

# Establishing a Business Analysis Practice in the HE Sector

## Business Analysis Toolkit

ucisa Project and Change Management Group



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# Executive Summary

Business analysis is rapidly gaining momentum in the higher education sector, with many universities having a business analysis practice already established in one form or another.

In this resource we provide several tools and techniques you can use to measure and understand the maturity of your own practice and outline some building blocks for developing your practice. We discuss how business analysis can add value to your organisation and highlight some potential solutions to common issues your practice might face. Case studies are included from institutions across the UK in order to give an

insight into established practices sitting at different levels of the maturity model.

This publication was created by the ucisa Project and Change Management Group (PCMG), a community of skilled and experienced project and change management professionals working together to develop and promote best practice in all aspects of project and change management in higher and further education. We have a strong sector focus which is informed and maintained by our members' presence at the heart of project and change management activities in institutions of all sizes across the UK and beyond.

Establishing a business analysis practice within a higher education environment is the latest in a suite of ucisa Project and Change Management Group publications including [Establishing a project management office in an HE environment](#) and [Establishing process improvement capability in an HE environment](#).

If you would like to get involved in contributing to future editions of this or any of the ucisa publications, then please get in touch via the ucisa [PCMG mailing list](#) or via [Twitter](#).

# Toolkit contributors



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**Lead author and ucisa Trustee**

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conferences internationally on this subject.

Sarah is also an active mentor to 'Women in Tech' aiming to encourage more women into the sector and to promote career development.

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## Toolkit contributors



**Michael Hall, Senior Business Analyst, University of Southampton**

Michael has delivered strategic benefits to organisations and has over 40 years' experience gained in the higher education and finance industries. In addition, Michael is also a professionally qualified psychodynamic counsellor.



**Matthew Scott, formerly Business Analyst Team Manager, University of Southampton**

Matthew established the business analysis practice at the University of Southampton and led the team to a high level of maturity and best practice aligned to the BCS best practice framework.

# Chapter 1

## What is business analysis and how does it add value?

### 1.1 What is business analysis and what is the role of the Business Analyst?

Business analysis is less well known than project management, and it is common to have to explain what the role entails. The International Institute of Business Analysis ([IIBA](#)) defines business analysis in the following way:

*“Business analysis is the set of tasks and techniques used to work as a liaison among stakeholders in order to understand the structure, policies, and operations of an organization, and to recommend solutions that enable the organization to achieve its goals.” [1](#)*

# What is business analysis and how does it add value?

The business analyst role can be varied and take on many aspects including but not exclusively:

- supports strategic-level decision making;
- a trusted partner;
- an agent for change;
- identify and implement process improvements, and
- the conduit between the business and the development teams.

Business analysis can be implemented at different levels within an organisation from the strategic level, which involves an analyst in the development of the organisation's strategies, or at the other end of the scale working closely with end-users developing processes and procedures to improve effectiveness in key operational areas. The main role of a business analyst is to identify and facilitate change by working with all the relevant stakeholders.

The guiding principles for business analysis identified in by Cadle, Paul and Yeates et al in, [Business](#)

[Analysis](#) are useful for further breaking down the role of the Business Analyst.

Cadle, Paul and Yeates state that a Business Analyst should focus on:

- **Root causes, not symptoms** - to distinguish between the symptoms of business problems and their root causes, and to investigate and address the root causes.
- **Business improvement, not IT change** - to recognise that IT systems should enable business opportunity, to analyse opportunities for business improvement and to enable business agility.
- **Options, not solutions** - to challenge predetermined solutions, and identify and evaluate options for meeting business needs.
- **Feasible, contributing requirements, not all requests** - to be aware of financial and timescale constraints, to identify requirements that are not feasible and do not contribute to business

objectives, and to evaluate stated requirements against business needs and constraints.

- **The entire business change lifecycle, not just requirements definition** - to analyse business situations and support the effective development, testing, deployment and post-implementation review of solutions.
- **Negotiation, not avoidance** - to recognise conflicting stakeholder views and requirements and negotiate conflicts between stakeholders.
- **[Business agility, not business perfection - to enable organisations to be responsive to external pressures and to recognise the importance of timely, relevant solutions.](#)**

In summary, a Business Analyst in higher education seeks to become a trusted partner of professional service departments and the academic community in order to understand how they work and strives to support their goals.

# What is business analysis and how does it add value ?



Acting as an agent for change, a Business Analyst will find a way to overcome issues, improve processes and help an organisation achieve its objectives using a range of tools and techniques. The role of the Business Analyst is ever evolving in line with business need, but on technology-based projects, the Business Analyst often acts as the conduit between the business and the development team, ensuring mutual understanding of requirements and goals. As business analysis becomes more mature within an organisation, the role of a Business Analyst is likely to extend increasingly to incorporate activities that support strategic-level decision making.

## 1.2 The relationship between a Business Analyst and Project Manager

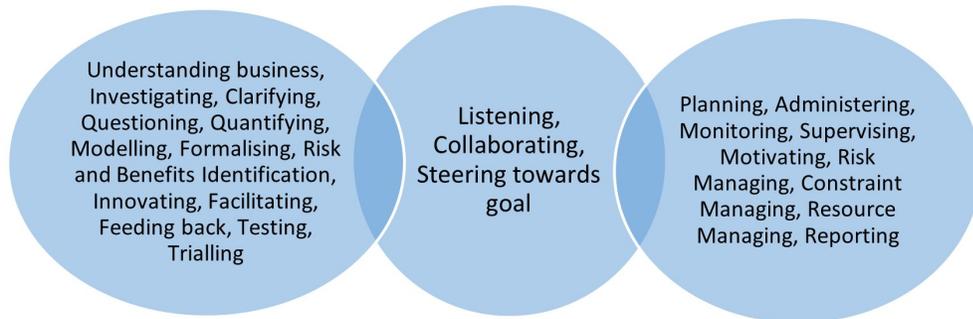
The interaction between the Business Analyst and Project Manager is primarily concerned with facilitating the activities necessary for project delivery. Business Analysts work with the Project Manager with a healthy professional tension, and the focus for each role is:

- The Project Manager is responsible for delivering the change;
- The Business Analyst is responsible for that change achieving what the business really needs;
- Business Analysts have a strong focus on realising business benefits; and
- Project Managers have a strong focus on costs and timescales.

