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Business Analysis in Digital Transformation
A Practical Toolkit

Memory Jogger

This PDF accompanies a half-day workshop session delivered at the Building Business Capability Conference 2022.

It contains the key diagrams and slides. We hope that you find it useful!

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Roadmap

| 1. Introduction | → | 2. Understanding Stakeholders & Perspectives | → | 3. Journey Mapping |

| 5. Innovating & Improving | ← | 4. Business Events & Boundaries | ← |

Please bring in real-world examples throughout

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1. Introduction

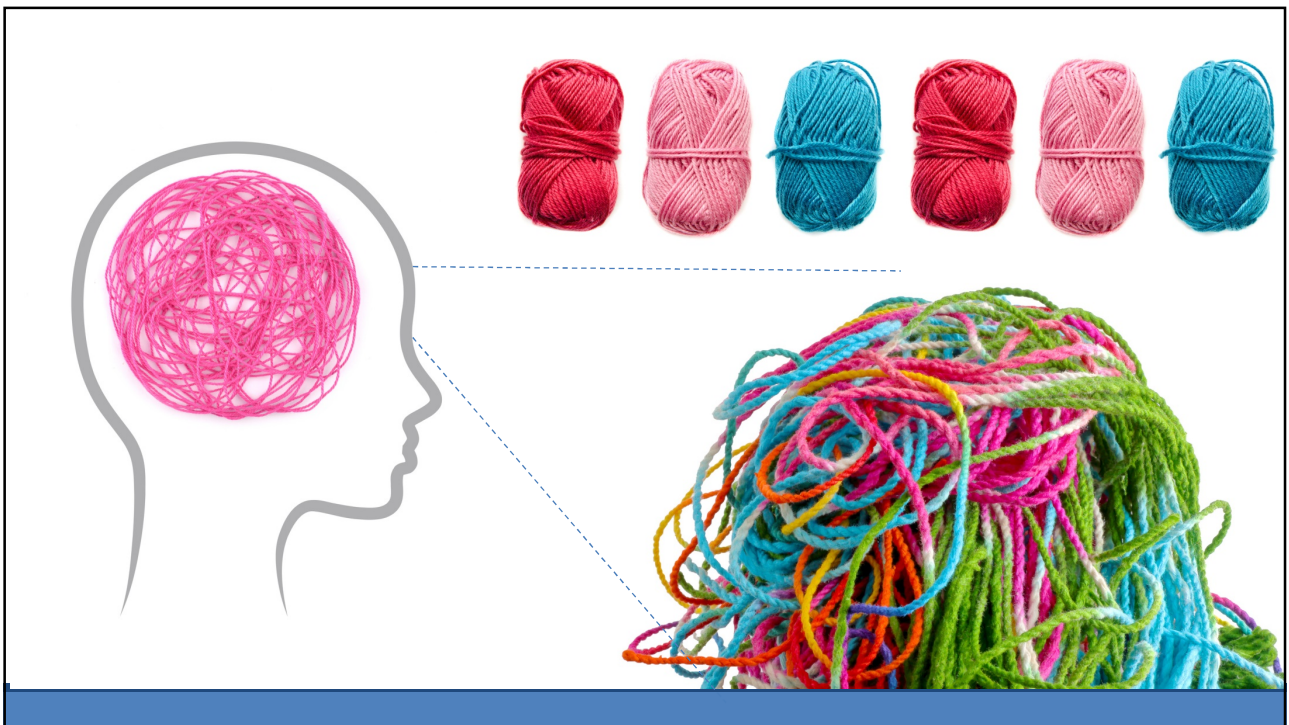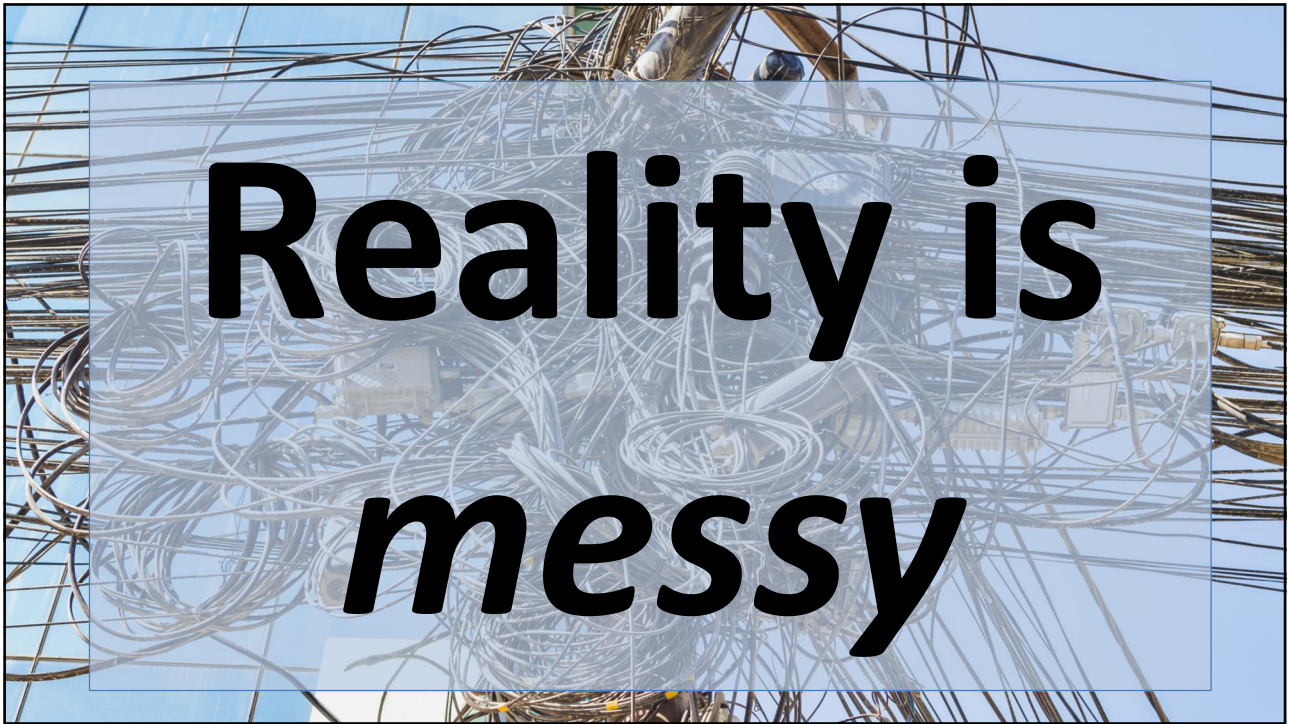|	
"…arises from the intersection of cloud computing, big data, IoT, and AI […]. Some describe it as the power of digital technology applied to every aspect of the organization…" — Thomas Siebel Siebel,T., 2019 "Digital Transformation: Survive and Thrive in an Era of Mass Extinction", RosettaBooks	"…encompasses the profound changes taking place in society and industries through the use of digital technologies. At the organizational level, it has been argued that firms must find ways to innovate with these technologies" —Gregory Vial
"…involves the usage of new technologies to drive significant improvements […]. This includes capitalizing on new opportunities as well as effectively transforming existing businesses and technology that enable them." — Anup Maheshwari Maheshwari, A., 2019 "Digital Transformation", Wiley	Vial, G., 2019 "Understanding digital transformation: A review and a research agenda" in Journal of Strategic Information Systems https://doi.org/10.1016/j.jsis.2019.01.003

