

## How to Choose a Business Analyst

Last year, I met with a prospective client whose President proceeded to tell me that he had hired MBA and PHD grads from Harvard and Oxford to come and work as Business Analysts. He blurted out that they had failed, and demanded that I tell him why. Now, I know his real question was what makes you think you'll succeed when they failed, but that's not the question he asked.

I answered the question he did ask by telling him I couldn't possibly tell him why without more details about the individuals and work they had been assigned. I didn't tell him, I was starting to get a pretty good idea (some things you just keep to yourself).

That being said, choosing an analyst is so much more than just selecting the guy with the most experience in a particular technology or domain. The truth of it is you need to find someone that is fairly agnostic of the applications and technologies within your environment and find someone that first comes with the foundation skills that will make them a great analyst. The second thing you want to ensure is that the person comes with the personality to make them a great fit within your environment, and finally you want to find a person who fits the career level to meet the performance you are expecting for the assigned role. The last thing you look at is the specific technologies they have experience with (unless there is some very unique challenge coupled with an elongated learning curve). A great analyst has the ability to move in, learn new technologies very quickly and adapt.

Domain knowledge presents a different angle than applications and technologies. While applications and technologies should play the least role in your decision to hire an analyst, arguments can be made for and against having domain knowledge. The thing to bear in mind is that typically the knowledge of intricate details of the project increase with the amount of domain knowledge.

If you choose to hire a person without domain knowledge, ensure the person compensates with a personality that is open to learning and results-oriented. Be cautious to understand how long it takes the average employee to adapt to your environment. If it takes a long time, hiring a senior without domain knowledge would really be like hiring an intermediate person. This is because the level of performance you will get will be similar to that of an intermediate while they are ramping up. I'd reconsider this unless you are in a bind or the project spans a few years.

In all other cases, I would argue that the average analyst will just consider this to be another problem to be solved as part of the new role.

## Foundation Skills

So with little formal professional standards governing the BA practice, how can we assess what makes a great analyst? How can we understand and assign a clear set of foundational skills to guide hiring? The best way to assess this foundational skill set is to understand the scope of tasks and activities within the role. To accomplish this, I researched countless ads for business analysts and compiled the basic functions of an analyst. From here it was easy (albeit time consuming) to break down the tasks into skills required to perform each task successfully.

This set of foundation skills can be categorized into business skills, soft skills, and technical skills. Within each of these categories is a subset of skills, knowledge and experiences that would give the candidate the ability to excel as an analyst.

By drilling down into the foundational skills, and categorizing them, I have been able to create a set of interview metrics that applies a 1 to 5 rating scale, (where 1 equates to a new BA candidate with no experience and 5 equates to a strategic analyst). This set of interview metrics has supported the interview and screening of approximately 300 business analysts. Out of those 300, only 2 ultimately had performance issues and 1 resulted in the person being placed on a performance improvement plan (PIP) and being removed from the client.

So just what are these foundation skills?

## **Business Skills**

### **Project Management**

Project Management skills can best be described as having the skill and ability to coordinate a project resources to achieve an effective result for the client. What makes up an effective result? Project is completed on time and on budget and meets the target business goals and objectives outlined in the project charter. An optimal result would be a higher quality product delivered under budget in less time. A challenged project is completed over budget and past the time line and does not meet the targeted business goals & objectives. A failed project is cancelled because it is clear it will not meet the expectations and deliver any real result for the money being spent.

A good BA will support the project manager and work with them to coordinate their resources and deliverables to meet key milestones.

### **Negotiation**

A good business analyst has a foundation in any type of negotiation skills. High-end sales are a good example of negotiation. This is needed because the analyst will be required to help a client understand if the requested solution is not the right solution and they need to sell them on a new one and negotiate the right implementation in the environment to satisfy the clients needs.

### **Domain Knowledge**

Domain knowledge is the knowledge and understanding that a person has in the industry vertical of the particular client. What I mean by that is that a person going to work as a BA in a retail chain, might have previous retail experience. This would be vertical industry experience.

To be honest, I rarely put a lot of stock into domain knowledge unless there is really some unique aspect to the industry that you must really know well. This is because a good business analyst will be able to work in the same industry they know well and provide average results on a failed, challenged or even an effective project. However, a great business analyst will be able to walk into any client in any industry and provide effective or optimal projects results. They are able to do this because they have the ability to think on their feet and adapt quickly (roll with the punches). This means they can tackle any project and learn it quickly enough to translate their learning into action as they work.

## **Soft Skills**

### **People Skills**

There's a lot of smaller pieces that make up people skills. Many of these can be found in the communication, collaboration sections, but there are some pieces I will cover here.

There are people who can come in and get the job done. There are those who will come in and get the job done and the client finds work for them after their project is up because they like them. Other clients are just happy the project is done.

Having people skills is about having the ability to work people of all career and skill levels and developing positive relationships. It is necessary for an analyst to spend time with front line staff and developers all the way up to the executive levels. Having good people skills will enable them to do this in a way that makes the rest of their job easier.

### **Communication**

Communication is the ability to send and receive messages to others in ways that are meaningful to the listener. Communication is verbal, written and non-verbal (body language) and all can be used to convey messages to a receiver.