# Figure 1

## Business Analyst

## Project Manager



**Figure1.** Connections between the roles of Business Analyst and Project Manager, adapted from Robertson, S. (2013).<sup>2</sup>, *Working with the project manager and Pullan. P.* (2015). [Business analysis/project management friction, and how to overcome it.](#)

Working closely together, a Business Analyst can support the Project Manager in delivering high-quality projects that deliver significant benefits. It should be noted, however, that a Business Analyst is not always working directly with a Project Manager or on project work.

# What is business analysis and how does it add value?

## 1.3 How does a Business Analyst add value?

A Business Analyst, by facilitating change, can add value to a business and help deliver organisational goals. CIO magazine indicates that 71% of failed software development can be traced back to poor requirements 7 – underlining the importance of a Business Analyst in defining high-quality, feasible requirements as part of delivering a successful project. However, a Business

Analyst is not simply useful for software development projects, and can perform analysis to inform effective decision-making, develop strategies, and support non-software related projects that lead to more efficient working practices. Some of the ways in which a Business Analyst can add value are listed below:

- **Improved processes/services** – refining business processes can lead to a significant improvement in the student and staff experience by enhancing the

speed, cost, reliability, sustainability and consistency of services.

- **Efficiency savings** – by improving business processes a Business Analyst can help reduce barriers, remove duplication of effort, and overcome issues that will free up staff time, reduce cost, and reduce the time taken to complete an end-to-end process. Tackling manual, paper-based processes, and replacing them with streamlined automated processes, will allow staff to focus on other more value-adding activities.
- **Avoidance of cost/pursuit of unnecessary solutions** – by understanding and capturing requirements, a Business Analyst can determine whether a new solution would meet the organisation's requirements, or if existing systems or other processes could fulfil the requirements, thus potentially stopping some work before it is too late (e.g., development of **unnecessary**

**solutions**).

- **Improved decision-making** – thorough analysis can enhance decision-making and ensure strong evidence is used to help an organisation determine its priorities and how to support them. The Business Analyst can support this by conducting options appraisals, drafting business cases, and identifying measurable benefits which will help effective prioritisation of resources.
- **Greater adoption / management of change** – a Business Analyst focuses substantial attention on working with end users and understanding their requirements, as well as ensuring effective change management, it helps ensure that projects are more likely to be successful, as users will be consulted and included in change and will feel it has been done with them and not to them.

# What is business analysis and how does it add value?



- **Identification of opportunities** – by understanding an organisation’s goals, how it operates, and working with stakeholders across an organisation, a Business Analyst is well placed to identify opportunities for improvement. This includes understanding where good practice exists, and if it can be replicated, how technology can support innovation, and which areas of an organisation could see substantial benefits by changing the way they work.
- **Supporting the introduction of new technology** – a Business Analyst is heavily involved in ensuring technology projects are driven by business need, with clearly defined, feasible and mutually understood requirements,

and accompanied by the necessary support to ensure a smooth **transition into a new way of working.**

- **Identification and measurement of benefits** – by identifying benefits, accessing or recording baseline data, and establishing clear methods of measuring benefits a Business Analyst can not only deliver change – but also provide evidence on how that change has helped an organisation improve.

## 1.4 How does a Business Analyst add value?

While writing this Toolkit, we sought feedback from professional services staff on what they considered the benefits of working with Business Analysts at their institutions to be.

# What is business analysis and how does it add value?

**Julie Neenan, Librarian, Head of Technical Services, Cardiff Metropolitan University:**

*"Here in the Technical Services department in the Library at Cardiff Metropolitan University we have been keen to improve our acquisition workflows for some time. In September 2015 we started to prepare to switch to a new cloud-based, next generation library management system and we were committed from the start to exploit as much of the business efficiencies as we could under this project to evidence to our senior managers that there was a good return on their investment.*

*The problem we had was that we didn't know how to capture what we currently did, or record what the new system could potentially offer us in a straightforward way (and one that would allow a layperson to follow). This is where the process mapping training we received from our Business Analyst has been invaluable. Initially we used the techniques to review and refine our own workflows (AS IS), however we quickly realised that we*

*could use the methodology to assist us with planning for system changes and facilitate group decision making (TO BE). Our Post-It Note budget has definitely increased (!) however the benefits for the team have been noticeable. As maps are being shared, processes are starting to join together the team dynamic has shifted as people are seeing connections and some of the silos that we saw previously are starting to break down. "*

**Claire Morgan, Director of Learning Enhancement, Cardiff Metropolitan University:**

*"A Business Analyst is more than a project manager – a Project Manager will keep the project to time, on track and deliver the outcomes. A Business Analyst ensures that the University is able to deliver the right project. Using business intelligence, Business Analysts at Cardiff Met review the projects and are flexible enough to ensure that what the University needs is actually being delivered rather than simply delivering the project."*