"Digital" is nothing new…
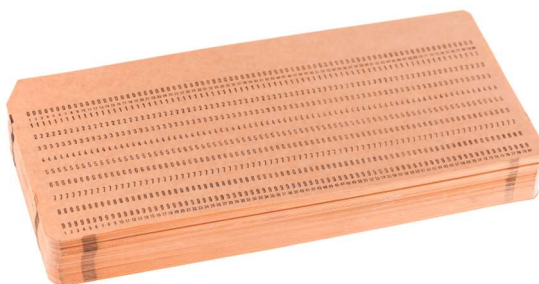
In many industries, what has changed?
Speed of technological change
Speed of communication
Business model innovation
Ability for competition/new entrants
Societal trends & expectations

Reality is *messy*

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2. *Understanding Stakeholders & Perspectives*

Roadmap

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5. Innovating & Improving	4. Business Events & Boundaries	

Please bring in real-world examples throughout

Stakeholders include…

Sponsor

Regulator

Tester

Supplier

Project Manager

Stakeholders can include…

Business Analyst

Customer

Domain SME

End User

Implementation SME

Operational Support

Spread The Net Wide…

Doctor/Nurse/Clinicians

Patient

Person paying

IT Maintenance team

Administrative team

Other patients

And so many, many more…

Beyond The User

A Thinking Tool: "UCOB"