I have saying that says: A part of loving is being loved. This means that you have to allow others to love you in the way they wish to express it as much as you need to receive it in the way that makes you comfortable. The same is true for communication.

People learn in many different ways and since communication is a vehicle for learning about the world around them, it is important to provide the messages in a variety of ways. It will make it easier for your receiver to accept and learn the content of your messages and ultimately they will be able to do a better job.

### **Collaboration**

The ability to work collaboratively is a critical skill of a successful business analyst. They must be able to work with the business, the stakeholders, the developer, testers, project management and sometimes external vendors. In order to do this, they must be able to check their ego at the door, listen communicate verbally and orally, mediate and negotiate at all levels.

Collaboration is as much a learned skill as it is innate. We learn by trial and error and only seem to learn collaboration when we are in tune with those around us. If you were to learn one single thing which would enable you to collaborate better as an analyst, it would be listening. We do not listen when others are speaking. We are usually formulating our response or counter arguments.

### **Innovation**

Innovation is the prize of people with job satisfaction and seniority. But the truth is that anyone can be an innovator at any stage of their career. Being innovative is the critical differentiator between my hiring a "wanna-be" analyst and one that thinks they know it all. I don't know it all. I know some things and I work to share them with others so they don't have to struggle as much as I did. Innovation tells me about your motivation and willingness to think-outside-the-box to resolve a problem with the best possible solution without getting hung up on attachments to particular solutions that don't cut it.

Be prepared to tell me what other contributions you have made to your past clients. These are achievements. I want to hear them. Just be prepared to back up the claim, and be honest about how much of a role you had in it.

I once asked a prospective BA if they could tell me anything new suggestions they had brought to our company. They responded matter of factly "No, I just do what I'm told." Honest, yes. But I did not recommend them for the job!

## Technical Skills

Technical knowledge is the knowledge and understanding that a person has in the technical horizontal of the particular project. A person going to work on a project to design a new point of sale (POS) system might have previous experience in designing a POS system for another client.

I do put some weight on technical knowledge, but not to the point of excluding analysts with the ability to learn and adapt quickly to whatever you throw at them. This includes technical knowledge. What I do look for is a diversity of technical environments and tools. This provides me with insight into the person's adaptability and ability to learn quickly.

As far as individual technical skills go, the list can be as long as the list of projects. The best indicator of a business analyst's success is to have a basic understanding of how development occurs, how data is stored and retrieved, how processes are automated and the basics of systems architecture. Each of these is a piece of the complex puzzle they will be tasked with solving during the project.

## Career Level

As a person grows in their career, they move through various stages. The Resource Maturation Model (RMM) illustrates the stages of learning individual tasks, improving at the overall job, excelling in performance and contributing to the innovations within the practice. Not everyone will achieve all of these levels, but it is still important to recognize and understand the level your candidate is at.

Hiring a new BA that comes in as an innovator, doesn't mean they will not still need some time to ramp up into the new role, project or environment. They will need time to ramp up, so understand what you can do through training and orientation to mitigate and reduce this.

You can use skill and career level of the BA to indicate the kind of participation you can expect. This means more than hand-holding juniors and letting seniors loose in the shop. It means you have to temper your projects needs with your budget and ability to mentor and tolerance for risk.

The truth is that while interviewing, managing and working with BA's from newbie to off the chart advanced, I found the single biggest group of contributors was the junior to intermediate group. They were full of motivation to improve and open to being mentored.

The RMM shows that innovation and shaping the practice comes at a higher level, but this does not mean that people at lower career levels don't contribute to this. The difference is that the senior knows what they are seeing within the context of the project, practice and environment and has the ability to document the innovation in ways that effectively transform the practice.

## Resume

If you can't put together a well-formatted resume, I would not consider you for a role as a business analyst unless you were looking for a junior role. I'm not saying you need to know how to navigate Word with the deftness of a surgeon conducting brain surgery, but you should know how to use one tab to place text in certain places on the paper without hitting the space bar or the tab key a hundred times. You should also know how to put together a decent sentence and paragraph and get across a clear message of what you are looking for in your new role and what you have done in the past.

If you can't sell yourself on paper...

The truth is that I have read so many resumes and conducted enough interviews to know where you are at in your career and where you want to be by the kind of language you use to describe your previous roles. So much of the role of an analyst is about documenting processes, business cases, use cases

requirements, issues, risks and gaps, that if you can't put together a resume that reflects your ability to put together a well defined document, I'm simply not going to hire you.

## **Final Notes**

It is important to remember that each project, situation and candidate are unique, and that while you may think BA's are a dime a dozen, it is simply not true. The truth of it is that it is like choosing any other employee for your company. Done well, it can contribute to the positive growth and evolution of your organization. Done wrong, it can turn into an unhealthy relationship. Utilizing tools like the interview matrices will assure a degree of success in hiring but there is one final consideration to make. The person conducting the interview: ensure you have a standard process for multiple interviews using the same techniques and then analyzing the gaps between the two results. When the results are consistent, there is no issue. When the results are inconsistent, you need to understand your tolerance for risk and consider having the person undergo a third interview.