**Laurence Cragg, Head of the Project Management Office, Cranfield University:**

*"The BA role is the initial engine room of our activities, an effective BA works with business teams to thoroughly understand business problems, offers insight and assists the creation of solutions which will add value to the organisation. All of this work is a prerequisite for great change projects."*

**Bhupinderpal Siran, Head of Business Relationship Management, University of Southampton:**

*"I can rely on the BA expertise and knowledge to translate technical responses in a manner that enables me to understand the impact and ramifications of a course of action and make evidence based and informed decisions.*

*BAs have a great understanding of the business and the working of the systems and come up with ideas of how to change them to deliver what the customer wants."*

## Chapter 2

# Building blocks for a business analysis practice



In this section we outline key activities for developing your institution's business analysis practice. A pick and mix approach can be taken based on your team's maturity level and based on whether you are establishing or evolving your business analysis practice.

The examples on the subsequent pages have been adapted from material supplied by the University of Southampton.

# Building blocks for a business analysis practice

## 2.1 Team Culture

Here are some examples of building an environment which promotes a healthy team culture, and which in turn will enable the team to be seen as internal consultants and trusted partners with business stakeholders. These measures also improve the experience for the customer when they engage with the business analyst practice.

- **Peer review culture** – Encourage support and development through peer reviews to ensure consistent and standardised output from the team:
  - Business Analysts produces a series of user stories and arranges with a fellow team member to critique;
  - Collaborate with your institution's quality and testing teams on static testing
- **Integrity** – Business Analysts do what they say they will do:
  - Create a charter for your team culture
  - A good starting point to work towards building your high performing team is to use [Team Canvas](#) to help ensure the work you do as a group is productive, happy and stress-free!
- **Collaboration** – Buddy up, use facilitator and scribe roles in workshops, and employ tools and techniques knowledge sharing:
  - Produce an induction programme for new business analysts which includes a buddy scheme, and ensure that this is rolled out to all team members (from fixed team and permanent staff to interns and contractors);
  - Hold knowledge sharing sessions for any specialist business analysis tools or techniques that the team come across.
- **Industry best practice** – Follow industry developments by Business Analysis Practitioners outside of higher education. Here are some suggestions to keep up to date:
  - [International Institute of Business Analysis conferences and resources](#)
  - [LinkedIn Learning](#), which provides access to thousands of up-to-date business, creative and technology skills training videos designed for desktop and mobile learning
  - Identify free, good quality resources such as [Prosci](#), [Modern Analyst](#), [Blackmetric](#) and [BusinessBalls](#)
- **Innovation Hour** – Take responsibility for business analysis practitioners' continuing professional development (CPD) by:
  - encouraging a pro-active approach to CPD;
  - providing business analysts with the head space for CPD;
  - Set as CPD as an appraisal objective;
  - Discuss CPD in your 1:1 meetings.

# Building blocks for a business analysis practice

## 2.2 Team development and training frameworks

Adopting a best practice business analysis training framework to help establish a common language for business analysts that may have a variety of previous experience in other organisations. Talking a common Business Analysis language will contribute to establishing the identity of the Business Analysis team practice.

Select a framework for business analysis training such as the [BCS Business Analysis Certification](#) or CCBA – BABOK ([Business Analysis Body of Knowledge](#)).

In addition to these business analysis frameworks there are other useful training frameworks that may be relevant to your team such as: [Lean Six Sigma](#), [Certified Scrum Master](#), [APM Business Change Management](#), [PRINCE2](#), [PRINCE2 Agile](#) and [DSDM](#) (formerly known as the Dynamic System

Development Method).

Useful publications for Business Analysts and business analysis teams include: Business analysis techniques: [99 essential tools for success](#), [Business analysis](#) and [A Guide to the Business Analysis Body of Knowledge®](#) (BABOK® Guide)

## 2.3 Advertising yourself to the business

There are a variety of ways to make your business analysis practice visible to key stakeholders. We would recommend that you share the following within your institution, perhaps through your intranet site or through printed materials:

- Publicise the role and profile of the Business Analyst;
- Describe how you are using the business analysis process lifecycle by:
  - investigate situations;

- defining requirements;
- managing change – show benefits management and realisation, and business change management.

## 2.4 Maximising business analysis practice value

Here are just some the ways you can maximise the value of the business analysis practice in your institution:

- prioritise strategically aligned pre-project and project that delivers the most value to the wider university, so that there will be a reduction in tasks that apply to limited stakeholder groups and silo culture;
- focus on providing options analysis for configurable solutions that give enterprise-wide value (over bespoke customisation for individual stakeholder groups);

# Building blocks for a business analysis practice

- establish a process for engaging in pre-project work, so that you are adding value at the both the concept stage and at the end of the project lifecycle;
- build up your team's reputation as an internal consultant who is seen as an independent trusted partner for the business who can help translate technological concepts;
- provide stakeholder feedback opportunities by conducting engagement interview (phone, face to face feedback) or through a survey.
- Talk about your team's current tools, techniques, templates and guidance, and share how you are evolving this as your team upskill in different skills such as business change management;
- Disseminate your best practice examples;
- Have knowledge share presentations for each business analysis process area. Your stakeholders here will include the business analysis team itself,

project managers, business relationship managers, professional services colleagues and academic staff.

- Make your workload visible (including backlog, current in-flight and completed) and show what your team's priorities are

## 2.5 Tools, techniques and deliverables

Naturally, you will want to ensure consistent customer experiences. High quality business analysis processes will go some way to ensure way to this, and you should also consider producing best practice templates. Business analysis teams that are open to continuous improvement and innovative ideas ([agile project management](#) for example) are successful business analysis teams.