User(s) — Use/Operate

Customer(s) — Pay For/Allocate Budget

Owner(s) — Own & Maintain

Beneficiary/(ies) — Benefit From/Receive Service
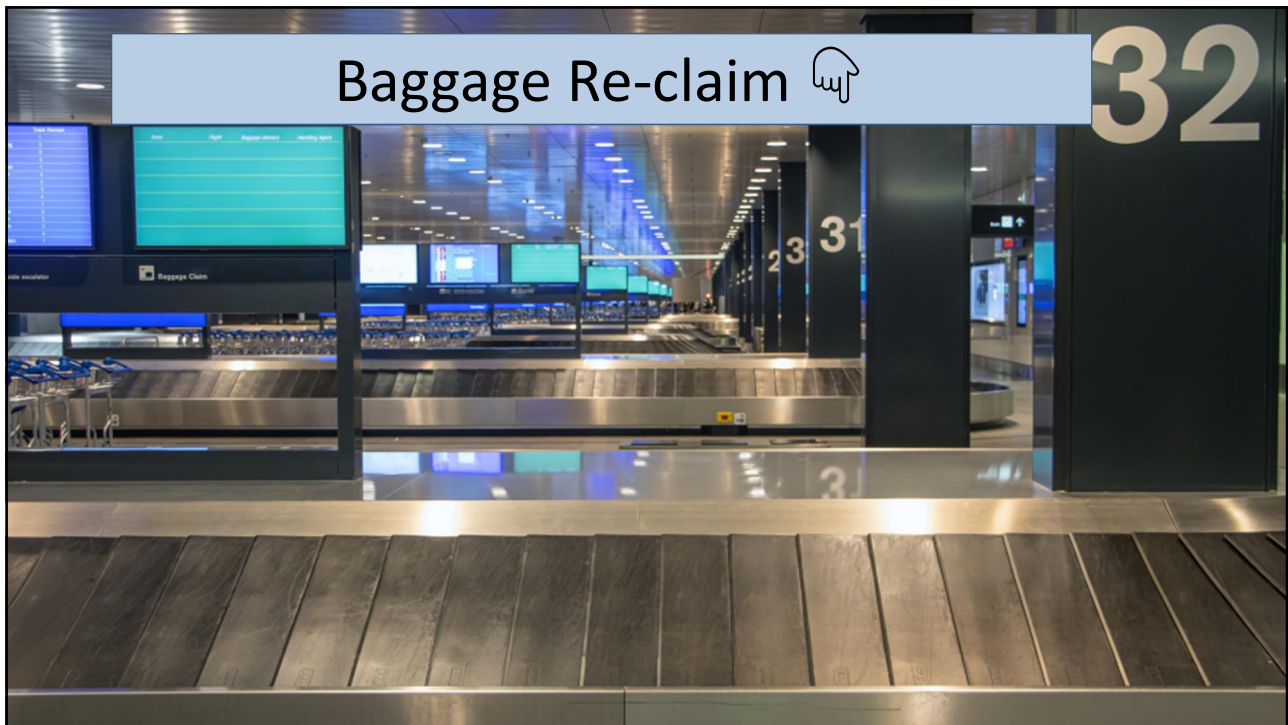
Baggage Re-claim 👆

Exercise: UCOB for Baggage Re-claim

Perspective	Definition	Stakeholder(s)
User(s)	Use/Operate	
Customer(s)	Pay For/Allocate Budget	
Owner(s)	Own & Maintain	
Beneficiary/(ies)	Benefit From/Receive Service	

PLUS: Can you identify any other perspectives that might be relevant?
Is there a wider/bigger perspective here too?

