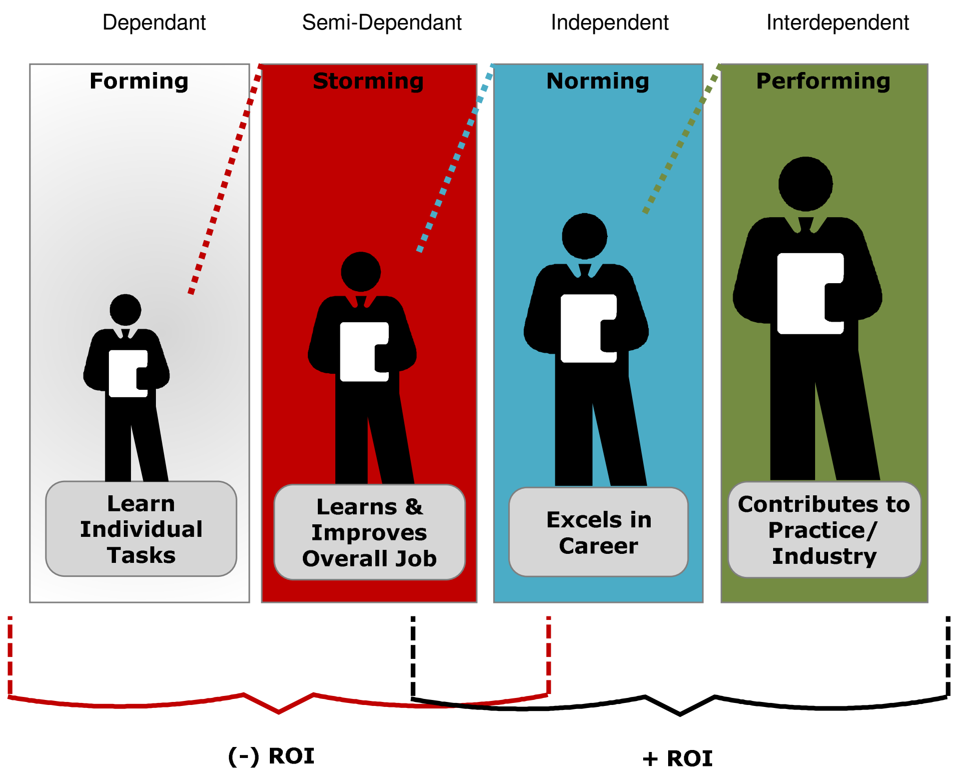
**The scale used above is 1 to 5 rating with being optimal low risk and 1 being high risk.

# Section 5 Project Selection

## 5.1 Methodology

E2 Consulting supports its client base through Global Relationship Management and Account Management. It is this model which provides the basis for supporting clients through projects from Conception to Maintenance by providing teams of strategic resources whose aim is to provide assistance with strategic planning, project planning, and resource placement.

It is E2 Consulting's business model to provide ongoing support for resources at all stages of their careers through recruitment, training, mentorship and consistent improvement. This is primarily achieved through the Center of Excellence for a given practice area.




Resource Maturation Model by Barbara Davis

The methodology applied in this project will provide an assessment of existing resource maturity, in order to target specific resources at various stages of maturation and career progression through the filtering and pipelining processes.

The Resource Maturation Model outlines how a given resource will progress throughout their career from Junior to Advanced levels. It aligns the patterns of the resource's knowledge and understanding with the phases of team development in order to better understand the impacts of new tasks and team dynamics on the resource's performance through each stage of maturity. The model assumes a generalization of resource dynamics related to the team and levels dependency based on the concept of the resource transitioning into existing team dynamics, but does not limit the phases from only occurring at aligned stages of resource development. In other words, resources will also experience various phases of team dynamics throughout the life of the team regardless of how new the resources are.

What is important to note, is the application of ROI measurements against a resources performance at given stages of maturity and how this information can be used to E2 Consulting 's advantage by managing resources through pipelining activities and across projects for best placement according to skill set.

Effectively, this project will address the way that resources are selected, trained and managed for health-care & insurance clients, in that it will proactively define specific Business Analysis competencies related to the roles and skill levels of analysts working within the Health-care/insurance industries and will measure the output of those competencies through Return on Investment associated to resources as products.

Unlike the Internal training tools already in place within E2 Consulting, this project will provide live support training and walk-throughs of industry processes in order to ensure full understanding and the means of adequately gauging that understanding along the process. This project will ensure that all resources receive consistent training, and that E2 Consulting management is able to provide mechanisms for assessing aptitude, readiness, filtering, pipelining, maturing and managing throughout the career of individuals and practice groups.