Conducting annual SWOT review for the business analysis team will also pay **dividends as it will help you identify your:**

- strengths (keep actions);
- weaknesses (change actions);
- opportunities (try actions); and
- threats (mitigate actions).

You can also start to build a dynamic business analysis toolkit that can evolve as your business analysis practice maturity increases. The flexible deliverables within the toolkit should meet a variety of stakeholder need (whether they are business sponsors or IT developers).

As your practice evolves you will work collaboratively and holistically with other roles such as project management, quality and test management, operations and development teams.

# Building blocks for a business analysis practice



## 2.6 Think to the future – using interns

In addition to the building blocks outlined above, many business analysis teams in universities are taking part in their institution's internship programme. This is mutually beneficial; invariably there is a positive impact on the team's output and on the team dynamic, and for the students this can be an important step in following a business analyst career after graduating.

## Chapter 3

# Challenges for Business Analysts within higher education



The following section covers some of the common issues facing universities in establishing and managing a business analysis team, along with suggestions for how to overcome them.

# Challenges for Business Analysts within higher education

## 3.1 Lack of understanding of business analysis

This is potentially the biggest barrier in growing business analysis expertise within organisations. It results in difficulty building effective relationships with senior leaders. The lack of understanding the value business analysis can bring to an organisation results in low levels of resourcing, business analysts being brought in too late to projects not being involved in the strategic decisions and being seen as an IT resource.

Here are a few suggestions for overcoming this issue:

- raise awareness through business analysis focused training including process improvement and process mapping;
- work closely with Business Relationship Managers, if they are present in your organisation;
- encourage business analysts to work on all types of change activity from organisational change to process improvements to new areas of business activity;
- embed business analysis and project management

frameworks and governance with clearly defined roles in delivering successful projects;

- implementing a change request process to filter all new project requests through increases the Teams exposure to a wide range of stakeholders; and
- offer knowledge sharing sessions covering topics such as tools, techniques and how Business Analysts can add value.

## 3.2 Silo-based organisations with devolved budgets

A major issue within the higher education sector is that there tend to be silos across academic faculties and professional service units. Academic faculties and units often have their own distinct processes and systems, even though the functions being performed are very similar, and devolved budgets mean these silos have the ability to procure their own systems.

- Establish links with the procurement function and set up controls to ensure analysis activities are

undertaken before procurement of a new system.

- Is the system needed?
  - Could benefits be gained from changing process or the organisational structure?
  - Does an existing system offer the same functionality?
  - Does the system meet the requirements?
  - Does the system bring a significant benefit to the institution?
  - Does the system fit within the architecture of the organisation?
- Build strategic relationships within the faculties and professional service departments to stimulate and shape business roadmaps and subsequently identify the change programs/projects which form part of delivering the strategy. This will also assist the IT department by giving them early sight of projects and change required and can help to alleviate the last-minute unexpected change that required huge amounts or resource to implement in tight deadlines.

# Challenges for Business Analysts within higher education

## 3.3 Lack of engagement at the right time

A common issue, linked to the points raised above, is that business analysts are not always involved with projects at the right time. Late involvement sometimes means that significant amounts of time has been spent focusing on a solution that is not fit for purpose and does not meet the most essential of requirements or is not technically feasible, or that there is a pre-existing system that can be used instead.

- Involving a Business Analyst at the outset of a project - in eliciting requirements and understanding the issues faced can help ensure the success of a project.
- The Business Analyst can capture the requirements, effectively challenging to highlight the truest requirements and priorities from the initial barrage of requirements.
- The Business Analyst can ensure the system

meets the requirements of the business, really digging deep into the system and suppliers offering to ensure it does what is required below the shiny surface of the sales pitch.

## 3.4 Difficulty in demonstrating benefits

Another issue that consistently occurs is difficulty in demonstrating the benefits of business analysis and project work – especially in respect of financial savings. It can be very difficult to get baseline data on performance and expenditure, in order to measure and demonstrate improvement, and there is a general lack of understanding of what benefits are and how they should be monitored. For instance, the introduction of a new system or process is often seen as the end result of a project, rather than the evaluation of benefits and the project's success.

- Using the Business Analysts to facilitate the production of the business case enables them to

use an evidenced based approach to a potential business change. Tools such as the [Benefits Dependency Network](#) clearly identify key drivers for change, investment objectives, benefits, business changes needed and the IT enablers for those changes. Further information can be found in the [ucisa Effective Benefits for IT and Business Change Projects Toolkit](#).

## Chapter 4

# Developing maturity

### 4.1 Maturity models

Maturity models have been around for several years and are used to compare the As Is against a benchmark and to guide improvement initiatives. The basic purpose of maturity models is to outline the stages of maturation paths, this includes characteristics of each stage and the logical relationship between them (Kohlegger et al, 2009)<sup>3</sup>. There are multiple models available to assess the maturity of any given field, see Maturity models for three of examples of maturity models for business analysis.

# Developing maturity

Appendix 2 shows a maturity model used by the IIBA in 2011 and 2012 in a survey to assess maturity of the Business Analysis sector in the UK. It should be noted that being at the highest level of maturity is not necessarily a desirable outcome for all organisations but should be used merely as a way of further understanding the current situation of the team, as a potential roadmap and as a useful tool for benchmarking.

## 4.2 Maturity of the sector

In 2016 the [ucisa Project and Change Management Group](#) (PCMG) Committee carried out a survey to measure the maturity of the business analysis community within the Higher Education (HE) sector. This informed our understanding of where we were as a community in terms of maturity. For the purposes of the survey, we used the IIBA's maturity model.