Moderate
Influence

Least Affected

Moderately
Affected

Most Affected

Most Influence

Least Influence

See Chevalier and Buckles (2008)
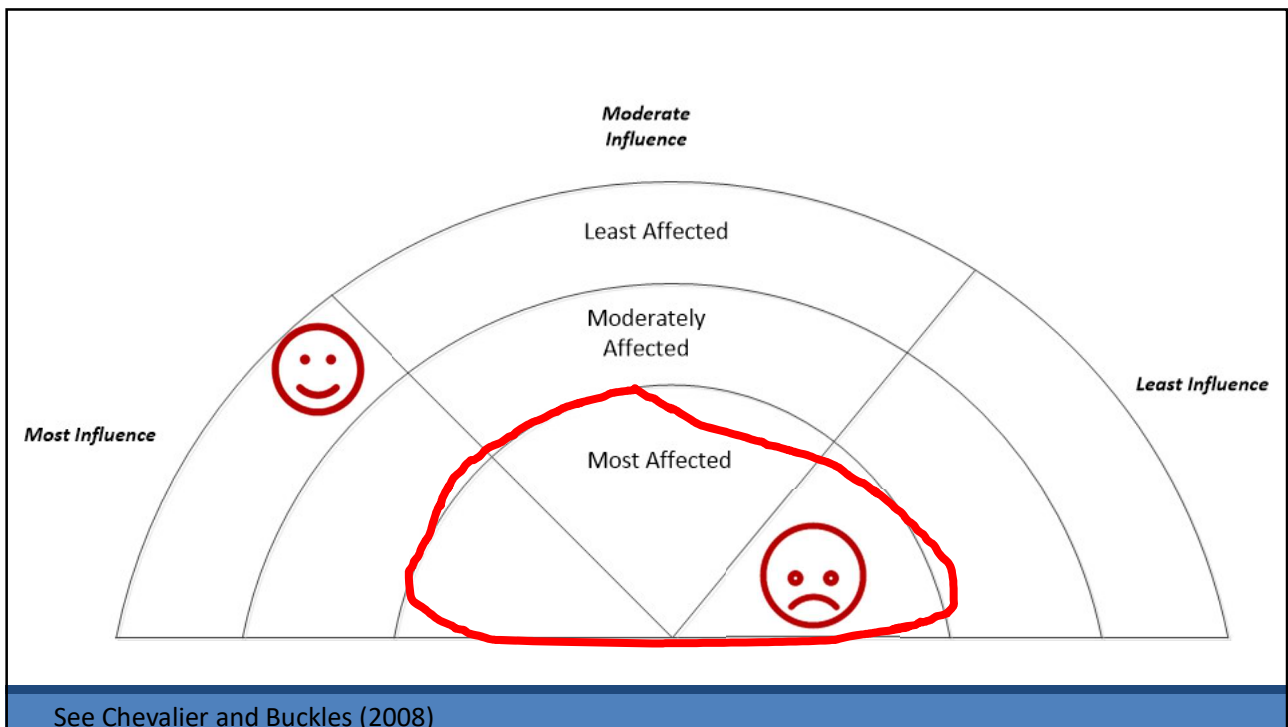
Persona Name
"Strapline….."

Bio/Demographics	Goals/Needs	Motivations	Frustrations

Personality	Preferences / Likes		Tech

Persona Name
"Strapline….."

Overlay: "I need to deal with the affairs of a relative on their behalf"

Bio/Demographics	Goals/Needs	Motivations	Frustrations

Personality	Preferences / Likes		Tech

PQR

Do P by Q in order to contribute to achieving R

"A system to_____by_____ in order to contribute to achieving_____"

Different Perspectives
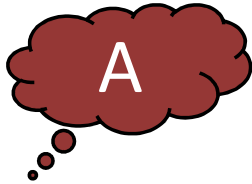
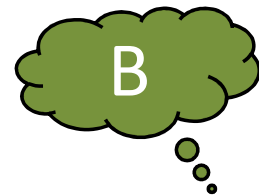**A** "LinkedIn exists to allow like-minded professionals to network, through direct messaging, social media updates and forums, in order to cultivate international networks and knowledge exchange"

"LinkedIn exists to allow sales professionals to find prospects, via paid-for upgrades, in order for them to make money for themselves and for LinkedIn" **B**

... plus many, many more perspectives!

What Does Success Look Like? 3Es

✔ Efficacy

🕐£ Efficiency

🎯 Effectiveness

3. Journey Mapping

Roadmap

1. Introduction →	2. Understanding Stakeholders & Perspectives →	3. Journey Mapping
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Please bring in real-world examples throughout

Journey Mapping

Persona: [It's me!] – Journey 'as experienced'
Situation: Booking & staying in a hotel for a weekend away.

Journey Map

Stage	1. Research Options	2. Decide & Book	3. Arrive & Check In	4. Use Facilities	5. Eat	6. Check Out	7. Give Feedback	8. Tell Friends