## 5.2 Results

The project recommended here supports both the Global Relationship Management / Account Management and Center of Excellence models by providing a higher degree of granularity in the specialization of Business Analysis through industry and client specific resource pipelining, training and management throughout the Resource Maturation Process and enables E2 Consulting to estimate and measure the Return on Investment (ROI) associated with Resources.

The following table illustrates the criteria for project selection based on the following weighted factors:

1. SF - Statutory Fulfillment: Does this project align with commonly accepted US fair business practices and company policy?
2. SA - Strategic Alignment: How well does this project align with E2 Consulting's strategic plans?
3. FA - Financial Analysis – E2 Consulting /Client: Does the cost benefit analysis support the project outcomes despite any perceived initial risks?
4. RC - Initial Risk Consideration: What are the initial perceived risks and weighting criteria fro consideration?
5. AA - Alternatives Analysis: What other resolution options have been presented and how does this solution compare to these other options?

| Summary: All Project Evaluation Factors | | | |
|---|---|---|---|
| Line | Factor | Maximum Rating Possible | Rating* |
| SF | Statutory Fulfillment | 35 | 33 |
| SA | Strategic Alignment | 45 | 43 |
| FA | Financial Analysis – E2 Consulting / Client | 60 | 57 |
| RC | Initial Risk Consideration | 45 | 34.5 |
| AA | Alternatives Analysis | 30 | 28 |
| | Total, All Project Factors | 215 | 195.5 |

| Line | Measure | Year 1 | Year 2 | Year 3 | Total |
|---|---|---|---|---|---|
| RA1 | Agency Benefits (Cash Inflow) | $ 3,016,000.00 | $ 3,546,400.00 | $ 4,076,800.00 | $ 10,639,200.00 |
| RA2 | Ongoing Costs (Cash Outflow) | $ 1,100,777.60 | $ 1,336,108.80 | $ 1,336,108.80 | $ 3,772,995.20 |
| RA3 | Benefit/Cost Variance (Net Cash Flow) | $ 1,915,222.40 | $ 2,210,291.20 | $ 2,740,691.20 | $ 6,866,204.80 |
| RA4 | Cumulative Net Benefits (Cumulative Net Cash Flow) | $ 1,915,222.40 | $ 2,210,291.20 | $ 2,740,691.20 | $ 6,866,204.80 |
| RA7 | Breakeven Point (Years 1 to 10) | | | Profit is approx. 2 X Cost | |

## 5.3 Financial Assumptions

The following assumptions were used to generate the estimates for this business case:

⇒ 20 resources in the first year would cycle through the training and will be billable at $85 USD / hour

⇒ Turn-over would be approximately 1.5 out of 10 employees (ongoing replacement of existing resources in the account)

⇒ Account growth rate is estimated at 2% per year (new demand for new resources to the account)

⇒ Practice Area Manager will be billable at $90 USD / hour

⇒ Ongoing costs include full loaded costs (est. salary plus benefits & travel) of all resources (manager & resources), cost of training

⇒ Cost of resources and Prices rise at a rate of 4% / yr

# Section 6 Glossary

| Term / Acronym Used | Definition |
|---|---|
| Billable Bench | Resources who are designated for a specific account, but not yet assigned to particular projects (on the bench), who can be loaned to other accounts for short-duration, interim projects in order to maintain billable status & timely availability |
| CU | Internal training tools – the static client information system currently used within E2 Consulting |
| SkillPort | Online training system currently utilized by E2 Consulting for ongoing resource training needs |
| Filtering | Tools & Techniques for identifying potential candidates and measuring aptitude for the role |
| LCD | Learning & Competency Division |
| Pipelining | Activities used to prepare candidates for skill-based placement within the account |
| RMG | Resource Management Group |
| ROI | Return on Investment |

# Section 7 Appendix A

## 7.1 Sample Training Plan

Due to the level of complexity involved in the Insurance/Healthcare Business Analysis role, it is proposed that candidates for this role be provided training as part of the filtering, pipelining and maturation process. To this end, it has been determined, that all candidates who wish to be considered for this role, must have a combination of previous business analysis experience AND pre-requisite training.

### 7.1.1 Pre-Requisite Training

| What? | Delivery Method | Duration in Hrs |
|---|---|---|
| **Introduction to Business Analysis** | | |
| Business Writing | SkillPort – to be developed/revised | 12 |
| Facilitate Discussions: JAD Sessions, facilitating difficult audiences, gaining buy-in, managing stakeholders | Trainer | 6 |
| **Roles & Responsibilities** | | |
| Introduction to BA Role | SkillPort – to be developed/revised | 2 |
| **BA Fundamentals** | | |
| Solution Delivery: Practical tips for seamless implementations & Deliverable transitions, Conducting Walk-throughs | Trainer | 2 |
| Business Rules | SkillPort – to be developed/revised | 8 |
| Ambiguity Review | SkillPort – to be developed | 4 |
| Analyzing Business Problems | SkillPort – to be developed/revised | 8 |
| Functional & Non-Functional Requirements | SkillPort – to be developed/revised | 12 |
| Business Process | SkillPort – to be developed/revised | 4 |
| **Assignments** | SkillPort – to be developed/revised | 12 |
| **Testing** | SkillPort – to be developed/revised | 2 |
| **Totals** | | **72** |

Upon successful completion of the filtering criteria and selection for the pipeline, candidates will begin the formal training for the Insurance/Healthcare Business Analyst Role.