The survey was sent out to all members of the PCMG mailing list and received a 32% response rate (which falls well within the expected response rate for an email survey). Our survey results revealed that every responding institution was undertaking business analysis activities; with over 65% having a dedicated business analysis team. This clearly shows that there is a recognised need for business analysis activities in the sector. When we looked at the size of the business analysis teams, we found that it came in at around five members of staff on average, which shows that it is still considered a relatively small area of operations for most organisations. The majority of business analysis teams had been in existence for less than ten years; however, most institutions had been undertaking analysis activities prior to the formation of a dedicated business analysis team. The question that gave us a real insight into the maturity of the business analysis function showed that 70% of organisations still see the business analysis function

as an IT-related one. In a mature business analysis practice, we would expect to see the business analysis function sitting with and supporting the senior management team of the organisation. One may argue that just because they are located in an IT function they still may be closely aligned to senior management; however, evidence shows that most organisations still consider them to be an IT asset with half of business analysts in the sector only working on IT change projects.

Overall, the survey results show us that as a sector we have not matured enough to be in a position to assist in driving the business strategy. As a sector, we are still working mainly on IT driven change initiatives and are based within the IT Services function. The majority of business analysts are not undertaking market and competitor analysis or getting involved in pre-project work, such as feasibility studies and business case development.

# Developing maturity



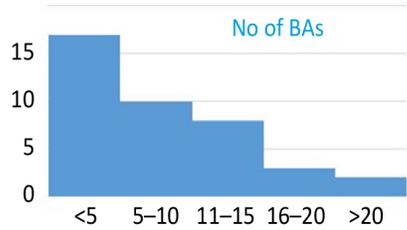
In 2011 and 2012 the International Institute of Business Analysis (IIBA) undertook a [similar survey](#) in the UK. The results showed that the average maturity levels for business analysis functions based in industry matched those found from our 2016 survey of HE institutions. However, as the IIBA survey was four years older than the HE one carried out we can hypothesise they have made some progress in maturing as a sector in those intervening years.

## 4.3 Results of the UK HE sector survey conducted by the ucisa Project and Change Management Group

A survey was sent out to the ucisa Project and Change Management community in 2016 in order to gain a better understanding of the maturity of business analysis within the higher education sector. The survey questions were designed so that we could establish maturity against the maturity model in appendix 3.

**Figure 2** gives us an overview of the results and how we fare across the sector

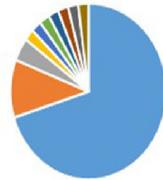
# Developing maturity



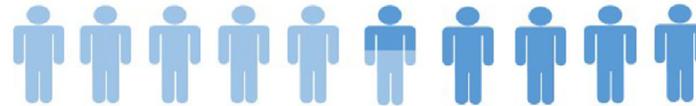
75% of BA teams assist in strategy development



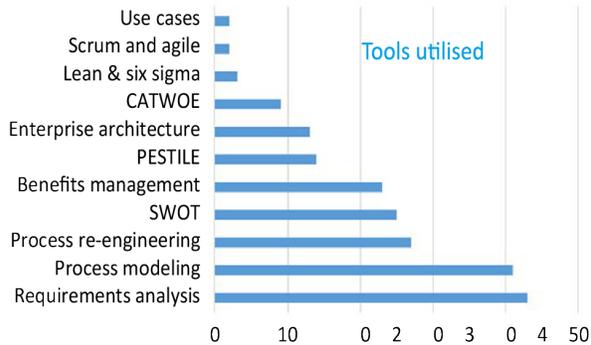
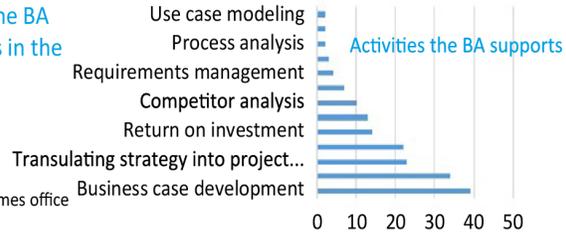
- IT services
- Library and information services
- HR
- Estates
- University registry & secretariat
- Other
- Finance
- Planning
- Strategic programmes office
- Registry services



Where the BA team sits in the org.



65% of institutions surveyed have a dedicated BA team



52% of BAs get involved in non-IT projects

53% of BA Teams live in a PMO

53% of BA teams work with university senior leadership



**Figure 2:** ucisa Project and Change Management Group Sector Business Analysis Maturity Survey Results 2016.



## 4.4 How to audit the maturity of your own practice

In addition to using a maturity model to assess the maturity of your practice it can be useful to consider the questions below:

- Do you get involved in non-IT change?
- Are you based in IT and is this holding you back from working on non- IT change?
- Are you involved in pre-project work i.e., business case development, strategic decisions, building roadmaps?
- Does the business understand the value you bring to the organisation?
- Have you established benefits management within the organisation?
- Do you have standards and governance for business analysis that are used across the organisation?

- Is there a community of practice established to support and develop business analysts or people undertaking roles/activities in this area?
- Do you have development and training opportunities for your business analysts using recognised qualification standards?



## Conclusion

*Establishing a business analysis practice within a higher education environment* is a simple toolkit that enables you to take the first steps in establishing a business analysis practice within your institution. The toolkit gives you the resources you need to establish your starting point and then guides you through the next steps required on the journey to creating a business analysis centre of excellence within your institution. The toolkit has been developed through the support of the ucisa Project and Change Management community.