Customer Actions

Emotional Journey

Thoughts/ Feelings

Information Needs

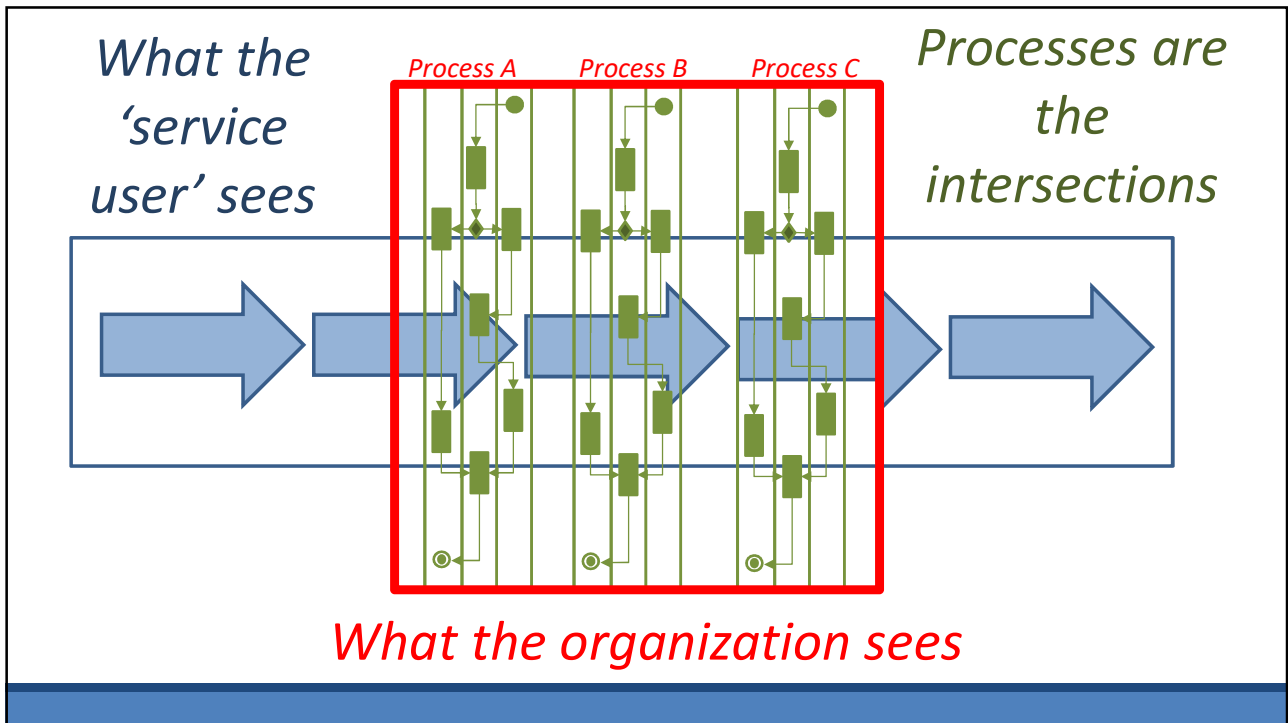*Pain Points Opportunities*
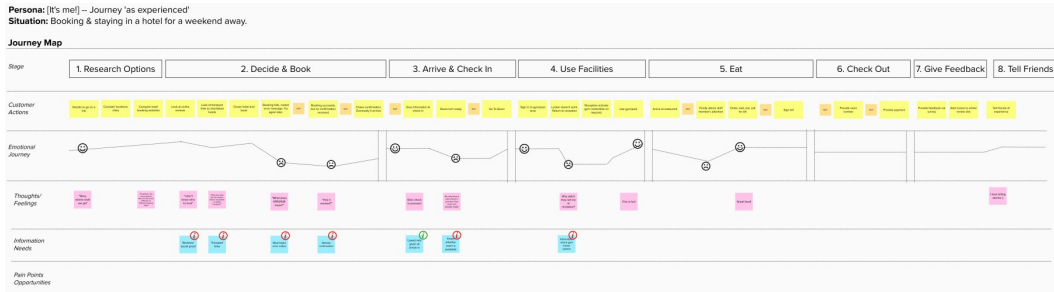
Journey Mapping

Different lenses:

- What it "ought" to be like
- What it "is" like

Tap into data & insight.

E.g. complaint data. What are some of the bad experiences that customers hate?
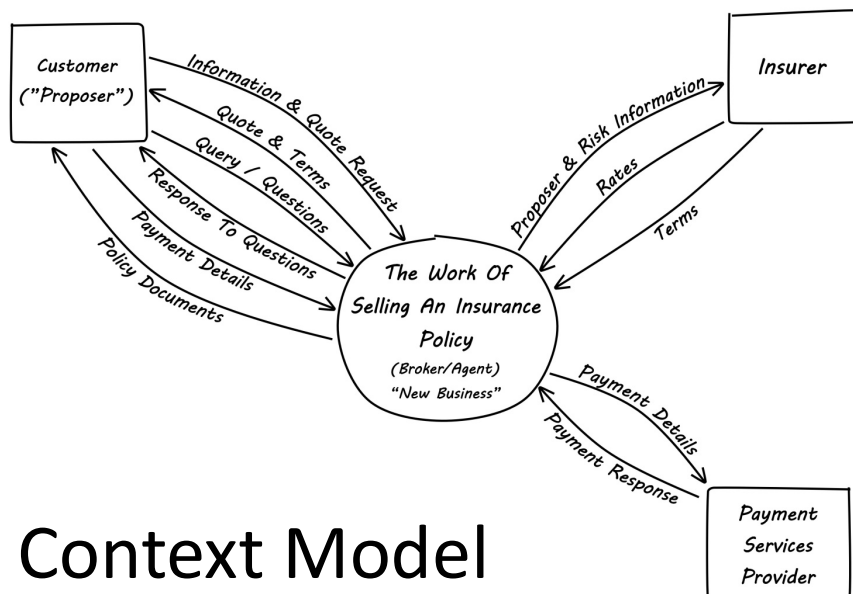
What the 'service user' sees