### 7.1.2 Introductory Training

If the candidate successfully completes the introductory program, they will be eligible for placement within the account. If however, they do not successfully complete they will be eligible to request another set of assignments and a re-test. In the event that the candidate does not pass on the second try, they must wait for a minimum of six (6) months to re-apply, and demonstrate that they have worked to advance their skills through experience.

| What? | Delivery Method | Duration in Hrs |
|---|---|---|
| **Introduction to Business Analysis** | | |
| **Roles & Responsibilities** | | |
| Introduction to Insurance/Healthcare BA Role | SkillPort – to be developed | 2 |
| **Insurance/Healthcare (IHC) BA Fundamentals** | | |
| Healthcare Fundamentals: HMO, Preferred Provider Org, Point Of Services overviews | SkillPort – to be developed | 12 |
| Insurance Fundamentals: Types of insurance, Co-Pay, Claims overview, Transactional Claim view, HIPPA | SkillPort – to be developed | 12 |
| Analyzing Business Problems across multi-tiered systems | SkillPort – to be developed | 8 |
| **Assignments** | SkillPort – to be developed | 9 |
| **Testing** | SkillPort – to be developed | 2 |
| **Totals** | | **45** |

### 7.1.3 Intermediate Training

In order to be eligible for Intermediate training, candidates must have a combination of one (1) year of Insurance/Healthcare specific Business Analysis experience AND they must have successfully completed the Introductory training.

| What? | Delivery Method | Duration in Hrs |
|---|---|---|
| **Intermediate Business Analysis** | | |

| What? | Delivery Method | Duration in Hrs |
|---|---|---|
| **BA Fundamentals** | | |
| IHC BA Best Practices | SkillPort – to be developed | 2 |
| Legacy Systems Analysis & Design - Optional | SkillPort – to be developed | 8 |
| Organizational Behavior In Risk Averse Environments | SkillPort – to be developed | 4 |
| Gap Analysis Across IHC Systems & Processes | SkillPort – to be developed | 4 |
| Developing Multi-Tiered Use Cases | SkillPort – to be developed | 8 |
| **Assignments** | SkillPort – to be developed | 7 |
| **Testing** | SkillPort – to be developed | 2 |
| **Totals** | | **35** |

### 7.1.4 Advanced Training

In order to be eligible for Intermediate training, candidates must have a combination of two (2) years of Insurance/Healthcare specific Business Analysis experience AND they must have successfully completed the Intermediate training.

| What? | Delivery Method | Duration in Hrs |
|---|---|---|
| **Advanced Business Analysis** | | |
| **IHC BA Fundamentals** | | |
| Business Discovery Assessments | SkillPort – to be developed | 12 |
| Strategic Planning | SkillPort – to be developed | 8 |
| Developing Business Cases | SkillPort – to be developed | 8 |
| Developing Statement of Work (SOW) | SkillPort – to be developed | 8 |
| Estimating Work and Activities | SkillPort – to be developed | 16 |
| **Assignments** | SkillPort – to be developed | 10 |
| **Testing** | SkillPort – to be developed | 2 |
| **Totals** | | **64** |

# Section 8 Appendix B

## 8.1 Sample BA Coaching Call Agenda

**BA Coaching Call**

**Participants:**

**Optional Participants:**

**Basic Agenda Format:**

1. Topic of the Week (30 minutes)
    a. Selected from input of the group or business request
    b. Presented by a member of the group or guest
2. Process 911 (15 minutes)
    a. Members turn to request input from the group on handling a situation on their project
3. Lessons Learned (10 minutes)
    a. Discussion of experiences during the week
    b. What worked, what didn't work
4. Select Topic for upcoming calls / meetings (5 minutes)
    a. Email an advance survey of topics or get topic suggestions and distribute to the group prior to meeting for a decision on 4 weeks in advance

**Weekly Agenda:**

1. Housekeeping – volunteer to take and distribute/publish notes
2. Suggested Topics of interest
    a. How to determine which artifacts to produce for a project based on project type
    b. Change Management – presented by
    c. Requirements Documents Walk Throughs
    d. Claims Management