# Appendix 1 Kathleen Hass maturity model (2010)



Figure 3: [Katherine Hass maturity model \(2010\)](#)

" K. Hass and Associates, Inc. " LORIUS, LLC Confidential

# Appendix 2 Cadle, Paul and Yeates model

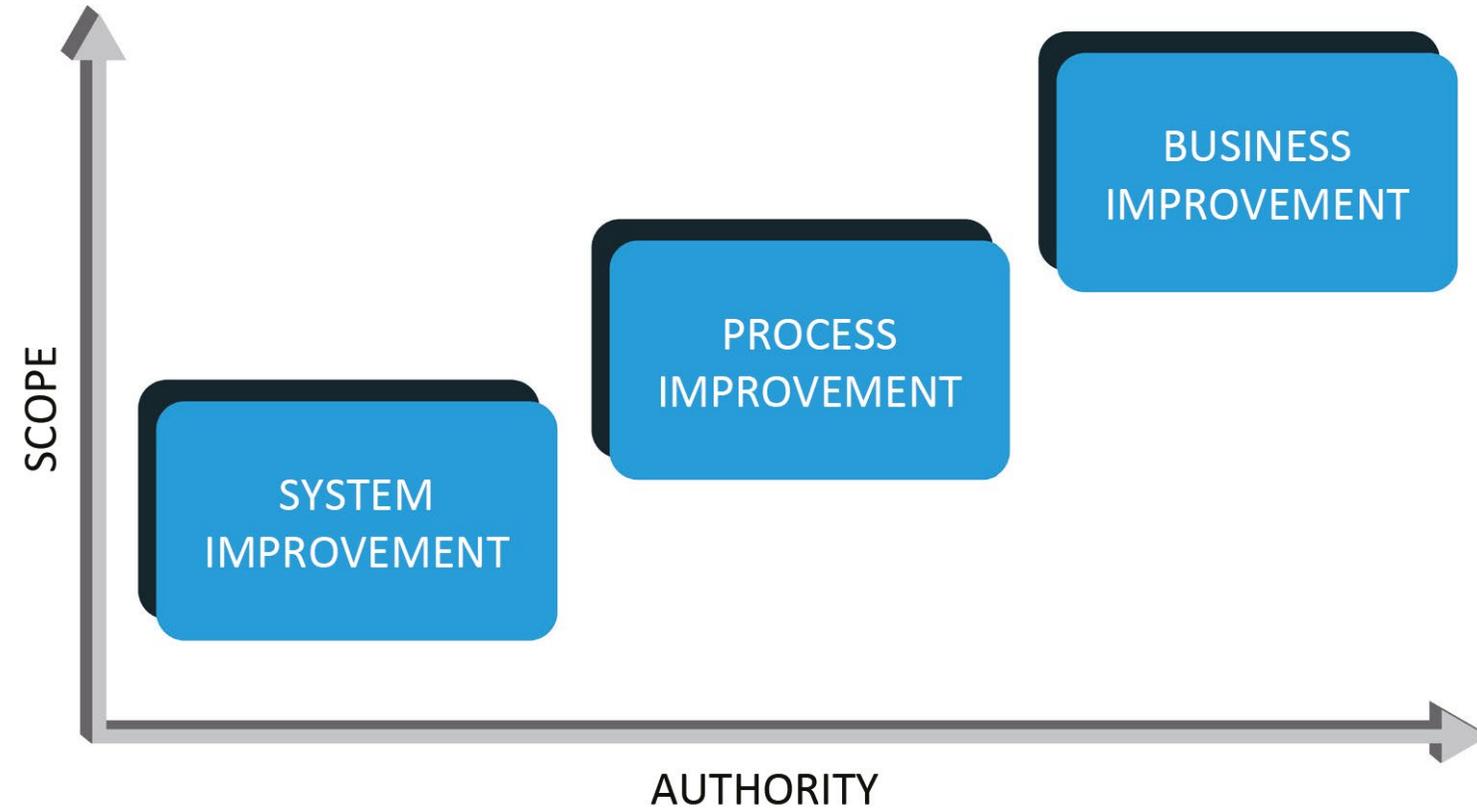
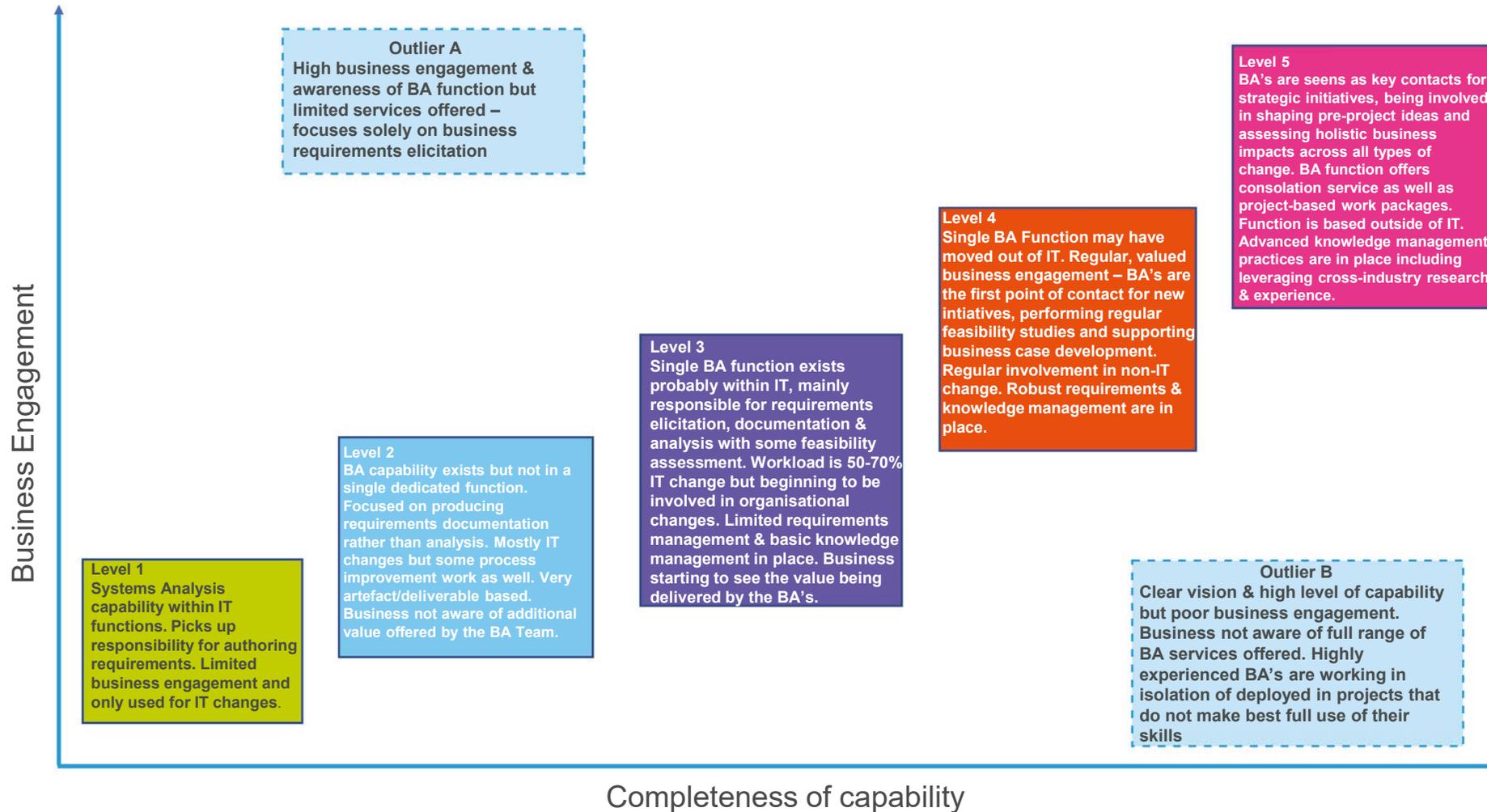