Process A   Process B   Process C

Processes are the intersections

What the organization sees

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4. Business Events & Boundaries

Roadmap

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┌──────────────────┐     ┌──────────────────┐     ┌──────────────────┐
│                  │     │  2. Understanding│     │                  │
│  1. Introduction │ ──▶ │  Stakeholders &  │ ──▶ │   3. Journey     │
│                  │     │   Perspectives   │     │    Mapping       │
└──────────────────┘     └──────────────────┘     └──────────────────┘
                                                             │
┌──────────────────┐     ┌──────────────────┐               │
│  5. Innovating & │ ◀── │  4. Business     │ ◀─────────────┘
│    Improving     │     │  Events          │
│                  │     │  & Boundaries    │
└──────────────────┘     └──────────────────┘
```

Please bring in real-world examples throughout

Work Context Model

Business Events
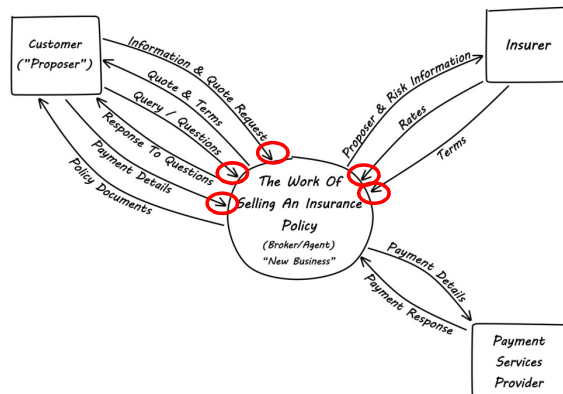
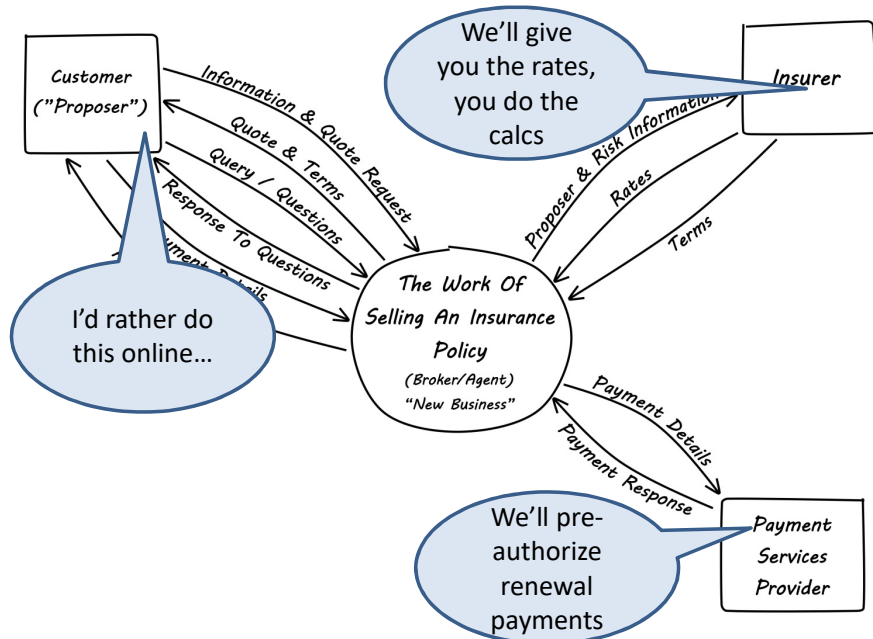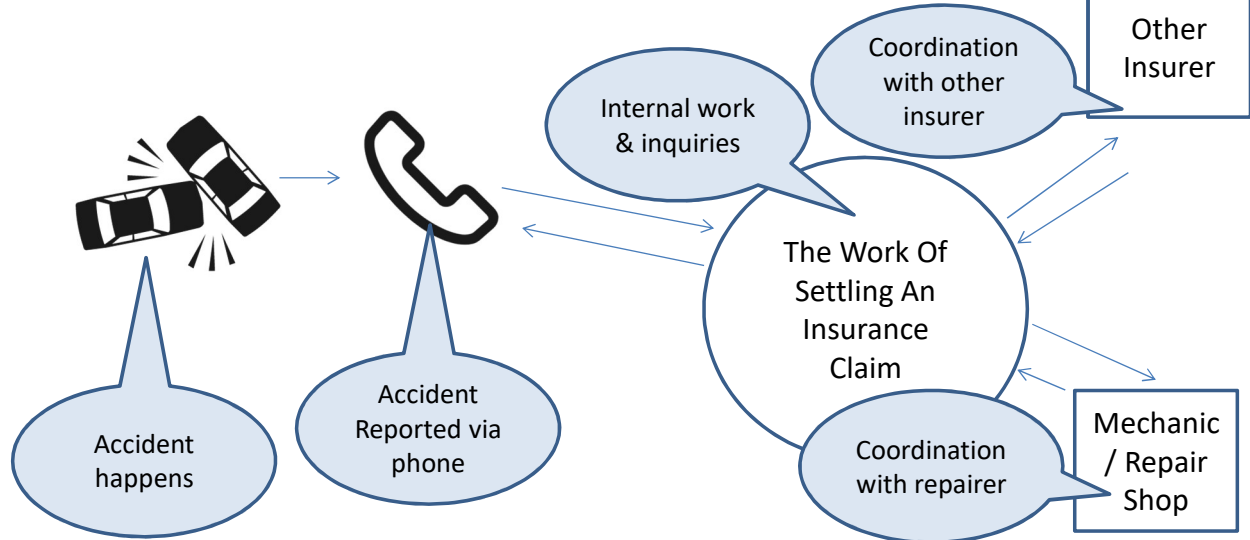## Move the automation boundary?

Shift channels (e.g. online)?
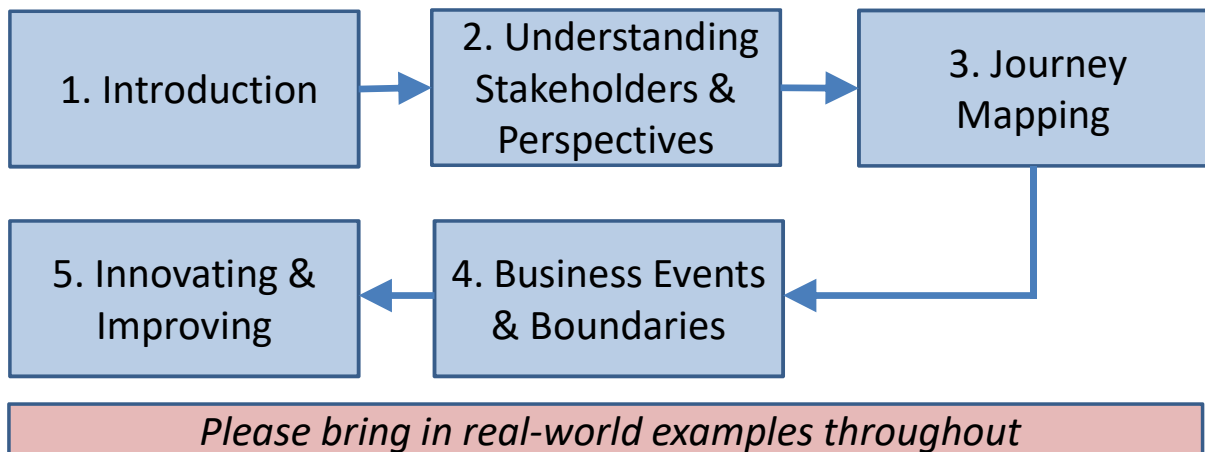
Anticipate needs?

15

Exercise: Car Insurance Claim

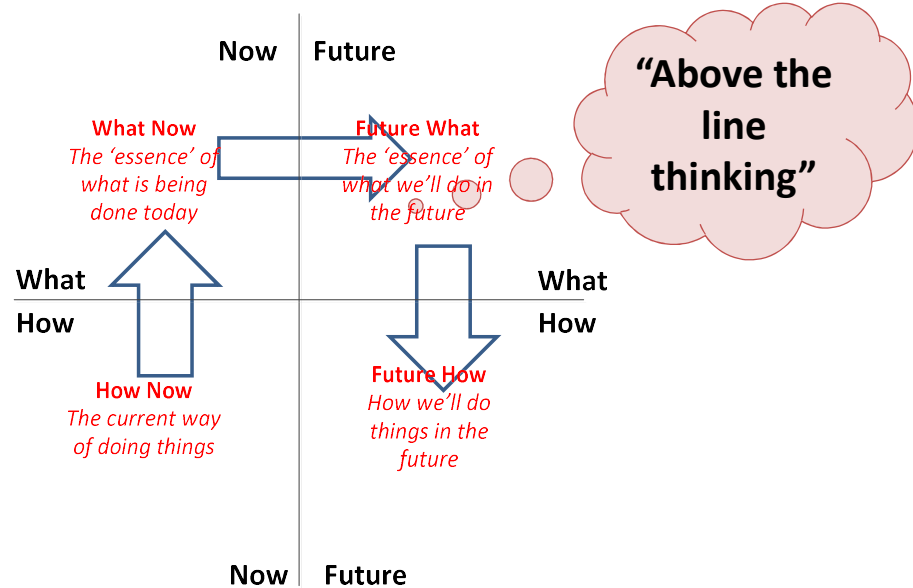Note: This is a high-level example, not all data flows or adjacent systems are shown.

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5. Innovating & Improving

Roadmap

```
┌─────────────────┐     ┌─────────────────────┐     ┌─────────────────┐
│                 │     │  2. Understanding   │     │                 │
│ 1. Introduction │ ──▶ │   Stakeholders &    │ ──▶ │   3. Journey    │
│                 │     │    Perspectives     │     │    Mapping      │
└─────────────────┘     └─────────────────────┘     └─────────────────┘
                                                              │
┌─────────────────┐     ┌─────────────────────┐              │
│ 5. Innovating & │ ◀── │ 4. Business Events  │ ◀────────────┘
│    Improving    │     │   & Boundaries      │
└─────────────────┘     └─────────────────────┘
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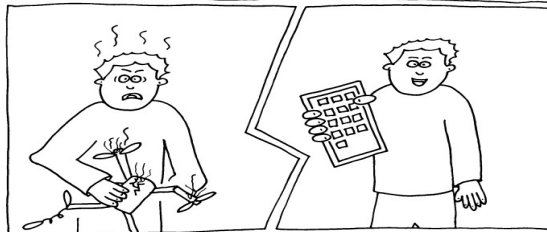
Please bring in real-world examples throughout

The "Brown Cow" Model

From: Robertson & Robertson (2013)

The Billboard Game

Constrained Brainstorm

Image credit: Dmitry Rozhkov   Source: https://commons.wikimedia.org/wiki/File:Rock_on_Bones2.jpg
)

Thanks!

.....stay in touch

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Connect with me on LinkedIn

www.blackmetric.co.uk

Appendix A: References & Further Reading

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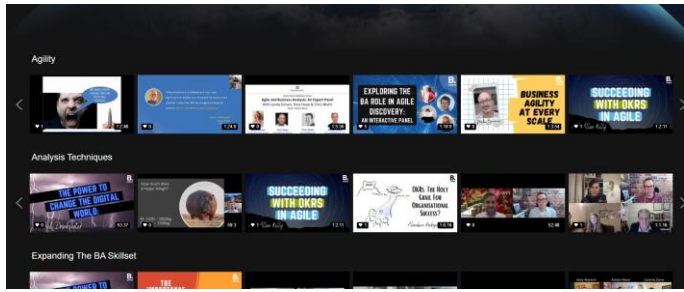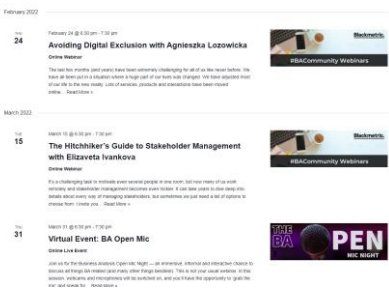Maheshwari, A.,(2019) "Digital Transformation", Chichester, UK, Wiley

Robertson, J. & Robertson, S. (2013). *Mastering the Requirements Process, 3rd ed*. Boston, Addison-Wesley/Pearson Education

Robertson, J. & Robertson, S. (2019). *Business Analysis Agility,* Boston, Addison-Wesley/Pearson Education

Vial, G., (2019) "Understanding digital transformation: A review and a research agenda" in Journal of Strategic Information Systems https://doi.org/10.1016/j.jsis.2019.01.003

Appendix **B**: Stay In Touch

We hope you've enjoyed the course. We'd love to stay in touch—here are some resources you might find useful:

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