Figure 4: [Cadle, Paul and Yeates \(2010\)](#),  
[BCS Business Analysis](#)

# Appendix 3 IIBA maturity model

**Figure 5:** Adapted by Sarah Cockrill Head of Strategic Engagement and Business Analysis, Coventry University using results of the [2012 IIBA survey](#)



# Appendix 4 Case study: Cardiff Metropolitan University - Business Improvement Services

## Description of current set up – *As Is*

Business Improvement Services (BIS), established in 2015, provides dedicated project management and business analysis services, with a primary focus on IT projects, across Cardiff Metropolitan University. Prior to 2015, the business analysis function maturity level was low. There was a sole business analyst, who had been deployed to a Student Record System project and was responsible for managing small IT improvement requests across the university.

BIS sits within the Library and Information Services directorate, with a team split into two functions: project management and business analysis. In 2015, the team was restructured, and it was decided to develop a hybrid role incorporating Business Analysis and Project Management. This was to ensure a flexibly resourced staffing core, equipped to meet the university's business analysis and project

management demands. There are two available options for BIS's business analysis 'service delivery'

1. BIS resources can provide full and direct business analysis to units and schools where capacity and expertise is not available.
2. Light touch business analysis – BIS staff provide support and mentoring to business staff assigned locally to carry out analysis within their schools and units.

Working closely with our IT colleagues, who provide the system analysis capability, BIS are regularly involved in IT changes – focusing on requirements gathering, process mapping, and User Acceptance Testing. Over the last 3 years, the emphasis has been on developing a Business Analysis toolkit and templates, providing the BIS team with a suite of tools to deploy when undertaking IT change requests or

facilitating workshops. The team has also introduced a training programme for process mapping and improvements that has been piloted into a team with no prior knowledge of process mapping techniques, which they are now using regularly to drive forward process improvements.

How you rate yourselves against the maturity model?

Cardiff Met would sit at level 3 of the IIB maturity model. The business analysis function has been established for 3 years in its current structure and it is deployed onto IT change projects. The focus is capturing requirements and mapping *As Is* and *To Be* processes. A robust gateway is in place for all IT change requests, which ensures that business analysis capability is deployed as early as possible. There are only minimal examples where this process has been bypassed.

# Appendix 4 Case study: Cardiff Metropolitan University - Business Improvement Services



The business is starting to see the value being delivered by Business Analysts in some of the projects, but engagement is limited to areas where they have been heavily involved and is not generally across the university.

What are your next steps to develop the team?

- Working towards increasing business engagement – rolling out training in process mapping and developing training in requirements gathering for staff across the university
- Increasing mentoring and coaching approach to business analysis capability - don't always got the capacity to undertake the work and want the university to be self-sufficient
- Working more outside of IT- focused projects.

# Appendix 5 Case study: Coventry University – Business Analysis Team



Description of current set up – As Is

Coventry University has a business analysis team that sits within the Engagement, Strategy, Planning and Digital Transformation arm of IT Services managed by the Head of Business Analysis. The team comprises of ten senior business analysts and two business analysts.

As a team we get regularly involved in delivering projects that include an IT element.

How you rate yourselves against the maturity model?

Coventry University's Business Analysis practice currently sits between level 3 and 4 of the IIB business analysis maturity model.

What are your next steps to develop the team?

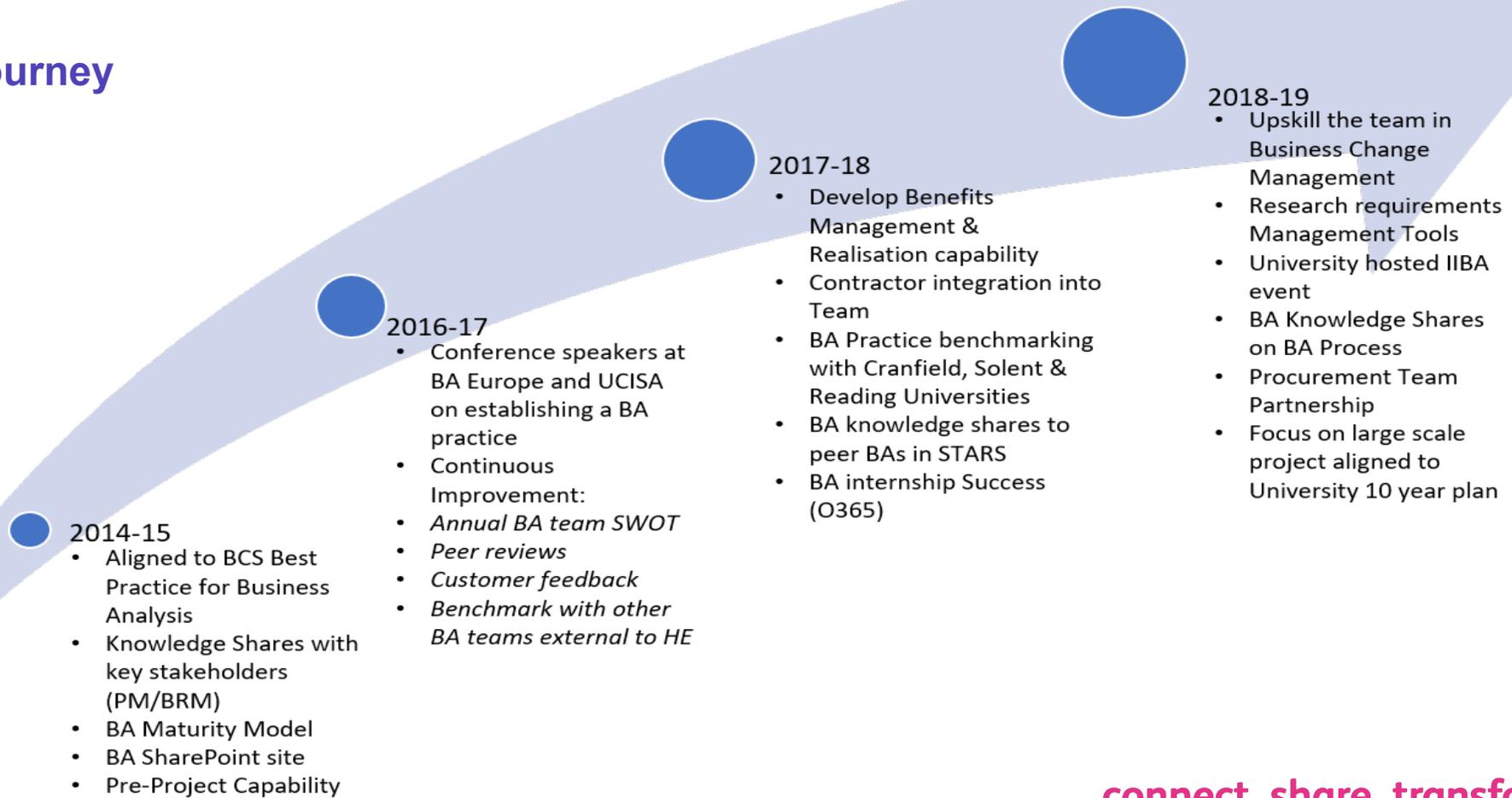
The next step is for Coventry is to develop our stakeholders' relationships across the university group so that we can input into strategic conversations and decisions and play a leading role in business case development for all change programmes that include an IT element.

# Appendix 6 Case study: University of Southampton – Business Analysis Team



Figure 6: The BA team journey from 2014 to 2019 at the University of Southampton

## BA Team Journey



# Appendix 6 Case study: University of Southampton – Business Analysis Team

How you rate yourselves against the maturity model?

The University of Southampton business analysis practice is at level four within IIB Business Analysis maturity model. We are developing elements of level five on the maturity model (particularly around pre-project engagement) but there are no plans at present for our business analysis practice to move beyond level four on the IIBA maturity roadmap.

We have a single business analysis function based in IT however we relocate business analysis practitioners into the business where projects demand. When new business change initiatives are being formulated the business analysis practice is involved and facilitate project briefs, project concepts and business cases.

We use a variety of tools for requirements capture and management and inform robust test case development by a dedicated test management team.

What are your next steps to develop the team?

The diagram on the preceding page shows the evolution of the business analysis practice at the University of Southampton and our continued journey. The team adopt a culture of continuous improvement and we plan to develop the following areas:

- investigate requirements management software to tie in with development and test teams;
- host International Institute of Business Analysis conference events;

- offer business change management capability by harnessing some of the most relevant tools and techniques from this discipline;
- evolve the procurement team's partnership and
- contribute and lead on the Agile agenda within the Programme Management Office.



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